



2021

DIRECT TO CONSUMER

Wine Shipping Report

Direct-to-Consumer Wine Shipping: Highlights and Trends from 2020

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› Agenda

1. 2020 Overview

2. 2020 Details

- Overall DtC Market
- DtC vs. Off-Premise Retail
- Price Per Bottle
- Regions
- Production Size
- Varietals
- Ship-To Destination

3. 2021 Report



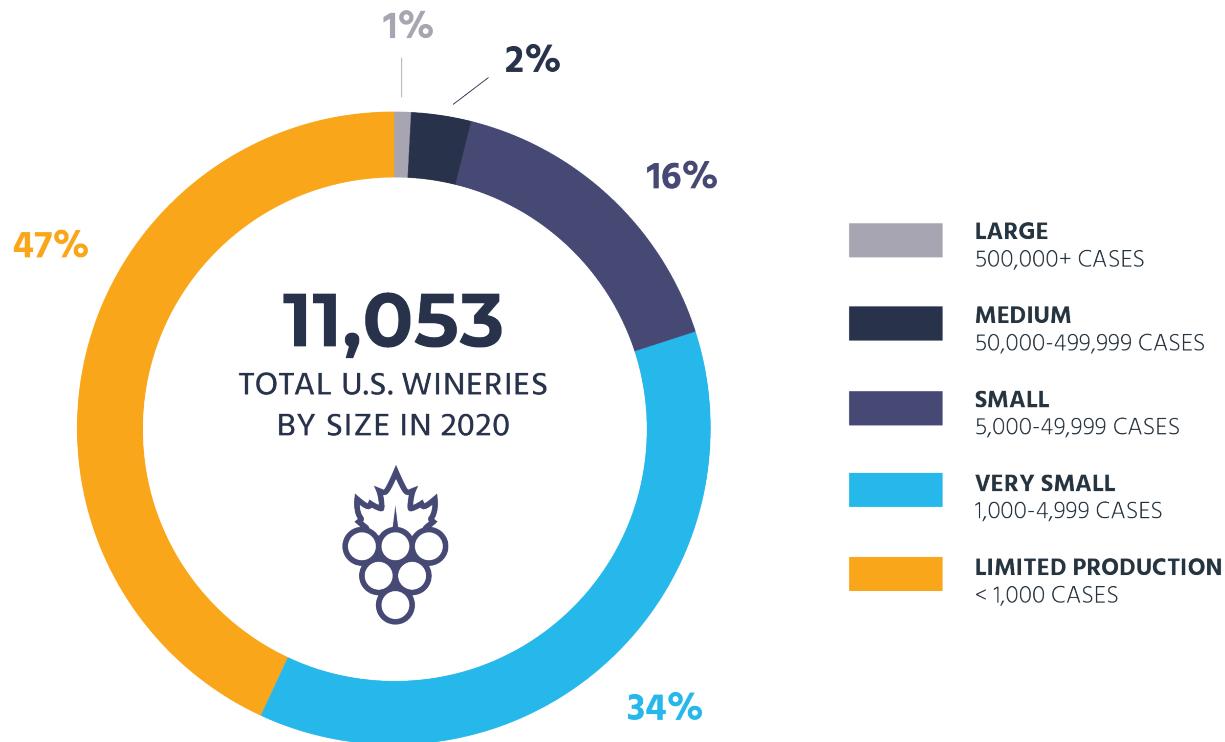
➤ ANNUAL DTC WINE SHIPPING REPORT

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TOTAL US WINERIES BY SIZE 2020



