

Wine Industry Metrics - Off-Premise Sales - October 2017

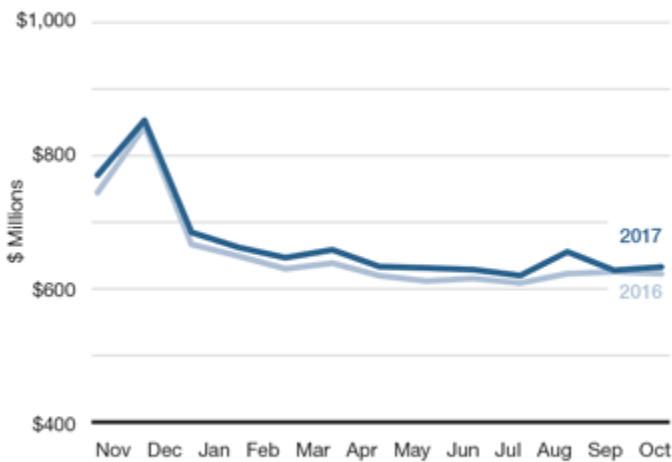
Wines Vines Analytics

Off-Premise Sales Flat as Red Blends Gain Market Share

Off-premise sales in IRI's multiple-outlet and convenience store channel in the four weeks ended Oct. 8, 2017 were even with last year. Sales of \$637 million rose \$2 million from a year ago. Scant growth of both domestic table and sparkling wines didn't hurt 52-week sales, which gained 3% to \$8.8 billion. Cabernet Sauvignon claimed 25% of table wine sales in the period but red blends led growth, rising 6% to claim 11% of table wine sales in the latest 52 weeks.

| Off-Premise Sales IRI Channels » | Month | 12 Months |
|-------------------------------------|-----------|-------------|
| | | |
| October 2017 | \$642 mil | \$8,840 mil |
| October 2016 | \$635 mil | \$8,536 mil |

OFF-PREMISE SALES



Source: IRI, Wines Vines Analytics. Domestic table and sparkling wine sales in multiple-outlet and convenience stores, four weeks ended Oct. 8, 2017.

Off-premise sales in IRI channels totaled \$637 million in the four weeks ended Oct. 8, virtually unchanged from a year earlier.

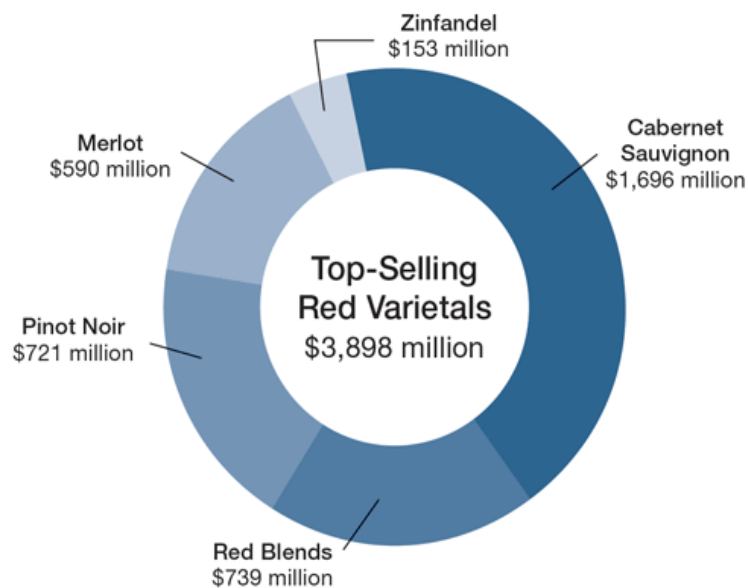
OFF-PREMISE VOLUME



Source: IRI, Wines Vines Analytics. Domestic table and sparkling wine sales in multiple-outlet and convenience stores, four weeks ended Oct. 8, 2017.

IRI reported that case volume totaled \$8.2 million in the four weeks ended Oct. 8, down 1% from a year earlier.

OFF-PREMISE RELATIVE MARKET SHARE



Source: IRI, Wines Vines Analytics. Table wines sold in bottles through multiple-outlet and convenience stores; 52 weeks ended Oct. 8, 2017.

Cabernet Sauvignon is the leading off-premise red varietal, selling \$1.7 billion in the 52 weeks ended Oct. 8, for a 25% share of table wine sales at stores monitored by IRI. Red blends are second with 11% of table wine sales, and the fastest-growing red varietal in the channel.

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.



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