



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



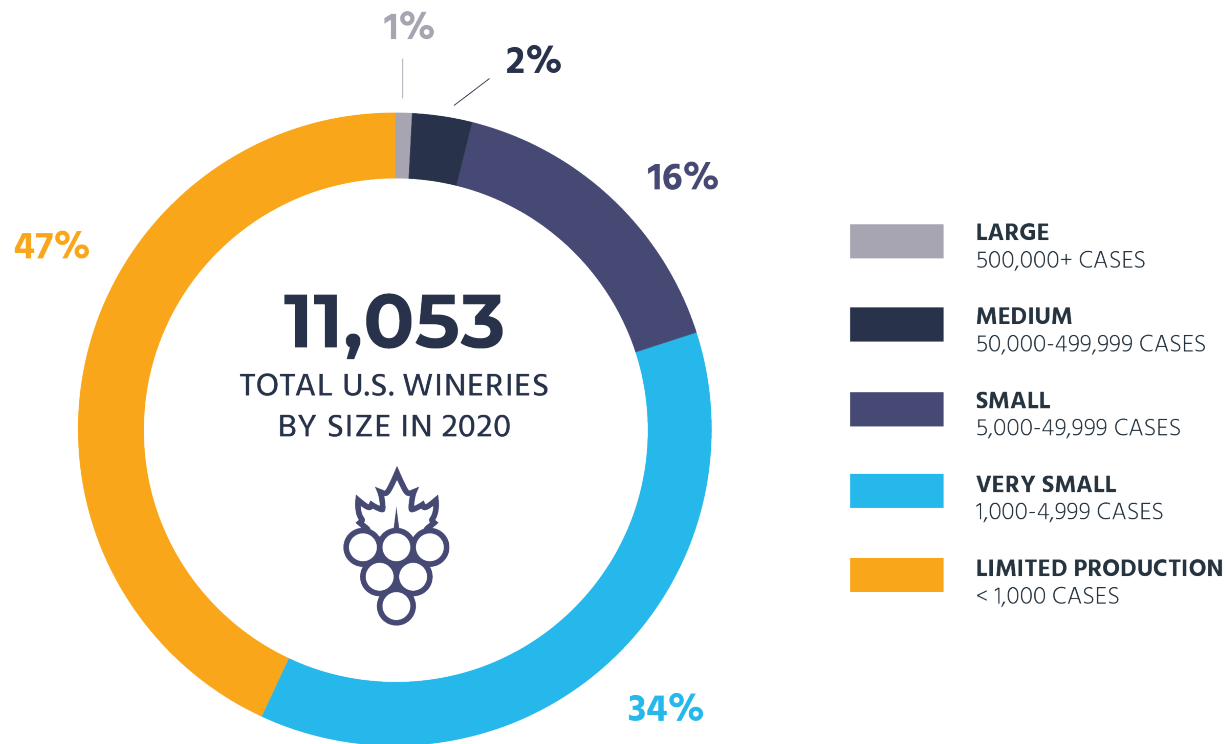
> ANNUAL DTC WINE SHIPPING REPORT

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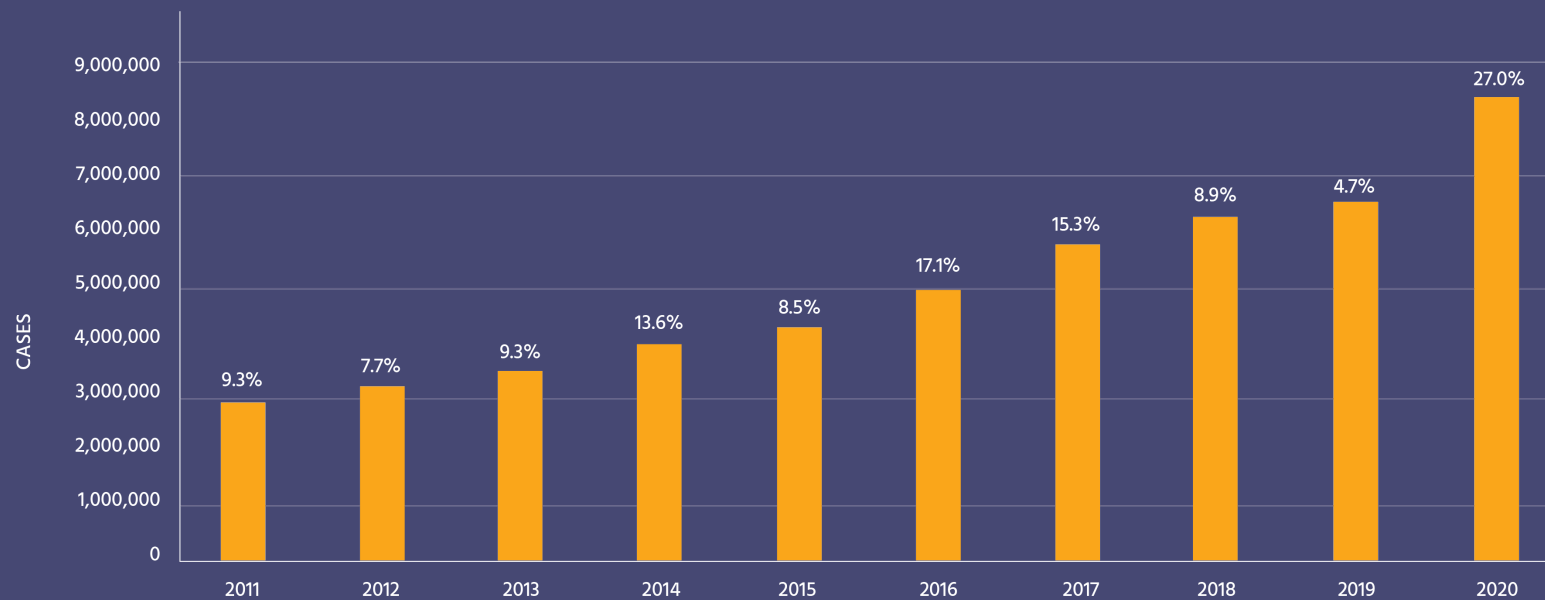
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TOTAL US WINERIES BY SIZE 2020



