



# WINEMETRICS

## 2016 Fine Dining Wine Distribution Report

Featuring 2016-2015 Trend Analysis

Includes Supplier Rankings by Variety



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## Introduction

This is the third edition of *Winemetrics' Fine Dining Wine Distribution Report*. The wine lists used in this report were compiled in Q4 of 2016 with new list data added and up-dated in the first months of 2017. Over 120 fine-dining and select upscale casual-dining chains and restaurant groups, representing over 2,500 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 2016-2015 trend analysis for brands, suppliers, varieties, country of origin and pricing. Our 2016 account base is nearly identical to that of 2015. Both reports survey 129 chains, restaurant groups and high-profile independents. Approximately 4% of the chains/groups surveyed in 2015 were substituted with more dynamic, wine-oriented chains/groups in 2016.

Our *2016 Fine Dining Wine Distribution Report* also includes supplier rankings by variety based on current 2017 portfolio content. **The most recent brand acquisitions and departures from the top 100 suppliers have been included in this report.**

Should you wish to acquire more detailed information about specific US markets or wine varieties, regions or brands, please contact us at [info@winemetrics.com](mailto:info@winemetrics.com).

Charles Gill  
Founder & CEO  
Winemetrics LLC  
[www.winemetrics.com](http://www.winemetrics.com)

## 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.

In addition to our annual reports, Winemetrics provides custom analysis of supplier portfolios via its Trilogy Reports 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](mailto:info@winemetrics.com).

## List of Major Restaurant Chains/Groups Used in the 2016 Fine Dining Survey

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

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

### By the Glass (BTG) and By the Bottle (BTB) Listings 2016-2015

Both BTG and BTB listings fell by -1.6% and -3.2% respectively in 2015. Average BTG and BTB pricing both fell slightly.

2016-15 Overview	2016	2015	% CHG
BTG # Listings	9044	8896	1.7%
BTG Ave. Price	12.81	11.7	9.5%
BTB # Listings	29432	30238	-2.7%
BTB Ave. Price	97.39	93.82	3.8%

### By The Bottle (BTB) Analysis Summary

#### *2016-2015 Comparison by Wine Type*

Distribution by wine type fell across all types in 2016. These losses were slightly offset by growth in rose still and rose sparkling wines, which were the only segments securing double-digit growth.

Type/Color	2016			2015			% CHG
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	
Dessert	53	\$99.85	0.2%	74	\$94.70	0.2%	-28.4%
Fortified	128	\$107.44	0.4%	122	\$113.96	0.4%	4.9%
Sparkling	1918	\$139.53	6.5%	2036	\$131.08	6.7%	-5.8%
Red	30	\$47.14	0.1%	46	\$48.64	0.2%	-34.8%
Rose	284	\$156.74	1.0%	235	\$142.24	0.8%	20.9%
White	1604	\$137.13	5.5%	1755	\$130.42	5.8%	-8.6%
Still	27296	\$94.33	92.9%	28006	\$90.92	92.6%	-2.5%
Red	18868	\$110.07	64.2%	19343	\$105.85	64.0%	-2.5%
Rose	492	\$45.34	1.7%	444	\$44.90	1.5%	10.8%
White	7936	\$61.08	27.0%	8219	\$58.96	27.2%	-3.4%
Grand Total	29395	\$97.39		30238	\$93.82		-2.8%

### *Breakdown by Country of Origin*

Overall BTB listings fell nearly 3%, with most major regions experiencing modest losses. Only Argentina, Italy and Chile improved share while Australia, South Africa and Spain suffered losses of over -10%.

Country	2016			2015			% CHG
	# Listings	Ave. Price	% Share	# Listings	Ave. Price	% Share	
U.S.	18381	\$94.15	62.5%	18960	\$89.62	62.7%	-3.1%
France	3399	\$147.94	11.6%	3426	\$149.69	11.3%	-0.8%
Italy	3209	\$87.95	10.9%	3188	\$87.24	10.5%	0.7%
Spain	886	\$73.51	3.0%	991	\$70.10	3.3%	-10.6%
Argentina	1018	\$61.75	3.5%	987	\$60.28	3.3%	3.1%
Australia	605	\$92.23	2.1%	706	\$86.43	2.3%	-14.3%
New Zealand	582	\$49.54	2.0%	624	\$50.03	2.1%	-6.7%
Chile	555	\$68.79	1.9%	549	\$68.09	1.8%	1.1%
Germany	256	\$54.88	0.9%	271	\$49.23	0.9%	-5.5%
South Africa	172	\$55.41	0.6%	194	\$49.16	0.6%	-11.3%
Portugal	143	\$103.82	0.5%	156	\$110.12	0.5%	-8.3%
Other	189	NA	0.7%	183	NA	0.6%	3.3%



### *BTB Breakdown by Variety*

No varieties posted an overall gain in distribution, but Pinot Noir, Merlot, Riesling, Sangiovese and Rhone Blend all achieved very modest increases in share.

