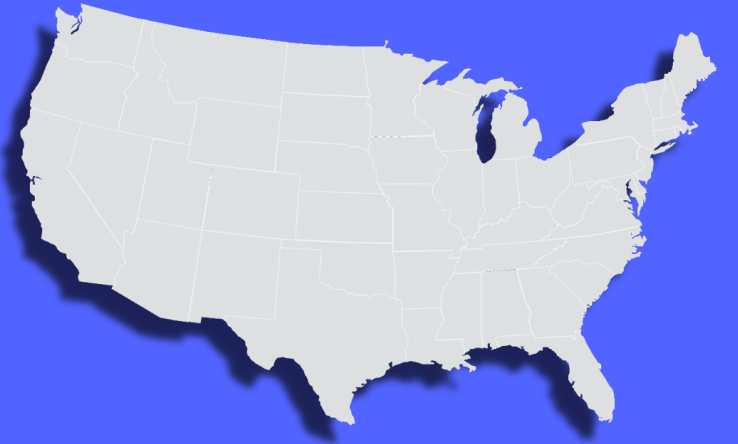




BY-THE-GLASS MENU INSIGHTS

INDEPENDENT ACCOUNTS NATIONALLY

GROUND SIGNAL THROUGH SEPTEMBER 30, 2026



SPARKLING WINE MENU INSIGHTS



 National

Accounts with Any Wine



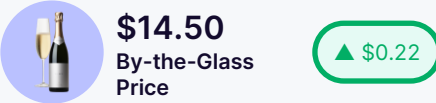
Accounts with Sparkling Wine
(Any Format)



Accounts with Sparkling Wine
By the Glass



Average Sparkling Wine
By-the-Glass Price



For example: Of independent accounts nationally with a wine menu, 62% list any Sparkling Wine, while 49% specifically list Sparkling Wine by the glass (BTG). The average Sparkling Wine BTG price is \$14.50.

BTG RANK	SPARKLING WINE BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	LA MARCA	GALLO	13% ▲ 4.8%	13% ▲ 4.8%	\$11.75 ▲ \$0.27
2	DOMAINE CHANDON	LVMH	6.0% ▲ 1.6%	7.9% ▼ 1.2%	\$15.17 ▲ \$0.23
3	MIONETTO	HENKELL X FREIXENET	5.5% ▲ 4.4%	5.7% ▲ 2.2%	\$12.18 ▲ \$0.12
4	MOET & CHANDON	LVMH	4.7% ▼ 0.1%	14% ▼ 2.1%	\$25.99 ▲ \$0.35
5	VEUVE CLICQUOT	LVMH	4.2% ▲ 5.9%	20% ▲ 1.6%	\$29.96 ▲ \$0.51
6	RUFFINO	Constellation Brands	3.8% ▼ 1.8%	4.1% ▼ 2.4%	\$11.51 ▲ \$0.02
7	ZONIN	ZONIN	3.1% ▼ 1.9%	3.1% ▼ 4.2%	\$10.54 ▲ \$0.22
8	WYCLIFF	GALLO	3.1% ▲ 1.2%	3.4% ▲ 0.7%	\$8.99 ▲ \$0.09
9 ▲ 2	AVISSI	TRINCHERO	2.6% ▲ 16%	2.5% ▲ 11%	\$11.65 ▲ \$0.37
10 ▼ 1	LUNETTA	PALMBAY	2.5% ▲ 0.5%	2.5% ▼ 2.8%	\$10.57 ▲ \$0.27
11 ▼ 1	FREIXENET	HENKELL X FREIXENET	2.1% ▼ 7.7%	2.4% ▼ 9.8%	\$10.52 ▲ \$0.21
12 ▲ 6	LAURENT PERRIER	Laurent-Perrier	2.0% ▲ 10%	5.5% ▲ 4.1%	\$29.10 ▲ \$0.21
13 ▼ 1	MASCHIO	Riunite & Civ	2.0% ▼ 11%	1.9% ▼ 10%	\$10.26 ▲ \$0.28
14 ▲ 3	ZARDETTO	ZARDETTO	1.9% ▲ 5.0%	2.0% ▲ 2.0%	\$11.95 ▲ \$0.23
15	BISOL	BISOL	1.8% ▼ 3.0%	2.2% ▼ 0.5%	\$15.03 ▲ \$0.25

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period

 National

Accounts with Any Wine



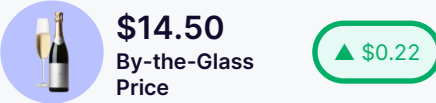
Accounts with Sparkling Wine
(Any Format)



Accounts with Sparkling Wine
By the Glass



Average Sparkling Wine
By-the-Glass Price



For example: Of independent accounts nationally with a wine menu, 62% list any Sparkling Wine, while 49% specifically list Sparkling Wine by the glass (BTG). The average Sparkling Wine BTG price is \$14.50.

BTG Δ RANK	SPARKLING WINE BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	POGGIO COSTA		1.0% ▲ 37%	0.9% ▲ 31%	\$12.29 ▲ \$0.34
2	PERRIER JOUET		1.0% ▲ 22%	5.5% ▲ 4.3%	\$33.97 ▲ \$1.63
3	AVISSI		2.6% ▲ 16%	2.5% ▲ 11%	\$11.65 ▲ \$0.37
4	TAITTINGER		1.3% ▲ 15%	6.0% ▲ 1.8%	\$26.94 ▲ \$0.33
5	LUCIEN ALBRECHT		1.2% ▲ 14%	1.5% ▲ 11%	\$15.41 ▼ \$0.24
6	BENVOLIO		1.6% ▲ 12%	1.6% ▲ 14%	\$11.73 ▲ \$0.29
7	LAURENT PERRIER		2.0% ▲ 10%	5.5% ▲ 4.1%	\$29.10 ▲ \$0.21
8	GAMBINO		1.3% ▲ 9.5%	1.3% ▲ 11%	\$11.36 ▼ \$0.10
9	ROEDERER ESTATE		1.2% ▲ 9.3%	3.4% ▲ 1.4%	\$19.10 ▼ \$0.93
10	VEUVE CLICQUOT		4.2% ▲ 5.9%	20% ▲ 1.6%	\$29.96 ▲ \$0.51
11	ZARDETTO		1.9% ▲ 5.0%	2.0% ▲ 2.0%	\$11.95 ▲ \$0.23
12	LA MARCA		13% ▲ 4.8%	13% ▲ 4.8%	\$11.75 ▲ \$0.27
13	SCARPETTA		1.0% ▲ 4.6%	1.0% ▲ 2.5%	\$12.31 ▲ \$0.52
14	MIONETTO		5.5% ▲ 4.4%	5.7% ▲ 2.2%	\$12.18 ▲ \$0.12
15	RAVENTOS I BLANC		1.0% ▲ 4.0%	1.7% ▲ 1.2%	\$17.12 ▲ \$0.03

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period. Minimum 1.0% BTG Menu Share

Channels with Highest Sparkling Wine BTG Menu Share

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	50%	▼ 5.2%	\$14.51
	FRENCH RESTAURANTS	975	73%	▼ 6.8%	\$20.35
	STEAK RESTAURANTS	2.5K	70%	▲ 0.1%	\$17.49
	GASTROPUBS	1.4K	68%	▼ 1.9%	\$11.79
	ITALIAN RESTAURANTS	6.5K	67%	▼ 2.8%	\$14.34
	AMERICAN RESTAURANTS	9.4K	62%	▼ 3.4%	\$14.04
	BRUNCH RESTAURANTS	1.3K	62%	▼ 4.3%	\$12.16
	SEAFOOD RESTAURANTS	3.3K	62%	▼ 1.1%	\$14.09
	MEDITERRANEAN RESTAURANTS	1.4K	58%	▼ 4.2%	\$14.93
BARS	ALL BARS	22.4K	50%	▼ 1.8%	\$13.47
	WINE-FOCUSED BARS	1.1K	78%	▲ 2.4%	\$15.04
	COCKTAIL-FOCUSED BARS	2.2K	76%	▼ 1.6%	\$16.05
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	70%	▲ 5.4%	\$18.10
	RESORTS	1.2K	69%	▲ 7.6%	\$16.64
NIGHTLIFE	ALL NIGHTLIFE	2.4K	48%	▲ 0.9%	\$14.73

For example: In the 12-month period ending September 30, 2026, 73% of independent French Restaurants with a wine menu featured at least one Sparkling Wine BTG, the highest percentage of any Restaurant trade channel. The average Sparkling Wine BTG price in this trade channel is \$20.35.

