



# Wine Victoria and Southern Glazer's Wine & Spirits *SGWS Overview and Route to Market Opportunities*

*July 2023*



# Agenda

## Topic

### ❖ **SGWS Overview and Background**

- SGWS Family Values
- Company History – Current Coverage
- Fine Wine Team

### ❖ **Digital Capabilities**

### ❖ **Analytics Capabilities**

### ❖ **US Economy and Category Insights**

### ❖ **RTM Strategies**

- Current RTM
- Create Supplier Relationship
- Direct Import – Lineage

**Company Overview:**  
*Our History & Team*

# SGWS' FAMILY values, leadership and succession plans make us an ideal business partner—now and for years to come

## SGWS Values and Ownership Details

- F** Fulfill the potential of our suppliers/customers
- A** Aspire to Excellence
- M** Mission and Vision Driven
- I** Integrity and inclusiveness are our hallmarks
- L** Leadership in everything we do
- Y** You are critical to our success

### Our Leadership



Wayne Chaplin (Chief Executive Officer), Harvey Chaplin (Chairman), Bennett Glazer (Executive Vice Chairman), Shelly Stein (President)

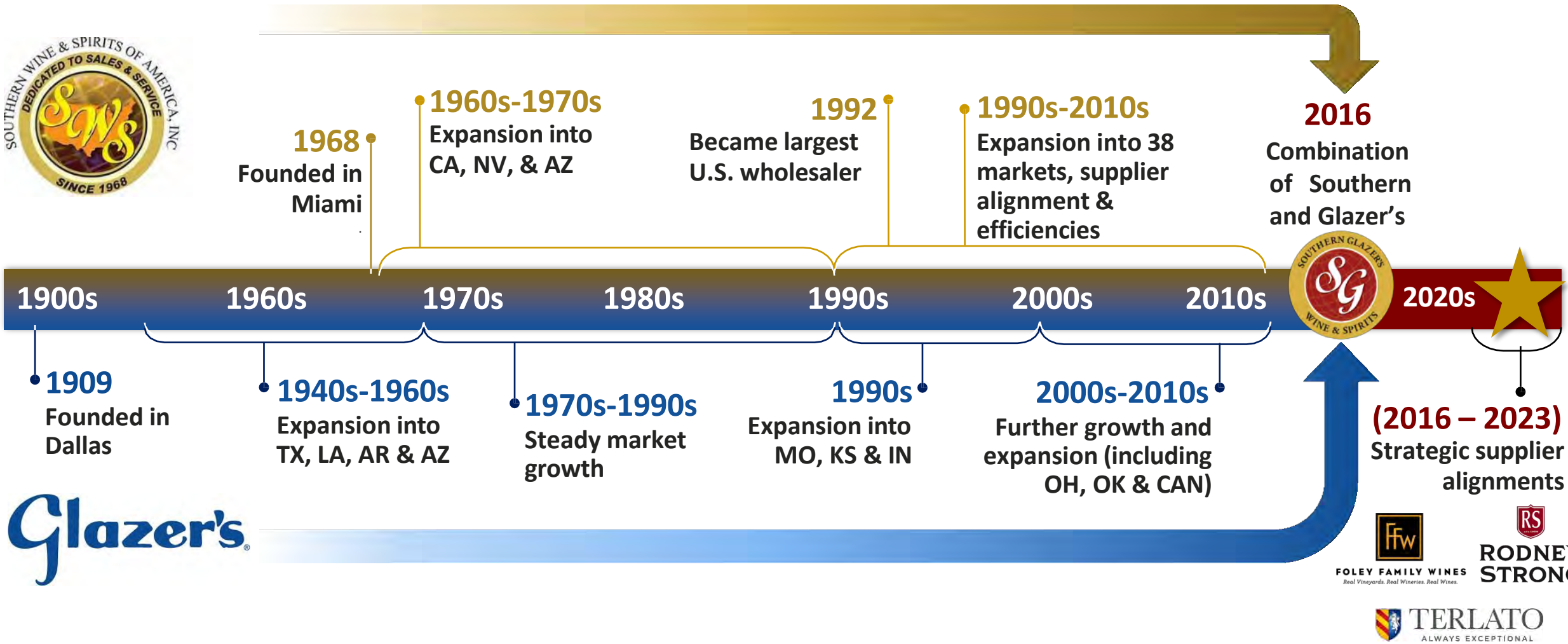
### Future Leaders



Top Row: David Chaplin, Jennifer Chaplin, Mark Chaplin,  
Bottom Row: Monica Chaplin, Robert Becker, Ryan Jove, Sam Glazer

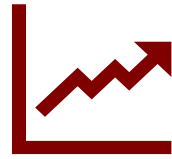
# We are the world's preeminent distributor of beverage alcohol, and proud to be a multi-generational, family-owned company

## Company History



# We are the only coast-to-coast distributor with full coverage and operations in all Top Five national markets and all control markets

**54 years**

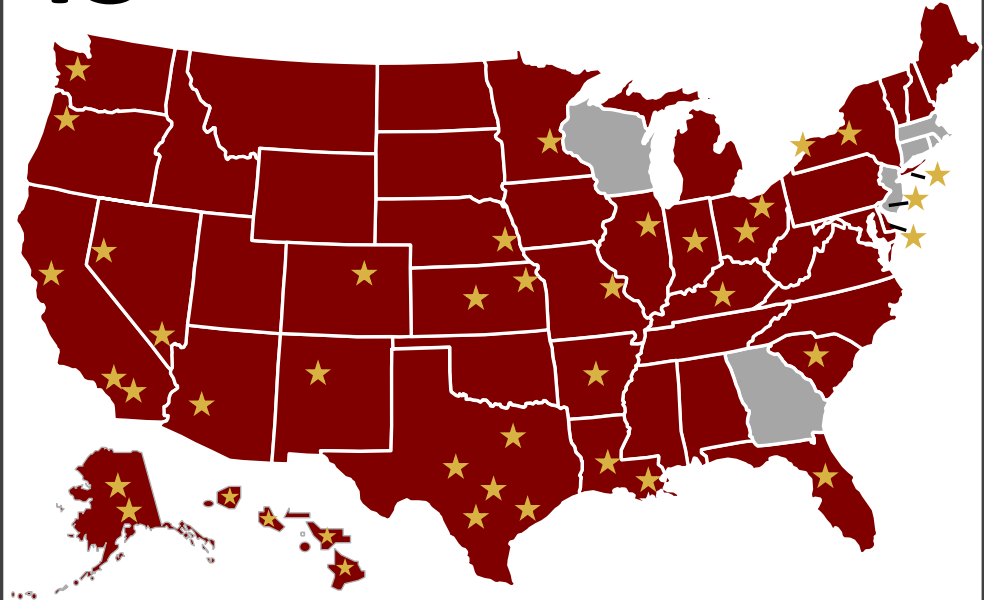


of uninterrupted growth and financial stability

**1 FAMILY**



**43** Distribution Centers in 25 states



**3,700** Delivery Vehicles



**46 markets**



**34.6%**  
Market Share<sup>1</sup>



**200M** Annual Cases Delivered



**> 14.8M** Warehouse Square Footage



**\$325M** SCM Investments in the next 36 months



**37<sup>th</sup>** Largest US Importer



# Our values and strategic direction have landed us on the 2021 list for U.S. Best Managed Companies

2021 U.S. Best Managed Companies



Recognizing private company success

THE WALL STREET JOURNAL. **Deloitte.**

## Southern Glazer's Wine & Spirits Recognized as a U.S. Best Managed Company

April 15, 2021—Southern Glazer's Wine & Spirits is proud to announce it has been selected as a 2021 U.S. Best Managed Company. Sponsored by Deloitte Private and The Wall Street Journal, the program recognizes outstanding U.S. private companies and the achievements of their management teams.

The 2021 designees are U.S. private companies that have demonstrated excellence in strategic planning and execution, a commitment to their people by fostering a dynamic, resilient culture—all while delivering strong financials.

In its second year, the U.S. Best Managed Companies program targeted more than 500 potential applicants from across the U.S., and Southern Glazer's was one of 49 honorees selected for the esteemed designation. Applicants are evaluated and selected by a panel of external judges focused on assessing hallmarks of excellence in four key areas: strategy, execution, culture and financials. Southern Glazer's joins a global ecosystem of honorees from more than 30 countries recognized by the Best Managed Companies program.

A major component of our success is our DE&I ethos that focuses on our people by building a welcoming culture



# Our national, regional and local Fine Wine structure leverages the power of SGWS—delivered with the care, detail and passion of a smaller company

## Fine Wine – An Integrated Structure



**A National, Enterprise-aligned vision, mission, and resources**



**Cindy Leonard**  
EVP/GM  
Fine Wine



**Laura DePasquale MS**  
SVP, Sales & Comm Ops  
Artisanal Wine



**Monique Bonnetain**



**Blake Leja**



**Michael Aitken**



**A well-connected and informed Region**



**Pierre-Paul Abraham**  
*West Region*



**Michele Geroni**  
*East Region*



**Johan Lowegard**  
*Central Region*



**Local placement of great wines with high-value wine accounts**







### NATIONAL

A centralized strategic hub and single point of contact to align vision and strategy

### REGION

A wine-savvy network of leaders to support key priorities and execution

### LOCAL MARKET

Empowered, wine-passionate storytellers building curated distribution



# Our wine education program consists of a three-pronged approach and embraces collaboration with wine suppliers

## Wine Education Approach

### Foundational wine knowledge and credentials

- We require our consultants to establish their core credentials and demonstrate working wine knowledge as a baseline requirement
- SGWS provides certification opportunities for all employees through the WSET and other country and appellation certification specialties
- Domaine & Estates consultants are strongly encouraged to continually update their education



ART Academy training at our Wynwood facility



### Trade and industry events to share our expertise

- We take our knowledge out to the market to educate and inspire interest, including raising the level of the buyer/customer through special education events

### Partnership with our wine suppliers

- We invite and encourage our wine suppliers to stay in close contact and help us learn your unique stories and identity
- Doing so enables our people to represent and place your products in alignment with your vision and to stay up to date on your latest vintages while maintaining a personal relationship

