

# Wine Industry Metrics - Off-Premise Sales - February 2013

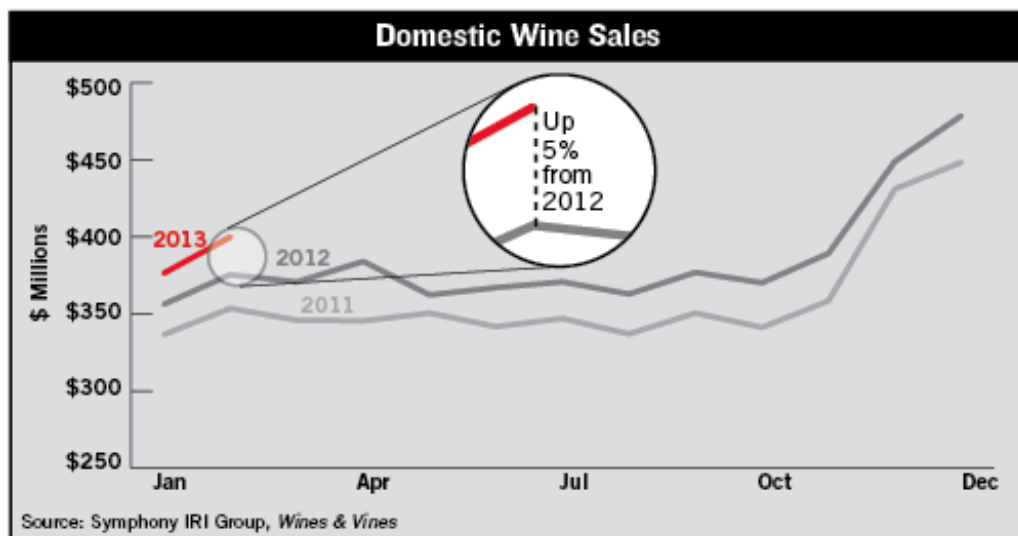
Wines Vines Analytics

## Domestic Table Wines Up 5% in February, 6% in 12 Months

Off-premise sales of domestic table wines in February continued their long-term growth trend, hitting 5% growth in value for the month vs. a year ago, and measuring 6% up for the past 12 months. In February 2012 the 12-month growth rate was 8%, so growth has decelerated gradually over the past year. By contrast, imported table wines were flat for the month and the past 12 months at the major food and drug stores where the Symphony IRI Group measures sales.

### Off-Premise Sales IRI Channels »

|               | Month     | 12 Months   |
|---------------|-----------|-------------|
| February 2013 | \$400 mil | \$5,081 mil |
| February 2012 | \$380 mil | \$4,795 mil |



## Two Months of Retail Growth to Start the Year

February was the second growth month of the year for domestic wine sales, even as the pace slackened to 5%. Washington and Oregon wines grew at 6%. Domestic table wines rose in price by 30 cents compared to February 2012.

**Top 30 Momentum Table Wine Brands of 2012**

| RANK | TABLE WINE BRAND             | PRODUCER                  | PRICE SEGMENT | ORIGIN      |
|------|------------------------------|---------------------------|---------------|-------------|
| 1    | Cupcake Vineyards            | The Wine Group            | \$8-\$10.99   | California  |
| 2    | 14 Hands                     | Chateau Ste. Michelle     | \$8-\$10.99   | Washington  |
| 3    | Barefoot                     | E&J Gallo Winery          | \$5-\$7.99    | California  |
| 4    | Liberty Creek                | E&J Gallo Winery          | < \$3.50      | California  |
| 5    | Apothic Ca                   | E&J Gallo Winery          | \$8-\$10.99   | California  |
| 6    | Black Box Wines Box          | Constellation Wines US    | > \$3.50      | California  |
| 7    | Bota Box                     | Delicato Family Vineyards | > \$3.50      | California  |
| 8    | Rex Goliath                  | Constellation Wines US    | \$5-\$7.99    | California  |
| 9    | Stella Rosa                  | San Antonio Winery        | \$11-\$14.99  | Italy       |
| 10   | Chateau Ste. Michelle        | Chateau Ste. Michelle     | \$8-\$10.99   | Washington  |
| 11   | Bogle Vineyards              | Bogle Vineyards           | \$8-\$10.99   | California  |
| 12   | Woodbridge By Robert Mondavi | Constellation Wines US    | \$5-\$7.99    | California  |
| 13   | Alamos                       | E&J Gallo Winery          | \$8-\$10.99   | Argentina   |
| 14   | The Naked Grape              | E&J Gallo Winery          | \$5-\$7.99    | California  |
| 15   | Menage A Trois               | Trincherro Family Estates | \$8-\$10.99   | California  |
| 16   | Gallo Family Vineyards       | E&J Gallo Winery          | \$3.50-\$4.99 | California  |
| 17   | J. Lohr                      | J. Lohr Winery            | \$11-\$14.99  | California  |
| 18   | Flipflop                     | The Wine Group            | \$5-\$7.99    | California  |
| 19   | The Dreaming Tree            | Constellation Wines US    | \$11-\$14.99  | California  |
| 20   | Franzia Box                  | The Wine Group            | < \$3.50      | California  |
| 21   | Vendange Box                 | Constellation Wines US    | > \$3.50      | California  |
| 22   | Edna Valley Vineyard         | E&J Gallo Winery          | \$11-\$14.99  | California  |
| 23   | Joel Gott                    | Joel Gott Wines           | \$11-\$14.99  | California  |
| 24   | Mark West Vineyards          | Constellation Wines US    | \$11-\$14.99  | California  |
| 25   | Clos Du Bois                 | Constellation Wines US    | \$11-\$14.99  | California  |
| 26   | Nobilo Regional Collection   | Constellation Wines US    | \$11-\$14.99  | New Zealand |
| 27   | Gnarly Head                  | Delicato Family Vineyards | \$8-\$10.99   | California  |
| 28   | Noble Vines                  | Delicato Family Vineyards | \$11-\$14.99  | California  |
| 29   | Entwine                      | Wente Family Vineyards    | \$11-\$14.99  | California  |
| 30   | Simply Naked                 | Constellation Wines US    | \$8-\$10.99   | California  |

The Top Momentum Table Wine Brands of 2012 are those with high volume and value as well as fast growth rates.