<b>Variety</b>	<b>2016</b>			<b>2015</b>			<b>% CHG</b>
	<b># Listings</b>	<b>Ave. Price</b>	<b>% Share</b>	<b># Listings</b>	<b>Ave. Price</b>	<b>% Share</b>	
Cabernet Sauvignon	5632	\$134.03	19.2%	5540	\$122.10	18.3%	1.7%
Chardonnay	3399	\$74.43	11.6%	3413	\$68.38	11.3%	-0.4%
Pinot Noir	3016	\$87.65	10.3%	3257	\$82.11	10.8%	-7.4%
Bordeaux Blend	2041	\$183.90	6.9%	2197	\$192.85	7.3%	-7.1%
Merlot	1708	\$67.88	5.8%	1851	\$67.09	6.1%	-7.7%
Sauvignon Blanc	1533	\$53.86	5.2%	1493	\$61.63	4.9%	2.7%
Brut	1334	\$153.42	4.5%	1454	\$144.19	4.8%	-8.3%
Pinot Grigio/Gris	1007	\$44.61	3.4%	1021	\$43.11	3.4%	-1.4%
Red Blend	1214	\$77.61	4.1%	993	\$73.18	3.3%	22.3%
Syrah/Shiraz	732	\$101.21	2.5%	864	\$94.90	2.9%	-15.3%
Zinfandel	714	\$59.61	2.4%	728	\$58.64	2.4%	-1.9%
Riesling	694	\$52.21	2.4%	768	\$48.86	2.5%	-9.6%
Malbec	706	\$61.93	2.4%	707	\$58.70	2.3%	-0.1%
Sangiovese	689	\$85.24	2.3%	678	\$81.55	2.2%	1.6%
Rhone Blend	580	\$83.78	2.0%	511	\$75.46	1.7%	13.5%
Other	4396	NA	15.0%	4763	NA	15.8%	-7.7%

### *BTB Breakdown by Price*

The strongest area of growth in 2016 was in the \$200+ price segment. All other segment lost distribution with the <\$25.00 falling by nearly a third.

<b>Price Segment</b>	<b>2016</b>		<b>2015</b>		<b>% CHG</b>
	<b># Listings</b>	<b>% Share</b>	<b># Listings</b>	<b>% Share</b>	
<\$25.00	316	1.1%	447	1.5%	-29.3%
\$25-\$39.99	5189	17.7%	5456	18.0%	-4.9%
\$40-\$59.99	7705	26.2%	7996	26.4%	-3.6%
\$60 - \$99.99	8528	29.0%	8764	29.0%	-2.7%
\$100-\$149	4207	14.3%	4270	14.1%	-1.5%
\$150-\$199	1502	5.1%	1550	5.1%	-3.1%
\$200+	1948	6.6%	1750	5.8%	11.3%

## BTB Producer Ranking – Top 10

Chateau Ste. Michelle remains atop the standings BTB while Cakebread, 2015's # 2 producer falls to #3 behind a reinvigorated Beringer, which very narrowly secured the #2 spot. Castello Banfi and Meiomi were the big winners in 2016 increasing their rankings from 10<sup>th</sup> to 5<sup>th</sup> and 14<sup>th</sup> to 8<sup>th</sup>, respectively.

### Top Producers Excerpt

2016				2015				
Producer	#BTG	#BTB	BTG+BTB	Rank	Producer	#BTB	#BTG	BTB+BTG
Chateau Ste. Michelle	172	387	559	<b>1</b>	Chateau Ste. Michelle	391	165	556
Beringer	128	258	386	<b>2</b>	Cakebread	351	38	389
Cakebread	28	357	385	<b>3</b>	Beringer	250	128	378
Caymus	52	317	369	<b>4</b>	Caymus	302	47	349
Banfi, Castello	70	253	323	<b>5</b>	Antinori	248	83	331
Antinori	67	227	294	<b>6</b>	Coppola, Francis	220	110	330
Coppola, Francis	96	198	294	<b>7</b>	Kendall-Jackson	203	104	307
Meiomi	126	168	294	<b>8</b>	Franciscan	267	37	304
Veuve Clicquot	37	255	292	<b>9</b>	Sonoma-Cutrer	179	121	300
Sonoma-Cutrer	107	170	277	<b>10</b>	Banfi, Castello	242	54	296

### Supplier Supplement Excerpt

*(Note: Winemetrics' Fine-Dining Wine Distribution Report lists the top 25-50 producers in most categories )*

Constellation Brands regained the #1 position in 2016, largely due to the purchase of The Prisoner Wine Co. and the robust growth of Meiomi. E&J Gallo broke into the top 5, supplanting Kobrand at the #4 spot.

#### Top 5 Suppliers, 2016-2015

2016	#BTG	#BTB	BTG+BTB	Rank	2015	#BTG	#BTB	BTG+BTB
Constellation Brands	669	1799	2468	1	Ste. Michelle Wine Estates	1605	550	2155
Ste. Michelle Wine Estates	584	1704	2288	2	Constellation Brands	1513	597	2110
Treasury Wine Estates	333	1233	1566	3	Treasury Wine Estates	1459	404	1863
E&J Gallo	494	920	1414	4	Kobrand	1142	237	1379
Terlato	317	1033	1350	5	Terlato	992	272	1264