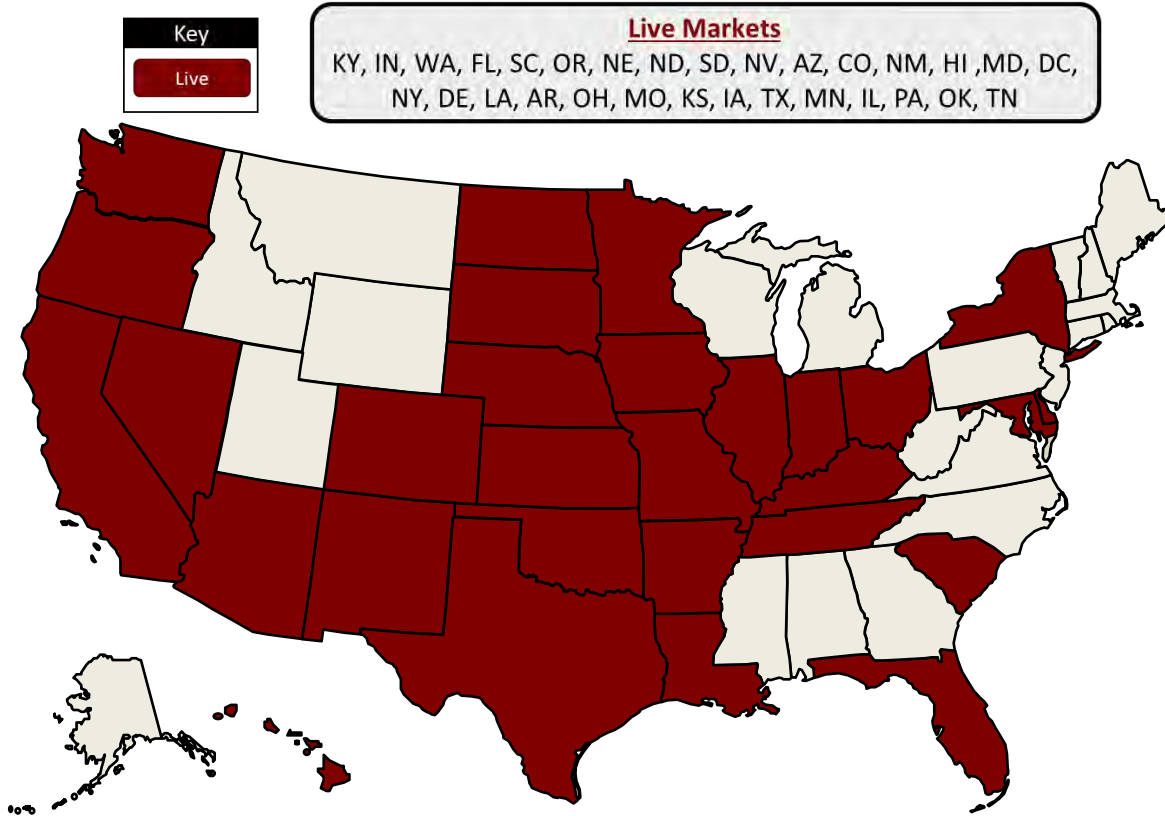


On the ground in Napa with suppliers

**Advantaged Go To Market:**  
*Digital*

# Proof Commerce is currently live in all 30 open markets, including the five largest beverage alcohol markets in the US

## SG Proof Commerce Deployment Status



Powered by...

	<b>Proprietary SGWS B2B E-Commerce platform</b> Proof Commerce is the #1 B2B Beverage Alcohol industry E-Commerce platform	
	<b>CRM platform for our sales teams to plan and execute</b> 6.3K Sales Consultants and Managers using Proof Sales; Sales Consultants recording Quality Visits see up to 36% YOY sales growth	
	<b>Partner with suppliers to collaborate on digital marketing</b> \$100M in revenue from 7M+ supplier emails and \$23M in attributed revenue from 35M million ad impressions—in 2021 alone	
	<b>Focus on customer satisfaction</b> 2 National Call Centers, 101 Proof-dedicated Service Consultants, 232K support cases—86% solved within 24 hours	
	<b>Supplier portal that provides 360° Supplier Planning</b> Select strategic suppliers have access to the Full Proof 360 Portal, collaborating with SGWS via unique dashboards and links	

(1) Time period: Since Inception (Mar '19 – Dec '22)

### SG Proof Commerce<sup>(1)</sup>

**\$3.3B**

Annualized Net Sales



**78%**  
Activation



**225.3M**  
Page Views



**131K**  
Customers Ordering



**3.6M**  
New PODs





# The B2C team is initially focused on growing our capabilities across key partners and expanding them to others shortly after

## B2C E-commerce Landscape

### National Accounts.com

### Regional Accounts.com

### Pure Play

### 4<sup>th</sup> Tier

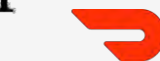
#### Omnichannel Retailers

Traditional Brick & Mortar Grocery and Bev Alc chain retailers offering delivery, pick-up (Click & Collect) services



#### Online retailers

W&S licensed retailers who were born online.



#### Delivery Platforms, Couriers, and Intermediaries

Unlicensed platforms and service providers enabling retailers to offer W&S delivery, pick-up or shipping

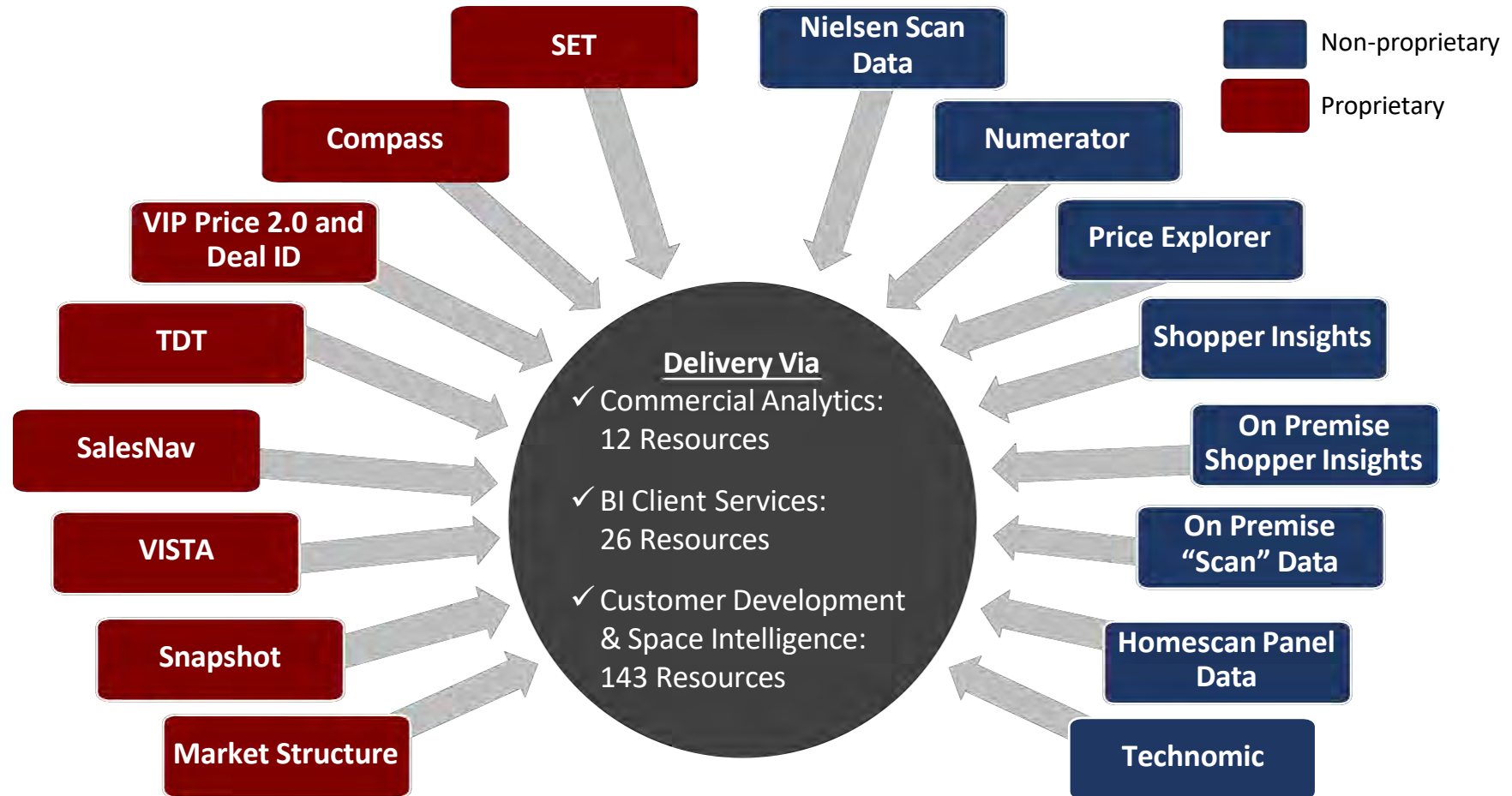


# Data & Analytics

# SGWS will leverage proprietary (and non-proprietary) data and tools to segment and target the right opportunities for Suppliers

## The SGWS Advantage

1. SGWS maintains the **largest proprietary dataset** in the beverage alcohol industry
2. Our data **cannot be purchased or replicated** by any competitor or third party
3. When paired with available third-party data our tools and insights become the industry's **most powerful and predictive**



