



WINEMETRICS

2020-19 On-Premise Wine Distribution Report

Featuring Supplier Share and
Chain Profile Data



WINEMETRICS

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Introduction

This is the eleventh edition of **Winemetrics** *On-Premise Wine Distribution Report*. Unlike previous editions, this release includes 2 years of data and will be priced accordingly. Initially, when COVID-19 first began affecting on-premise wine distribution, we thought it would be optimal to provide pre-COVID 2020 distribution information. However as the pandemic progressed, we realized that the report would be incomplete without revealing how seriously it has affected on-premise wine distribution. Therefore, we have updated nearly all of our early Q1 2020 survey data with information obtained as recently as October, 2020. This includes the number of open chain locations in Q3 as obtained from each chain's website.

We have again carefully matched our 2020/2019 account samples to provide very accurate trend analysis this year. A total of 172 restaurant groups and chains were surveyed for this report in both 2020 and 2019, representing over 9,200 establishments nationwide.

Should you wish to acquire more detailed information about specific chains, wine varieties and/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 35 years of experience at all levels of the wine industry and has been providing on-premise wine distribution analysis to the industry for over a decade.

In addition to our annual reports, Winemetrics provides custom analysis of supplier portfolios and in-depth analysis of distribution opportunities in specific chains with its Wine List Analysis Reports. For more information and demos of our leading-edge products, please email us anytime at info@winemetrics.com.

Highlights from Winemetrics 2020-19 On-Premise Wine Distribution Report

Below are some highlights from our report:

- Survey Profile:
 - 172 chains/restaurant groups were surveyed in both 2020 and 2019.
 - Total units represented each year 2020: 9249 2019: 9516
 - Total BTG listings fell -8% and BTB listings fell -9%

- Distribution Growth Leaders – Producers with robust growth in 2017 (BTB only)
 - Meiomi
 - La Crema
 - Josh Cellars
 - Apothic
 - Rocca delle Macie
 - Mondavi Private Selection
 - The Prisoner Wine Co.

- Countries that exceeded average 2020-2019 growth (BTB only), which was -9%.
 - Argentina
 - Chile
 - Spain
 - Australia

A list of the national and regional chains and restaurant groups surveyed for this report is included on the following page.

List of Major Restaurant Chains/Groups Used in Our 2018 Sample

110 Grill	CRAVE	Landry's Seafood	Romano's MG
99 Restaurant	Daily Grill	Lazy Dog	Roy's
Anthony's CF Pizza	Del Frisco's Grille	Legal Seafood	Ruby Tuesday
Bad Daddy's Burger	Devon Seafood	Longhorn Steakhouse	Russo's Pizza
Bahama Breeze	District Chophouse	Lucille's BBQ	Rusty Bucket, The
Bar Louie	Duke's Chowderhouse	Maggianos	Ruth's Chris
Bareburger	Earl's	Main Event	Salt Creek Grille
Bartaco	Eddie Merlot's	Marlow's Tavern	Saltgrass Steakhouse
Benihana	Eddie V's	Mastro's	Sauce Pizza & Wine
Bertucci's	Fatz Café	Matchbox Pizza	Seasons 52
Biaggis	Firebirds	McCormick & Schmick's	Sedona Taphouse
BJ's	Fish City Grill	Mellow Mushroom	Shula's
Black Angus	Fishmarket	Melting Pot, The	Sizzling Steak Concepts
Black Finn	Flanigan's	Miller's Ale House	Smokey Bones
Blue Sushi Sake	Flemings	Mimi's Café	Stonewood
Bluewater Grill	Fogo de Chao	Mitchell's	Stoney River
Bonefish Grill	Fox & Hound	Mon Ami Gabi	Tahoe Joe's
Brass Tap, The	Gordon Biersch	Morton's	Ted's Montana Grill
Bravo	Grand Lux	North	Texas de Brazil
Brick House	Granite City	Not Your Average Joe's	TGI Friday's
Brio	Greene Turtle, The	Ocean Prime	The Chophouse
Brixx Pizza	Grimaldi's	Oceanaire	The Palm
Bubba Gump Shrimp Co.	Hard Rock Café	O'Charley's	The Smith
Buca di Beppo	Haru Sushi	Old Spaghetti Factory	Thirsty Lion, The
Burton's Grill	Harvest Seasonal	Olive Garden	Tommy Bahama
CA Pizza Kitchen	Hickory Tavern	Original Roadhouse	Tom's Urban
Cantina Laredo	Hillstone	Outback	Tony Roma's
Capital Grille	Hooked on Harry's	Pacific Catch	Top Golf
Carino's	Houlihan's	Pappadeaux	True Food Kitchen
Carolina Ale House	Houston's	Paul Martin's	Truluck's
Carrabba's	Hyde Park Steakhouse	Perry's Steakhouse	Tuscany-SRG
Cattlemens	Il Fornaio	PF Changs	Twin Peaks
Champps	J. Alexanders	Phillips Seafood	Uno Chicago Grill
Chart House	J. Gilberts	Piatti	Village Tavern
Cheddar's	Jax Fish House	Pinstripes	Wildfire
Cheesecake Factory	Joe's Crab Shack	Punch Bowl Social	Willie G's
Churrasco's	Joey	RA Sushi	Wood N Tap
City Tap House	Johnny's Italian Stkhse	RAM Brewery	Wood Ranch BBQ
Claim Jumper	Katsuya	Red Lobster	Yard House
Cleo	Keg Steakhouse	Redlands	Zea
Clyde's	Kincaid's	Redstone Grill	
Coastal Flats	King's Bowl	Rock & Brews	
Copeland's	King's Fish House	Rock Bottom	
Copper Canyon	Kona Grill	Rockfish Seafood Grille	