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VOLUME OF SHIPMENTS WITH ANNUAL VOLUME GROWTH 2011 - 2020

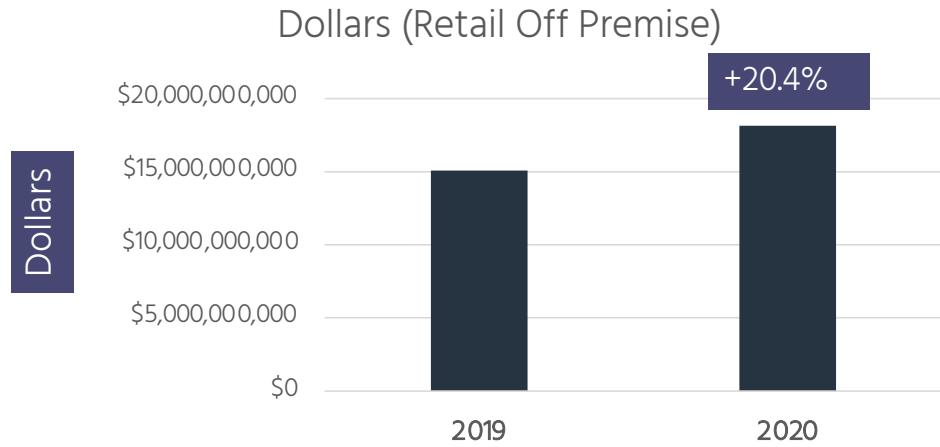


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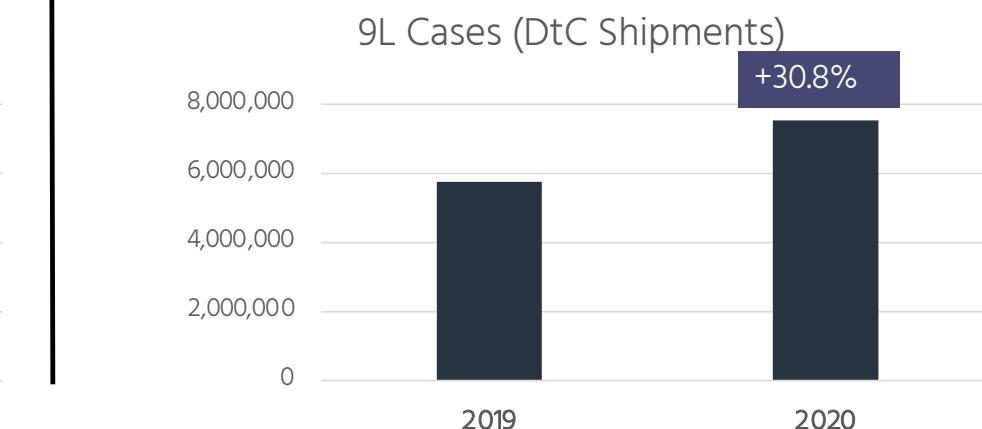