**With enhanced alignment, our Suppliers realize the full benefit of our tools and investments**



## United States – Market Insights

# Industry and Economic Updates

## June's Key Ingredients

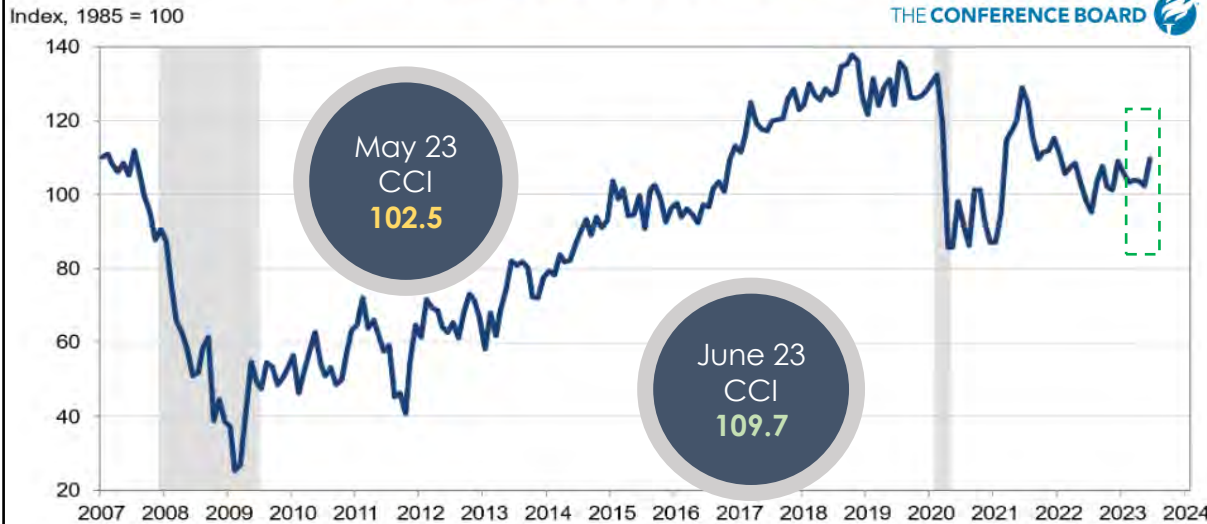
- ❑ Consumer Confidence, Present Situation and Expectation indices **all increased in June from May**. Consumer sentiment turned **positive in June (highest level since Sep'21)**
- ❑ Inflation **cooled to 3%** in June and reached the **lowest it has been over the last 2 year**
- ❑ Numerator survey responses indicate **Restaurants are the #1 planned cutback** across all consumer segments, with **42% planning to cut on Alcoholic beverages**
- ❑ Occupancy rates for hotels are down 1.9 points vs. 2022 and 3.8 pts below 2019 levels
- ❑ The Food Index from May to June **increased slightly** as Food at Home remains flat and **Food away from Home increased 0.4%** but is slowing vs May. **Alcoholic beverages increased +4% vs June LY**
- ❑ Federal student loan borrowers' **repayment could commence in October, discretionary spending is expected to decrease** with the largest proportion of Student debt is held by the **top 20% of income earners**
- ❑ Nielsen reports RTD category **reached \$10.4 billion in off-premise** sales for the L52 weeks, mainly driven by Spirits based RTDs
- ❑ Recruiting and retaining the Gen-X generation holds a **large opportunity for suppliers and SGWS**
- ❑ Wine 5.0L share **increased by 5.7pts** vs LY in the week leading up to 4th of July



Consumer Confidence, Present Situation and Expectation indices all saw increases (+7.2, +7.8, +6.4 respectively) in June from May, while Producer Price Index consistently decreased vs LY, suggesting the supply side of inflation has been resolved and consumers are optimistic

Consumer confidence index (CCI) improved in June to 109.7, it's highest level since January 2022

### Consumer Confidence Index®

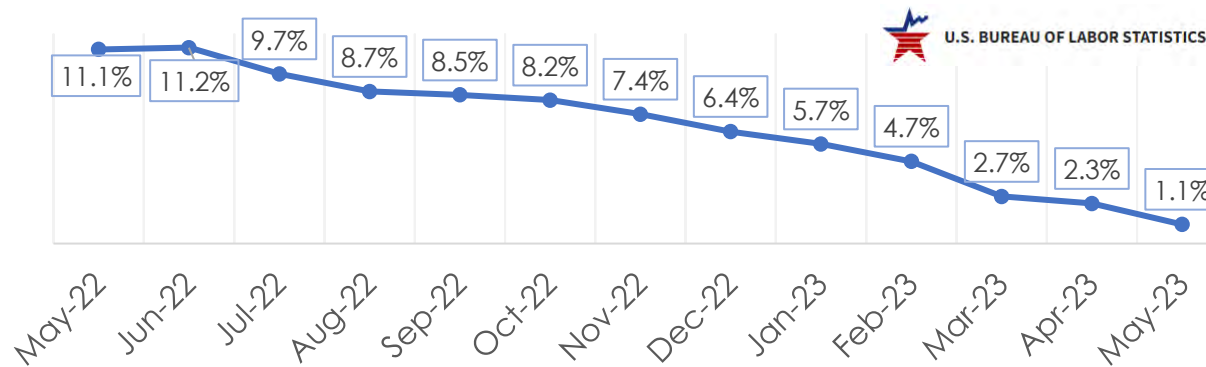


Jun23 saw increases in consumer assessment of current business conditions/ labor market & short-term business conditions/labor market vs May23

### Present Situation and Expectations Index



### Producer Price Index (PPI) for final demand – 12-month % chg



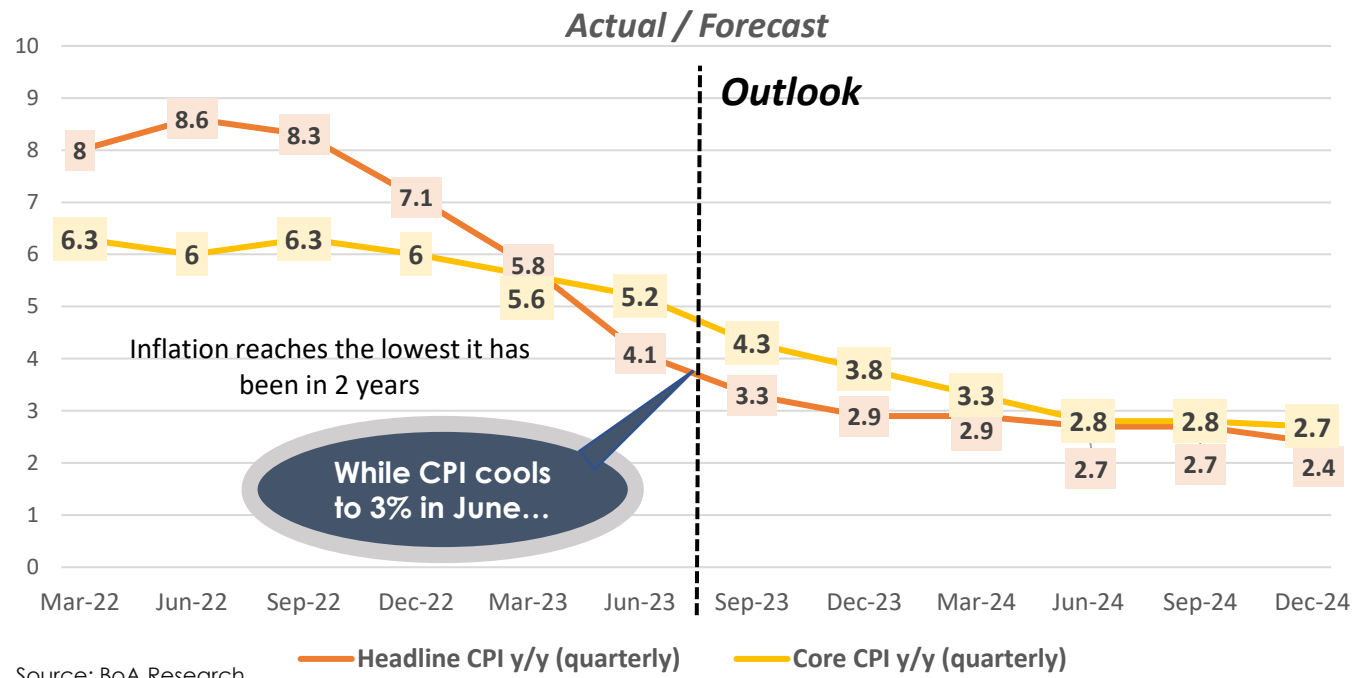
Source: www.bls.gov

- ▲ 23.7% Consumers said business conditions were "good" (up from 19.7% last month)
- ▲ 14.2% Consumers expect business conditions to improve (up from 13.2% last month)
- ▲ 46.8% Consumers said jobs were "plentiful" (up from 43.3% last month)
- ▲ 15.5% Consumers expect more jobs to be available, (up from 13.8% last month)

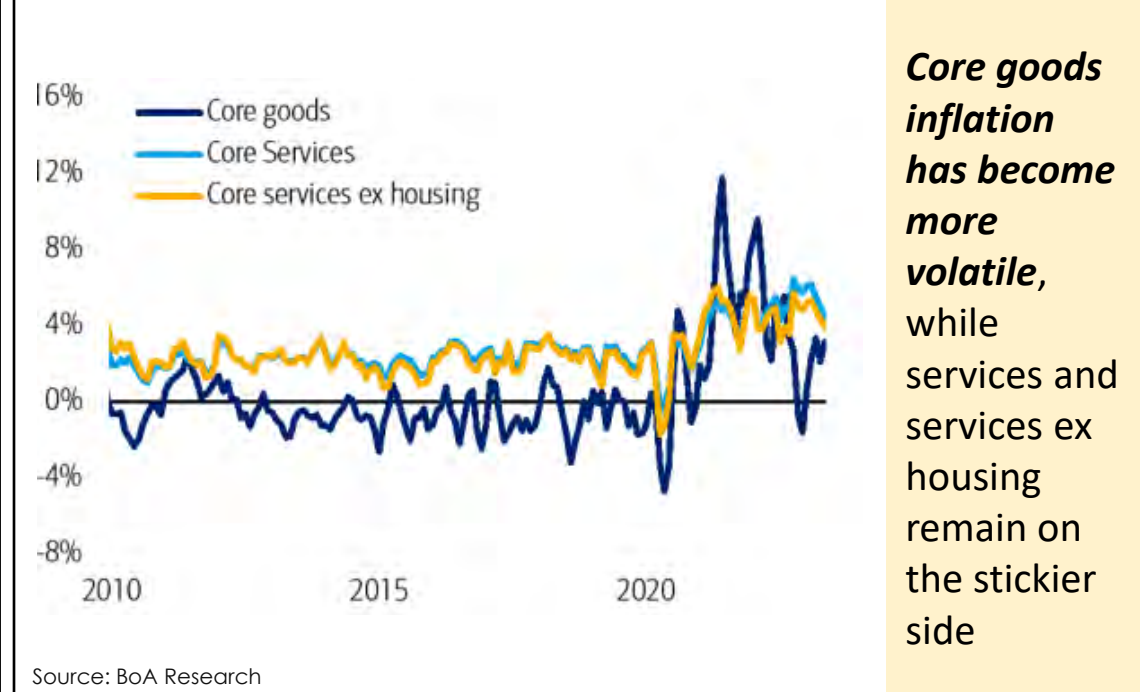
Source: www.conference-board.org/topics/consumer-confidence

While inflation cools to 3% in June and reaches the lowest it has been over the last 2 years, mortgage rates hit ~7%, continuing to add some pressure to the housing market, the middle-class and a quarter of the workforce who are non-college graduates that are earning ~+13% less per week vs. college graduates