Note: Limited to the top half of trade channels based on number of accounts with wine on menu (at least 975 accounts)

Channels with Fastest-Growing Menu Share (YoY)

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	STEAK RESTAURANTS	2.5K	70%	▲ 0.1%	\$17.49
BARS	WINE-FOCUSED BARS	1.1K	78%	▲ 2.4%	\$15.04
HOTELS & RESORTS	RESORTS	1.2K	69%	▲ 7.6%	\$16.64
MISCELLANEOUS	GOLF COURSES & COUNTRY CLUBS	1.0K	45%	▲ 1.7%	\$12.14

For example: Steak Restaurants are the fastest-growing trade channel among independent Restaurants for Sparkling Wine BTG, increasing menu share by 0.1% YoY. In the 12-month period ending September 30, 2026, 70% of accounts in this trade channel offered Sparkling Wine BTG, with an average price of \$17.49.



KTCs with Highest Sparkling Wine BTG Menu Share

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	50%	▼ 5.2%	\$14.51
	COCKTAIL-FOCUSED MODERN FINE DINING	2.6K	85%	▼ 0.6%	\$19.99
	COCKTAIL-FOCUSED FINE DINING	3.1K	85%	▼ 0.4%	\$19.81
	MODERN FINE DINING	3.7K	82%	▼ 0.1%	\$20.33
	COCKTAIL-FOCUSED ELEVATED DINING	2.6K	82%	▼ 1.3%	\$14.87
	FINE DINING	4.4K	82%	—	\$20.02
	ELEVATED + FINE DINING STEAK RESTAURANTS	1.4K	80%	▲ 0.6%	\$18.92
	COCKTAIL-FOCUSED DINING	15.8K	75%	▼ 1.5%	\$15.40
	HIGH-ENERGY DINING	5.1K	72%	▼ 1.6%	\$15.40
	ELEVATED DINING	6.2K	72%	▼ 1.8%	\$14.48
BARS	ALL BARS	22.4K	50%	▼ 1.8%	\$13.47
	COCKTAIL BARS	2.7K	72%	▼ 2.2%	\$15.62
	CASUAL COCKTAIL BARS	1.6K	69%	▼ 4.9%	\$13.20
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	70%	▲ 5.4%	\$18.10
NIGHTLIFE	ALL NIGHTLIFE	2.4K	48%	▲ 0.9%	\$14.73

For example: In the 12-month period ending September 30, 2026, 85% of independent Cocktail-Focused Modern Fine Dining accounts with a wine menu featured at least one Sparkling Wine BTG, the highest percentage of any Restaurant KTC. The average Sparkling Wine BTG price in this KTC is \$19.99.

Note: Limited to the top half of KTCs based on number of accounts with wine on menu (at least 1394 accounts)

KTCs with Fastest-Growing Menu Share (YoY)

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ELEVATED + FINE DINING STEAK RESTAURANTS	1.4K	80%	▲ 0.6%	\$18.92
	FINE DINING	4.4K	82%	—	\$20.02

For example: Elevated + Fine Dining Steak Restaurants are the fastest-growing KTC among independent Restaurants for Sparkling Wine BTG, increasing menu share by 0.6% YoY. In the 12-month period ending September 30, 2026, 80% of accounts in this KTC offered Sparkling Wine BTG, with an average price of \$18.92.

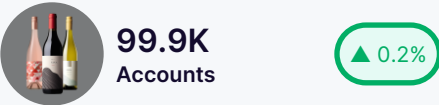


ROSÉ MENU INSIGHTS



 National

Accounts with Any Wine



Accounts with Rosé (Any Format)



Accounts with Rosé By the Glass



Average Rosé By-the-Glass Price



For example: Of independent accounts nationally with a wine menu, 58% list any Rosé, while 46% specifically list Rosé by the glass (BTG). The average Rosé BTG price is \$12.80.

BTG RANK	ROSE BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	THE PALM BY WHISPERING ANGEL	LVMH	6.5% ▲ 6.9%	7.4% ▲ 6.7%	\$14.96 ▲ \$0.21
2	BERINGER	TREASURY WINE ESTATES	2.8% ▼ 3.9%	3.0% ▼ 3.0%	\$9.03 ▲ \$0.06
3 ▲1	CHATEAU D'ESCLANS	LVMH	2.3% ▲ 7.4%	3.8% ▲ 8.3%	\$18.01 ▼ \$0.23
4 ▼1	FLEURS DE PRAIRIE	DEUTSCH FAMILY WINE & SPIRITS	2.2% ▼ 5.6%	2.3% ▼ 1.8%	\$12.28 ▲ \$0.05
5 ▲1	HAMPTON WATER	GÉRARD BERTRAND	2.2% ▲ 13%	2.4% ▲ 13%	\$14.13 ▼ \$0.12
6 ▼1	BIELER PERE & FILS	TRINCHERO FAMILY WINE AND SPIRITS	2.1% ▲ 3.7%	2.0% ▲ 5.4%	\$12.10 ▲ \$0.51
7 ▲1	MIRAVAL	CAMPARI GROUP	1.8% ▲ 2.4%	2.6% ▲ 0.1%	\$15.22 ▲ \$0.18
8 ▼1	PEYRASSOL	WD	1.8% ▼ 1.3%	2.3% ▲ 3.0%	\$15.53 ▲ \$0.32
9	DAOU VINEYARDS	TREASURY WINE ESTATES	1.8% ▲ 1.9%	2.1% ▲ 0.8%	\$13.61 ▼ \$0.25
10	DOMAINE CHANDON	LVMH	1.3% ▼ 11%	1.5% ▼ 14%	\$14.98 ▼ \$0.08
11	FLEUR DE MER	GALLO	1.3% ▼ 6.1%	1.4% ▼ 8.7%	\$13.66 ▲ \$0.09
12 ▲1	AIX	KOBRAND	1.0% ▲ 2.1%	1.2% ▲ 3.1%	\$14.14 ▲ \$0.20
13 ▲7	MINUTY	LVMH	1.0% ▲ 31%	1.2% ▲ 21%	\$16.20 ▲ \$0.67
14 ▼2	GERARD BERTRAND	GÉRARD BERTRAND	1.0% ▼ 11%	1.4% ▼ 8.2%	\$13.68 ▼ \$0.40
15	LA VIEILLE FERME	VINEYARD BRANDS	1.0% ▲ 4.2%	1.0% ▲ 7.9%	\$10.08 ▲ \$0.31

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period

 National

Accounts with Any Wine



Accounts with Rosé (Any Format)



Accounts with Rosé By the Glass



Average Rosé By-the-Glass Price



For example: Of independent accounts nationally with a wine menu, 58% list any Rosé, while 46% specifically list Rosé by the glass (BTG). The average Rosé BTG price is \$12.80.

BTG Δ RANK	ROSÉ BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	MINUTY	LVMH	1.0% ▲ 31%	1.2% ▲ 21%	\$16.20 ▲ \$0.67
2	HAMPTON WATER	 GÉRARD BERTRAND	2.2% ▲ 13%	2.4% ▲ 13%	\$14.13 ▼ \$0.12
3	LA FLEUR	 PRESTIGE BEVERAGE GROUP	1.0% ▲ 10%	1.0% ▲ 7.3%	\$11.45 ▲ \$0.03
4	CHATEAU D'ESCLANS	LVMH	2.3% ▲ 7.4%	3.8% ▲ 8.3%	\$18.01 ▼ \$0.23
5	THE PALM BY WHISPERING ANGEL	LVMH	6.5% ▲ 6.9%	7.4% ▲ 6.7%	\$14.96 ▲ \$0.21
6	LA VIEILLE FERME	 VINEYARD BRANDS	1.0% ▲ 4.2%	1.0% ▲ 7.9%	\$10.08 ▲ \$0.31
7	BIELER PERE & FILS	TRINCHERO FAMILY WINE AND SPIRITS	2.1% ▲ 3.7%	2.0% ▲ 5.4%	\$12.10 ▲ \$0.51
8	MIRAVAL	 CAMPARI GROUP	1.8% ▲ 2.4%	2.6% ▲ 0.1%	\$15.22 ▲ \$0.18
9	AIX	 KOBRAND	1.0% ▲ 2.1%	1.2% ▲ 3.1%	\$14.14 ▲ \$0.20
10	DAOU VINEYARDS	 TREASURY WINE ESTATES	1.8% ▲ 1.9%	2.1% ▲ 0.8%	\$13.61 ▼ \$0.25
11	PEYRASSOL	 WD	1.8% ▼ 1.3%	2.3% ▲ 3.0%	\$15.53 ▲ \$0.32
12	BERINGER	 TREASURY WINE ESTATES	2.8% ▼ 3.9%	3.0% ▼ 3.0%	\$9.03 ▲ \$0.06
13	FLEURS DE PRAIRIE	 DEUTSCH FAMILY WINE & SPIRITS	2.2% ▼ 5.6%	2.3% ▼ 1.8%	\$12.28 ▲ \$0.05
14	FLEUR DE MER	GALLO	1.3% ▼ 6.1%	1.4% ▼ 8.7%	\$13.66 ▲ \$0.09
15	GERARD BERTRAND	 GÉRARD BERTRAND	1.0% ▼ 11%	1.4% ▼ 8.2%	\$13.68 ▼ \$0.40

