

WINE BUSINESS MONTHLY

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REVIEW OF THE INDUSTRY

WBM

50

LARGEST WINERIES

+**HOT**BRANDS

WBM 50 LARGEST WINERIES

LIST

As part of our review of the industry, *Wine Business Monthly* compiled its fifteenth annual ranking of U.S. wineries by case sales. While this list has always included the top 30 U.S. wineries by volume, this year we've expanded it to include the top 50 by volume.

When we first published this list in 2003, the threshold for inclusion was about 350,000 cases. The list has changed over the years as the U.S. wine business has evolved with several companies being acquired and/or merging or otherwise growing.

This year, the threshold for being among the top 30 is double that. Much of the movement in the largest wine companies has been among the top 31 to 50, where the inclusion point is just over 350,000 cases. So, we've expanded our list to the WBM 50 to create a better snapshot of the industry.

Companies are listed in order of cases sold domestically of brands owned by the winery. This list does not include private labeling or custom crush wineries that make wine for others.

Though there are now 9,654 wineries in the U.S., the WBM 50 companies represent more than 90 percent of domestic wine sold by volume.

1	E&J GALLO WINERY	70 MILLION	11	BOGLE VINEYARDS	2.5 MILLION
2	THE WINE GROUP	53 MILLION	12	DEUTSCH FAMILY WINE & SPIRITS (JOSH CELLARS)	2.2 MILLION
3	CONSTELLATION BRANDS	50 MILLION	13	PRECEPT WINE	1.9 MILLION
4	TRINCHERO FAMILY ESTATES	19.3 MILLION	14	VINTAGE WINE ESTATES	1.75 MILLION
5	TREASURY WINE ESTATES	16 MILLION	15	FRANCIS FORD COPPOLA WINERY	1.7 MILLION
6	DELICATO FAMILY VINEYARDS	10.2 MILLION	16	C. MONDAVI & FAMILY	1.7 MILLION
7	BRONCO WINE COMPANY	10 MILLION	17	J. LOHR VINEYARDS & WINES	1.6 MILLION
8	STE. MICHELLE WINE ESTATES	9 MILLION	18	KORBEL	1.5 MILLION
9	JACKSON FAMILY WINES	6 MILLION	19	WX BRANDS	1.3 MILLION
10	VIÑA CONCHA Y TORO (FETZER VINEYARDS)	2.75 MILLION	20	FOLEY FAMILY WINES	1.2 MILLION

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21 DON SEBASTIANI & SONS	1.1 MILLION	36 WINES OF SUBSTANCE	550,000
22 RODNEY STRONG WINE ESTATES	950,000	37 NAKEDWINES.COM	515,000
23 DUCKHORN VINEYARDS	900,000	38 FERRARI-CARANO VINEYARDS AND WINERY	450,000
24 PERNOD RICARD USA	900,000	39 HAHN FAMILY WINES	430,000
25 BOISSET COLLECTION	875,000	40 DUPLIN WINERY	421,000
26 O'NEILL VINTNERS & DISTILLERS	760,000	41 CASTLE ROCK WINERY	400,000
27 HESS FAMILY WINE ESTATES	750,000	42 A TO Z WINeworks	400,000
28 MICHAEL DAVID WINERY	700,000	43 KING ESTATE WINERY	400,000
29 DOMAINE CHANDON ESTATES & WINES	675,000	44 OLIVER WINERY & VINEYARDS	400,000
30 WENTE VINEYARDS	650,000	45 CRIMSON WINE GROUP	375,000
31 TERLATO WINE GROUP	650,000	46 PURPLE WINE + SPIRITS	375,000
32 RIBOLI FAMILY WINE ESTATES	625,000	47 SCOTTO CELLARS	375,000
33 SCHEID VINEYARDS	580,000	48 CLINE FAMILY CELLARS	370,000
34 COOPER'S HAWK WINERY & RESTAURANTS	570,000	49 RUTHERFORD WINE COMPANY	350,000
35 MESA VINEYARDS	550,000	50 MCMANIS FAMILY VINEYARDS	340,000

2003 — The First WBM 30 List

Wine Company (purchased by)

