



# WINE METRICS

## 2011 On-Premise

## Supplier Distribution Report

## (Excerpt)

Analysis of the Top 50 Suppliers in the  
On-Premise Channel



WINEMETRICS

## TABLE OF CONTENTS

Page		Page		Page	
1	Table of Contents	42	<b>Top Supplier by BTG Price</b>	110-111	Loosen Bros. USA
2	Introduction	43	<\$5	112-113	Mendocino Wine Co.
3	About Our 2011 Supplier Report	44	\$5-\$5.99	114-115	Merryvale
4	List of Accounts Used in Our Sample	45	\$6-\$6.99	116-117	Moet-Hennessy USA
5	Top 50 Suppliers By the Bottle (BTB)	46	\$7-\$7.99	118-119	MMD, USA
6	Top 50 Suppliers By the Glass (BTG)	47	\$8-\$8.99	120-121	Neyers
7	<b>Top Suppliers by Account Type and Cuisine, BTB and BTG</b>	48	\$9-\$9.99	122-123	Palm Bay International
8	Overall Casual	49	\$10-\$11.99	124-125	Pasternak
9	Casual American	50	\$12+	126-127	Pernod Ricard
10	Casual Italian	51	<b>Supplier BTG/BTB Summary</b>	128-129	Préstige Wine Imports
11	Casual Seafood		Distribution by Brand	130-131	Purple Wine Co.
12	Casual Steakhouse		Distribution by Price Segment	132-133	Rodney Strong
13	Overall Upscale Casual		Distribution by Variety	134-135	Silver Oak
14	Upscale Casual American		<b>A-Z List of Top 50 Suppliers</b>	136-137	Ste. Michelle Wine Estates
15	Upscale Casual Italian	52-53	Ascentia	138-139	Terlato
16	Upscale Casual Seafood	54-55	Banfi Vintners	140-141	TGIC Importers
17	Upscale Casual Steakhouse	56-57	Bogle	142-143	Treasury Wine Estates
18	Overall Fine Dining	58-59	Boisset Family Estates	144-145	Trinchero
19	Fine American	60-61	Bronco	146-147	Vias Imports
20	Fine Seafood	62-63	Brown Forman	148-149	Vineyard Brands
21	Fine Steakhouse	64-65	Cape Classics	150-151	Vintage Point
		66-67	Caymus	152-153	Wilson Daniels Ltd.
22	<b>Top Suppliers by Variety</b>	68-69	Constellation Brands	154-155	Winebow
23	Cabernet Sauvignon	70-71	Crimson Wine Group	156-157	WJ Deutsch & Sons, Ltd.
24	Chardonnay	72-73	Delicato Family Vineyards	158-159	Zonin USA
25	Merlot	74-75	Diageo		
26	Pinot Gris/Grigio & Blends	76-77	Duckhorn		
27	Pinot Noir	78-79	E&J Gallo		
28	Bordeaux Blends	80-81	Far Niente		
29	Sauvignon Blanc	82-83	Ferrari-Carano		
30	Sangiovese	84-85	Foley Family		
31	Syrah/Shiraz	86-87	Folio		
32	Riesling	88-89	Francis Coppola		
33	White Zinfandel and Malbec	90-91	Frederick Wildman & Sons		
34	Sparkling	92-93	Grgich Hills		
35	Zinfandel	94-95	Heck Estates		
		96-97	Hess Family Estates		
36	<b>Top Suppliers by BTB Price</b>	98-99	Huneus Vintners		
37	<\$25	100-101	J. Lohr		
38	\$25-\$40	102-103	Jackson Family Estates		
39	\$40-\$60	104-105	Jordan		
40	\$60-\$100	106-107	King Estate		
41	\$100+	108-109	Kobrand		

## Introduction

Welcome to the first edition of **Winemetrics'** *On-Premise Supplier Report*. This is our first report that focuses on the entire supplier portfolio on-premise as our previous reports have all focused on individual brand performance. By providing composite data by supplier versus just brand, we reveal the 'portfolio power' of the nation's top 50 wine marketers.

Our report provides detailed supplier distribution information by account type (e.g. Casual Dining-American), variety and price segment. It also provides a breakdown of each of the top 50 suppliers by leading brands, varieties and price segments. Distribution information is compiled and organized both by-the-glass (BTG) and by-the-bottle (BTB). While we assume our clients probably have superior information regarding their own brands' distribution on-premise, we doubt any other source can match the level of competitive information offered in Winemetrics' 2011 On-Premise Supplier Distribution Report.