Source: Symphony IRI Group year 2012 week ending Jan 6, 2013, Infoscan total U.S. multi-outlet.



The Top 30 Momentum Table Wine Brands include some familiar names such as Cupcake, Barefoot and Rex Goliath. New entrants include Joel Gott, Edna Valley Vineyards, Entwine and Simply Naked. To create the Momentum Brands list the Symphony IRI Group (SIG) started with the top 250 brands by volume in from their total U.S. multi-outlet results for 52 weeks ending Jan. 6, 2013, and created a power ranking by the following measures:

- Volume sales

- Volume sales actual changes vs. year ago
- Volume sales % change vs. year ago
- Quality merchandising incremental collars (feature and/or display)
- Dollar sales actual change vs. year ago
- Dollar sales % change vs. year ago
- Unit sales actual change vs. year ago
- Unit sales % change vs. year ago
- Average price per 750 ml % change vs. year ago
- Velocity in dollars
- Velocity % change vs. year ago in dollars

SIG ranked brands for each measure (low to high) and awarded points based on 2012 sales performance. For example, the brand with the highest volume sales received 1 point and the brand with the lowest volume sales received 250 points. This methodology was consistent for each measure used. Points received across each measure were added for a sum total by brand resulting in the final point total. Brands were ranked in ascending order of “total points” to determine the final 2012 Top 30 Table Wine Momentum Brands.

### Top 20 New Table Wine Brands of 2012

| RANK | BRAND                  | SALES       | PRODUCER                     | AVG. PRICE/ 750ML | ORIGIN     |
|------|------------------------|-------------|------------------------------|-------------------|------------|
| 1    | Skinnnygirl            | \$4,744,489 | Beam Global                  | \$13.02           | California |
| 2    | Be                     | \$3,171,366 | Treasury Wine Estates        | \$8.48            | California |
| 3    | Bella Bolle            | \$2,411,898 | Prestige Wine Group          | \$8.37            | Italy      |
| 4    | Acronym                | \$1,493,272 | Winery Exchange              | \$9.30            | California |
| 5    | Macaron                | \$1,373,152 | The Wine Group               | \$8.14            | Italy      |
| 6    | Fancy Pants            | \$1,343,155 | Trincher Family Estates      | \$9.38            | California |
| 7    | Thorny Rose            | \$1,326,270 | Constellation Brands         | \$9.91            | Washington |
| 8    | Wine Sisterhood        | \$778,289   | Canopy Management            | \$10.23           | California |
| 9    | Flirt                  | \$764,181   | Vintage Wine Estates         | \$9.92            | California |
| 10   | Ooh La La              | \$736,064   | Constellation Brands         | \$9.43            | California |
| 11   | Barefoot Refresh       | \$686,625   | E. & J. Gallo Winery         | \$6.47            | California |
| 12   | Butterfly Kiss         | \$652,999   | Diageo Chateau & Estate      | \$10.41           | California |
| 13   | Zonin Winemakers Col.  | \$652,720   | Casa Vinicola Zonin          | \$7.62            | Italy      |
| 14   | Curious Beasts         | \$478,954   | Truett-Hurst                 | \$14.42           | California |
| 15   | Flame Lily             | \$425,550   | Trincher Family Estates      | \$8.90            | California |
| 16   | Insomnia               | \$397,785   | Terravant Wine Co.           | \$9.25            | California |
| 17   | Artisan Vintners Guild | \$392,884   | Artisan Vintners Guild       | \$9.04            | California |
| 18   | Stark Raving           | \$370,416   | Diageo Chateau & Estate      | \$10.48           | California |
| 19   | Alvarez de Toledo      | \$361,387   | Alvarez de Toledo Wine Group | \$8.64            | Spain      |
| 20   | Aura                   | \$333,340   | E. & J. Gallo Winery         | \$10.02           | California |

Fifteen of the top 20 new brands off-premise are from California, with three from Italy and one each from Spain and Washington. Data from year 2012 week ending Jan. 6, 2013, Infoscan total U.S. multi-outlet.

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Brands with eye-catching names, and some with themes aimed at women consumers dominated the Top 20 New Brands of 2012 as picked by the Symphony IRI Group from off-premise sales data. The top four brands were launched by wine companies other than the big three – E. & J. Gallo, The Wine Group and Constellation Brands. Skinnygirl by Beam Global ranked No. 1 and led No. 2 Be wines from Treasury Wine Estates by more than \$1.5 million cases.

### **About IRI Channels**

Sourced from IRI, these figures cover sales in multiple-outlet and convenience store channels. These include grocery, drug, mass marketers, membership clubs, dollar and convenience stores. Liquor store sales are not included.

# **WINES & VINES**

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