

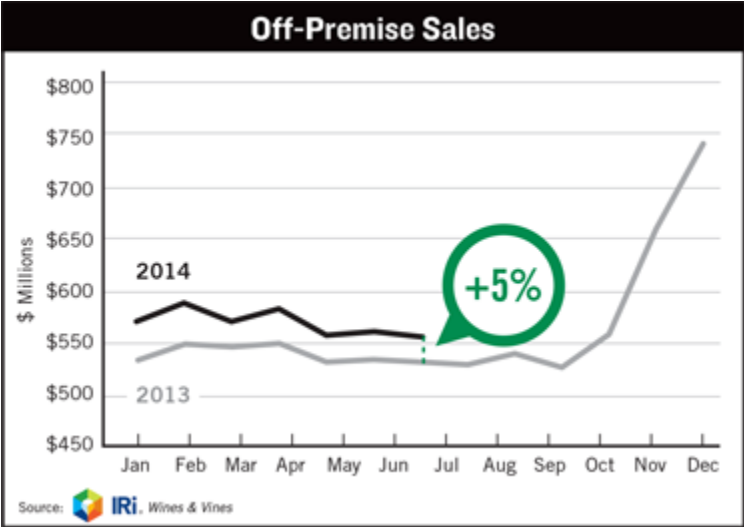
Wine Industry Metrics - Off-Premise Sales - July 2014

Wines Vines Analytics

Growth Rate of Off-Premise Sales Steady for Third Month

The growth rates for off-premise sales of domestic wine stayed the same in July as in May and June, according to Wines & Vines analysis of IRI data: 5% growth in the most recent four weeks compared to the same period a year ago, and 6% growth in the most recent 52 weeks.

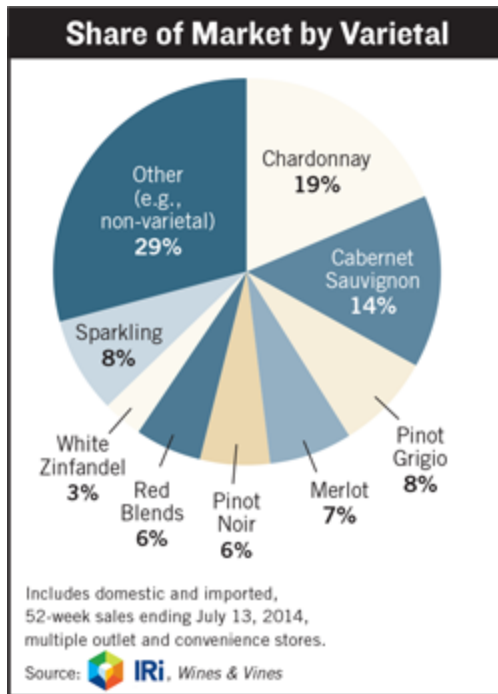
| Off-Premise Sales IRI Channels » | Month | |
|----------------------------------|-----------|-------------|
| | 12 Months | |
| July 2014 | \$568 mil | \$7,701 mil |
| July 2013 | \$533 mil | \$7,128 mil |



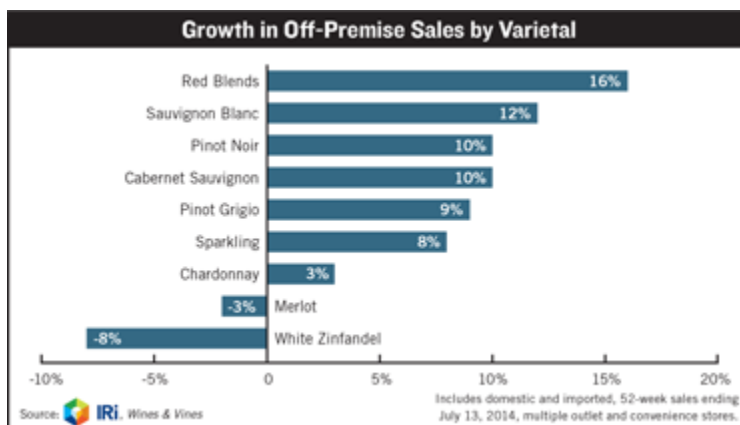
The 52-week rate had been 7% in January through April, indicating that sales gains have slowed since then. IRI is a Chicago-based market research firm. Our analysis combines sparkling wines and still wines, using IRI's data from multi-outlet and convenience stores.

Cabernet Catching up to Chardonnay

Chardonnay remained the most valuable wine type in the U.S. off-premise market during the past year, according to IRI, but sales of No. 2 Cabernet Sauvignon grew at a faster rate and sparkling wine emerged as No. 3. Chardonnay captured 19% market share in value, and brought in \$1.8 billion in the stores tracked by IRI.



The leading red wine type, Cabernet Sauvignon, sped up from a 7% growth rate last year to 10% this year among all wines, domestic and imported. Chardonnay slowed by one percentage point to 3% growth. Sparkling wine virtually tied with Pinot Grigio/Gris in terms of sales when sparkling was included with table wines. While the sparkling category grew by 8%, imported sparkling grew by 11% and Italian sparkling grew by 15%. Prosecco was the key to the Italian success, as this type increased by 36%.



About IRI Channels

Sourced from Chicago-based 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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