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period. Minimum 1.0% BTG Menu Share

Channels with Highest Rosé BTG Menu Share

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	47%	▼ 8.5%	\$12.75
	FRENCH RESTAURANTS	975	69%	▼ 9.6%	\$15.35
	STEAK RESTAURANTS	2.5K	65%	▼ 3.6%	\$13.50
	GASTROPUBS	1.4K	64%	▼ 4.9%	\$11.73
	ITALIAN RESTAURANTS	6.5K	61%	▼ 4.3%	\$13.21
	SEAFOOD RESTAURANTS	3.3K	59%	▼ 2.8%	\$12.76
	AMERICAN RESTAURANTS	9.4K	58%	▼ 5.4%	\$12.59
	MEDITERRANEAN RESTAURANTS	1.4K	58%	▼ 8.5%	\$13.34
BARS	ALL BARS	22.4K	48%	▼ 5.6%	\$12.34
	WINE-FOCUSED BARS	1.1K	76%	▲ 0.8%	\$13.20
	COCKTAIL-FOCUSED BARS	2.2K	66%	▼ 4.0%	\$13.65
	BREW PUBS	1.6K	45%	▼ 7.9%	\$10.47
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	64%	▲ 5.0%	\$14.89
	RESORTS	1.2K	63%	▲ 6.6%	\$13.92
NIGHTLIFE	ALL NIGHTLIFE	2.4K	38%	▼ 6.5%	\$12.84

For example: In the 12-month period ending September 30, 2026, 69% of independent French Restaurants with a wine menu featured at least one Rosé BTG, the highest percentage of any Restaurant trade channel. The average Rosé BTG price in this trade channel is \$15.35.

Channels with Fastest-Growing Menu Share (YoY)

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
BARS	WINE-FOCUSED BARS	1.1K	76%	▲ 0.8%	\$13.20
HOTELS & RESORTS	RESORTS	1.2K	63%	▲ 6.6%	\$13.92

For example: Wine-Focused Bars are the fastest-growing trade channel among independent Bars for Rosé BTG, increasing menu share by 0.8% YoY. In the 12-month period ending September 30, 2026, 76% of accounts in this trade channel offered Rosé BTG, with an average price of \$13.20.

Note: Limited to the top half of trade channels based on number of accounts with wine on menu (at least 975 accounts)



KTCs with Highest Rosé BTG Menu Share

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	47%	▼ 8.5%	\$12.75
	COCKTAIL-FOCUSED MODERN FINE DINING	2.6K	81%	▼ 1.9%	\$15.81
	COCKTAIL-FOCUSED FINE DINING	3.1K	81%	▼ 1.3%	\$15.70
	COCKTAIL-FOCUSED ELEVATED DINING	2.6K	78%	▼ 4.3%	\$13.67
	MODERN FINE DINING	3.7K	77%	▼ 1.5%	\$15.85
	FINE DINING	4.4K	77%	▼ 1.1%	\$15.72
	ELEVATED + FINE DINING STEAK RESTAURANTS	1.4K	74%	▼ 0.4%	\$14.35
	COCKTAIL-FOCUSED DINING	15.8K	70%	▼ 3.5%	\$13.53
	HIGH-ENERGY DINING	5.1K	68%	▼ 4.4%	\$13.41
	ELEVATED DINING	6.2K	67%	▼ 4.6%	\$13.34
	COCKTAIL-FOCUSED MULTICULTURAL DINING	2.0K	63%	▼ 2.5%	\$14.65
BARS	ALL BARS	22.4K	48%	▼ 5.6%	\$12.34
	COCKTAIL BARS	2.7K	63%	▼ 4.3%	\$13.44
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	64%	▲ 5.0%	\$14.89
NIGHTLIFE	ALL NIGHTLIFE	2.4K	38%	▼ 6.5%	\$12.84

For example: In the 12-month period ending September 30, 2026, 81% of independent Cocktail-Focused Modern Fine Dining accounts with a wine menu featured at least one Rosé BTG, the highest percentage of any Restaurant KTC. The average Rosé BTG price in this KTC is \$15.81.

Note: Limited to the top half of KTCs based on number of accounts with wine on menu (at least 1394 accounts)

KTCs with Fastest-Growing Menu Share (YoY)

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
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No KTCs had a growing menu share of Rosé year-over-year.



CHARDONNAY MENU INSIGHTS



 National

Accounts with Any Wine



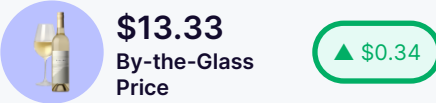
Accounts with Chardonnay (Any Format)



Accounts with Chardonnay By the Glass



Average Chardonnay By-the-Glass Price



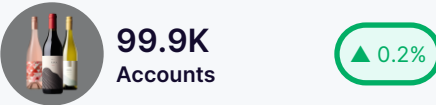
For example: Of independent accounts nationally with a wine menu, 66% list any Chardonnay, while 53% specifically list Chardonnay by the glass (BTG). The average Chardonnay BTG price is \$13.33.

BTG RANK	CHARDONNAY BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	KENDALL-JACKSON		11% ▲ 1.3%	12% ▲ 1.3%	\$11.13 ▲ \$0.22
2	SONOMA-CUTRER		6.6% ▼ 2.3%	9.2% ▼ 0.6%	\$15.15 ▲ \$0.23
3	LA CREMA		4.3% ▲ 2.2%	5.4% ▲ 1.9%	\$13.64 ▲ \$0.36
4	ROMBAUER VINEYARDS		3.2% ▲ 16%	8.3% ▲ 12%	\$21.69 ▲ \$0.56
5 ▲1	CHALK HILL		2.7% ▲ 3.5%	3.6% ▼ 0.4%	\$14.71 ▲ \$0.27
6 ▼1	WILLIAM HILL ESTATE WINERY		2.6% ▼ 3.8%	2.8% ▼ 3.9%	\$10.79 ▲ \$0.18
7 ▲2	JOSH CELLARS		2.5% ▲ 8.0%	2.9% ▲ 12%	\$10.96 ▲ \$0.34
8 ▼1	MER SOLEIL		2.5% ▲ 1.6%	3.4% ▼ 0.2%	\$13.95 ▼ \$0.03
9 ▼1	J. LOHR		2.4% ▲ 3.5%	2.7% ▲ 2.2%	\$11.35 ▲ \$0.08
10	HESS		1.8% ▼ 0.1%	1.9% ▼ 3.6%	\$11.33 ▲ \$0.20
11 ▲7	FRANK FAMILY VINEYARDS		1.7% ▲ 28%	3.2% ▲ 26%	\$18.75 ▼ \$0.41
12	CANYON ROAD		1.6% ▼ 3.0%	1.7% ▼ 2.3%	\$8.17 —
13 ▼2	WENTE VINEYARDS		1.6% ▼ 5.1%	1.8% ▼ 6.2%	\$12.00 ▲ \$0.06
14	LOUIS JADOT		1.6% ▲ 2.6%	3.9% ▲ 7.6%	\$16.31 ▲ \$0.48
15 ▼2	CHATEAU STE. MICHELLE		1.5% ▼ 3.0%	1.9% ▼ 1.6%	\$11.15 ▲ \$0.02

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period

 National

Accounts with Any Wine



Accounts with Chardonnay (Any Format)



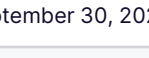
Accounts with Chardonnay By the Glass



Average Chardonnay By-the-Glass Price



For example: Of independent accounts nationally with a wine menu, 66% list any Chardonnay, while 53% specifically list Chardonnay by the glass (BTG). The average Chardonnay BTG price is \$13.33.