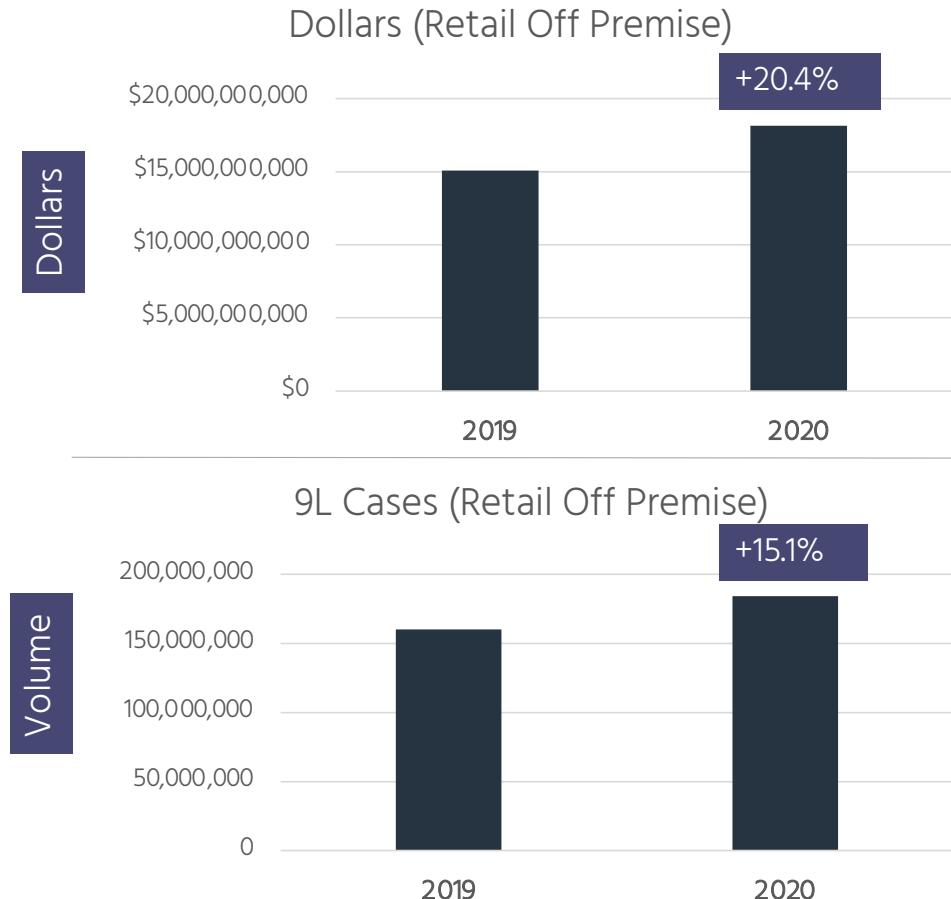
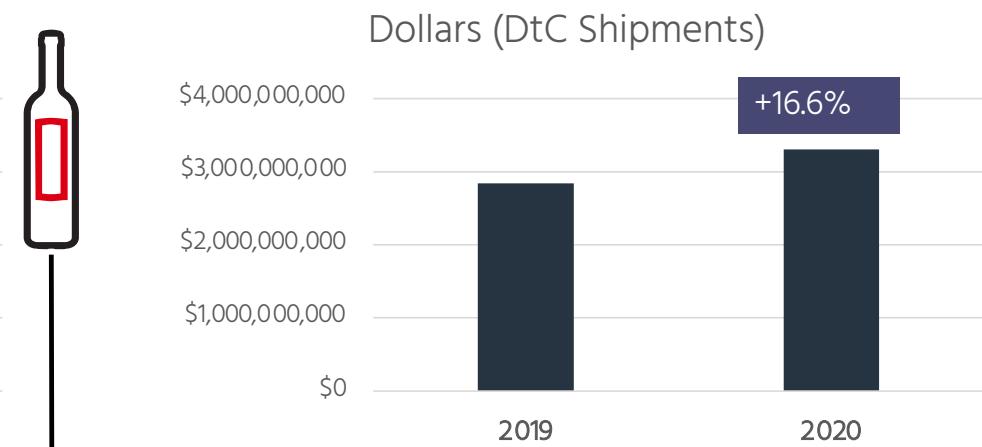
COVID CHANNEL SHIFTING HAS RESULTED IN LARGE GAINS FOR OFF PREMISE RETAIL & DtC SHIPMENTS SINCE MARCH 2020



