



WINEMETRICS

2017 Fine Dining

Wine Distribution Report

Featuring 2017-2016 Trend Analysis
and Supplier Rankings



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Introduction

This is the fourth edition of *Winemetrics' Fine Dining Wine Distribution Report*. The wine lists used in this report were compiled in Q4 of 2017 with new list data added and up-dated in the first months of 2018. Over 120 fine-dining and select upscale casual-dining chains and restaurant groups, representing over 2,200 accounts nationwide, were surveyed for this report. In many of the larger restaurant groups, we have surveyed multiple chains. As with all of our reports, we limit our survey to lists with fewer than 500 wines by the 750 ml. bottle so as to prevent accounts with vast wine selections from skewing our data.

This year's report features 2017-2016 trend analysis for brands, suppliers, varieties, country of origin and pricing. Our 2017 account base is nearly identical to that of 2016. Both reports survey 126 chains, restaurant groups and high-profile independents. Approximately 3% of the chains/groups surveyed in 2016 were substituted with more dynamic, wine-oriented chains/groups in 2017.

Our *2017 Fine Dining Wine Distribution Report* also includes supplier rankings by variety based on current 2018 portfolio content. **The most recent brand acquisitions and departures from the top 100 suppliers, as of March 1, 2018 have been included in this report.**

Producers that fared particularly well in 2017 include (in no particular order): Cakebread, Duckhorn, Meiomi, Rodney Strong, Belle Glos, The Prisoner Wine Co. and Elouan.

Should you wish to acquire more detailed information about specific wine varieties, regions or brands, please contact us at info@winemetrics.com.

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About Winemetrics

Winemetrics is the leading source of on-premise wine information and analysis, and provides the most complete, objective wine market intelligence available. The founder of Winemetrics, Charles Gill, has over 30 years of experience at all levels of the wine industry and has been providing on-premise wine distribution analysis to the industry for the past decade.

List of Major Restaurant Chains/Groups Used in the 2017 Fine Dining Survey

2017 Account Base

Ark Management	Grill on the Alley	Old Ebbitt Grill
Back Bay Rest. Group	Grillsmith	Paddlefish
Big Red F Rest. Group	Grimaldi's	Pappas Bros.
BLT Steak	Harris Ranch Inn	Passion Food Hospitality
Bluewater Grill	Harry Caray's Rest. Group	Patina Rest. Group
Bonefish Grill	Heart of America	Paul Martin's
BR Guest	Hillstone RG	Perry's Steakhouse
Bravo Brio Rest. Group	Hyde Park Steakhose	PF Changs
Buckhead Life Rest. Group	Il Fornaio	Piatti
Burton's Grill	J. Alexander's Holdings	Quaintance Weaver
Cameron-Mitchell	J. Gilberts	Reata
Capital Grille	Jean-Georges Rest. Group	Redstone Grill
Catch 35	Joes American	Restaurants Unlimited
Chart House	Joe's Seafood	Roots Steakhouse
Chloe	Joey	Roy's
Clyde's Restaurant Group	Katsuya	Ruth's Chris
Copper Canyon	Keg Steakhouse	Salt Creek Grille
Cordua Restaurants	Kent Rathbun Rest. Group	Schwartz Bros.
CRAVE	Kimpton Group	Seasons 52
David Wilhelm Rest. Group	King's Seafood Company	Select Rest. Group
Del Frisco's Grill	Kona Grill	Shula's
Devon Seafood	Landry's Seafood	Sizzling Steak Concepts
District Chophouse	Legal Seafood	Starr Restaurant Group
Earls Restaurants	LEYE	Stefani Rest. Group
Eddie Merlot's	Maggianos	Stonewood Grill
Eddie V	Marlow's Tavern	Strategic Hospitality
El Gaucho	Mastro's	Striphouse
Finn & Porter	Matchbox Food Group	Sullivan's
Firebirds	McCormick & Schmick's	Sushi Samba
Fishmarket	Melting Pot, The	Texas de Brazil
Flemings	Michael Mina	The Chophouse
Fogo de Chao	Mike Ditkas	The Palm
Fourth Wall Restaurants	Mitchell's	The Prime Rib
Francesca's	Morton's	Truluck's
GCT Oyster Bar	Newport Restaurant Group	Union Square Hospitality
Gene & Georgetti	Nobu	Village Tavern
Gibsons Restaurant Group	Not Your Average Joes	Wildfire
Grand Lux Café	Ocean Prime	Willie G's
Great American Restaurants	Oceanaire	Wolfgang Puck Rest. Group

Part I: By the Bottle (BTB) Distribution Analysis (Excerpt)

By the Glass (BTG) and By the Bottle (BTB) Listings 2017-2016

Both BTG and BTB listings increased by over 3% in 2017, reversing 2016's modest BTB contraction and building on 2016 slim BTG gains. Much of this growth can be attributed to the implementation of Coravin systems in leading fine dining chains. This is substantiated by a nearly +30% increase in BTG listings priced in the \$20+ segment.

