

Wine Industry Metrics - Off-Premise Sales - November 2017

Wines Vines Analytics

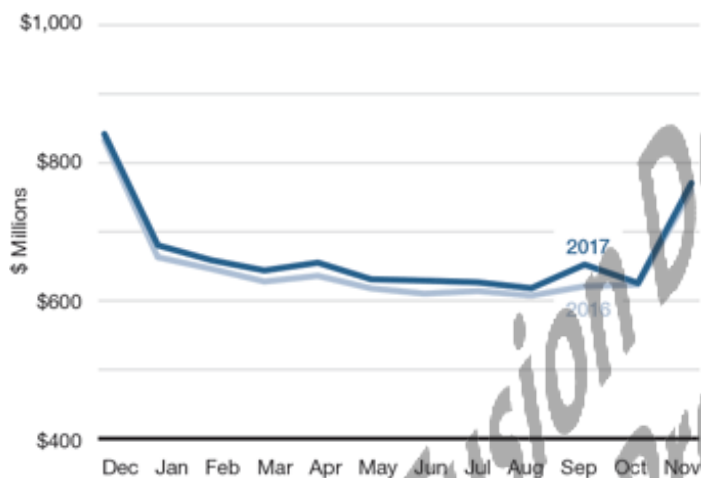
\$25-plus U.S. Wines Shine as Off-Premise Sales Rise 1%

Off-premise sales through multiple-outlet and convenience stores in the four weeks ended Dec. 3 increased 1% to \$777 million versus a year earlier, market research firm IRI reported. Growth came largely from domestic sparkling wines, which gained 2% in the period while table wine sales increased 1%. Sales in the previous 52 weeks rose 3% to \$8.8 billion. The strongest growth among domestic table wines was in the \$25-plus category, with sales up 17% to \$205 million.

Off-Premise Sales IRI Channels »

| | Month | 12 Months |
|---------------|-----------|-------------|
| November 2017 | \$777 mil | \$8,819 mil |
| November 2016 | \$766 mil | \$8,588 mil |

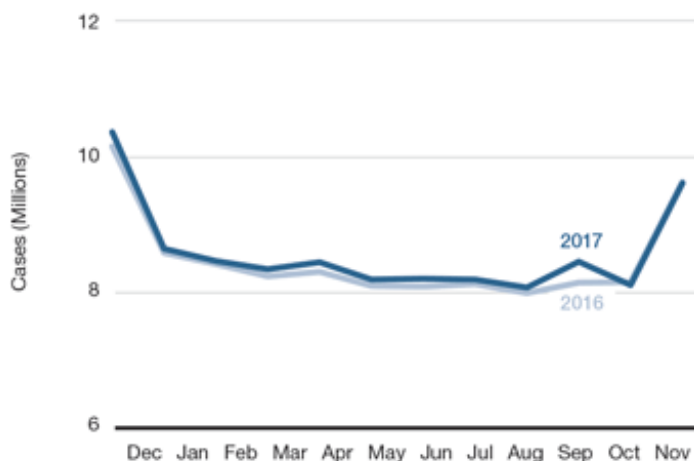
OFF-PREMISE SALES



Source: IRI, Wines Vines Analytics. Domestic table and sparkling wine sales in multiple-outlet and convenience stores, four weeks ended Dec. 3, 2017.

Off-premise sales totaled \$777 million in the four weeks ended Dec. 3, up 1% from a year earlier.

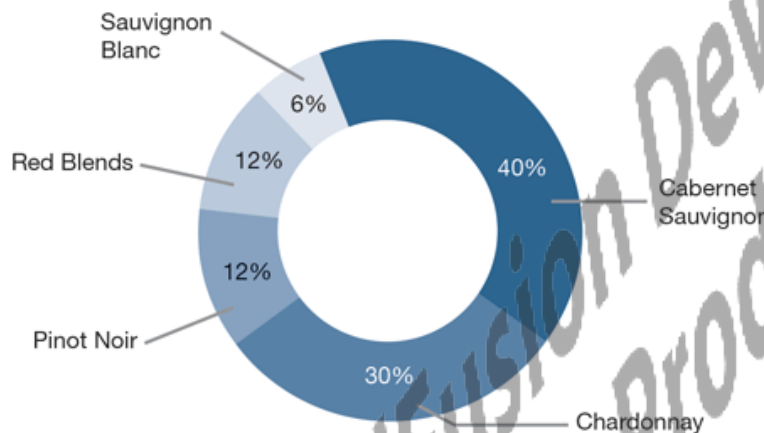
OFF-PREMISE VOLUME



Source: IRI, Wines Vines Analytics. Domestic table and sparkling wine sales in multiple-outlet and convenience stores, four weeks ended Dec. 3, 2017.

IRI reported that case volumes totaled 9.6 million in the four weeks ended Dec. 3, on par with a year earlier.

OFF-PREMISE \$25-PLUS RELATIVE SHARE



Source: IRI, Wines & Vines Analytics. Table wine sales in multiple-outlet and convenience stores; 52 weeks ending Nov. 5, 2017.

Cabernet Sauvignon led sales of \$25-plus bottles in the 52 weeks ended Dec. 3, with 40% share of the price segment followed by Chardonnay at 30%.

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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