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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



Total Wine: March thru December

nielsen

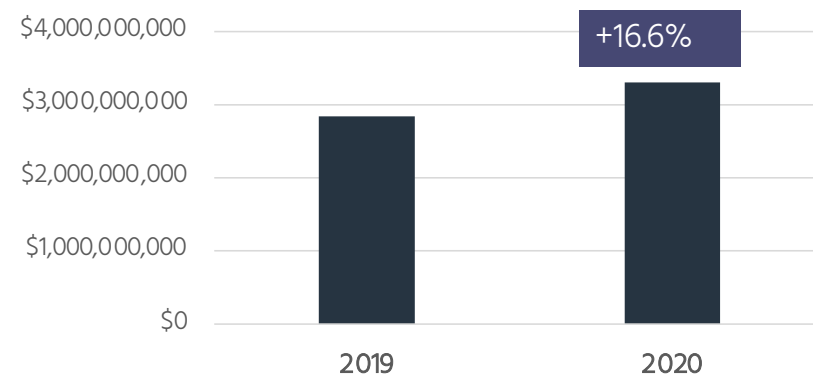
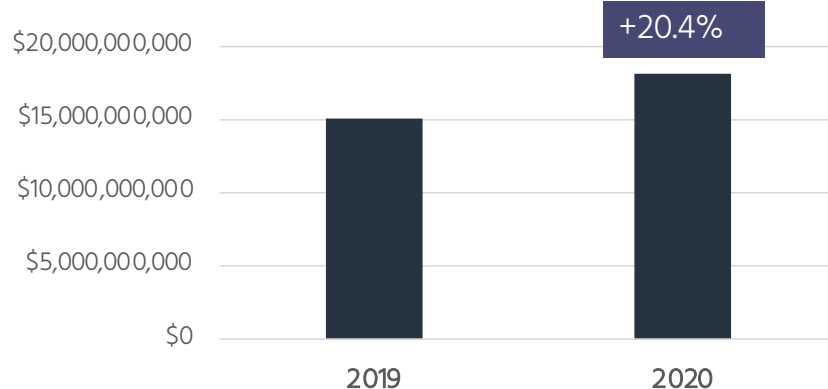
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WINES VINES ANALYTICS

Dollars (Retail Off Premise)

Dollars (DtC Shipments)

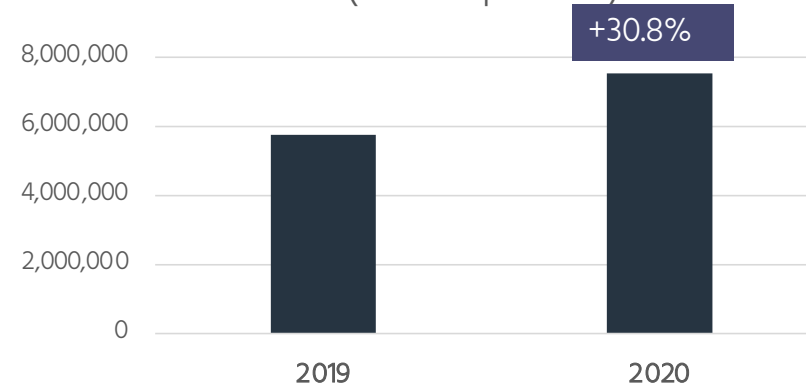
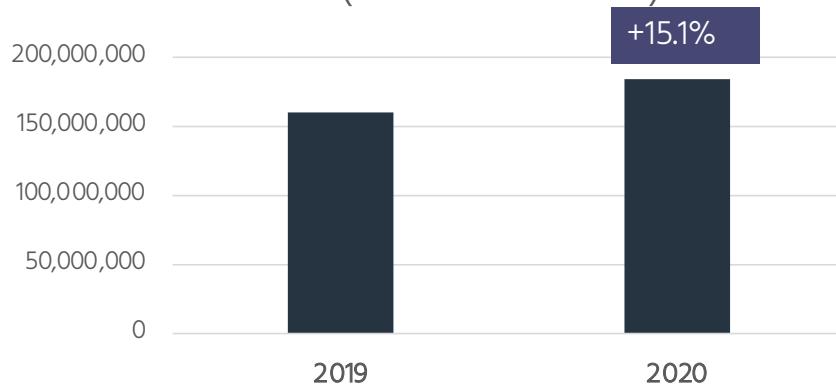
Dollars