Should you wish to acquire more detailed information about specific suppliers or wine varieties not listed in this report, please contact us at [info@winemetrics.com](mailto:info@winemetrics.com). Note that our supplier example below lists data from Precept Brands, a supplier that did not make the top 50 supplier list in the by-the-bottle segment.

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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 30 years of experience at all levels of the alcoholic beverage industry and has been providing the wine industry with on-premise wine distribution analysis for the past decade.

In addition to our new On-Premise Supplier Distribution Report, we also publish an annual *On-Premise Wine Distribution Report* as well as an *On-Premise Chain Accounts Report*, which will profile over 150 chain and multi-concept restaurant groups in the 2011 edition. It will also include, for the first time, fine-dining chains and share of distribution by supplier. Winemetrics' 2011 On-Premise Chain Accounts Report will be an essential tool in the marketing arsenal of any wine brand steward or national accounts sales executive. For more details on this report and to download an excerpt, please visit our site at [www.winemetrics.com](http://www.winemetrics.com) where you may sign up for our newsletter, *What's on America's Wine Lists*.

For the restaurant trade, Winemetrics creates custom wine list analysis reports, which compare a client's list to key national and regional competitors by restaurant cuisine and type (Casual, Upscale Casual, Fine Dining). These reports feature analysis by country and appellation, variety, price and brand, allowing clients to determine if their lists provide the diversity and value needed to attract and retain high-value, core wine consumers. For more information, or to view a sample restaurant wine list analysis report, please visit our site at [www.winemetrics.com](http://www.winemetrics.com) and click on "Restaurants." or email us at [info@winemetrics.com](mailto:info@winemetrics.com) with your inquiries.

## About Our 2011 On-Premise Supplier Distribution Report

Our supplier portfolio data was compiled during the first half of 2011, largely from supplier websites. This laborious task of matching thousands of brands to hundreds of suppliers was then applied to the data compiled from the sample we used for our 2010 On-Premise Report. Based on our experience on the timing and changes in wine list data, we believe this report portrays an accurate picture of supplier distribution in 2011.

Winemetrics surveys a representative group of wine lists from over 175 national and regional chains and restaurant groups. This account sample represents approximately 8000 restaurants nationwide and provides a very real picture of the wines being ordered and consumed on-premise.

A list of the major national and regional chains and restaurant groups sampled in our report is included on the following page.

Also, please note that as we are including both *By the Bottle (BTB)* and *By the Glass (BTG)* distribution analysis in this report, all tables will be labeled *BTB* or *BTG* to indicate the source of the data. Please note that certain suppliers represent such a multitude of brands that those with the least distribution may not have been included in their supplier BTB/BTG Distribution Summary. However, that information can be provided in Excel reports upon request.

Also, please note that the Supplier BTB/BTG Summary included in this excerpt is not among the top 50 suppliers. Precept Brands actually ranks 63<sup>rd</sup> in BTB distribution. We used them as an example of the depth of our data as we actively track the brands of more than 500 suppliers.