nielsen



Total Wine: March thru December



AVERAGE PRICE PER BOTTLE: 2011 - 2020



PERCENT OF TOTAL VOLUME BY PRICE CATEGORY FOR 2019 & 2020



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SHARE OF VOLUME & VALUE BY PRICE GROUP

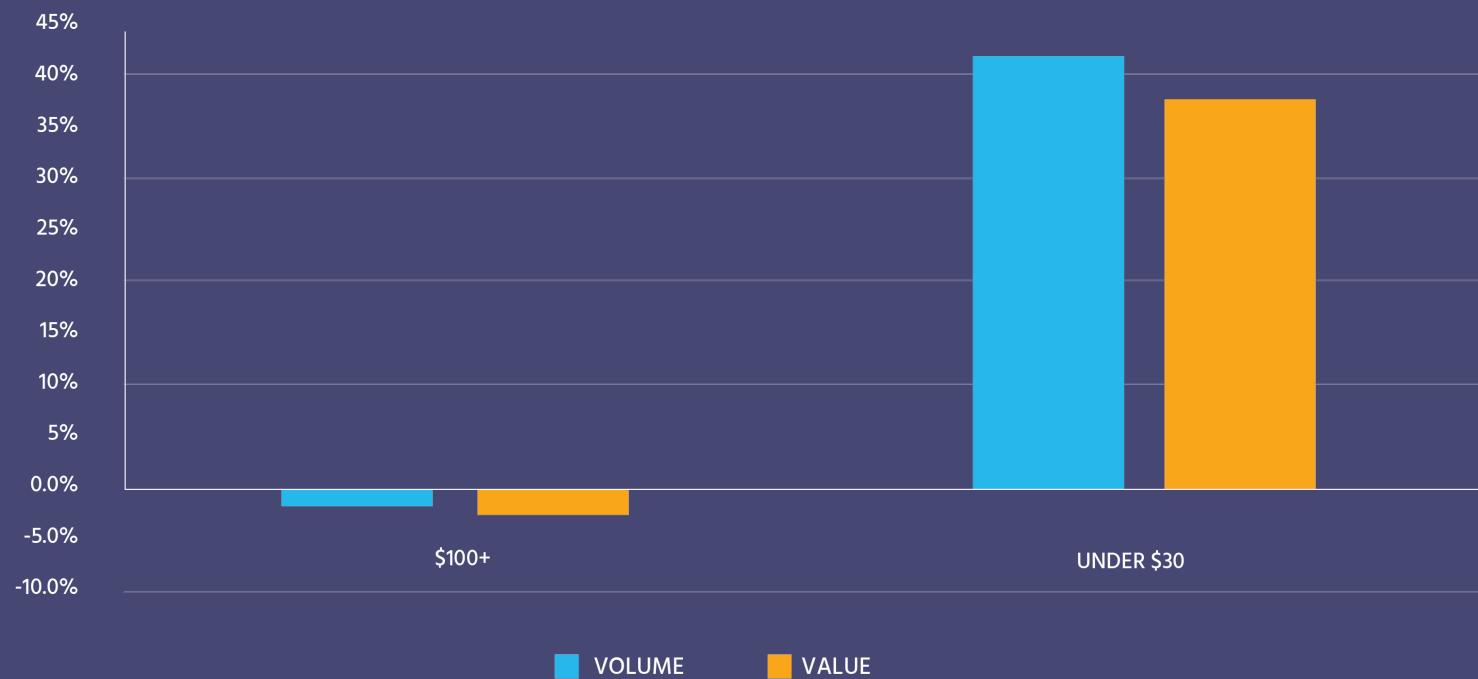


CHANGE IN VOLUME AND VALUE BY PRICE CATEGORY



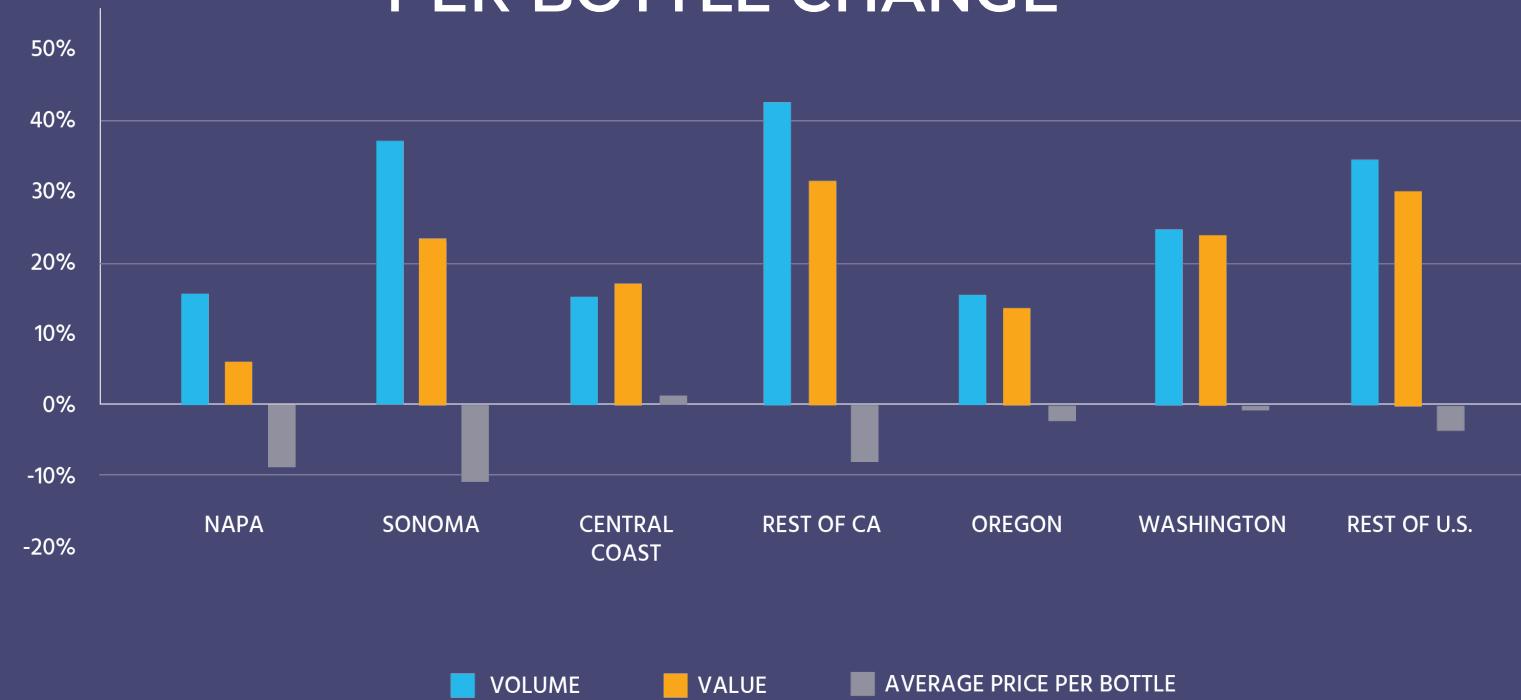