	2017		2016		% CHG
	# Listings	Ave. Price	# Listings	Ave. Price	
Total BTB	30444	\$98.39	29432	\$97.39	3.4%
Total BTG	9464	\$13.38	9094	\$12.81	4.1%

By The Bottle (BTB) Analysis Summary

2017-2016 Comparison by Wine Type

Distribution by wine type increased 3.4%, largely due to organic growth in the Fine Dining Steakhouse segment.

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Type/Color	2017			2016			% CHG
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	
Dessert	47	\$73.91	0.2%	53	\$99.85	0.2%	-11.3%
Fortified	125	\$102.74	0.4%	128	\$107.44	0.4%	-2.3%
Sparkling	2026	\$141.08	6.7%	1927	\$139.15	6.5%	5.1%
Red	31	\$45.57	0.1%	30	\$47.14	0.1%	3.3%
Rose	314	\$154.39	1.0%	284	\$156.74	1.0%	10.6%
White	1681	\$139.03	5.5%	1604	\$137.13	5.4%	4.8%
Still	28246	\$95.24	92.8%	27324	\$94.34	92.8%	3.4%
Red	19469	\$111.05	64.0%	18891	\$110.07	64.2%	3.1%
Rose	501	\$45.40	1.6%	491	\$45.31	1.7%	2.0%
White	8276	\$62.90	27.2%	7942	\$61.09	27.0%	4.2%
Grand Total	30444	\$98.39		29432	\$97.39		3.4%

Breakdown by Country of Origin

France grew nearly 10% based on demand for both still and sparkling rose and higher-priced Bordeaux Blends. Australia (+15.7%) and Germany (10.9%) exhibited the highest percentage growth while Chile suffered the singular loss, falling -6.5%.

Country	2017			2016			% CHG
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	
U.S.	18893	\$96.47	62.1%	18405	\$94.14	62.5%	2.7%
France	3725	\$145.56	12.2%	3401	\$147.94	11.6%	9.5%
Italy	3246	\$84.79	10.7%	3215	\$87.99	10.9%	1.0%
Spain	915	\$73.57	3.0%	887	\$73.51	3.0%	3.2%
Argentina	1053	\$62.74	3.5%	1020	\$61.75	3.5%	3.2%
Australia	700	\$85.82	2.3%	605	\$92.23	2.1%	15.7%
New Zealand	580	\$50.25	1.9%	583	\$49.54	2.0%	-0.5%
Chile	519	\$71.84	1.7%	555	\$68.79	1.9%	-6.5%
Germany	285	\$55.71	0.9%	257	\$54.88	0.9%	10.9%
South Africa	175	\$60.46	0.6%	172	\$55.41	0.6%	1.7%
Portugal	147	\$86.49	0.5%	143	\$103.82	0.5%	2.8%
Other	206		0.7%	189	NA	0.6%	9.0%

BTB Breakdown by Variety

Nearly all varieties posted increases with Rhone Blend (+12.2%), a major component of French rose wines, reaching double digits. Pinot Noir (+7.2), Bordeaux Blend (+7.0) and, in a surprising comeback, Syrah/Shiraz (+6.9%), compiled the best percentages of growth. Among declining varieties, Sangiovese fell the farthest, -11.7%.

Variety	2017			2016			% CHG
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	
Cabernet Sauvignon	5756	\$135.05	18.9%	5639	\$134.03	19.2%	2.1%
Chardonnay	3599	\$77.09	11.8%	3402	\$74.43	11.6%	5.8%
Pinot Noir	3236	\$87.54	10.6%	3020	\$87.65	10.3%	7.2%
Bordeaux Blend	2183	\$185.48	7.2%	2041	\$183.90	6.9%	7.0%
Merlot	1631	\$70.77	5.4%	1711	\$67.88	5.8%	-4.7%
Sauvignon Blanc	1603	\$54.14	5.3%	1534	\$53.86	5.2%	4.5%
Brut	1373	\$156.80	4.5%	1339	\$153.31	4.5%	2.5%
Pinot Grigio/Gris	992	\$46.03	3.3%	1008	\$44.61	3.4%	-1.6%
Red Blend	1180	\$77.04	3.9%	1218	\$77.61	4.1%	-3.1%
Syrah/Shiraz	782	\$98.43	2.6%	732	\$101.21	2.5%	6.8%
Zinfandel	695	\$62.15	2.3%	711	\$59.68	2.4%	-2.3%
Riesling	683	\$53.38	2.2%	695	\$52.21	2.4%	-1.7%
Malbec	740	\$60.90	2.4%	708	\$61.93	2.4%	4.5%
Sangiovese	609	\$86.90	2.0%	690	\$85.24	2.3%	-11.7%
Rhone Blend	651	\$81.42	2.1%	580	\$83.78	2.0%	12.2%
Other	4731		15.5%	4404	NA	15.0%	7.4%