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

Anthony's	Grand Lux Café	Prime Rib, The
Anthony's Coal Fired Pizza	Granite City	Ram Brewery
Bahama Breeze	Green Mill	Mainstreet Ventures
Benihana	Heart of America	QWRH Group
Bertucci's	Hillstone Group	Red Lobster
Biaggi's	Hilton Restaurant Group	Redrock Canyon Grill
Bice	Houlihan's	Redstone American Grill
BJ's	Il Fornaio	Restaurants America
Black Angus Steakhouse	Islamorada Fish Co.	Restaurants Unlimited Inc.
BLT Steak	J. Alexander's	Rockbottom
Bobby Van's Steakhouses	J. Gilbert's	Rockfish
Bonefish Grill	Joey	Romano's Macaroni Grill
Bravo Cucina	Keg Steakhouse	Rosebud Restaurants
Brigantine	Kimpton Hotel Restaurants	Roy's
Brio Tuscan Grille	Kincaid's	Ruby Tuesday
Buca Di Beppo	King's Fish House	Ruths Chris Steak House
Bugaboo Creek Steakhouse	Kona Grill	Salt Creek Grille
Calhoun's	Landry's Seafood	Saltgrass Steakhouse
California Pizza Kitchen	Lark Creek Restaurants	Sam Snead's
Cameron - Mitchell	Legal Seafoods	Seasons 52
Cantina Laredo	Levy Restaurants	Select Restaurants
Capital Grille	Longhorn Steakhouse	Shula's
Carino's Italian Grill	Louise's	Spaghetti Warehouse
Carmel's Best	MacKay Restaurant Group	Starr Restaurant Group
Carrabba's	Maggiano's	Stefani Restaurants
Cattlemens Steakhouse	Market Broiler	STK (One Group)
Champpps	Marmalade Café	Stonewood Tavern & Grill
Charlie Brown's	McCormick & Schmick's	Stoney River Legendary Steaks
Chart House	McGrath's Fish House	Sullivan's
Cheesecake Factory	Melting Pot	Sundried Tomato Café
China Grill Mgmt.	Mimi's Café	Tavistock Group
Claim Jumper	Mitchell's	Ted's Montana Grill
Consolidated Restaurants	Morton's of Chicago	Texas de Brazil
Copeland's	Nobu	Texas Land & Cattle
Craft	Not Your Average Joe's	The Chophouse
Daily Grill	Oceanaire	The Palm
Dukes Chowder House	Old Spaghetti Factory	Tommy Bahama
E Brands	Olive Garden	Tony Roma's
Elephant Bar	One Group	Truluck's
Firebirds Rocky Mtn. Grill	Outback Steakhouse	TS Restaurant Group
Fishmarket	P F Chang's China Bistro	Typhoon
Flanigan's	Back Bay Restaurants	Uno Chicago Grill
Fleming's	Pappadeaux Seafood Kitchen	Village Tavern
Fogo de Chao	Pasta Pomodoro	Wildfire Steakhouse
Fox Restaurant Concepts	Patina Restaurant Group	Wolfgang Puck Restaurants
Fuzio	Phillips Seafood	WoodRanch BBQ
Gallagher's	Piatti	Yardhouse
Gordon Biersch	Pizzeria Regina	Zios

## Report Excerpts

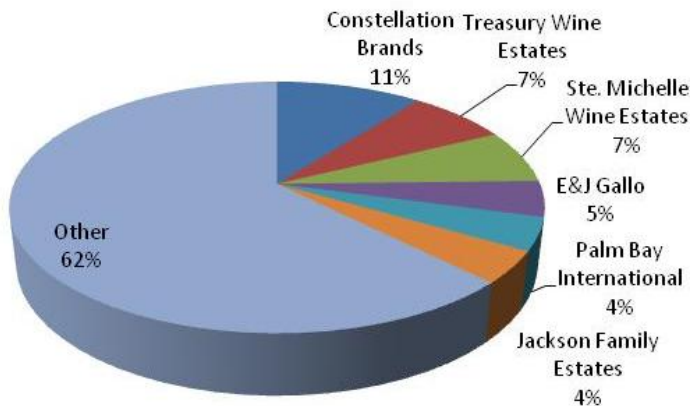
### Top 25 Suppliers by BTB Distribution

Rank	Supplier	# Listings	Average Price
1	Constellation Brands	3861	\$38.47
2	Treasury Wine Estates	2634	\$43.67
3	Ste. Michelle Wine Estates	2518	\$41.08
4	E&J Gallo	1681	\$28.66
5	Palm Bay International	1535	\$42.43
6	Jackson Family Estates	1509	\$45.86
7	Trincher	1220	\$28.43
8	Kobrand	1056	\$77.91
9	Terlato	1040	\$60.91
10	Moet-Hennessy USA	1008	\$125.32
11	Diageo	935	\$48.94
12	Banfi Vintners	789	\$44.73
13	Brown Forman	622	\$41.42
14	Pernod Ricard	425	\$80.46
15	Francis Coppola	399	\$49.61
16	WJ Deutsch & Sons, Ltd.	365	\$32.98
17	Caymus	348	\$96.41
18	J. Lohr	295	\$33.81
19	Folio	259	\$60.72
20	Rodney Strong	249	\$48.11
21	Winebow	240	\$71.08
22	Foley Family	232	\$46.12
23	Frederick Wildman & Sons	231	\$61.52
24	Vintage Point	230	\$46.05
25	Huneeus Vintners	228	\$94.28