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CHANGE IN VOLUME AND VALUE , >\$100 AND <\$30



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2020 REGIONAL VOLUME & VALUE GROWTH, AVG PRICE PER BOTTLE CHANGE



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TRENDS IN VOLUME SHIPPED: NAPA VS SONOMA



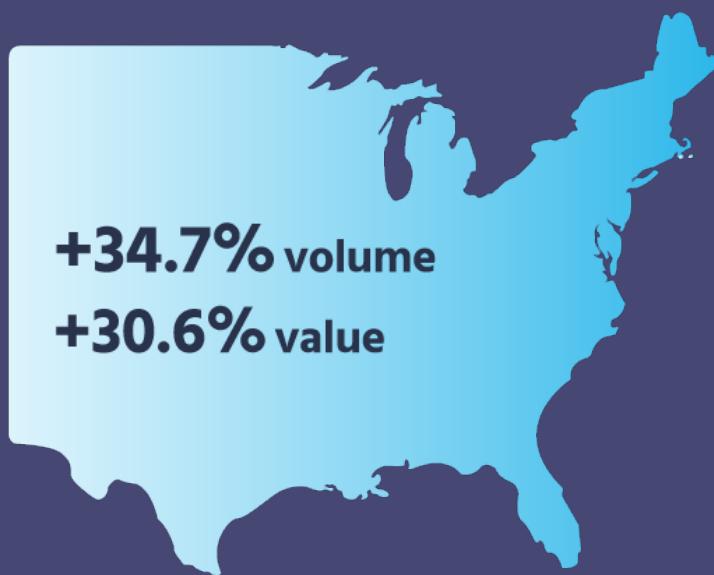
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REST OF U.S. OVERPERFORMS