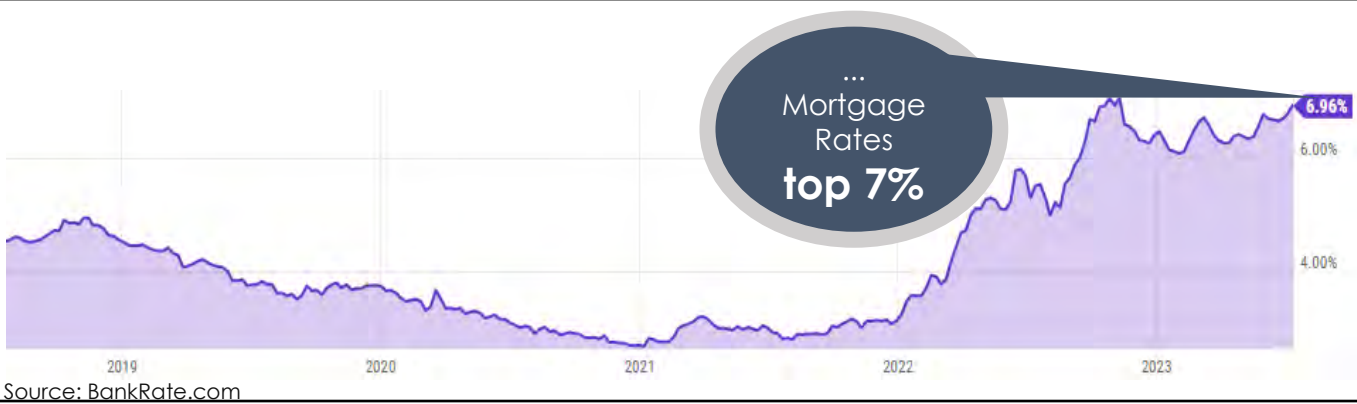
### Headline & Core CPI y/y (quarterly)



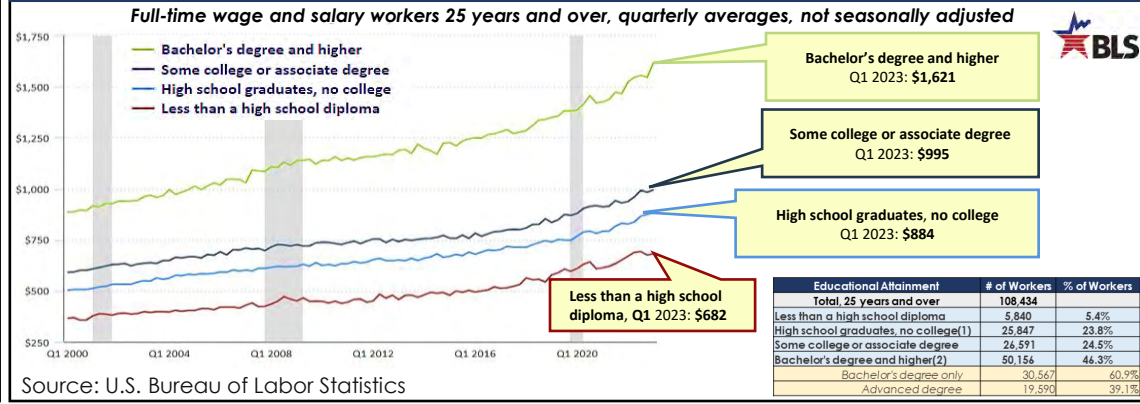
### Core goods, services, and services ex housing inflation (3m % annualized)



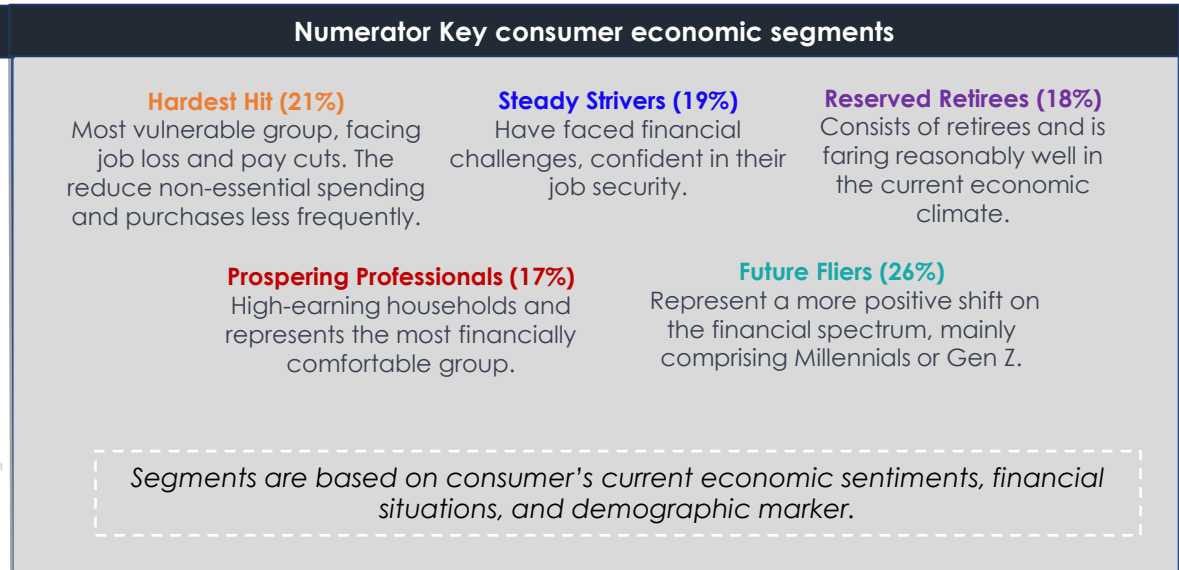
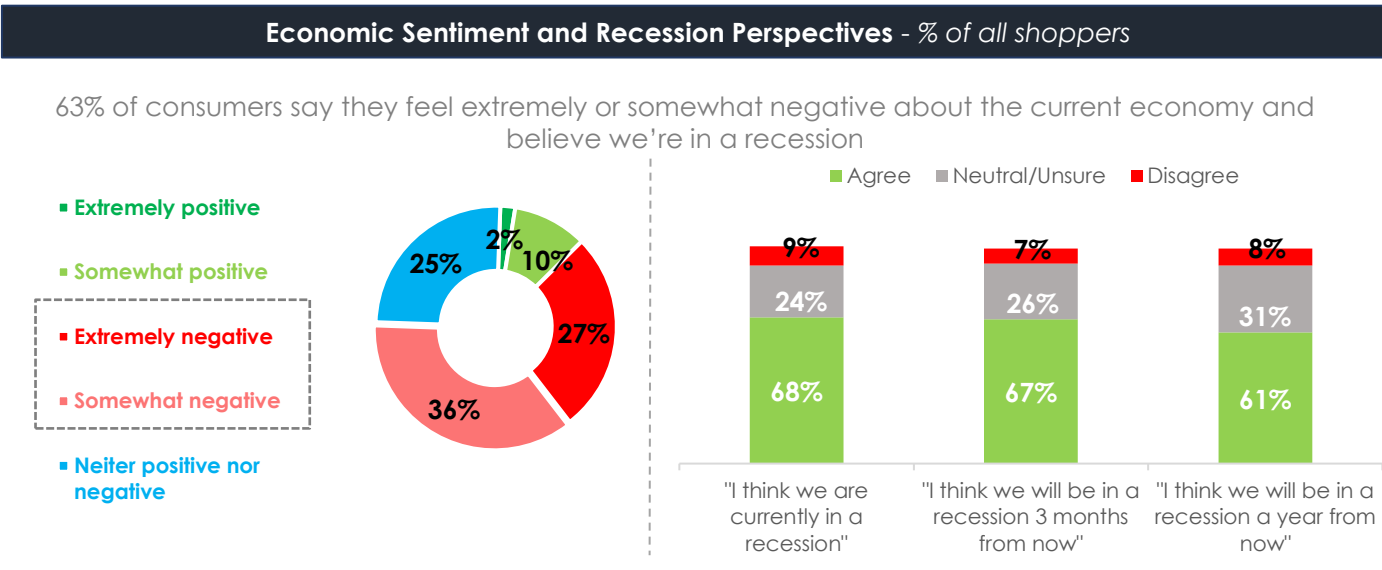
### 30 Year Mortgage Rate



### Median Usual Weekly Earnings: Q1 2023 - By Educational Attainment



# While consumer sentiment has improved, across all economic segments, consumers feel concerned about the current economy and are cutting back on restaurants, dining out, and purchasing alcoholic beverages



### Observed Spending - Buy Rate 12ME May 2023 vs YA

While spending cuts are already evident across groups for durable goods, spending at full and limited-service restaurants was up versus year-ago for all consumer groups, particularly Future Fliers

	<80	80-89	90-94	95-105	106-109	110-119	120-129	>130
	All Shoppers	Hardest Hit	Steady Strivers	Reserved Retirees	Future Fliers	Prospering Professionals		
<b>Restaurant</b>	122	117	126	126	131	124		
Pet	109	109	105	110	113	111		
Limited-Service Restaurant	108	106	115	115	114	116		
Grocery	105	106	111	108	110	107		
Toys	93	88	97	91	96	98		
Office	91	83	91	94	95	93		

### Planned Cutbacks - Ranked by group, ordered by ranking

Restaurants were the #1 planned cutback across all consumer segments, with 42% planning to cut on Alcoholic beverages