BTG Δ RANK	CHARDONNAY BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	FRANK FAMILY VINEYARDS		1.7% ▲ 28%	3.2% ▲ 26%	\$18.75 ▼ \$0.41
2	ROMBAUER VINEYARDS		3.2% ▲ 16%	8.3% ▲ 12%	\$21.69 ▲ \$0.56
3	DECOY		1.1% ▲ 15%	1.2% ▲ 7.7%	\$13.12 ▲ \$0.93
4	CLOS DU BOIS		1.3% ▲ 14%	1.6% ▲ 11%	\$10.23 ▼ \$0.04
5	WOODBIDGE BY ROBERT MONDAVI		1.0% ▲ 11%	1.2% ▲ 12%	\$7.87 ▼ \$0.11
6	SEA SUN		1.0% ▲ 11%	1.2% ▲ 15%	\$11.53 ▲ \$0.04
7	CAVE DE LUGNY		1.0% ▲ 9.8%	1.2% ▲ 8.8%	\$13.74 ▲ \$0.30
8	JOSH CELLARS		2.5% ▲ 8.0%	2.9% ▲ 12%	\$10.96 ▲ \$0.34
9	LOUIS LATOUR		1.1% ▲ 5.2%	2.9% ▲ 4.5%	\$15.76 ▲ \$0.87
10	HARKEN		1.3% ▲ 5.1%	1.4% ▲ 5.8%	\$11.27 ▲ \$0.38
11	DAOU VINEYARDS		1.4% ▲ 4.2%	2.0% ▲ 6.5%	\$14.39 ▼ \$0.05
12	FAR NIENTE		1.1% ▲ 4.0%	5.2% ▲ 8.0%	\$25.59 ▲ \$0.34
13	FLOWERS		1.0% ▲ 4.0%	3.4% ▲ 11%	\$21.97 ▲ \$0.41
14	CHALK HILL		2.7% ▲ 3.5%	3.6% ▼ 0.4%	\$14.71 ▲ \$0.27
15	J. LOHR		2.4% ▲ 3.5%	2.7% ▲ 2.2%	\$11.35 ▲ \$0.08

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period. Minimum 1.0% BTG Menu Share

Channels with Highest Chardonnay BTG Menu Share

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	56%	▼ 8.6%	\$13.38
	STEAK RESTAURANTS	2.5K	76%	▼ 1.4%	\$15.62
	GASTROPUBS	1.4K	71%	▼ 3.8%	\$12.24
	SEAFOOD RESTAURANTS	3.3K	68%	▼ 2.8%	\$13.55
	FRENCH RESTAURANTS	975	68%	▼ 8.8%	\$18.51
	AMERICAN RESTAURANTS	9.4K	67%	▼ 5.4%	\$13.45
	ITALIAN RESTAURANTS	6.5K	66%	▼ 3.7%	\$14.02
	THAI RESTAURANTS	978	60%	▼ 5.4%	\$10.63
	MEDITERRANEAN RESTAURANTS	1.4K	60%	▼ 7.6%	\$13.73
BARS	ALL BARS	22.4K	50%	▼ 7.0%	\$12.33
	WINE-FOCUSED BARS	1.1K	72%	▼ 0.3%	\$14.59
	COCKTAIL-FOCUSED BARS	2.2K	58%	▼ 8.1%	\$14.55
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	70%	▲ 3.8%	\$15.71
	RESORTS	1.2K	72%	▲ 6.5%	\$14.95
NIGHTLIFE	ALL NIGHTLIFE	2.4K	44%	▼ 7.1%	\$13.49

For example: In the 12-month period ending September 30, 2026, 76% of independent Steak Restaurants with a wine menu featured at least one Chardonnay BTG, the highest percentage of any Restaurant trade channel. The average Chardonnay BTG price in this trade channel is \$15.62.

Channels with Fastest-Growing Menu Share (YoY)

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
HOTELS & RESORTS	RESORTS	1.2K	72%	▲ 6.5%	\$14.95

For example: Resorts are the fastest-growing trade channel among independent Hotels & Resorts for Chardonnay BTG, increasing menu share by 6.5% YoY. In the 12-month period ending September 30, 2026, 72% of accounts in this trade channel offered Chardonnay BTG, with an average price of \$14.95.

Note: Limited to the top half of trade channels based on number of accounts with wine on menu (at least 975 accounts)



KTCs with Highest Chardonnay BTG Menu Share

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	56%	▼ 8.6%	\$13.38
	ELEVATED + FINE DINING STEAK RESTAURANTS	1.4K	81%	▼ 0.6%	\$16.85
	COCKTAIL-FOCUSED FINE DINING	3.1K	80%	▼ 1.3%	\$18.53
	COCKTAIL-FOCUSED MODERN FINE DINING	2.6K	80%	▼ 1.7%	\$18.81
	FINE DINING	4.4K	79%	▼ 0.6%	\$18.31
	MODERN FINE DINING	3.7K	78%	▼ 1.0%	\$18.60
	COCKTAIL-FOCUSED ELEVATED DINING	2.6K	77%	▼ 3.4%	\$14.76
	HIGH-ENERGY DINING	5.1K	73%	▼ 4.2%	\$14.74
	COCKTAIL-FOCUSED DINING	15.8K	72%	▼ 3.5%	\$14.79
	ELEVATED DINING	6.2K	72%	▼ 3.7%	\$14.45
	COCKTAIL-FOCUSED MULTICULTURAL DINING	2.0K	66%	▼ 5.3%	\$15.56
	CASUAL ITALIAN RESTAURANTS	3.2K	62%	▼ 5.5%	\$12.20
BARS	ALL BARS	22.4K	50%	▼ 7.0%	\$12.33
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	70%	▲ 3.8%	\$15.71
NIGHTLIFE	ALL NIGHTLIFE	2.4K	44%	▼ 7.1%	\$13.49

For example: In the 12-month period ending September 30, 2026, 81% of independent Elevated + Fine Dining Steak Restaurants with a wine menu featured at least one Chardonnay BTG, the highest percentage of any Restaurant KTC. The average Chardonnay BTG price in this KTC is \$16.85.

Note: Limited to the top half of KTCs based on number of accounts with wine on menu (at least 1394 accounts)

KTCs with Fastest-Growing Menu Share (YoY)

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
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No KTCs had a growing menu share of Chardonnay year-over-year.





SAUVIGNON BLANC MENU INSIGHTS



 National

Accounts with Any Wine



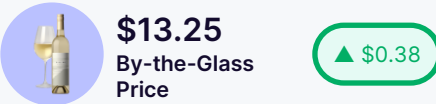
Accounts with Sauvignon Blanc
(Any Format)



Accounts with Sauvignon Blanc
By the Glass



Average Sauvignon Blanc
By-the-Glass Price



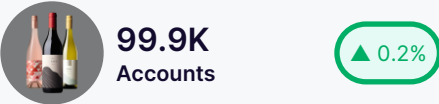
For example: Of independent accounts nationally with a wine menu, 56% list any Sauvignon Blanc, while 46% specifically list Sauvignon Blanc by the glass (BTG). The average Sauvignon Blanc BTG price is \$13.25.

BTG RANK	SAUVIGNON BLANC BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	KIM CRAWFORD	 Constellation Brands	11% ▲ 2.8%	13% ▲ 1.8%	\$12.58 ▲ \$0.11
2	WHITEHAVEN	 GALLO	7.0% ▲ 13%	7.8% ▲ 11%	\$12.73 ▲ \$0.21
3	MATUA	 TREASURY WINE ESTATES	3.8% ▲ 4.5%	3.9% ▲ 2.4%	\$10.47 ▲ \$0.19
4 ▲1	THE CROSSINGS	 DEUTSCHER FAMILY	2.4% ▲ 5.4%	2.5% ▲ 5.7%	\$11.22 ▲ \$0.15
5 ▲1	STONELEIGH	 Pernod Ricard	2.3% ▲ 9.0%	2.4% ▲ 9.2%	\$12.35 ▲ \$0.23
6 ▲1	FERRARI CARANO	 FOLEY FAMILY	1.8% ▲ 2.2%	2.8% ▲ 1.8%	\$12.45 ▲ \$0.35
7 ▲5	EMMOLO	 Wagner FAMILY OF WINE	1.7% ▲ 17%	2.6% ▲ 17%	\$13.08 ▲ \$0.21
8 ▲1	NOBILO	 GALLO	1.7% ▲ 5.7%	1.9% ▲ 3.5%	\$10.75 ▲ \$0.24
9 ▼1	JOEL GOTT	 TRINCHERO	1.7% ▲ 4.1%	2.0% ▲ 2.4%	\$10.86 ▲ \$0.02
10 ▲5	CLOUDY BAY	 LVMH	1.7% ▲ 22%	4.3% ▲ 10%	\$19.51 ▲ \$0.51
11 ▼1	VILLA MARIA	 indevin	1.5% ▼ 3.6%	1.7% ▼ 5.2%	\$11.49 ▲ \$0.23
12 ▲2	MOHUA	 VINEYARD BRANDS	1.4% ▼ 0.2%	1.5% ▲ 1.6%	\$12.04 ▲ \$0.13
13	DUCKHORN VINEYARDS	 DUCKHORN	1.4% ▼ 2.8%	4.0% ▼ 2.4%	\$16.58 ▲ \$0.25
14 ▼3	BRANCOTT ESTATE	 Pernod Ricard	1.3% ▼ 14%	1.5% ▼ 11%	\$11.00 ▲ \$0.19
15 ▲2	HONIG	 HONIG	1.2% ▲ 4.4%	2.5% ▼ 0.3%	\$15.03 ▼ \$0.04

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period

 National

Accounts with Any Wine



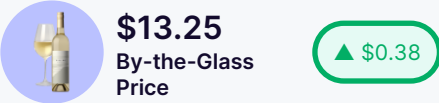
Accounts with Sauvignon Blanc
(Any Format)



Accounts with Sauvignon Blanc
By the Glass



Average Sauvignon Blanc
By-the-Glass Price



For example: Of independent accounts nationally with a wine menu, 56% list any Sauvignon Blanc, while 46% specifically list Sauvignon Blanc by the glass (BTG). The average Sauvignon Blanc BTG price is \$13.25.

