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REVIEW OF THE INDUSTRY





INNOVATION+QUALITY

A forum for ultra-premium wineries.

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WBM 30 List

As part of our review of the Industry, Wine Business Monthly compiled its fourteenth annual ranking of the top 30 U.S. wineries by case sales. Though there are now 9.091 wineries in the U.S., the WBM 30 companies represent more than 90 percent of domestic wine sold by volume. The three top wine companies by themselves represent more than half of all case sales. The list includes two new wineries this year – Josh Cellars, owned by Deutsch Family Wine & Spirits has grown rapidly to become a million case brand. Naked Wines, an online wine retailer that works with independent winemakers from around the world, rounds out the list at number 30. The threshold for being part of this group has ratcheted up, with the smallest of the group now producing close to 600,000 cases per year. Companies are listed in order of cases sold domestically of brands owned by the winery. This list does not include custom crush wineries that make wine for others.

The WBM 30 U.S. Wine Company List

2016

| Wine | Company Annual U | J.S. Case Sales |
|------|--|-----------------|
| 1 | E&J Gallo Winery | 75 million |
| 2 | The Wine Group | 57 million |
| 3 | Constellation Brands | 51 million |
| 4 | Trinchero Family Estates | 19 million |
| 5 | Treasury Wine Estates | 15 million |
| 6 | Bronco Wine Company | 10 million |
| 7 | Delicato Family Vineyards | 9.2 million |
| 8 | Ste. Michelle Wine Estates | 9 million |
| 9 | Jackson Family Wines | 6 million |
| 10 | Viña Concha y Toro (Fetzer Vineyards) | 2.75 million |
| 11 | Bogle Vineyards | 2.3 million |
| 12 | Francis Ford Coppola Winery | 1.7 million |
| 13 | CK Mondavi Family Vineyards | 1.7 million |
| 14 | Precept Wine | 1.7 million |
| 15 | J. Lohr Vineyards & Wines | 1.6 million |
| 16 | Korbel | 1.5 million |
| 17 | Vintage Wine Estates | 1.4 million |
| 18 | Foley Family Wines | 1.1 million |
| 19 | Don Sebastiani & Sons | 1.1 million |
| 20 | Josh Cellars | 1 million |
| 21 | Rodney Strong Wine Estates | 950,000 |
| 22 | O'Neill Vintners & Distillers | 950,000 |
| 23 | Pernod Ricard USA | 900,000 |
| 24 | Boisset Collection | 840,000 |
| 25 | Wente Vineyards | 818,000 |
| 26 | Hess Family Wine Estates | 725,000 |
| 27 | Domaine Chandon Estates & 1 | Wines 650,000 |
| 28 | Michael David Winery | 650,000 |
| 29 | Riboli Family Wines | 625,000 |
| 30 | NakedWines.com | 515,000 |

2003

| 2003 | | |
|------|--|--|
| Win | e Company (purchased by) | |
| 1. | E&J Gallo Winery | |
| 2. | Constellation Brands | |
| 3. | The Wine Group | |
| 4. | Beringer Blass Wine Estates (Treasury Wine Estates) | |
| 5. | Bronco Wine Company | |
| 6. | Robert Mondavi Winery (Constellation Brands) | |
| 7. | Trinchero Family Estates | |
| 8. | Brown-Forman Wines | |
| 9. | Kendall-Jackson (Jackson Family Wines) | |
| 10. | Diageo Chateau & Estate Wines | |
| 11. | Stirnson Lane / Ste. Michelle Wine Estates | |
| 12 | Allied Domecq (Beam Wine Estates/Constellation) | |
| 13. | Delicato Family Vineyards (DFV) | |
| 14. | Golden State Vintners (The Wine Group) | |
| 15, | Phillips-Hogue (Constellation Brands) | |
| 16. | C. Mondavi & Sons | |
| 17, | Peak Wines (Beam Wine Estates) | |
| 18, | Ironstone Vineyards | |
| 19. | J. Lohr Vineyards & Wines | |
| 20, | Chalone Group (Diageo Chateau & Estate Wines) | |
| 21, | Don Sebastiani & Sons | |
| 22. | Bogle Vineyards | |
| 23, | Rodney Strong Vineyards | |
| 24. | Barefoot Cellars (E&J Gallo) | |
| 25, | San Antonio Winery | |
| 26. | The Hess Collection | |
| 27. | Round Hill / Rutherford Wine Company | |
| 28. | Domaine Chandon | |
| 29, | Wente Vineyards | |
| | | |

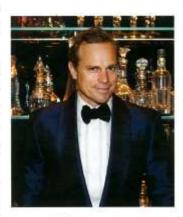
30. Bonny Doon Vineyard

24. Boisset Collection

Jean-Charles Boisset, President ANNUAL U.S. CASE SALES VOLUME: 840,000 ANNUAL GLOBAL CASE SALES VOLUME: 6.6 million

At **Boisset Collection**, innovation is continual, and so are the newly-created, memorable experiences.

This year Boisset opened The JCB Tasting Salon in Yountville, a Napa Valley destination "uniting wine with retail fashion and lifestyle decadence." The destination includes Atelier by JCB, "a gourmet epicurean paradise featuring a curated assortment of artisan products from the best purveyors in the world offering everything imaginable..." Atelier by



JCB carries hundreds of high-end products selected by president **Jean- Charles Boisset**.

Boisset purchased Wattle Creek Winery along with the newly renovated Ghirardelli Square tasting room in San Francisco this year. The company also introduced a Napa Valley Cabernet Sauvignon under Buena Vista Winery this year, Chateau Buena Vista, and a Champagne sourced from the Champagne region in France, with approval from the CIVC. (Buena Vista founder Count Haraszthy's son Arpad spent two years in France learning the craft of sparkling wine production in the 19th century and was first to make méthode traditionelle sparkling wine in California.) Raymond Vineyards, now celebrating its fortieth anniversary, released a wine with a velvet label representing its red room. DeLoach Vineyards introduced its Jewell Collection label, adorned with jewelry.

A new brand of sparkling wine, Haute Couture, is launching, and Boisset is even starting a small brewery, **Yountville Brewing Company**.