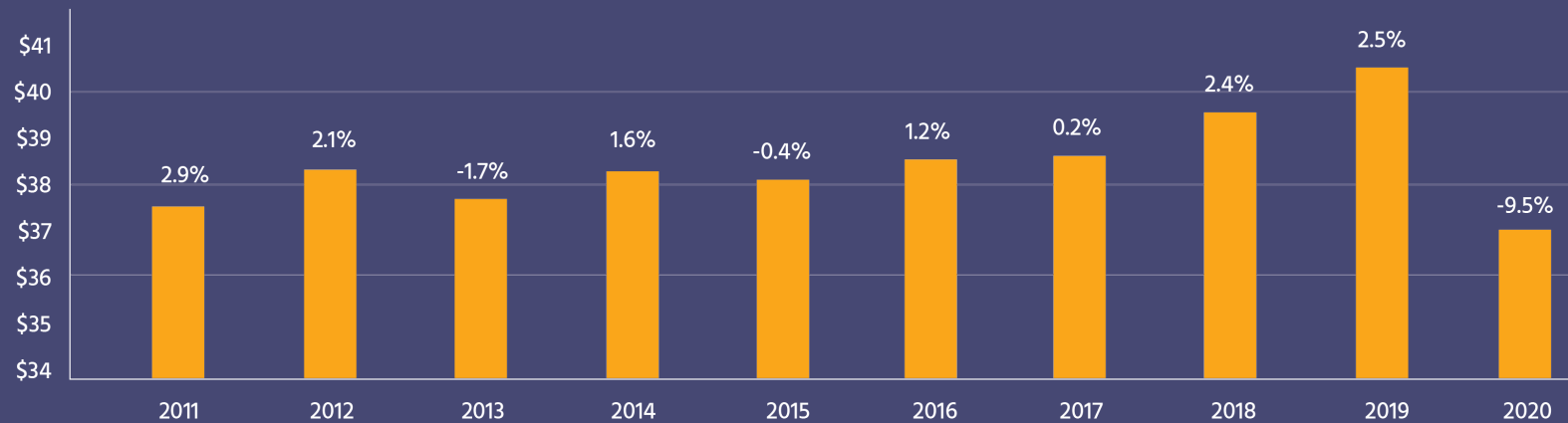
Volume

9L Cases (Retail Off Premise)

9L Cases (DtC Shipments)