BTB Breakdown by Price

Wines priced under \$40/bottle declined by double-digits while listings in the \$150-\$199 (+24%) price segment enjoyed the greatest percentage growth.

Price Segment	2017		2016		% CHG
	# Listings	% Share	# Listings	% Share	
<\$25.00	196	0.6%	316	1.1%	-38.0%
\$25-\$39.99	4543	14.9%	5205	17.7%	-12.7%
\$40-\$59.99	8120	26.7%	7718	26.2%	5.2%
\$60 - \$99.99	9098	29.9%	8533	29.0%	6.6%
\$100-\$149	4494	14.8%	4209	14.3%	6.8%
\$150-\$199	1862	6.1%	1502	5.1%	24.0%
\$200+	2131	7.0%	1949	6.6%	9.3%

Producer Ranking – Chardonnay BTB

Cakebread remains atop the standings BTB while Sonoma-Cutrer regains the # 2 position from Kendall-Jackson.

Top Producers Excerpt – Chardonnay BTB

2017					2016				
Producer	# Listings	Ave. Price	% Share	Rank	Producer	# Listings	Ave. Price	% Share	
Chardonnay	3599	\$77.09			Chardonnay	3402	\$74.43		
Cakebread	163	\$90.97	4.5%	1	Cakebread	161	\$88.85	4.7%	
Sonoma-Cutrer	149	\$55.85	4.1%	2	Kendall-Jackson	145	\$41.20	4.3%	
Kendall-Jackson	130	\$41.47	3.6%	3	Sonoma-Cutrer	142	\$55.77	4.2%	
Jordan	102	\$75.12	2.8%	4	Far Niente	85	\$109.37	2.5%	
Far Niente	85	\$111.49	2.4%	5	Jordan	84	\$74.02	2.5%	
Jadot, Maison Louis	79	\$93.87	2.2%	6	Jadot, Maison Louis	77	\$86.21	2.3%	
Mer Soleil	72	\$60.66	2.0%	7	Mer Soleil	74	\$58.07	2.2%	
Rombauer	72	\$78.43	2.0%	8	La Crema	70	\$49.43	2.1%	
Chateau Ste. Michelle	62	\$45.11	1.7%	9	Chateau Ste. Michelle	63	\$44.00	1.9%	
Franciscan	61	\$59.14	1.7%	10	Chalk Hill	54	\$77.06	1.6%	

Supplier Supplement Excerpt – Cabernet Sauvignon BTB

(Note: Winemetrics' Fine-Dining Wine Distribution Report lists the top 25-50 producers for most varieties)

Ste. Michelle Wine Estates displaced Constellation Brands as the leading Cabernet Sauvignon supplier while Treasury Wine Estates repeats at #3. Jackson Family Wines breaks into the top 5, replacing Silver Oak at #4.

2017				2016		
Supplier	# BTB	Ave. Price	Rank	Supplier	# BTB	Ave. Price
Cabernet Sauvignon	5756	\$135.05		Cabernet Sauvignon	5639	\$134.03
Ste. Michelle Wine Estates	377	\$109.64	1	Constellation Brands	364	\$84.66
Constellation Brands	325	\$87.04	2	Ste. Michelle Wine Estates	359	\$113.86
Treasury Wine Estates	293	\$117.60	3	Treasury Wine Estates	294	\$109.66
Jackson Family Wines	216	\$136.58	4	Silver Oak	206	\$164.26
Silver Oak	207	\$170.13	5	Caymus	196	\$191.91
Caymus	200	\$193.80	6	Jackson Family Wines	189	\$118.15
Terlato	159	\$107.76	7	Terlato	160	\$106.02
E&J Gallo	155	\$77.87	8	E&J Gallo	157	\$75.83
Kobrand	146	\$134.21	9	Kobrand	146	\$121.98
Nickel & Nickel	135	\$211.79	10	Nickel & Nickel	127	\$197.98