- | | | |
|--|---|--|
| 1. E&J Gallo Winery | 11. Stimson Lane / Ste. Michelle Wine Estates | 21. Don Sebastiani & Sons |
| 2. Constellation Brands | 12. Allied Domecq
(Beam Wine Estates/Constellation) | 22. Bogle Vineyards |
| 3. The Wine Group | 13. Delicato Family Vineyards (DFV) | 23. Rodney Strong Vineyards |
| 4. Beringer Blass Wine Estates
(Treasury Wine Estates) | 14. Golden State Vintners
(The Wine Group) | 24. Barefoot Cellars (E&J Gallo) |
| 5. Bronco Wine Company | 15. Phillips-Hogue
(Constellation Brands) | 25. San Antonio Winery |
| 6. Robert Mondavi Winery
(Constellation Brands) | 16. C. Mondavi & Sons | 26. The Hess Collection |
| 7. Trinchero Family Estates | 17. Peak Wines (Beam Wine Estates) | 27. Round Hill / Rutherford Wine Company |
| 8. Brown-Forman Wines | 18. Ironstone Vineyards | 28. Domaine Chandon |
| 9. Kendall-Jackson (Jackson Family Wines) | 19. J. Lohr Vineyards & Wines | 29. Wente Vineyards |
| 10. Diageo Chateau & Estate Wines | 20. Chalone Group
(Diageo Chateau & Estate Wines) | 30. Bonny Doon Vineyard |

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24. Pernod Ricard USA

Jo-Anna Partridge, Vice President Operations,
Pernod Ricard Winemakers

ANNUAL U.S. CASE SALES VOLUME: 900,000
EMPLOYEES: 850 nationally (18,000 globally)

Paris-based liquor conglomerate **Pernod Ricard** expanded its footprint in the U.S. at the end of 2014 when the corporation purchased the 600,000-case Sonoma wine brand **Kenwood Vineyards** from **Korbel**. Then the corporation invested in Kenwood with upgrades to its winemaking facility.

Kenwood's strong presence in chain accounts strengthened the corporation's presence in the U.S. market, in theory enabling increased distribution of other premium wines and spirits. Kenwood was founded in 1970.

Pernod Ricard SA employs 18,000 people worldwide. It is the world's second-largest spirits and wines producer. Pernod Ricard USA, based in New York, New York, has roughly 850 employees across the U.S. The corporation's spirits and wines include **Absolut Vodka**, **Avión Tequila**, **Chivas Regal**, **Glenlivet**, **Jameson Irish Whiskey**, **Malibu**, **Kahlúa Liqueur**, **Aberlour Single Malt Scotch**, **Altos Tequila**, **Beefeater Gin**, and on and on. Wines include **Brancott Estate**, **Campo Viejo**, **Graffigna**, **Jacob's Creek**, **Perrier-Jouët Champagne**, **GH Mumm Champagne** and **Mumm Napa**.



25. Boisset Collection

Jean-Charles Boisset, President

ANNUAL U.S. CASE SALES VOLUME: 875,000
ANNUAL GLOBAL CASE SALES VOLUME: 6.7 million
EMPLOYEES: 250 (1,000 globally)

At **Boisset Collection**, innovation is continual and so are the newly-created, memorable experiences. The focus is on high-end, super- and ultra-premium wines. Among the new offerings and highlights this year: a **Chateau Buena Vista Cabernet Sauvignon** program; the introduction of the **Raymond Napa Valley Reserve 40th Anniversary Cabernet Sauvignon** with a velvet label; the **Secret Indulgence** line of wines introduced by **Jean-Charles Boisset**; the release of **Haute Couture** sparkling wine; and the growth of **Legend Vineyard Exclusives**, a partnership with **John Legend**.

Raymond Vineyards, part of the Boisset Collection, expanded its Napa Valley vineyard holdings this year, purchasing neighboring **Bartolucci**



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Vineyard with 47 acres planted. Boisset also closed on a 10-acre property directly adjacent to **Buena Vista**—the hill behind the property. Guests will now be able to see a view of San Francisco from the winery. The wine country wildfires threatened **Buena Vista** in October, and while the surrounding landscape burned, the winery emerged unscathed.

Last 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 Jean-Charles Boisset.

Boisset purchased **Wattle Creek Winery** along with the newly renovated **Ghirardelli Square** tasting room in San Francisco in 2016.