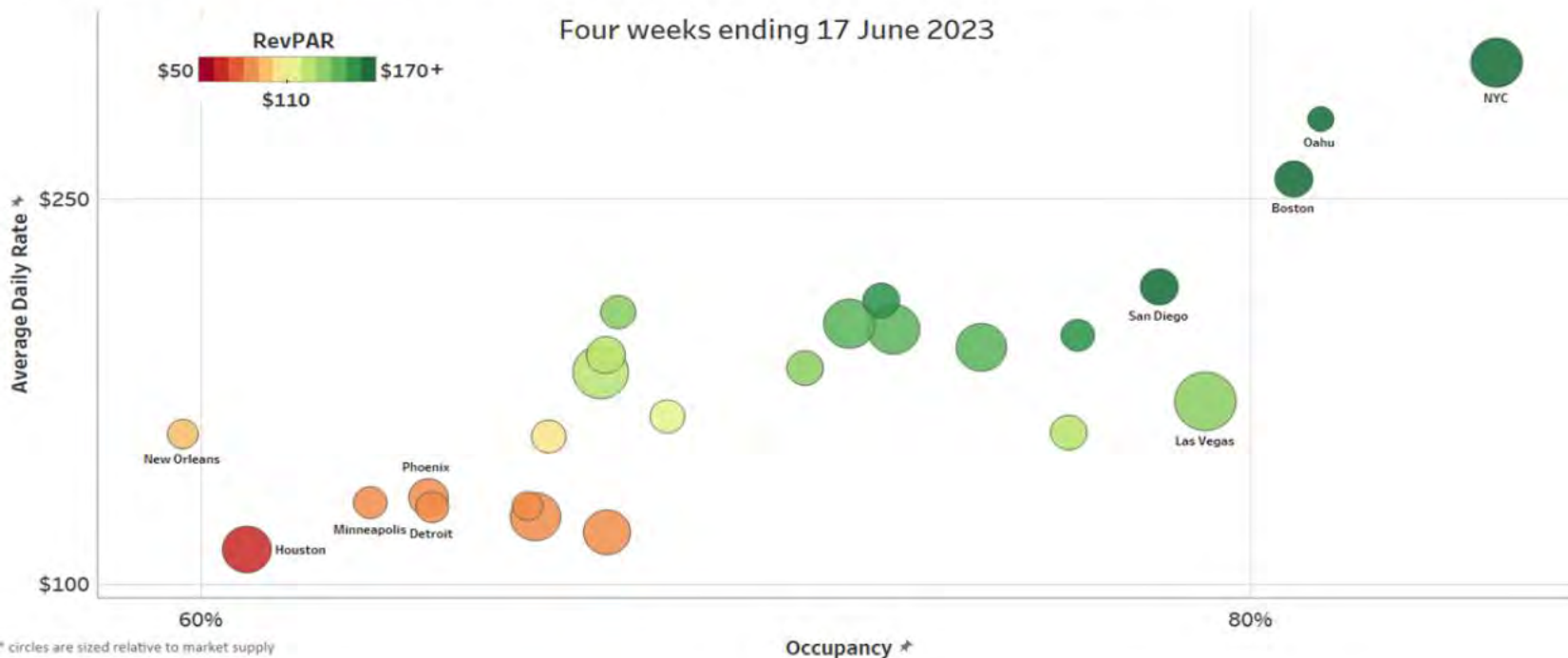
	All Shoppers	Hardest Hit	Steady Strivers	Reserved Retirees	Future Fliers	Prospering Professionals
<b>Restaurants/Dining Out/Food delivery</b>	52%	1	1	1	1	1
Recreational activities	42%	3	2	3	2	2
Travel / Vacation	38%	4	4	6	5	4
Desserts / sweets	30%	7	7	8	8	8
<b>Alcohol beverages</b>	24%	9	9	7	8	7

Source: Numerator June 2023 Economic Segmentation survey (n=23,472)

## Occupancy rates for hotels are down 1.9 points vs. 2022 and 3.8 pts below 2019 levels across the Top 25 markets with San Diego performing the best vs. 2019

### U.S. Top 25 Markets

(Running 28-day performance, callouts: top 5 and bottom 5 Occupancy performers)



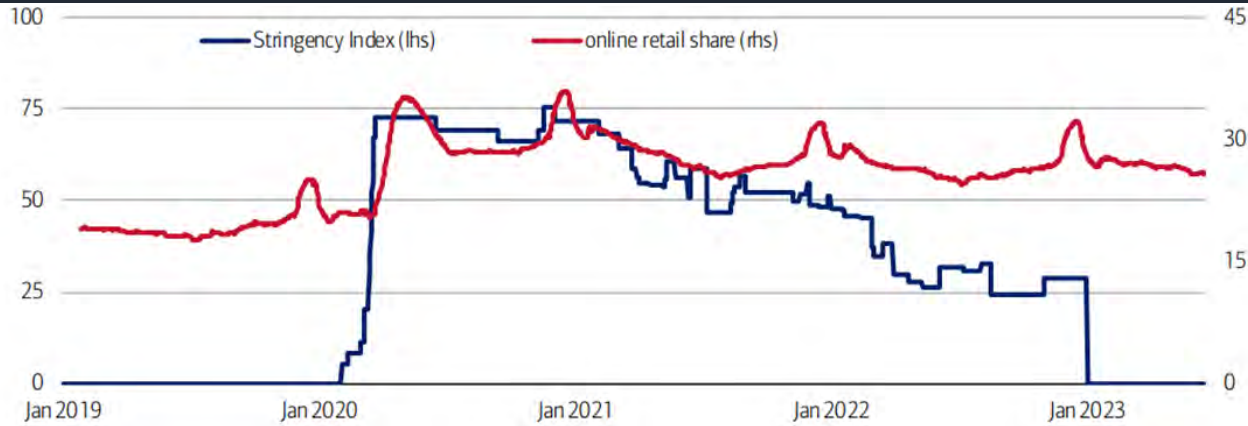
- ✓ NYC had the highest occupancy rate of 84.7% which was a 1.6pt decline from 4-week period ending Mid-May
- ✓ The next best occupancy markets were:
  - ✓ Oahu (81.3%, +3.0 ppts vs. prior month)
  - ✓ Boston (80.8%, +3.6 ppts)
  - ✓ Las Vegas (79.1%, +0.6 ppts)
  - ✓ San Diego (78.3%, +5.2 ppts)
- ✓ None of the Top 25 Markets matched their 2019 occupancy level:
  - ✓ San Diego (-0.3 ppts from 2019)
  - ✓ Phoenix (64.3%, -0.5 ppts from 2019)
- ✓ Steepest declines vs. 2019:
  - ✓ New Orleans (59.6%, -11.5 ppts from 2019)
  - ✓ San Francisco (-18.7 ppts from 2019)
  - ✓ Minneapolis (63.2%, -6.9 ppts)
  - ✓ Detroit (64.4%, -4.7 ppts).

In terms of a revenue per available room (RevPAR), only 13 of the Top 25 Markets experienced YoY gains for the matched period, down from 21 markets last month. Oahu had the largest YoY RevPAR dollar gain, increasing +13.1% and New York City gained +8.6% vs. PY



## The share of online retail spending has risen from 20% in 2019 to 27% in the first half of 2023.

Share of Online Spending vs US Stringency Index (%)  
(Stringency index measures the strictness of government policies; A higher value indicates more restrictive policies)



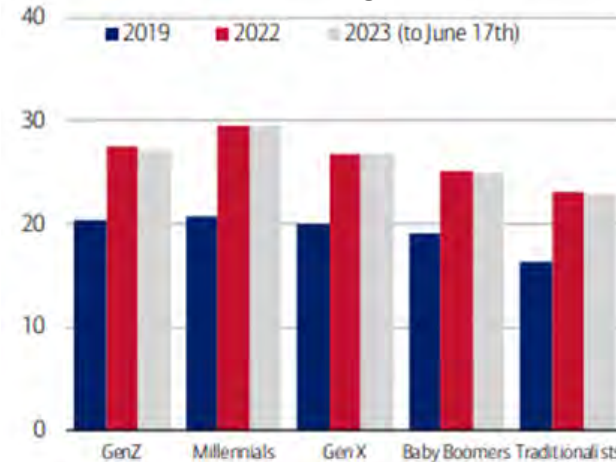
In 2019, Bank of America reported that **20% of the total value of credit/debit card spend on retail spending was online**. While below some peak periods, the 1<sup>st</sup> half of 2023 is **reporting online share of 27%**

The share of online retail spending in Bank of America credit and debit cards keeps growing across all different incomes and all generations.

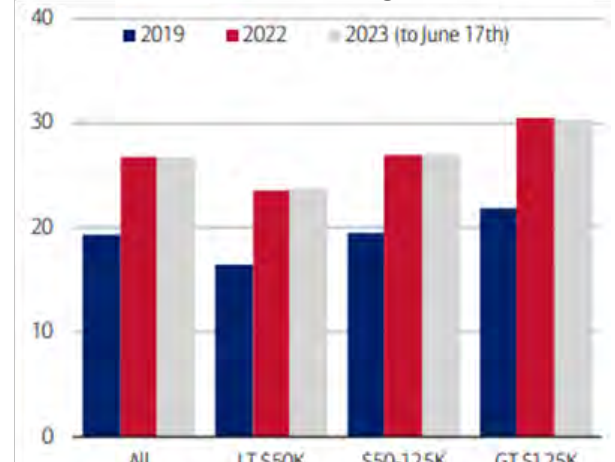


Brick-and-mortar retail is responding to these challenges by embracing customers to **browse in-store BUT buy ONLINE**. Also, offering better in-person services. Some examples:

Online retail spending by Generation



Online retail spending by Income

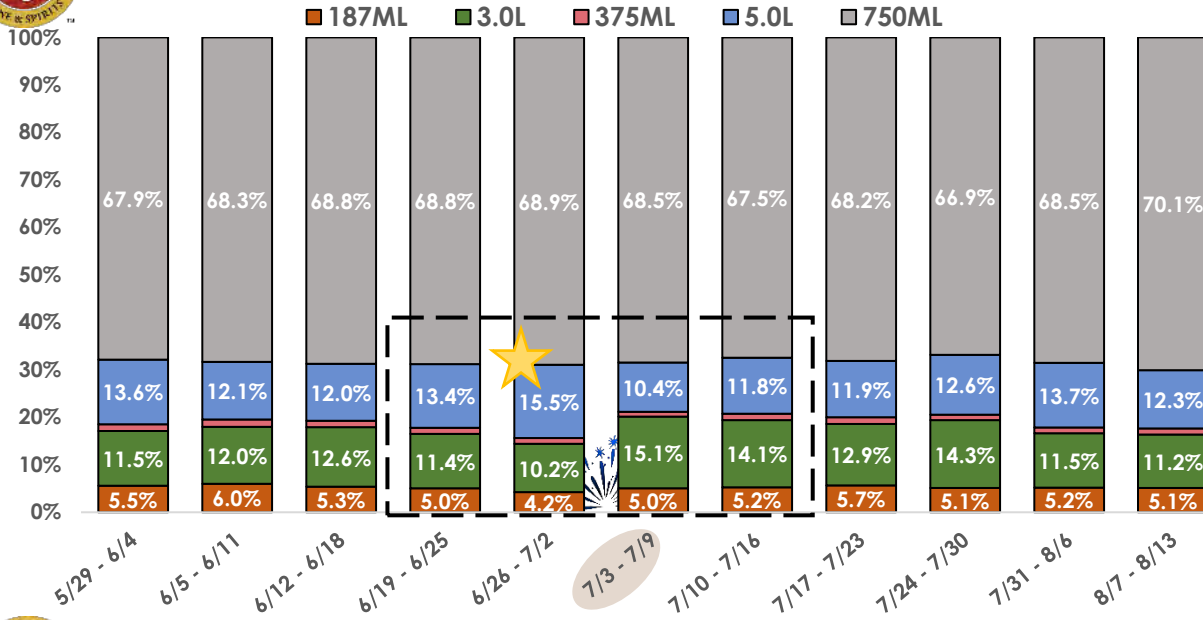


# Category Insights

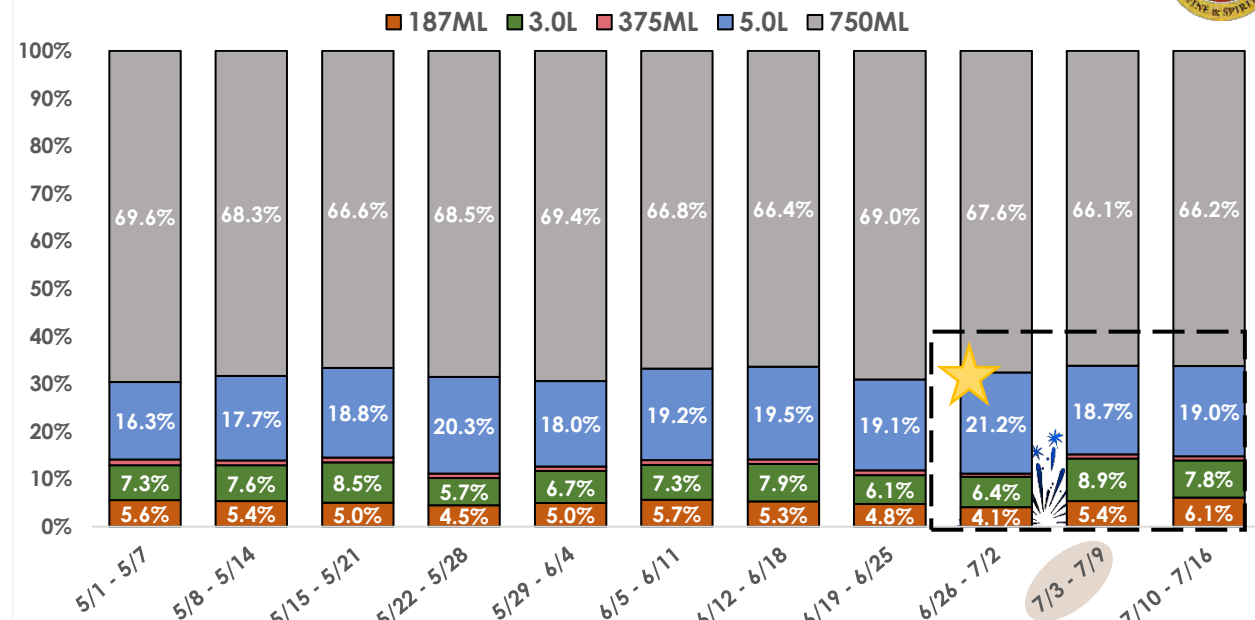
# Wine 5.0L share increased by 5.7pts vs LY in the week leading up to 4<sup>th</sup> of July

\*Includes Supplier Gains

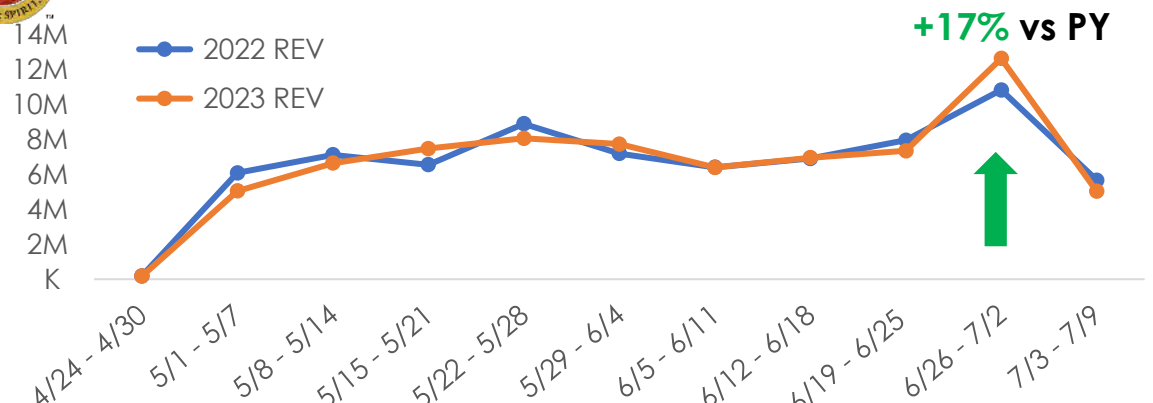
Wine 9L VOL Sales Item Size % Share by Week – 5/29 – 8/13 of 2022



Wine 9L VOL Sales Item Size % Share by Week – 5/1 – 7/16 of 2023



4/24 – 7/9 Wine 3.0L & 5.0L REV vs PY



Top Wine 3.0L & 5.0L Brands by 9L VOL Sales – July 4<sup>th</sup> 2023 Off-Premise



“While shoppers are still interested in buying and drinking their favorite alcoholic beverages, the idea is to give them the same alternatives but within a low or non-alcoholic version”

**Kantar: LOW & NO Trends**

KANTAR

Of all beverage alcohol shoppers,

29% are interested in switching to **nonalcoholic** versions

**US Nonalcoholic and low-alcoholic beverage market forecast through 2026**

0%

+25.4%

Growth in the nonalcoholic beverage segment

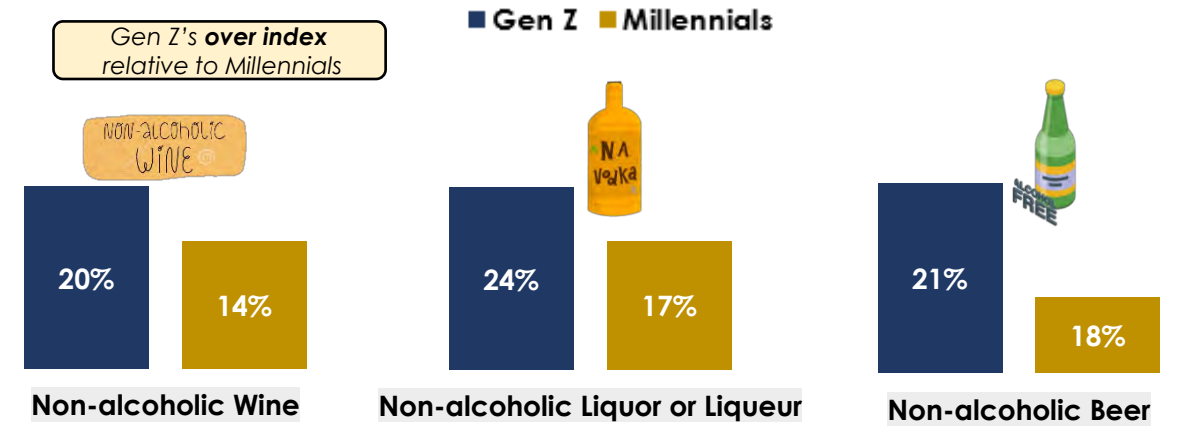
↓%

+5.9%

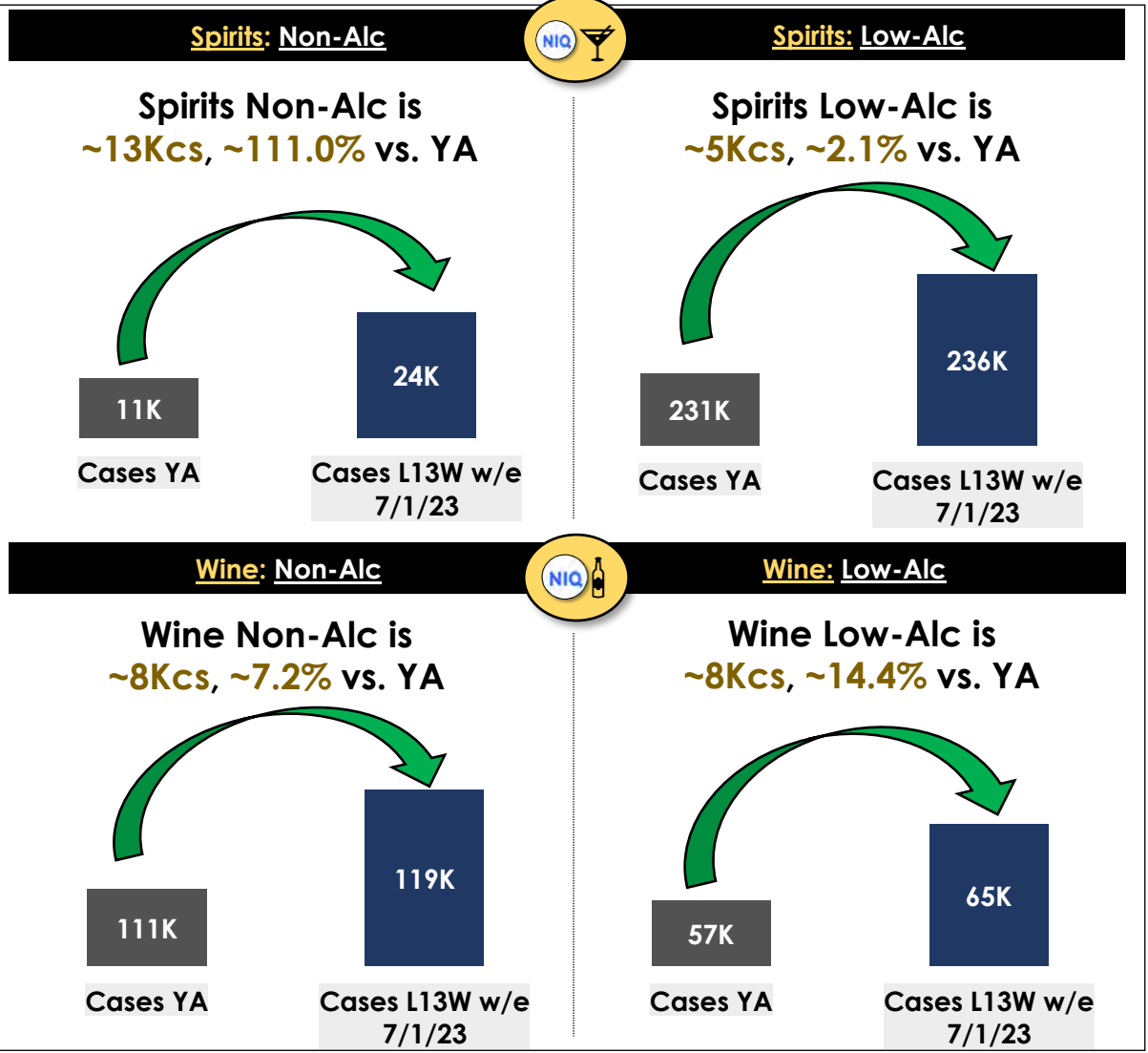
Growth in the low-alcoholic beverage segment

\*Low to nonalcoholic beverages are those with an alcohol by volume (ABV) range of 0.05%-1.2%. No-alcohol beverages are those with an ABV below 0.05%.