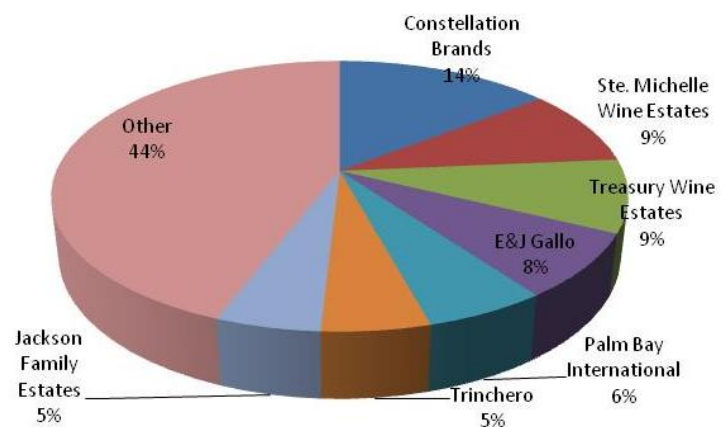
### Top 25 Suppliers by BTG Distribution

Rank	Suppliers	# Listings	Average Price
1	Constellation Brands	2782	\$7.70
2	Ste. Michelle Wine Estates	1765	\$7.26
3	Treasury Wine Estates	1674	\$6.77
4	E&J Gallo	1485	\$7.16
5	Palm Bay International	1113	\$6.73
6	Trincher	968	\$6.76
7	Jackson Family Estates	955	\$8.97
8	Diageo	519	\$8.55
9	Brown Forman	498	\$9.56
10	Banfi Vintners	459	\$7.25
11	Terlato	375	\$9.99
12	Francis Coppola	265	\$9.78
13	Pernod Ricard	242	\$8.66
14	WJ Deutsch & Sons, Ltd.	241	\$6.62
15	J. Lohr	217	\$8.56
16	Kobrand	214	\$10.70
17	Moet-Hennessy USA	206	\$13.74
18	Bogle	187	\$6.10
19	Prestige Wine Imports	180	\$6.73
20	Zonin USA	171	\$6.58
21	Bronco	163	\$5.59
22	Folio	135	\$9.40
23	Hess Family Estates	130	\$10.12
24	Vintage Point	129	\$9.58
25	Rodney Strong	121	\$9.48

### Top Suppliers in BTB Distribution



### Top Suppliers by BTG Distribution



**Report Excerpts - Continued**  
**Top Suppliers by Variety**

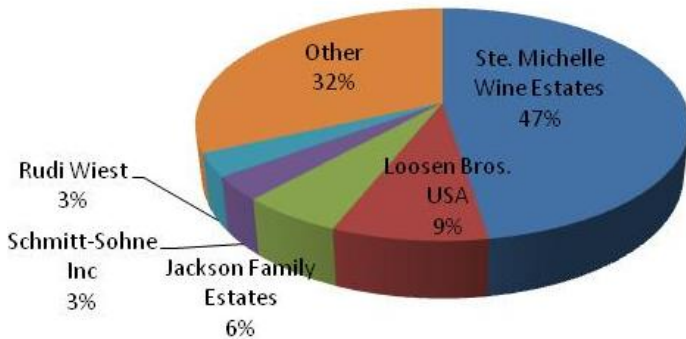
Top 10 Suppliers in BTB Distribution:  
 Riesling

Rank	Supplier	# Listings	Average Price
1	Ste. Michelle Wine Estates	593	\$25.45
2	Loosen Bros. USA	107	\$35.18
3	Jackson Family Estates	70	\$26.10
4	Schmitt-Sohne Inc	41	\$32.02
5	Rudi Wiest	40	\$41.39
6	Palm Bay International	33	\$27.44
7	Brown Forman	31	\$29.00
8	Constellation Brands	28	\$27.93
9	Ascentia	23	\$27.38
10	Treasury Wine Estates	20	\$21.73