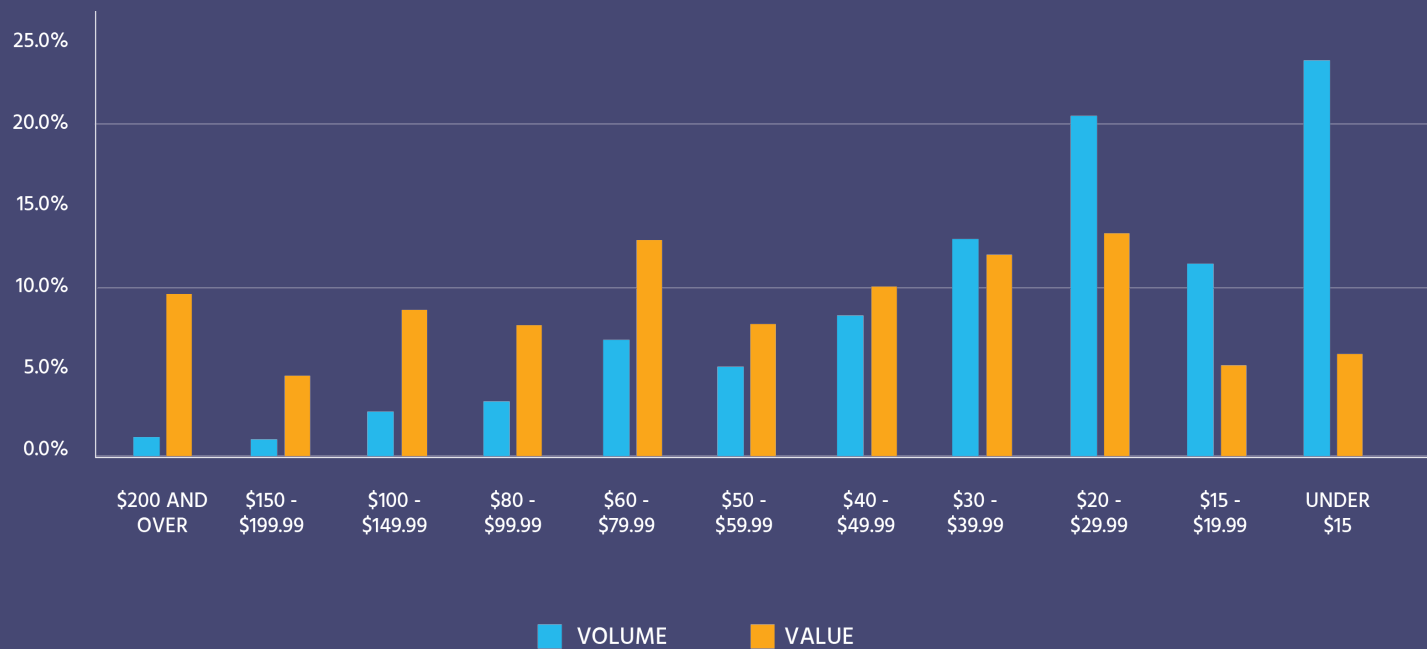
AVERAGE PRICE PER BOTTLE: 2011 - 2020



PERCENT OF TOTAL VOLUME BY PRICE CATEGORY FOR 2019 & 2020



SHARE OF VOLUME & VALUE BY PRICE GROUP

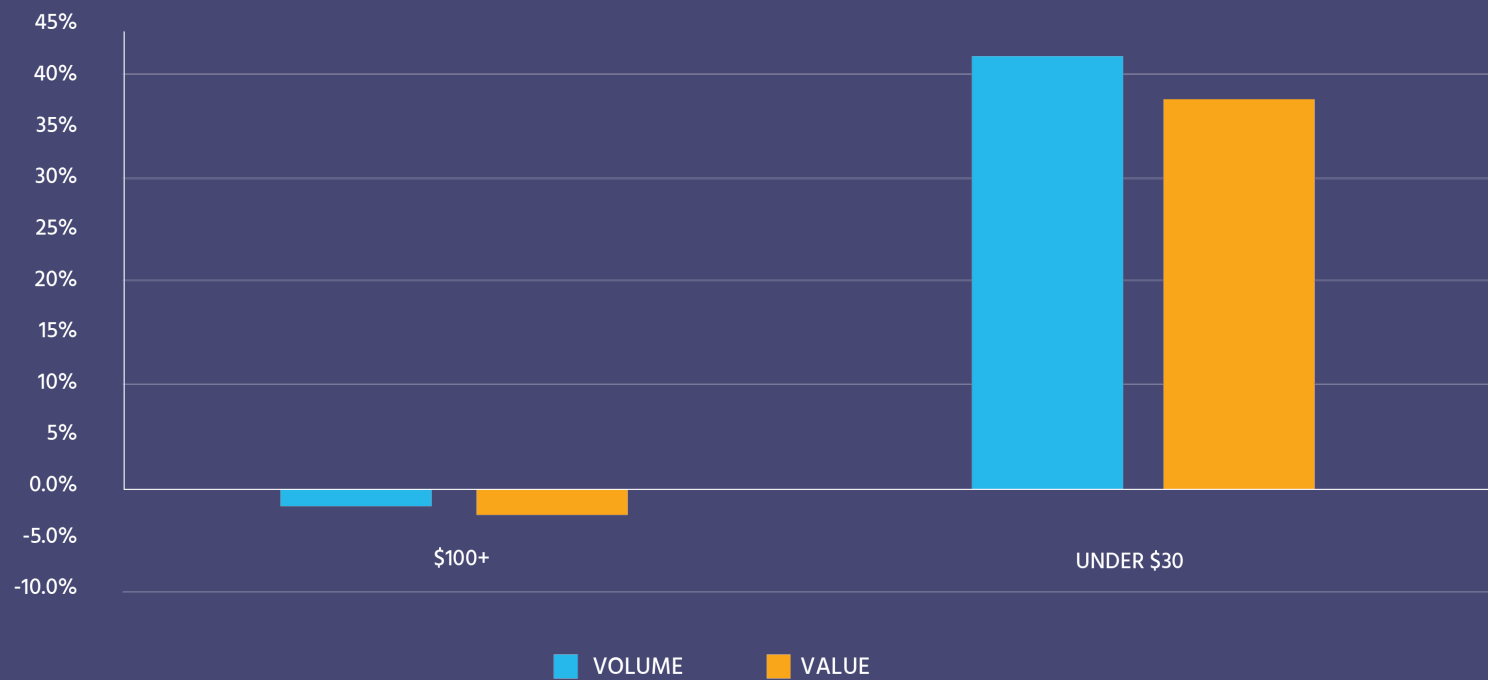