BTG Δ RANK	SAUVIGNON BLANC BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	ROMBAUER VINEYARDS	 GALLO	1.0% ▲ 34%	2.2% ▲ 37%	\$16.31 ▼ \$0.26
2	CLOUDY BAY	 LVMH	1.7% ▲ 22%	4.3% ▲ 10%	\$19.51 ▲ \$0.51
3	YEALANDS ESTATE	 Marlborough Lines	1.0% ▲ 18%	1.0% ▲ 12%	\$11.95 ▲ \$0.17
4	DASHWOOD	 FOLEY FAMILY WINES & SPIRITS	1.0% ▲ 18%	1.0% ▲ 17%	\$12.11 ▲ \$0.18
5	EMMOLO	 Wagner FAMILY OF WINE	1.7% ▲ 17%	2.6% ▲ 17%	\$13.08 ▲ \$0.21
6	WHITEHAVEN	 GALLO	7.0% ▲ 13%	7.8% ▲ 11%	\$12.73 ▲ \$0.21
7	CRAGGY RANGE	 CRAGGY RANGE	1.1% ▲ 10%	2.1% ▲ 8.0%	\$16.47 ▲ \$0.64
8	STONELEIGH	 Pernod Ricard	2.3% ▲ 9.0%	2.4% ▲ 9.2%	\$12.35 ▲ \$0.23
9	FRENZY	 WD	1.0% ▲ 6.0%	1.0% ▲ 1.0%	\$12.96 ▲ \$0.36
10	DECOY	 DUCKHORN	1.0% ▲ 5.8%	1.3% ▲ 9.2%	\$12.31 —
11	NOBILO	 GALLO	1.7% ▲ 5.7%	1.9% ▲ 3.5%	\$10.75 ▲ \$0.24
12	THE CROSSINGS	 DEUTSCH FAMILY WINE & SPIRITS	2.4% ▲ 5.4%	2.5% ▲ 5.7%	\$11.22 ▲ \$0.15
13	MATUA	 TREASURY WINE ESTATES	3.8% ▲ 4.5%	3.9% ▲ 2.4%	\$10.47 ▲ \$0.19
14	HONIG	 HONIG NAPA VALLEY	1.2% ▲ 4.4%	2.5% ▼ 0.3%	\$15.03 ▼ \$0.04
15	JOEL GOTT	 TRINCHERO FAMILY WINE AND SPIRITS	1.7% ▲ 4.1%	2.0% ▲ 2.4%	\$10.86 ▲ \$0.02

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period. Minimum 1.0% BTG Menu Share

Channels with Highest Sauvignon Blanc BTG Menu Share

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	47%	▼ 8.3%	\$13.28
	STEAK RESTAURANTS	2.5K	71%	▼ 1.7%	\$14.58
	GASTROPUBS	1.4K	68%	▼ 4.8%	\$12.11
	FRENCH RESTAURANTS	975	65%	▼ 11%	\$16.75
	SEAFOOD RESTAURANTS	3.3K	62%	▼ 3.0%	\$13.57
	AMERICAN RESTAURANTS	9.4K	60%	▼ 6.1%	\$13.16
	ITALIAN RESTAURANTS	6.5K	59%	▼ 4.7%	\$13.76
	MEDITERRANEAN RESTAURANTS	1.4K	54%	▼ 8.6%	\$13.76
	THAI RESTAURANTS	978	48%	▼ 5.9%	\$11.25
BARS	ALL BARS	22.4K	44%	▼ 5.9%	\$12.50
	WINE-FOCUSED BARS	1.1K	71%	▲ 0.3%	\$14.03
	COCKTAIL-FOCUSED BARS	2.2K	59%	▼ 5.3%	\$14.24
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	64%	▲ 4.4%	\$15.17
	RESORTS	1.2K	65%	▲ 5.0%	\$14.62
NIGHTLIFE	ALL NIGHTLIFE	2.4K	38%	▼ 5.4%	\$13.65

For example: In the 12-month period ending September 30, 2026, 71% of independent Steak Restaurants with a wine menu featured at least one Sauvignon Blanc BTG, the highest percentage of any Restaurant trade channel. The average Sauvignon Blanc BTG price in this trade channel is \$14.58.

Note: Limited to the top half of trade channels based on number of accounts with wine on menu (at least 975 accounts)

Channels with Fastest-Growing Menu Share (YoY)

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
BARS	WINE-FOCUSED BARS	1.1K	71%	▲ 0.3%	\$14.03
HOTELS & RESORTS	RESORTS	1.2K	65%	▲ 5.0%	\$14.62

For example: Wine-Focused Bars are the fastest-growing trade channel among independent Bars for Sauvignon Blanc BTG, increasing menu share by 0.3% YoY. In the 12-month period ending September 30, 2026, 71% of accounts in this trade channel offered Sauvignon Blanc BTG, with an average price of \$14.03.



KTCs with Highest Sauvignon Blanc BTG Menu Share

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	47%	▼ 8.3%	\$13.28
	ELEVATED + FINE DINING STEAK RESTAURANTS	1.4K	79%	▼ 0.4%	\$15.63
	COCKTAIL-FOCUSED FINE DINING	3.1K	78%	▼ 1.8%	\$16.83
	COCKTAIL-FOCUSED MODERN FINE DINING	2.6K	77%	▼ 2.1%	\$16.99
	COCKTAIL-FOCUSED ELEVATED DINING	2.6K	76%	▼ 2.9%	\$14.42
	FINE DINING	4.4K	75%	▼ 1.0%	\$16.73
	MODERN FINE DINING	3.7K	75%	▼ 1.2%	\$16.89
	COCKTAIL-FOCUSED DINING	15.8K	70%	▼ 3.2%	\$14.17
	HIGH-ENERGY DINING	5.1K	69%	▼ 3.7%	\$14.17
	ELEVATED DINING	6.2K	68%	▼ 4.0%	\$14.06
	COCKTAIL-FOCUSED MULTICULTURAL DINING	2.0K	65%	▼ 3.4%	\$14.77
	BRUNCH-FOCUSED RESTAURANTS	5.3K	57%	▼ 7.4%	\$13.52
BARS	ALL BARS	22.4K	44%	▼ 5.9%	\$12.50
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	64%	▲ 4.4%	\$15.17
NIGHTLIFE	ALL NIGHTLIFE	2.4K	38%	▼ 5.4%	\$13.65

For example: In the 12-month period ending September 30, 2026, 79% of independent Elevated + Fine Dining Steak Restaurants with a wine menu featured at least one Sauvignon Blanc BTG, the highest percentage of any Restaurant KTC. The average Sauvignon Blanc BTG price in this KTC is \$15.63.

Note: Limited to the top half of KTCs based on number of accounts with wine on menu (at least 1394 accounts)

KTCs with Fastest-Growing Menu Share (YoY)

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
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No KTCs had a growing menu share of Sauvignon Blanc year-over-year.

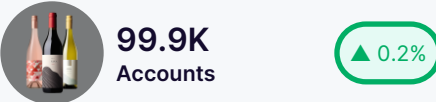


CABERNET SAUVIGNON MENU INSIGHTS



 National

Accounts with Any Wine



Accounts with Cabernet
Sauvignon (Any Format)



Accounts with Cabernet
Sauvignon By the Glass



Average Cabernet Sauvignon
By-the-Glass Price



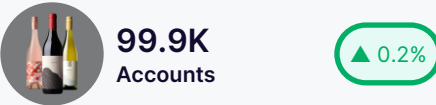
For example: Of independent accounts nationally with a wine menu, 64% list any Cabernet Sauvignon, while 50% specifically list Cabernet Sauvignon by the glass (BTG). The average Cabernet Sauvignon BTG price is \$14.25.