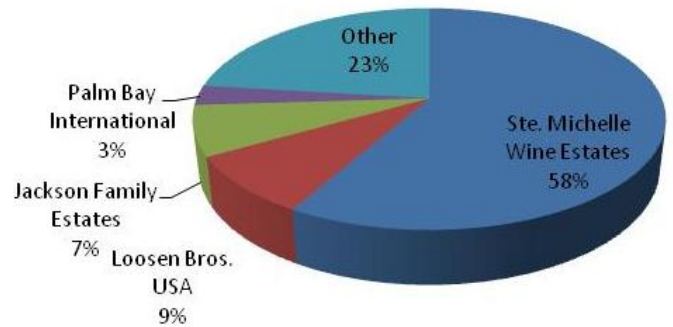
Top 10 Suppliers in BTG Distribution:  
 Riesling

Rank	Supplier	# Listings	Average Price
1	Ste. Michelle Wine Estates	540	\$ 6.43
2	Loosen Bros. USA	79	\$ 10.67
3	Jackson Family Estates	68	\$ 6.68
4	Palm Bay International	27	\$ 7.86
5	Constellation Brands	23	\$ 7.37
6	Rudi Wiest	21	\$ 9.29
7	Treasury Wine Estates	17	\$ 6.11
8	Wente	15	\$ 6.95
9	Bridgeview	13	\$ 5.90
10	Schmitt-Sohne Inc	13	\$ 9.04

**Top Suppliers in BTB Distribution:  
 Riesling**



**Top Suppliers in BTG Distribution:  
 Riesling**





**Report Excerpts – Continued**  
**Top Suppliers by Price Segment**

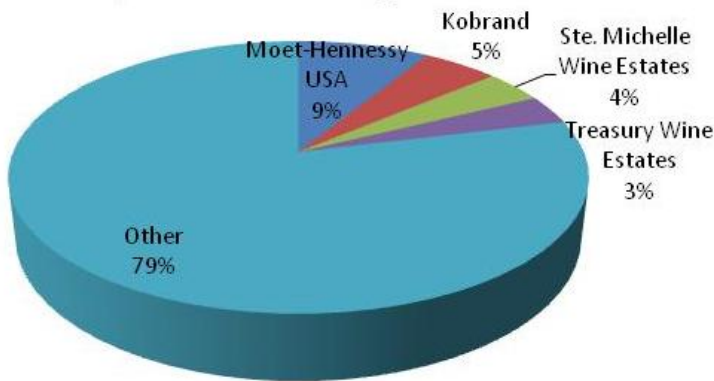
**Top Suppliers in the \$100+  
 BTB Segment**

Rank	Suppliers	# Listings
1	Moet-Hennessy USA	363
2	Kobrand	208
3	Ste. Michelle Wine Estates	162
4	Treasury Wine Estates	144
5	Silver Oak	124
6	Caymus	114
7	Far Niente	99
8	Constellation Brands	93
9	Pernod Ricard	84
10	Duckhorn	83

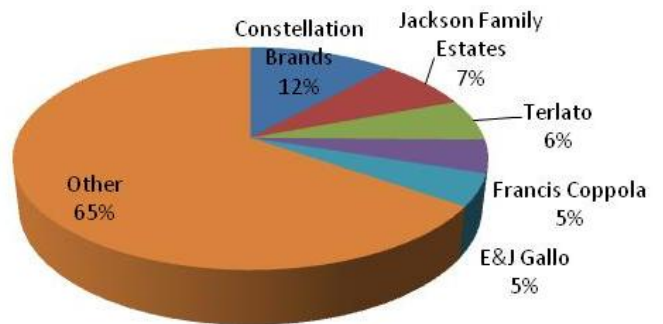
**Top Suppliers in the \$10-\$11.99  
 BTG Segment**

Rank	Supplier	# Listings
1	Constellation Brands	180
2	Jackson Family Estates	116
3	Terlato	93
4	Francis Coppola	74
5	E&J Gallo	71
6	Brown Forman	60
7	Pernod Ricard	45
8	Trincherro	44
9	Kobrand	43
10	Treasury Wine Estates	36