On-Premise Insights

Part I: By the Bottle (BTB) Distribution Analysis

By The Bottle (BTB) Analysis Summary

BTB Breakdown by Wine Type

#BTB	2020	2019	%CHG
Sparkling	2317	2490	-7%
Red	25	37	-32%
Rose	324	320	1%
White	1968	2133	-8%
Still	32531	35779	-9%
Red	20023	22007	-9%
Rose	1681	1698	-1%
White	10827	12074	-10%
Grand Total	35059	38473	-9%

BTB Breakdown by Country of Origin – Top Ten

Country by #BTB	2020	2019	% CHG
Grand Total	35059	38473	-9%
U.S.	22283	24498	-9%
Italy	5166	6036	-14%
France	2729	2999	-9%
Argentina	1225	1161	6%
New Zealand	1002	1133	-12%
Australia	897	942	-5%
Spain	741	757	-2%
Chile	378	283	34%
Germany	194	235	-17%
Portugal	182	166	10%
South Africa	105	135	-22%

BTB Breakdown by Variety – Top 15

2020				2019				
Variety	#BTG	#BTB	BTG+BTB	Rank	Variety	#BTG	#BTB	BTG+BTB
Grand Total	20300	35059	55359		Grand Total	21975	38473	60448
Cabernet Sauvignon	2845	6342	9187	1	Cabernet Sauvignon	3014	6679	9693
Chardonnay	2695	4543	7238	2	Chardonnay	3128	5130	8258
Pinot Noir	2079	3659	5738	3	Pinot Noir	2194	3950	6144
Pinot Grigio/Gris	1624	1863	3487	4	Pinot Grigio/Gris	1717	2056	3773
Red Blend	1360	2110	3470	5	Merlot	1442	2234	3676
Sauvignon Blanc	1240	1882	3122	6	Red Blend	1410	2117	3527
Merlot	1115	1866	2981	7	Sauvignon Blanc	1417	2086	3503
Moscato Bianco	958	959	1917	8	Bordeaux Blend	269	1806	2075
Riesling	768	962	1730	9	Riesling	838	1097	1935
Brut	456	1231	1687	10	Moscato Bianco	945	959	1904
Bordeaux Blend	235	1444	1679	11	Malbec	770	1023	1793
Malbec	618	935	1553	12	Brut	427	1264	1691
Prosecco	842	631	1473	13	Prosecco	919	763	1682
White Zinfandel	622	536	1158	14	Sangiovese	532	934	1466
Sangiovese	353	646	999	15	White Zinfandel	736	656	1392

Top 10 Brands By The Bottle

(Note: Winemetrics On-Premise Wine Distribution Report lists the top 25-50 producers in most categories).

2020				2019				
	#BTG	#BTB	BTG+BTB	Rank		#BTG	#BTB	BTG+BTB
Chateau Ste. Michelle	699	851	1550	1	Chateau Ste. Michelle	712	874	1586
Beringer	584	692	1276	2	Beringer	729	821	1550
Kendall-Jackson	562	599	1161	3	Kendall-Jackson	582	643	1225
Coppola, Francis	487	581	1068	4	Coppola, Francis	481	577	1058
Ecco Domani	385	386	771	5	Cavit	516	505	1021
La Crema	347	384	731	6	Ecco Domani	508	506	1014
Cavit	352	322	674	7	La Marca	415	282	697
Meiomi	278	380	658	8	Mark West	327	329	656
Josh	322	323	645	9	Cupcake	339	311	650
14 Hands	307	332	639	10	14 Hands	308	337	645