BTG RANK	CABERNET SAUVIGNON BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	JOSH CELLARS		6.8% ▲ 3.9%	7.4% ▲ 5.8%	\$11.47 ▲ \$0.27
2	DAOU VINEYARDS		5.5% ▲ 7.9%	8.1% ▲ 4.9%	\$16.63 ▲ \$0.08
3	CAYMUS VINEYARDS		4.8% ▼ 0.1%	15% ▲ 5.9%	\$27.09 ▲ \$1.99
4 ▲1	BONANZA		4.3% ▲ 24%	4.7% ▲ 26%	\$12.54 ▲ \$0.18
5 ▼1	J. LOHR		4.1% ▲ 2.2%	5.1% ▲ 3.2%	\$12.47 ▲ \$0.25
6	JUSTIN VINEYARD		3.5% ▲ 4.1%	6.1% ▲ 4.6%	\$17.61 ▲ \$0.06
7	LOUIS M. MARTINI		2.6% ▼ 15%	4.6% ▼ 7.7%	\$13.05 ▲ \$0.21
8 ▲2	AUSTIN HOPE		2.5% ▲ 8.4%	4.9% ▲ 11%	\$19.88 ▲ \$0.30
9 ▼1	JOEL GOTT		2.5% ▼ 0.2%	2.8% ▼ 4.7%	\$12.70 ▲ \$0.22
10 ▼1	QUILT WINES		2.5% ▲ 6.4%	4.4% ▲ 6.9%	\$18.95 ▲ \$0.33
11	ROBERT MONDAVI WINERY		2.2% ▲ 11%	4.5% ▲ 1.0%	\$13.94 ▲ \$1.13
12	FRANCISCAN ESTATE		2.1% ▲ 15%	2.8% ▲ 9.1%	\$12.62 ▼ \$0.08
13	DECOY		2.0% ▲ 8.4%	2.8% ▲ 6.5%	\$14.82 ▲ \$0.05
14	CANYON ROAD		1.6% ▼ 3.4%	1.6% ▼ 5.3%	\$8.21 ▲ \$0.10
15	RODNEY STRONG VINEYARDS		1.4% ▼ 6.9%	2.7% ▼ 4.4%	\$14.27 ▲ \$0.28

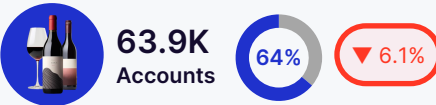
Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period

 National

Accounts with Any Wine



Accounts with Cabernet
Sauvignon (Any Format)



Accounts with Cabernet
Sauvignon By the Glass



Average Cabernet Sauvignon
By-the-Glass Price



For example: Of independent accounts nationally with a wine menu, 64% list any Cabernet Sauvignon, while 50% specifically list Cabernet Sauvignon by the glass (BTG). The average Cabernet Sauvignon BTG price is \$14.25.

BTG Δ RANK	CABERNET SAUVIGNON BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	UNSHACKLED	 Constellation Brands	1.0% ▲ 35%	1.3% ▲ 32%	\$14.96 ▲ \$0.39
2	BONANZA	 Wagner FAMILY of WINE	4.3% ▲ 24%	4.7% ▲ 26%	\$12.54 ▲ \$0.18
3	SMITH & HOOK	 GALLO	1.0% ▲ 17%	1.3% ▲ 5.7%	\$14.01 ▲ \$0.15
4	FRANCISCAN ESTATE	 GALLO	2.1% ▲ 15%	2.8% ▲ 9.1%	\$12.62 ▼ \$0.08
5	WOODBIDGE BY ROBERT MONDAVI	 THE WINE GROUP	1.1% ▲ 12%	1.2% ▲ 12%	\$7.79 ▲ \$0.06
6	ROBERT MONDAVI WINERY	 Constellation Brands	2.2% ▲ 11%	4.5% ▲ 1.0%	\$13.94 ▲ \$1.13
7	BERINGER	 TREASURY WINE ESTATES	1.1% ▲ 9.6%	2.9% ▲ 4.8%	\$15.39 ▼ \$0.02
8	AUSTIN HOPE	 HOPE FAMILY WINES	2.5% ▲ 8.4%	4.9% ▲ 11%	\$19.88 ▲ \$0.30
9	DECOY	 DUCKHORN	2.0% ▲ 8.4%	2.8% ▲ 6.5%	\$14.82 ▲ \$0.05
10	DAOU VINEYARDS	 TREASURY WINE ESTATES	5.5% ▲ 7.9%	8.1% ▲ 4.9%	\$16.63 ▲ \$0.08
11	OBERON	 FOLIO FINE WINE PARTNERS	1.1% ▲ 7.7%	1.5% ▲ 0.5%	\$16.67 ▲ \$0.49
12	SILVER OAK	 SILVER OAK	1.2% ▲ 7.1%	9.7% ▲ 5.5%	\$36.04 ▼ \$0.66
13	QUILT WINES	 COPPER CANE WINES & PROVISIONS	2.5% ▲ 6.4%	4.4% ▲ 6.9%	\$18.95 ▲ \$0.33
14	JUSTIN VINEYARD	 the Wonderful company	3.5% ▲ 4.1%	6.1% ▲ 4.6%	\$17.61 ▲ \$0.06
15	JOSH CELLARS	 DEUTSCHER FAMILY WINERY	6.8% ▲ 3.9%	7.4% ▲ 5.8%	\$11.47 ▲ \$0.27

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period. Minimum 1.0% BTG Menu Share

Channels with Highest Cabernet Sauvignon BTG Menu Share

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	52%	▼ 7.6%	\$14.38
	STEAK RESTAURANTS	2.5K	77%	▼ 1.5%	\$18.34
	GASTROPUBS	1.4K	72%	▼ 2.3%	\$12.95
	SEAFOOD RESTAURANTS	3.3K	65%	▼ 2.0%	\$14.24
	AMERICAN RESTAURANTS	9.4K	65%	▼ 5.7%	\$14.50
	ITALIAN RESTAURANTS	6.5K	62%	▼ 3.9%	\$14.89
	THAI RESTAURANTS	978	57%	▼ 4.6%	\$10.98
	MEDITERRANEAN RESTAURANTS	1.4K	55%	▼ 6.4%	\$14.59
	SUSHI RESTAURANTS	2.2K	52%	▼ 10.0%	\$11.93
BARS	ALL BARS	22.4K	48%	▼ 4.8%	\$13.04
	WINE-FOCUSED BARS	1.1K	67%	▼ 1.0%	\$16.23
	COCKTAIL-FOCUSED BARS	2.2K	55%	▼ 5.3%	\$15.49
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	67%	▲ 4.2%	\$17.09
	RESORTS	1.2K	69%	▲ 4.2%	\$16.64
NIGHTLIFE	ALL NIGHTLIFE	2.4K	44%	▼ 6.4%	\$14.33

For example: In the 12-month period ending September 30, 2026, 77% of independent Steak Restaurants with a wine menu featured at least one Cabernet Sauvignon BTG, the highest percentage of any Restaurant trade channel. The average Cabernet Sauvignon BTG price in this trade channel is \$18.34.

Channels with Fastest-Growing Menu Share (YoY)

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
HOTELS & RESORTS	RESORTS	1.2K	69%	▲ 4.2%	\$16.64

For example: Resorts are the fastest-growing trade channel among independent Hotels & Resorts for Cabernet Sauvignon BTG, increasing menu share by 4.2% YoY. In the 12-month period ending September 30, 2026, 69% of accounts in this trade channel offered Cabernet Sauvignon BTG, with an average price of \$16.64.

Note: Limited to the top half of trade channels based on number of accounts with wine on menu (at least 975 accounts)



KTCs with Highest Cabernet Sauvignon BTG Menu Share

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	52%	▼ 7.6%	\$14.38
	ELEVATED + FINE DINING STEAK RESTAURANTS	1.4K	82%	▼ 0.7%	\$20.48
	COCKTAIL-FOCUSED ELEVATED DINING	2.6K	74%	▼ 1.5%	\$16.05
	COCKTAIL-FOCUSED FINE DINING	3.1K	74%	▼ 2.3%	\$21.05
	COCKTAIL-FOCUSED MODERN FINE DINING	2.6K	73%	▼ 2.8%	\$21.22
	FINE DINING	4.4K	72%	▼ 1.8%	\$20.65
	MODERN FINE DINING	3.7K	71%	▼ 2.3%	\$20.90
	HIGH-ENERGY DINING	5.1K	70%	▼ 3.4%	\$16.23
	ELEVATED DINING	6.2K	69%	▼ 2.5%	\$15.34
	COCKTAIL-FOCUSED DINING	15.8K	69%	▼ 3.0%	\$16.06
	COCKTAIL-FOCUSED MULTICULTURAL DINING	2.0K	65%	▼ 4.3%	\$16.86
	CASUAL AMERICAN RESTAURANTS	5.9K	61%	▼ 6.9%	\$12.65
BARS	ALL BARS	22.4K	48%	▼ 4.8%	\$13.04
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	67%	▲ 4.2%	\$17.09
NIGHTLIFE	ALL NIGHTLIFE	2.4K	44%	▼ 6.4%	\$14.33

For example: In the 12-month period ending September 30, 2026, 82% of independent Elevated + Fine Dining Steak Restaurants with a wine menu featured at least one Cabernet Sauvignon BTG, the highest percentage of any Restaurant KTC. The average Cabernet Sauvignon BTG price in this KTC is \$20.48.