**Past 3-month % of Shoppers that have purchased non-alcoholic beverages**



**Nielsen: Spirits & Wine Non & Low-Alc | Abs. 9L Vol & % Chg. vs YA**



SOURCE: KANTAR, APRIL 2023, LIQUOR.COM, FOOD DIVE, BEV INDUSTRY, PR NEWswire, JUST DRINKS, FOX BUSINESS, FORBES, BUSINESS INSIDER, SHOPPERSCOPE@SHOPPING FOR BEVERAGE ALCOHOL DEEP DIVE, JANUARY 2023

SOURCE: NIELSEN TOTAL US XAOC + LIQUOR + CONV L13W/E 7/1/23, Low-Alc - Wine: <10% ABV (excl. Moscato's), Spirits: <30% ABV/60 Proof (excl. Cordials, RTD/RTS)





# Sparkling consistently leads in growing \$ market share, mainly taking share from Red Wine and other wine classes



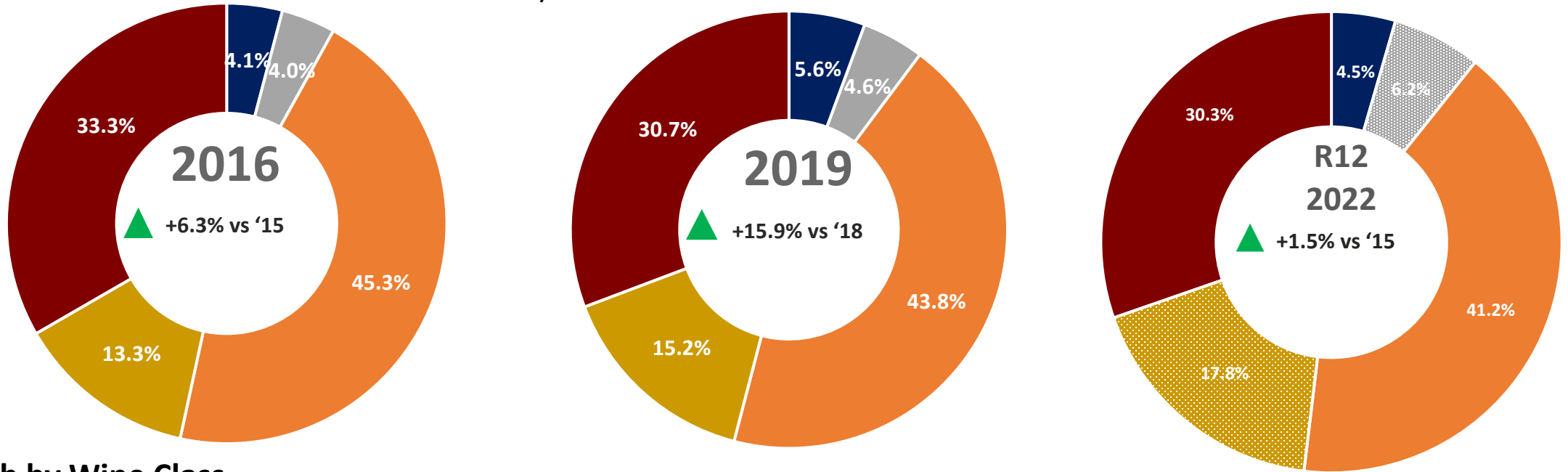
Key Share Gainers



\$ Share

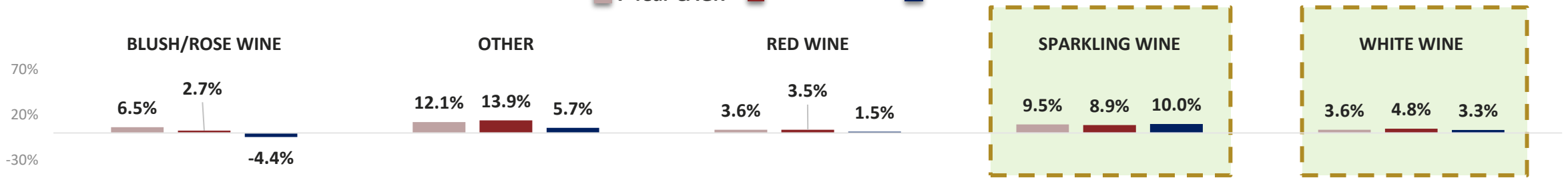
## SGWS Wine \$ Market Share by Class (2016 – R12 2023)

■ BLUSH/ROSE WINE ■ OTHER ■ RED WINE ■ SPARKLING WINE ■ WHITE WINE



## Growth by Wine Class

■ 7 Year CAGR ■ 5 Year CAGR ■ 3 Year CAGR



Source(s): OneSource (2015 and 2023 May)

CAGR Periods: 3 Yr (2020 – R12 2023), 5 Yr (2018 – R12 2023), 7 Yr (2016 – R12 2023)



# For Still Wine, White Wine is gaining share over PY at the expense of Red Wine

## Nielsen Wine \$'s & Volume Share Change by Color

CATEGORY / BRAND	\$ Share			9L EQ Volume Share			\$ Share % Chg vs PY			9L EQ Share % Chg vs PY		
	\$ Share L52	\$ Share L26	\$ Share L13	9L EQ Share L52 Wks	9L EQ Share L26 Wks	9L EQ Latest 13 Wks	\$ L52	\$ L26	\$ L13	9L L52	9L L26	9L L13
STILL WINE	87.1%	86.0%	87.7%	92.0%	91.3%	92.4%	-0.2%	-0.3%	-0.2%	-0.2%	-0.2%	-0.2%
RED	51.5%	52.8%	49.9%	45.9%	46.9%	45.0%	-0.8%	-0.7%	-0.7%	-0.6%	-0.5%	-0.6%
WHITE	41.5%	40.8%	42.9%	45.2%	44.6%	46.2%	1.1%	1.0%	1.1%	1.0%	1.0%	1.0%
PINK	7.0%	6.5%	7.2%	8.8%	8.5%	8.9%	-0.3%	-0.3%	-0.4%	-0.5%	-0.4%	-0.5%
SPARKLING	12.9%	14.0%	12.3%	8.0%	8.7%	7.6%	0.2%	0.3%	0.2%	0.2%	0.2%	0.2%
WHITE	82.7%	83.2%	82.9%	84.3%	84.8%	84.7%	1.0%	0.9%	1.2%	0.9%	1.0%	1.4%
PINK	16.4%	16.0%	16.3%	14.6%	14.2%	14.3%	-0.9%	-0.8%	-1.0%	-0.8%	-0.9%	-1.2%
RED	0.9%	0.9%	0.9%	1.1%	1.0%	1.0%	-0.1%	-0.1%	-0.1%	-0.1%	-0.1%	-0.2%
<b>Grand Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>

Source(s): Source: Nielsen Total US xAOC + Liquor + Conv, week ending 06/03/2023



# White Wine is gaining share at the expense of Red Wine. For Still Wine, Sauv Blanc continues to be the #1 \$'s share gainer vs PY, while for Sparkling, Other Sparkling takes share from French Champagne

## Nielsen Wine \$'s & Volume Share Change by Category

CATEGORY / BRAND	\$ Share			9L EQ Volume Share			\$ Share % Chg vs PY			9L EQ Share % Chg vs PY		
	\$ Share L52	\$ Share L26	\$ Share L13	9L EQ Share L52 Wks	9L EQ Share L26 Wks	9L EQ Latest 13 Wks	\$ L52	\$ L26	\$ L13	9L L52	9L L26	9L L13
	<b>STILL WINE</b>	<b>87.1%</b>	<b>86.0%</b>	<b>87.7%</b>	<b>92.0%</b>	<b>91.3%</b>	<b>92.4%</b>	<b>-0.2%</b>	<b>-0.3%</b>	<b>-0.2%</b>	<b>-0.2%</b>	<b>-0.2%</b>
TOTAL CABERNET SAUVIGNON	19.6%	20.3%	19.1%	15.9%	16.4%	15.8%	0.1%	0.2%	0.2%	0.2%	0.2%	0.2%
TOTAL CHARDONNAY	16.9%	16.6%	17.4%	18.2%	18.0%	18.6%	0.2%	0.2%	0.2%	0.3%	0.3%	0.3%
TOTAL MALBEC	1.4%	1.4%	1.4%	1.3%	1.3%	1.2%	-0.1%	-0.0%	-0.0%	-0.0%	-0.0%	-0.0%
TOTAL MERLOT	3.7%	3.7%	3.6%	4.7%	4.7%	4.6%	-0.2%	-0.2%	-0.2%	-0.2%	-0.2%	-0.2%
TOTAL MUSCAT/MOSCATO	3.5%	3.5%	3.4%	4.9%	4.9%	4.7%	-0.2%	-0.2%	-0.2%	-0.3%	-0.3%	-0.3%
TOTAL OTHER RED	13.3%	13.7%	12.8%	12.8%	13.1%	12.4%	-0.5%	-0.4%	-0.5%	-0.3%	-0.3%	-0.3%
TOTAL OTHER SPARKLING	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	-0.0%	-0.0%	-0.0%	-0.0%	-0.0%	-0.0%
TOTAL OTHER WHITE	2.1%	2.0%	2.1%	2.8%	2.7%	2.7%	-0.0%	-0.1%	-0.1%	-0.0%	-0.0%	-0.1%
TOTAL PINOT GRIGIO/PINOT GRIS	9.4%	9.2%	9.7%	11.5%	11.4%	11.8%	0.4%	0.4%	0.4%	0.4%	0.4%	0.5%
TOTAL PINOT NOIR	8.2%	8.4%	8.0%	5.7%	5.8%	5.5%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%
TOTAL RIESLING	1.4%	1.3%	1.3%	1.4%	1.3%	1.3%	-0.0%	-0.0%	-0.1%	-0.0%	-0.0%	-0.1%
TOTAL ROSE	4.0%	3.5%	4.2%	3.0%	2.7%	3.1%	-0.2%	-0.2%	-0.2%	-0.2%	-0.2%	-0.2%
TOTAL SAUV BLANC/FUME	8.7%	8.4%	9.2%	7.2%	7.1%	7.5%	0.6%	0.6%	0.7%	0.5%	0.5%	0.5%
TOTAL WHITE ZINFANDEL	1.3%	1.3%	1.3%	2.5%	2.5%	2.5%	-0.1%	-0.1%	-0.1%	-0.2%	-0.1%	-0.1%
TOTAL ZINFANDEL	1.2%	1.2%	1.2%	0.8%	0.8%	0.8%	-0.1%	-0.1%	-0.1%	-0.0%	-0.0%	-0.0%
ALL OTHER	5.4%	5.4%	5.3%	7.4%	7.3%	7.3%	-0.1%	-0.1%	-0.1%	-0.3%	-0.3%	-0.3%
<b>SPARKLING</b>	<b>12.9%</b>	<b>14.0%</b>	<b>12.3%</b>	<b>8.0%</b>	<b>8.7%</b>	<b>7.6%</b>	<b>0.2%</b>	<b>0.3%</b>	<b>0.2%</b>	<b>0.2%</b>	<b>0.2%</b>	<b>0.2%</b>
TOTAL FRENCH CHAMPAGNE	20.6%	21.1%	18.3%	4.9%	5.0%	4.2%	-1.2%	-1.3%	-1.3%	-0.2%	-0.2%	-0.3%
TOTAL MUSCAT/MOSCATO	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	-0.0%	-0.0%	-0.0%	-0.0%	-0.0%	-0.0%
TOTAL OTHER SPARKLING	79.4%	78.9%	81.6%	95.1%	94.9%	95.7%	1.2%	1.3%	1.3%	0.2%	0.3%	0.3%
TOTAL OTHER WHITE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	-0.0%	-0.0%	-0.0%	-0.0%	-0.0%	-0.0%
ALL OTHER	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Grand Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>