**Top Suppliers BTB Distribution:  
 \$100+ Price Segment**



**Top Suppliers in BTG Distribution:  
 \$10-\$11.99 Price Segment**





## Report Excerpts – Continued

### Supplier Summary:

#### Precept Brands

By the Bottle Distribution

BTB Listings: 79

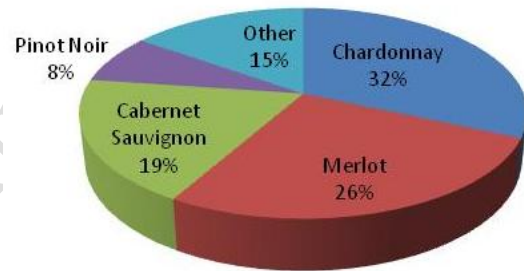
Average Price: \$33.76

Ranking: 63rd

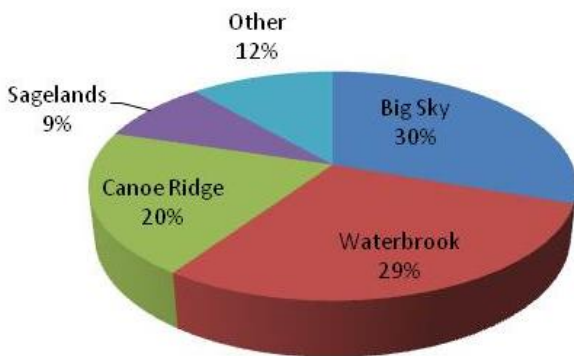
Precept Brands: BTB Distribution  
By Brand

Brand	# Listings	Average Price
Big Sky	24	\$28.00
Waterbrook	23	\$31.04
Canoe Ridge	16	\$43.88
Sagelands	7	\$31.14
Red Knot	3	\$27.33
Apex	2	\$75.00
Shingleback	2	\$41.00
Bloom	1	\$24.00
Pine & Post	1	\$23.00

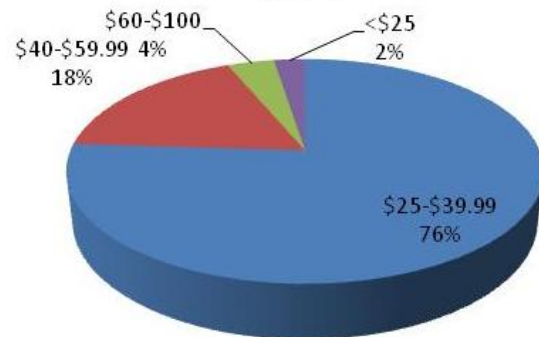
Precept Brands BTB Distribution by  
Variety



Precept Brands BTB Distribution by  
Brand



Precept Brands BTB Distribution by  
Price



## Report Excerpts – Continued

### Supplier Summary:

#### Precept Brands

By the Glass Distribution

BTG Listings: 54

Average Price: \$7.41

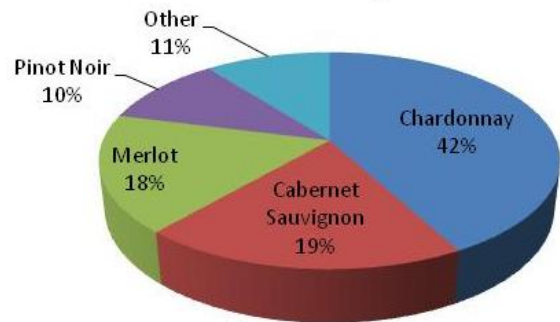
Ranking: 41st

### Precept Brands: BTG Distribution

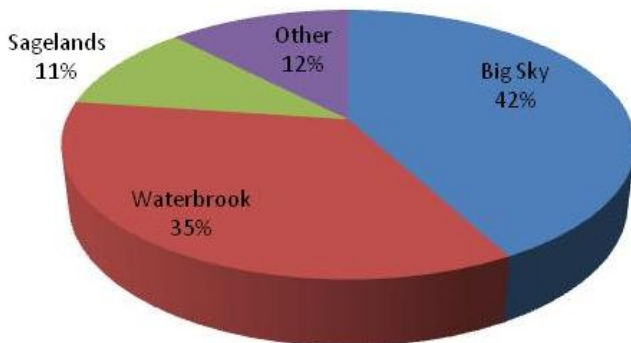
By Brand

Brand	# Listings	Average Price
Big Sky	24	\$6.69
Waterbrook	20	\$7.88
Sagelands	6	\$7.89
Canoe Ridge	3	\$9.08
Red Knot	3	\$7.98
Pine & Post	1	\$5.75

### Precept Brands BTG Distribution by Variety



### Precept Brands BTG Distribution by Brand



### Precept Brands BTG Distribution by Price