CHANGE IN VOLUME AND VALUE BY PRICE CATEGORY

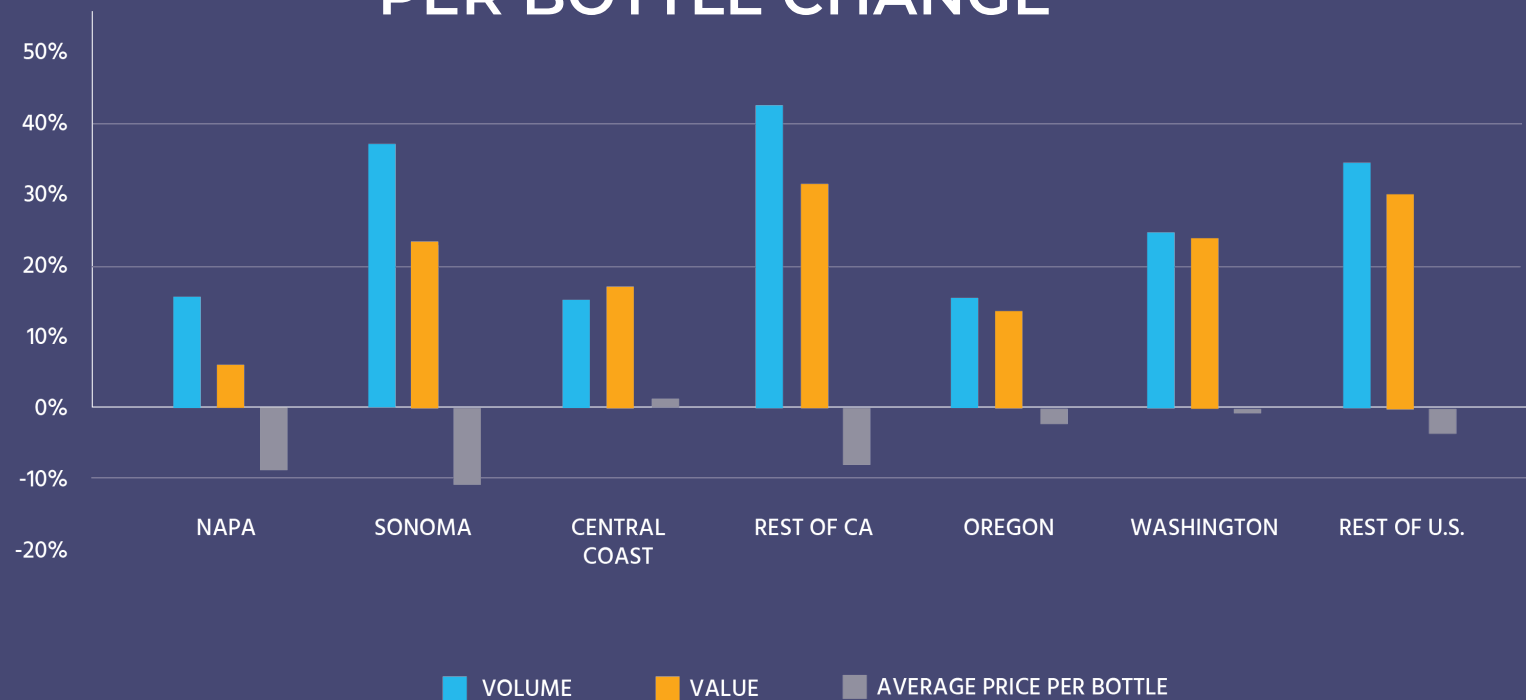


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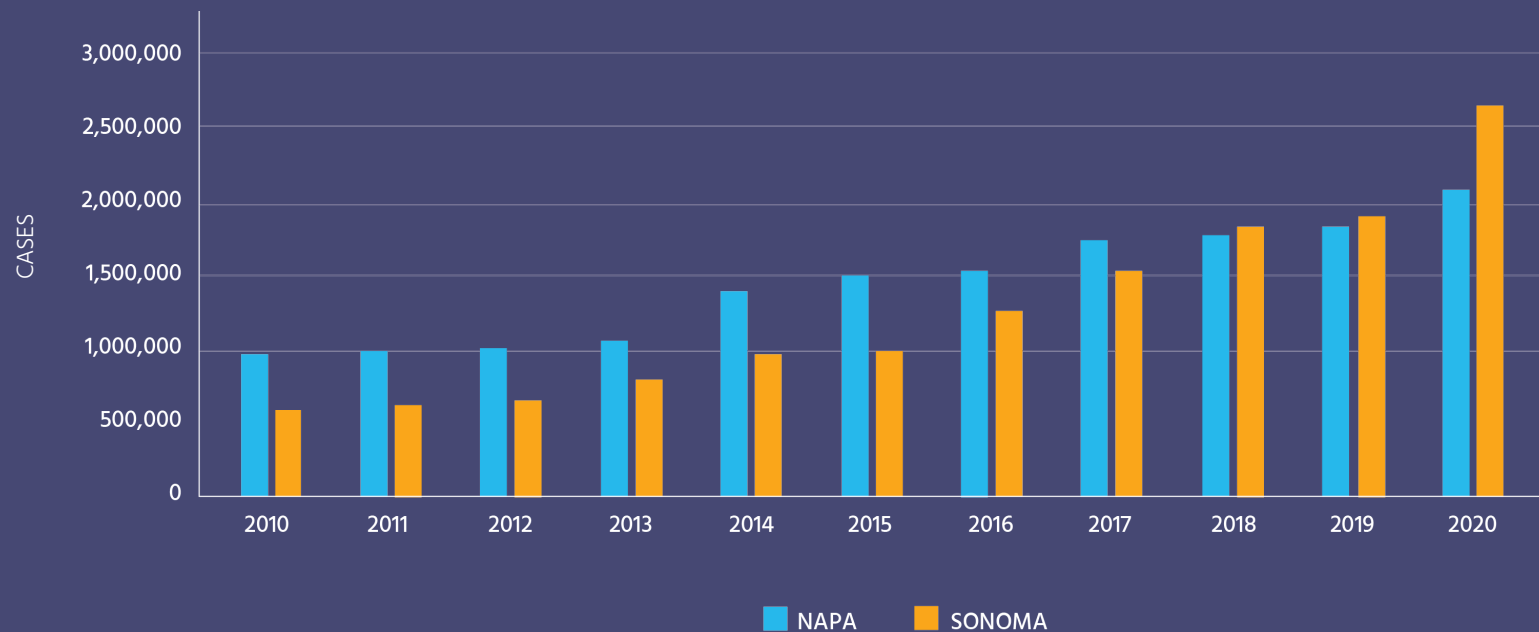
CHANGE IN VOLUME AND VALUE , >\$100 AND <\$30