Source(s): Source: Nielsen Total US xAOC + Liquor + Conv, week ending 06/03/2023



# For Still & Sparkling Wine \$15 – \$19.99 see most share gain vs PY in \$ and Volume, at the expense of <\$10 \$25+ Nielsen Wine Share by Price Tier

\$10-\$14.99 & \$15-\$19.99 gain the most share in L13 vs. PY



Price Tier	CATEGORY / BRAND	\$ Share			9L EQ Volume Share			\$ Share % Chg vs PY			9L EQ Share % Chg vs PY		
		\$ Share L52	\$ Share L26	\$ Share L13	9L EQ Share L52 Wks	9L EQ Share L26 Wks	9L EQ Latest 13 Wks	\$ L52	\$ L26	\$ L13	9L L52	9L L26	9L L13
		<b>Wine</b>											
STILL WINE		87.1%	86.0%	87.7%	92.0%	91.3%	92.4%	-0.2%	-0.3%	-0.2%	-0.2%	-0.2%	-0.2%
<\$10		42.7%	42.2%	43.5%	68.2%	67.8%	68.5%	-0.4%	-0.3%	-0.3%	-0.4%	-0.4%	-0.5%
\$10-14.99		29.6%	29.6%	29.7%	21.1%	21.3%	21.0%	0.1%	0.2%	0.2%	0.1%	0.2%	0.2%
\$15-19.99		13.4%	13.5%	13.3%	6.7%	6.8%	6.7%	0.5%	0.5%	0.5%	0.3%	0.3%	0.3%
\$20-24.99		5.5%	5.5%	5.5%	2.2%	2.2%	2.1%	0.1%	0.1%	0.1%	0.1%	0.0%	0.0%
\$25-\$29.99		1.8%	1.8%	1.7%	0.6%	0.6%	0.5%	-0.1%	-0.1%	-0.1%	-0.0%	-0.0%	-0.0%
\$30-49.99		3.7%	3.8%	3.5%	0.9%	0.9%	0.8%	-0.2%	-0.2%	-0.1%	-0.1%	-0.1%	-0.0%
\$50+		3.3%	3.5%	2.8%	0.4%	0.4%	0.3%	-0.2%	-0.2%	-0.2%	-0.0%	-0.0%	0.0%
SPARKLING		12.9%	14.0%	12.3%	8.0%	8.7%	7.6%	0.2%	0.3%	0.2%	0.2%	0.2%	0.2%
<\$10		17.8%	17.5%	18.2%	33.5%	33.1%	33.6%	-0.4%	-0.6%	-0.6%	-1.2%	-1.5%	-1.3%
\$10-14.99		30.6%	30.3%	31.1%	36.0%	35.9%	36.0%	0.3%	0.3%	0.4%	-0.0%	0.1%	0.4%
\$15-19.99		23.4%	23.5%	24.8%	21.2%	21.6%	22.0%	2.0%	2.0%	1.9%	1.7%	1.8%	1.4%
\$20-24.99		4.2%	4.2%	4.4%	2.7%	2.8%	2.8%	0.1%	0.2%	0.2%	0.1%	0.1%	0.1%
\$25-\$29.99		2.3%	2.3%	2.0%	1.2%	1.3%	1.0%	-0.7%	-0.5%	-0.6%	-0.3%	-0.2%	-0.3%
\$30-49.99		4.6%	4.8%	4.2%	1.6%	1.7%	1.4%	-0.2%	-0.2%	-0.2%	-0.1%	-0.1%	-0.1%
\$50+		17.1%	17.4%	15.2%	3.6%	3.7%	3.2%	-1.1%	-1.2%	-1.2%	-0.2%	-0.2%	-0.3%
Grand Total		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source(s): Source: Nielsen Total US xAOC + Liquor + Conv, week ending 06/03/2023



## **RTM Strategies /Supply Chain**

# United States RTM options with SGWS

## Current Importer

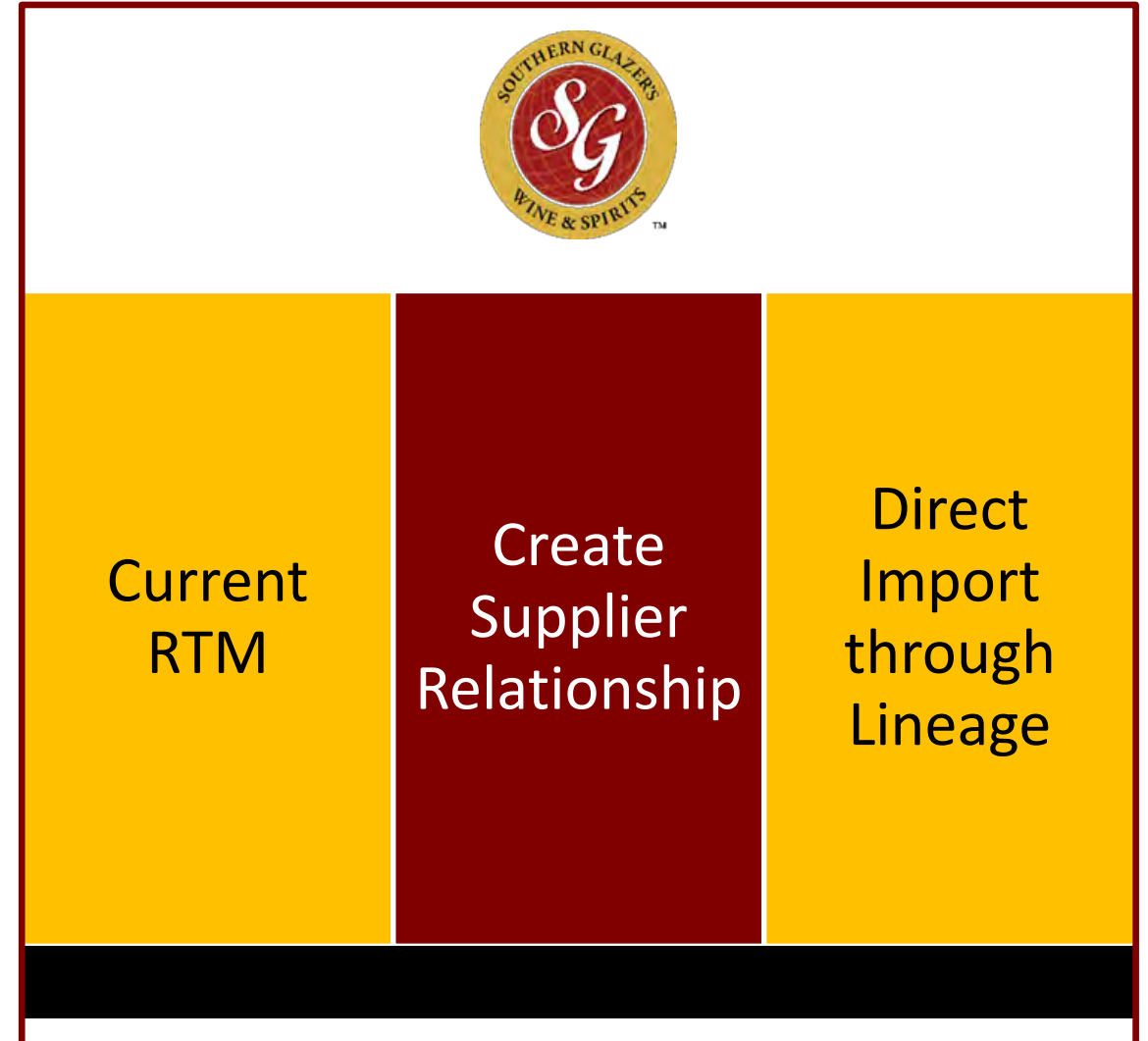
- 2-page ppt presentation to [newproducts@sgws.com](mailto:newproducts@sgws.com)
- Limited opportunities/ presentation limits

## Create Supplier Relationship

- SGWS has over 300 suppliers
- Timing/ Ownership/ Margin/ Control
- For more scalable wineries

## Lineage / D&E

- Nationally recognized Artisanal portfolio
- D&E / Signature Sales Teams
- National Strategy: Laura DePasquale MS
- Supplier Strategy: Eric Larkee
- Sales Strategy – Local
- Compliance/ Registration/ SGWS requirements
- Limited scope – 10k cs maximum
- D&E – CA, FL, NY, TX & WA
  - California – 16 with full State coverage
  - Florida – 6 in top metro markets
  - New York – 2 covering top Manhattan restaurants with 41 Signature reps in full state
  - Texas – 5 in top metro markets, 34 Signature reps in State
  - Washington – 10 with full State coverage





THANK YOU!



Thank you for your time today and for the opportunity to grow together!