Note: Limited to the top half of KTCs based on number of accounts with wine on menu (at least 1394 accounts)

KTCs with Fastest-Growing Menu Share (YoY)

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
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No KTCs had a growing menu share of Cabernet Sauvignon year-over-year.



PINOT NOIR MENU INSIGHTS



 National

Accounts with Any Wine



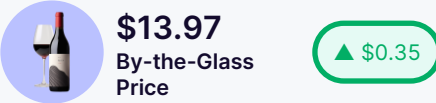
Accounts with Pinot Noir (Any Format)



Accounts with Pinot Noir By the Glass



Average Pinot Noir By-the-Glass Price



For example: Of independent accounts nationally with a wine menu, 57% list any Pinot Noir, while 46% specifically list Pinot Noir by the glass (BTG). The average Pinot Noir BTG price is \$13.97.

BTG RANK	PINOT NOIR BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	MEIOMI		9.2% ▼ 5.8%	11% ▼ 3.4%	\$13.05 ▲ \$0.08
2	LA CREMA		3.9% ▲ 0.7%	5.9% ▲ 0.4%	\$13.91 ▲ \$0.23
3	BELLE GLOS		3.8% ▲ 4.0%	9.3% ▲ 3.5%	\$19.08 ▲ \$0.20
4	MARK WEST		3.3% ▲ 4.3%	3.6% ▲ 7.0%	\$9.85 ▲ \$0.09
5	ELOUAN		2.6% ▼ 6.9%	3.0% ▼ 6.0%	\$13.70 ▲ \$0.36
6 ▲ 2	SEA SUN		2.2% ▲ 19%	2.3% ▲ 19%	\$11.85 ▲ \$0.14
7 ▼ 1	ANGELINE VINEYARDS		2.0% ▲ 2.7%	2.0% ▲ 2.2%	\$11.34 ▲ \$0.53
8 ▼ 1	BOEN		1.9% ▲ 1.0%	2.4% ▲ 0.9%	\$13.74 ▲ \$0.03
9	ERATH		1.9% ▲ 1.5%	2.7% ▲ 2.5%	\$14.12 ▲ \$0.44
10 ▲ 1	HAHN ESTATE		1.7% ▲ 10%	2.0% ▲ 3.9%	\$11.79 ▲ \$0.31
11 ▼ 1	J VINEYARDS		1.6% ▼ 2.1%	2.5% ▼ 3.4%	\$14.32 ▼ \$0.09
12 ▲ 1	BENTON LANE		1.3% ▲ 2.2%	1.9% ▲ 0.3%	\$16.61 ▲ \$0.31
13 ▲ 3	JOSH CELLARS		1.3% ▲ 22%	1.6% ▲ 25%	\$12.44 ▲ \$0.87
14 ▲ 3	BANSHEE		1.3% ▲ 24%	1.5% ▲ 14%	\$13.54 ▼ \$0.08
15 ▼ 3	KEN WRIGHT CELLARS		1.3% ▼ 0.6%	3.0% ▼ 1.0%	\$18.74 ▲ \$1.15

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period

 National

Accounts with Any Wine



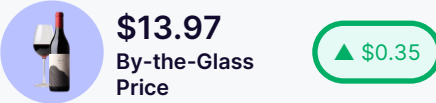
Accounts with Pinot Noir (Any Format)



Accounts with Pinot Noir By the Glass



Average Pinot Noir By-the-Glass Price



For example: Of independent accounts nationally with a wine menu, 57% list any Pinot Noir, while 46% specifically list Pinot Noir by the glass (BTG). The average Pinot Noir BTG price is \$13.97.

BTG Δ RANK	PINOT NOIR BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	SIDURI		1.2% ▲ 53%	2.3% ▲ 17%	\$16.84 ▼ \$0.30
2	A TO Z		1.0% ▲ 47%	1.3% ▲ 41%	\$13.86 ▲ \$0.28
3	BANSHEE		1.3% ▲ 24%	1.5% ▲ 14%	\$13.54 ▼ \$0.08
4	JOSH CELLARS		1.3% ▲ 22%	1.6% ▲ 25%	\$12.44 ▲ \$0.87
5	SEA SUN		2.2% ▲ 19%	2.3% ▲ 19%	\$11.85 ▲ \$0.14
6	HAHN ESTATE		1.7% ▲ 10%	2.0% ▲ 3.9%	\$11.79 ▲ \$0.31
7	MARK WEST		3.3% ▲ 4.3%	3.6% ▲ 7.0%	\$9.85 ▲ \$0.09
8	BELLE GLOS		3.8% ▲ 4.0%	9.3% ▲ 3.5%	\$19.08 ▲ \$0.20
9	ANGELINE VINEYARDS		2.0% ▲ 2.7%	2.0% ▲ 2.2%	\$11.34 ▲ \$0.53
10	BENTON LANE		1.3% ▲ 2.2%	1.9% ▲ 0.3%	\$16.61 ▲ \$0.31
11	ERATH		1.9% ▲ 1.5%	2.7% ▲ 2.5%	\$14.12 ▲ \$0.44
12	BOEN		1.9% ▲ 1.0%	2.4% ▲ 0.9%	\$13.74 ▲ \$0.03
13	ARGYLE		1.2% ▲ 0.9%	2.2% ▼ 0.5%	\$15.74 ▼ \$0.39
14	CARMEL ROAD		1.2% ▲ 0.8%	1.3% ▲ 1.9%	\$11.42 ▲ \$0.35
15	LA CREMA		3.9% ▲ 0.7%	5.9% ▲ 0.4%	\$13.91 ▲ \$0.23

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period. Minimum 1.0% BTG Menu Share

Channels with Highest Pinot Noir BTG Menu Share

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	48%	▼ 7.6%	\$14.01
	STEAK RESTAURANTS	2.5K	73%	▼ 0.9%	\$16.53
	GASTROPUBS	1.4K	69%	▼ 3.1%	\$12.63
	FRENCH RESTAURANTS	975	66%	▼ 9.5%	\$18.10
	AMERICAN RESTAURANTS	9.4K	62%	▼ 5.5%	\$14.08
	SEAFOOD RESTAURANTS	3.3K	61%	▼ 3.1%	\$14.10
	ITALIAN RESTAURANTS	6.5K	59%	▼ 3.6%	\$13.91
	MEDITERRANEAN RESTAURANTS	1.4K	52%	▼ 7.6%	\$14.73
	THAI RESTAURANTS	978	47%	▼ 5.3%	\$11.62
BARS	ALL BARS	22.4K	45%	▼ 5.1%	\$13.18
	WINE-FOCUSED BARS	1.1K	69%	▼ 0.7%	\$15.72
	COCKTAIL-FOCUSED BARS	2.2K	57%	▼ 4.1%	\$15.10
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	65%	▲ 5.1%	\$16.26
	RESORTS	1.2K	66%	▲ 7.1%	\$15.59
NIGHTLIFE	ALL NIGHTLIFE	2.4K	38%	▼ 5.6%	\$13.97

For example: In the 12-month period ending September 30, 2026, 73% of independent Steak Restaurants with a wine menu featured at least one Pinot Noir BTG, the highest percentage of any Restaurant trade channel. The average Pinot Noir BTG price in this trade channel is \$16.53.

Channels with Fastest-Growing Menu Share (YoY)

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
HOTELS & RESORTS	RESORTS	1.2K	66%	▲ 7.1%	\$15.59

For example: Resorts are the fastest-growing trade channel among independent Hotels & Resorts for Pinot Noir BTG, increasing menu share by 7.1% YoY. In the 12-month period ending September 30, 2026, 66% of accounts in this trade channel offered Pinot Noir BTG, with an average price of \$15.59.