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



TRENDS IN VOLUME SHIPPED: NAPA VS SONOMA



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REST OF U.S. OVERPERFORMS

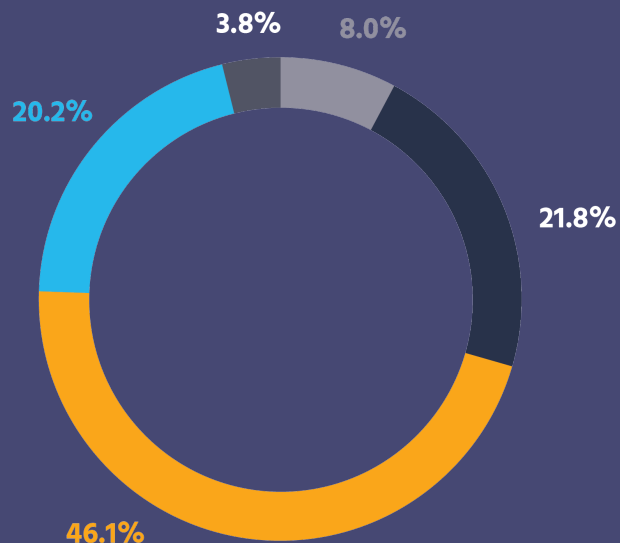


**Non-West
Coast wineries
overperform**

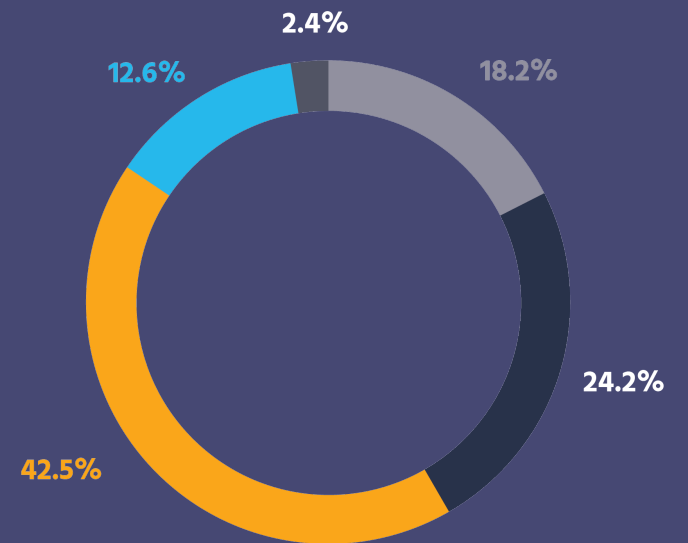
+34.7% volume
+30.6% value

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

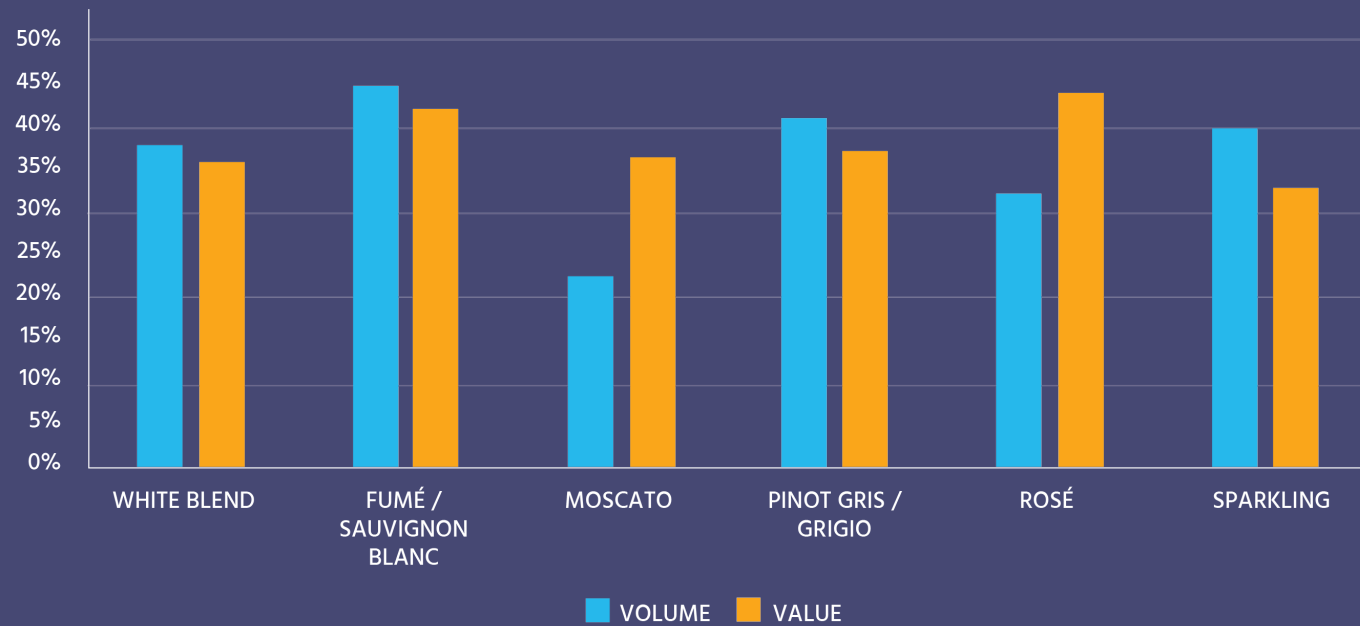


VALUE



VOLUME

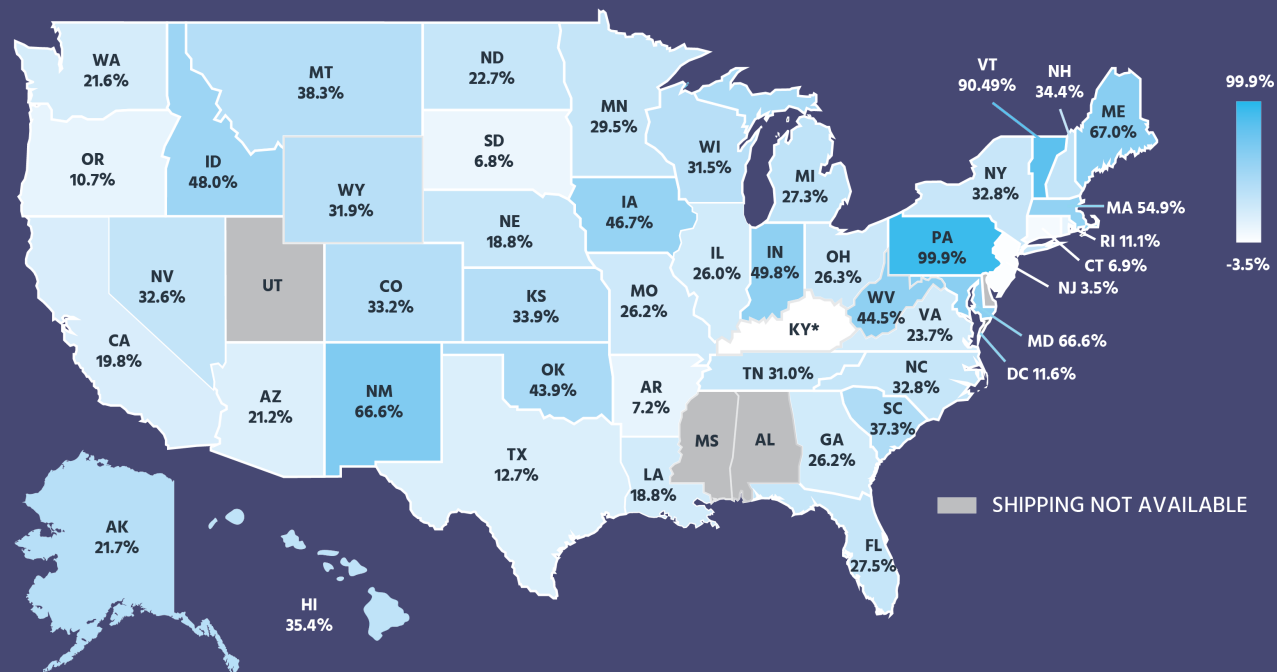
HIGHEST GROWTH VARIETALS IN 2020



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%

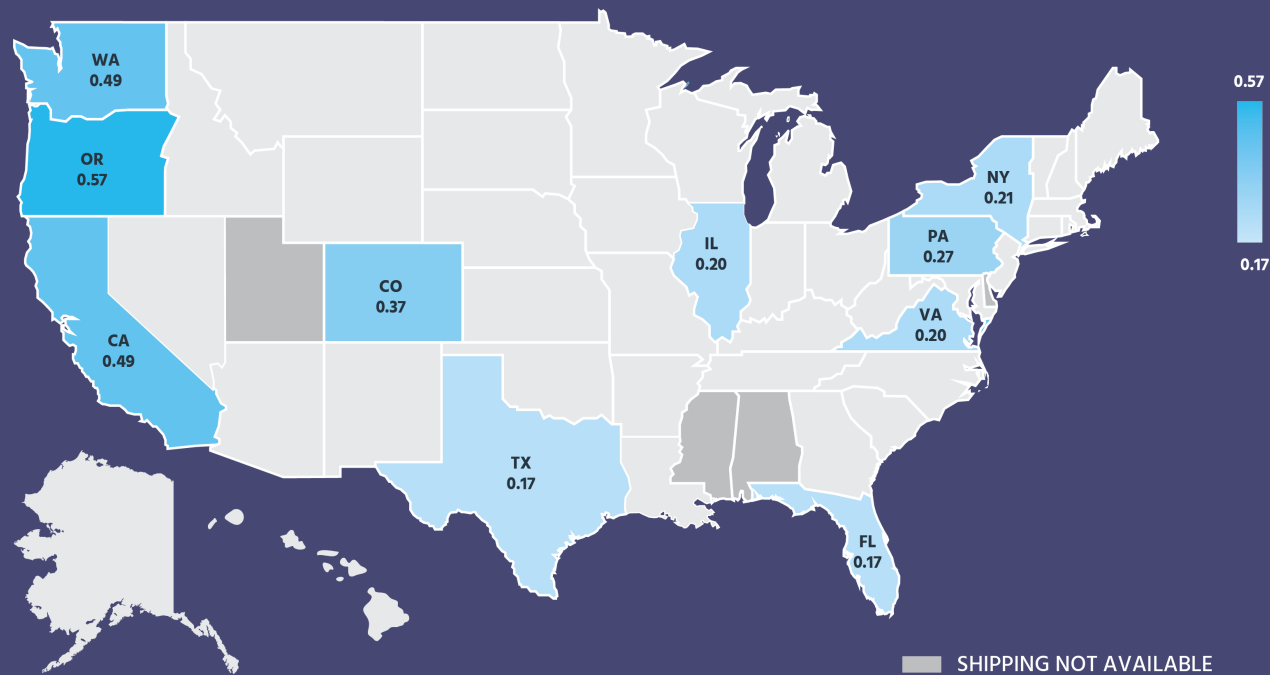
VOLUME CHANGE BY STATE



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