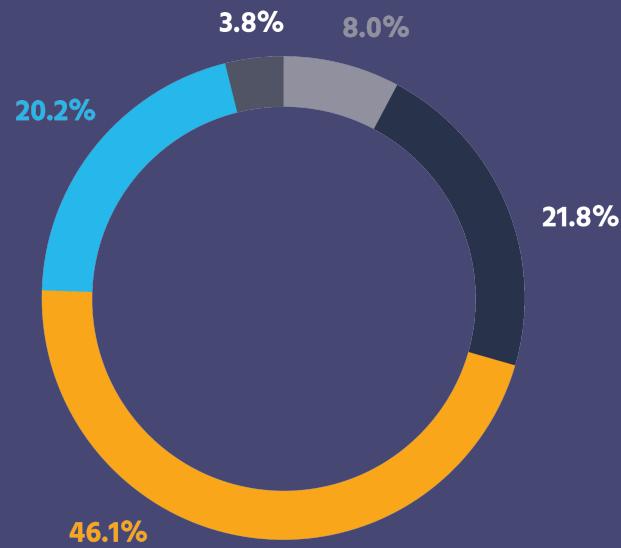
Non-West
Coast wineries
overperform

+34.7% volume
+30.6% value



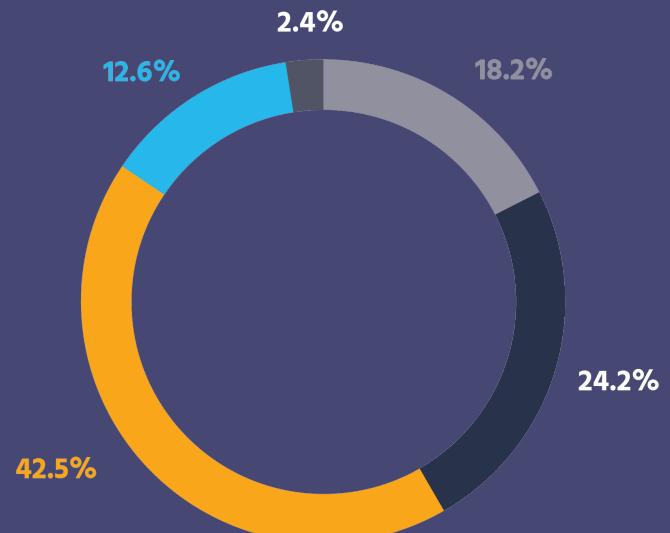
TOTAL VALUE	\$254,852,714
TOTAL VOLUME IN CASES	1,007,827
AVG. PRICE PER BOTTLE	\$21.07
VALUE % OF TOTAL	6.9%
CHANGE IN VALUE	30.6%
VOLUME % OF TOTAL	12.0%
CHANGE IN VOLUME	34.7%
CHANGE IN AVG. PRICE PER BOTTLE	-3.1%

VALUE AND VOLUME OF SHIPMENTS BY WINERY SIZE



VALUE

LARGE
500,000+ CASES
MEDIUM
50,000-499,999 CASES
SMALL
5,000-49,999 CASES
VERY SMALL
1,000-4,999 CASES
LIMITED PRODUCTION
<1,000 CASES



VOLUME

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HIGHEST GROWTH VARIETALS IN 2020



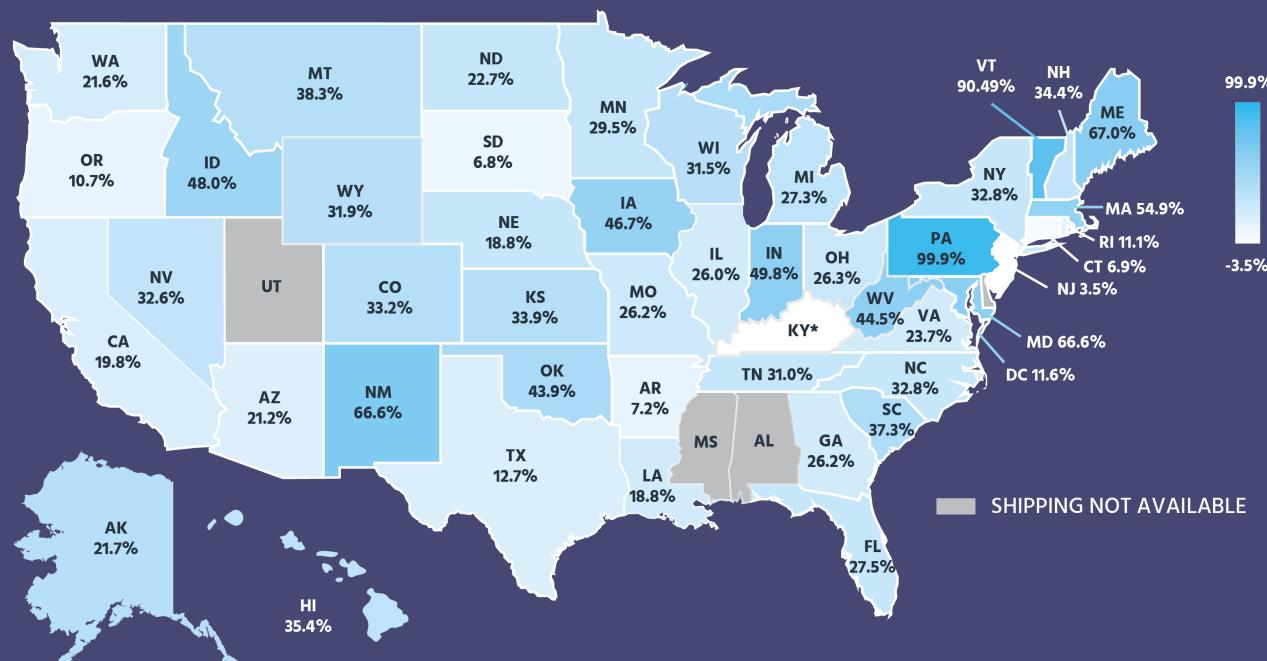
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TOP DTC SHIPPED VARIETALS

Rank by Volume	Varietal	% of Total Volume	Change in Volume	Avg Bottle Price	Change in Avg Bottle Price
1	Cabernet Sauvignon	15.5%	18.2%	\$62.03	-13.1%
2	Red Blend	14.1%	28.5%	\$41.34	-10.9%
3	Pinot Noir	13.7%	21.0%	\$43.02	-7.7%
4	Chardonnay	9.5%	33.6%	\$31.02	-8.4%
5	Zinfandel	5.8%	22.6%	\$28.22	-5.3%

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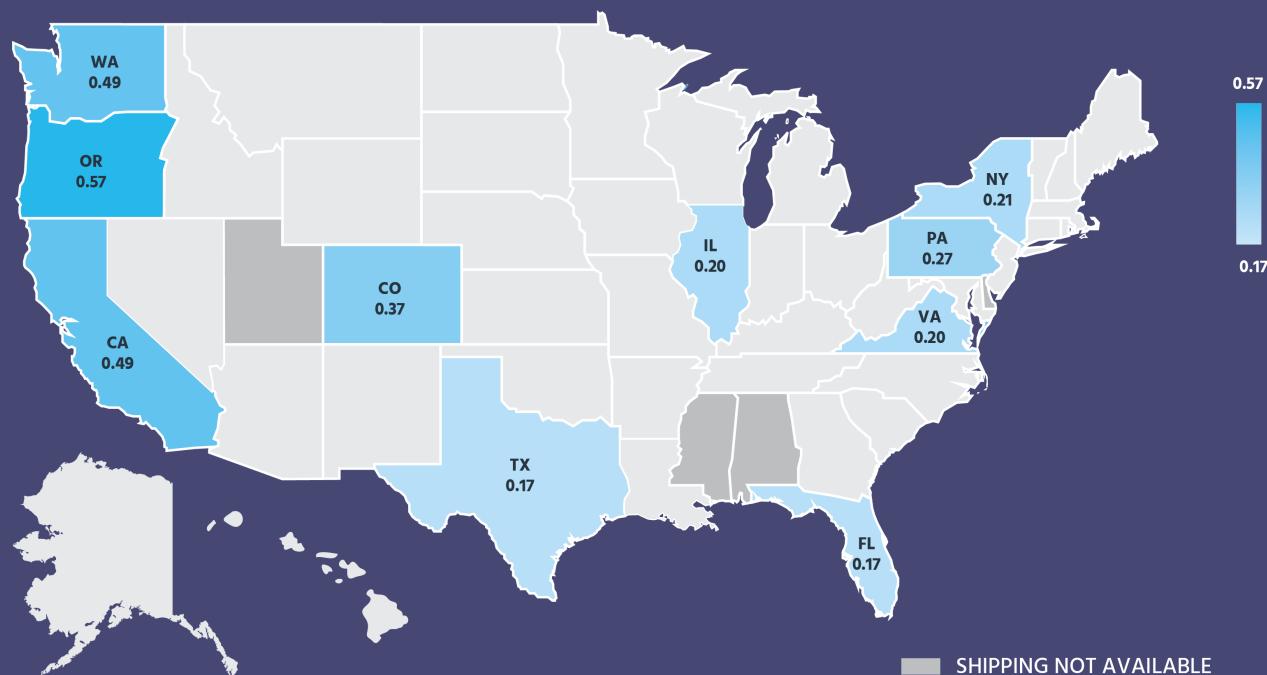
VOLUME CHANGE BY STATE