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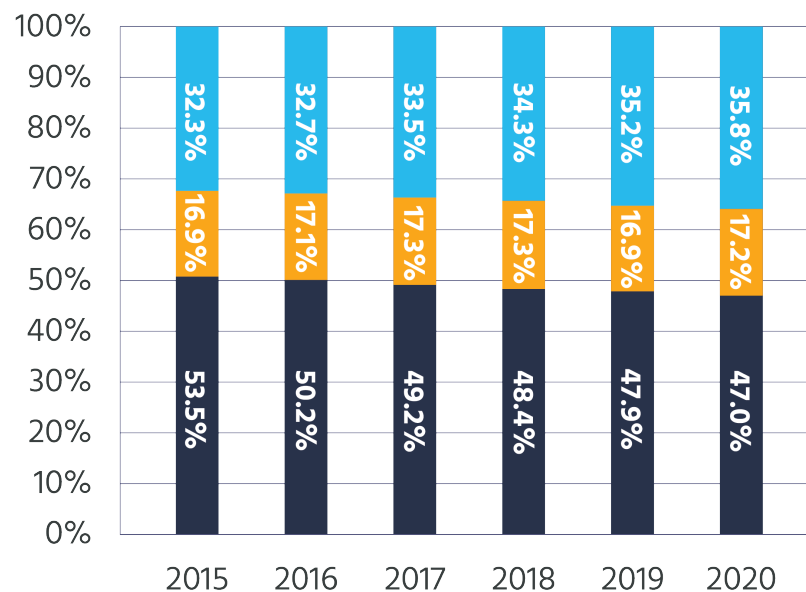
TOP 10 STATES BY BOTTLES SHIPPED PER CAPITA



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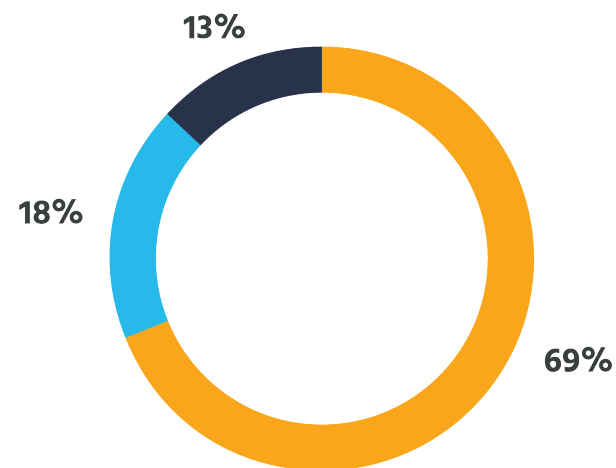


ALL RETAIL CHANNELS VS. ECOMMERCE BY CATEGORY



Total Retail

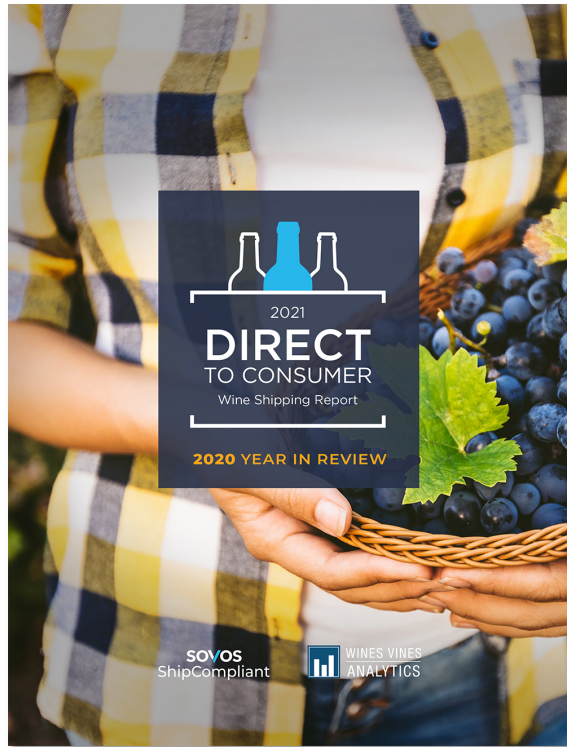
■ SPIRITS
■ WINE
■ BEER/CIDER



eCommerce



DTC WINE SHIPPING REPORT ONLINE



Find the full report at

[**dtcreport.com**](https://dtcreport.com)

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> THANK YOU

FREE THE GRAPES!
— TO ENSURE CONSUMER CHOICE IN FINE WINE —



A purple circular logo containing a white silhouette of a wine glass. To the right of the logo, the text "DIRECT TO CONSUMER WINE SYMPOSIUM" is written in a dark purple, serif font.



A blue square logo containing a white bar chart with three bars of increasing height. To the right of the logo, the text "WINES VINES ANALYTICS" is written in a blue, sans-serif font, with "WINES VINES" on the top line and "ANALYTICS" on the bottom line.

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A person wearing a yellow, white, and blue plaid shirt is holding a woven basket filled with dark blue grapes. The person's hands are visible at the bottom of the basket. The background is a blurred outdoor setting with green foliage.

THANK YOU
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