*New permissions for shipping to Kentucky became effective in December 2020.

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TOP 10 STATES BY BOTTLES SHIPPED PER CAPITA



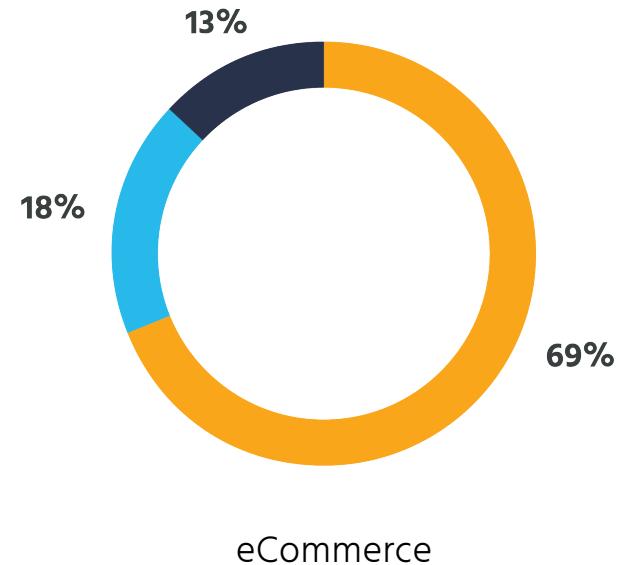
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ALL RETAIL CHANNELS VS. ECOMMERCE BY CATEGORY

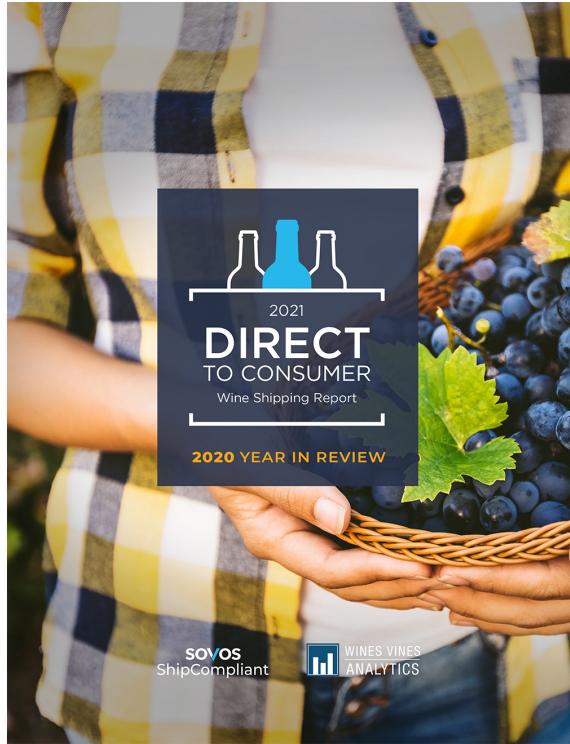


SPIRITS
WINE
BEER/CIDER





DTC WINE SHIPPING REPORT ONLINE



Find the full report at

dtcreport.com

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➤ THANK YOU

FREE THE GRAPES!
TO ENSURE CONSUMER CHOICE IN FINE WINE



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A photograph of a person from the waist up, wearing a yellow and blue plaid shirt over a white t-shirt. They are holding a small, round, woven basket filled with dark, ripe grapes and some green leaves. The background is a soft-focus outdoor setting.

THANK YOU
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