Note: Limited to the top half of trade channels based on number of accounts with wine on menu (at least 975 accounts)



KTCs with Highest Pinot Noir BTG Menu Share

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	48%	▼ 7.6%	\$14.01
	ELEVATED + FINE DINING STEAK RESTAURANTS	1.4K	80%	▼ 0.3%	\$17.86
	COCKTAIL-FOCUSED FINE DINING	3.1K	77%	▼ 1.4%	\$18.85
	COCKTAIL-FOCUSED MODERN FINE DINING	2.6K	76%	▼ 1.7%	\$19.00
	FINE DINING	4.4K	75%	▼ 1.1%	\$18.67
	MODERN FINE DINING	3.7K	74%	▼ 1.4%	\$18.87
	COCKTAIL-FOCUSED ELEVATED DINING	2.6K	74%	▼ 1.9%	\$14.90
	COCKTAIL-FOCUSED DINING	15.8K	68%	▼ 3.0%	\$15.19
	HIGH-ENERGY DINING	5.1K	68%	▼ 3.5%	\$15.14
	ELEVATED DINING	6.2K	67%	▼ 2.6%	\$14.63
	COCKTAIL-FOCUSED MULTICULTURAL DINING	2.0K	60%	▼ 3.7%	\$15.40
	CASUAL ITALIAN RESTAURANTS	3.2K	57%	▼ 4.8%	\$12.41
BARS	ALL BARS	22.4K	45%	▼ 5.1%	\$13.18
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	65%	▲ 5.1%	\$16.26
NIGHTLIFE	ALL NIGHTLIFE	2.4K	38%	▼ 5.6%	\$13.97

For example: In the 12-month period ending September 30, 2026, 80% of independent Elevated + Fine Dining Steak Restaurants with a wine menu featured at least one Pinot Noir BTG, the highest percentage of any Restaurant KTC. The average Pinot Noir BTG price in this KTC is \$17.86.

Note: Limited to the top half of KTCs based on number of accounts with wine on menu (at least 1394 accounts)

KTCs with Fastest-Growing Menu Share (YoY)

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
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No KTCs had a growing menu share of Pinot Noir year-over-year.

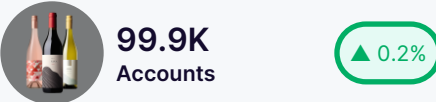


MERLOT MENU INSIGHTS



 National

Accounts with Any Wine



Accounts with Merlot (Any Format)



Accounts with Merlot By the Glass



Average Merlot By-the-Glass Price



For example: Of independent accounts nationally with a wine menu, 40% list any Merlot, while 27% specifically list Merlot by the glass (BTG). The average Merlot BTG price is \$11.40.

BTG RANK	MERLOT BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	DECOY	 DUCKHORN VINEYARDS	4.0% ▲ 23%	4.4% ▲ 19%	\$13.98 ▲ \$0.02
2	DUCKHORN VINEYARDS	 DUCKHORN VINEYARDS	2.9% ▼ 0.7%	11% ▲ 0.9%	\$20.12 ▲ \$1.21
3	J. LOHR	 J. LOHR VINEYARDS & WINES	2.8% ▲ 3.8%	2.8% ▲ 3.3%	\$11.56 ▲ \$0.05
4	14 HANDS	 STE MICHELLE WINE ESTATES	2.3% ▼ 7.9%	2.2% ▼ 6.4%	\$9.88 ▲ \$0.14
5 ▲ 2	JOSH CELLARS	 DEUTSCH FAMILY WINE & SPIRITS	2.0% ▲ 21%	1.9% ▲ 16%	\$11.26 ▲ \$0.37
6 ▼ 1	CANYON ROAD	 GALLO	2.0% ▲ 2.6%	1.8% ▼ 1.0%	\$8.11 ▲ \$0.05
7 ▲ 2	RODNEY STRONG VINEYARDS	 RODNEY STRONG	1.8% ▲ 17%	1.9% ▲ 4.4%	\$11.98 ▲ \$0.25
8 ▲ 3	CHATEAU STE. MICHELLE	 STE MICHELLE WINE ESTATES	1.8% ▲ 30%	2.2% ▲ 12%	\$13.72 ▲ \$0.88
9 ▼ 3	COLUMBIA CREST	 STE MICHELLE WINE ESTATES	1.7% ▼ 4.7%	1.6% ▼ 7.2%	\$10.73 ▲ \$0.42
10 ▼ 2	BOGLE VINEYARDS	 BOGLE FAMILY VINEYARDS	1.6% ▲ 6.0%	1.5% ▲ 2.6%	\$10.03 ▲ \$0.26
11 ▼ 1	KENDALL-JACKSON	 JACKSON FAMILY WINES	1.5% ▲ 2.4%	1.7% ▼ 3.5%	\$11.04 ▲ \$0.28
12 ▲ 2	WOODBIDGE BY ROBERT MONDAVI	 THE WINE GROUP	1.4% ▲ 13%	1.4% ▲ 11%	\$7.64 ▼ \$0.10
13	MARKHAM VINEYARDS	 KIRIN	1.3% ▲ 5.1%	2.6% ▲ 7.7%	\$15.56 ▼ \$0.15
14 ▼ 2	ST. FRANCIS	 ST. FRANCIS WINERY & VINEYARDS	1.3% ▲ 0.6%	1.9% ▲ 1.0%	\$14.83 ▲ \$0.94
15	MURPHY GOODE	 JACKSON FAMILY WINES	1.3% ▲ 9.0%	1.1% ▲ 6.9%	\$11.17 ▲ \$0.42

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period

 National

Accounts with Any Wine



Accounts with Merlot (Any Format)



Accounts with Merlot By the Glass



Average Merlot By-the-Glass Price



For example: Of independent accounts nationally with a wine menu, 40% list any Merlot, while 27% specifically list Merlot by the glass (BTG). The average Merlot BTG price is \$11.40.

BTG Δ RANK	MERLOT BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	FERRARI CARANO	 FOLEY FAMILY WINES & SPIRITS	1.3% ▲ 35%	1.9% ▲ 14%	\$16.42 ▲ \$0.09
2	CHATEAU STE. MICHELLE	 STE MICHELLE WINE ESTATES	1.8% ▲ 30%	2.2% ▲ 12%	\$13.72 ▲ \$0.88
3	DECOY	 DUCKHORN VINEYARDS	4.0% ▲ 23%	4.4% ▲ 19%	\$13.98 ▲ \$0.02
4	JOSH CELLARS	 DEUTSCH FAMILY WINES & SPIRITS	2.0% ▲ 21%	1.9% ▲ 16%	\$11.26 ▲ \$0.37
5	RODNEY STRONG VINEYARDS	 RODNEY STRONG	1.8% ▲ 17%	1.9% ▲ 4.4%	\$11.98 ▲ \$0.25
6	WOODBIDGE BY ROBERT MONDAVI	 THE WINE GROUP	1.4% ▲ 13%	1.4% ▲ 11%	\$7.64 ▼ \$0.10
7	ROBERT MONDAVI WINERY	 Constellation Brands	1.0% ▲ 13%	1.1% ▲ 4.0%	\$9.77 ▼ \$0.20
8	MURPHY GOODE	 Jackson FAMILY WINES	1.3% ▲ 9.0%	1.1% ▲ 6.9%	\$11.17 ▲ \$0.42
9	EMMOLO	 Wagner FAMILY OF WINE	1.2% ▲ 8.4%	3.3% ▲ 9.6%	\$19.25 ▲ \$0.81
10	BOGLE VINEYARDS	 BOGLE FAMILY VINEYARDS	1.6% ▲ 6.0%	1.5% ▲ 2.6%	\$10.03 ▲ \$0.26
11	MARKHAM VINEYARDS	 KIRIN	1.3% ▲ 5.1%	2.6% ▲ 7.7%	\$15.56 ▼ \$0.15
12	DRUMHELLER	 STE MICHELLE WINE ESTATES	1.2% ▲ 4.3%	1.0% ▼ 3.0%	\$10.28 ▲ \$0.13
13	SYCAMORE LANE	 TRINCHERO FAMILY WINE & SPIRITS	1.1% ▲ 4.1%	0.9% ▲ 1.1%	\$8.12 ▲ \$0.15
14	J. LOHR	 J. LOHR VINEYARDS & WINES	2.8% ▲ 3.8%	2.8% ▲ 3.3%	\$11.56 ▲ \$0.05
15	CANYON ROAD	 GALLO	2.0% ▲ 2.6%	1.8% ▼ 1.0%	\$8.11 ▲ \$0.05

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period. Minimum 1.0% BTG Menu Share

Channels with Highest Merlot BTG Menu Share

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	30%	▼ 13%	\$11.27
	STEAK RESTAURANTS	2.5K	57%	▼ 6.2%	\$13.69
	SEAFOOD RESTAURANTS	3.3K	41%	▼ 6.2%	\$11.31
	ITALIAN RESTAURANTS	6.5K	38%	▼ 7.6%	\$11.85
	THAI RESTAURANTS	978	38%	▼ 9.3%	\$9.61
	AMERICAN RESTAURANTS	9.4K	35%	▼ 11%	\$11.58
	GASTROPUBS	1.4K	31%	▼ 12%	\$10.81
	JAPANESE RESTAURANTS	3.8K	31%	▼ 16%	\$9.65
	MEDITERRANEAN RESTAURANTS	1.4K	31%	▼ 14%	\$11.71
BARS	ALL BARS	22.4K	23%	▼ 12%	\$11.03
	WINE-FOCUSED BARS	1.1K	36%	▼ 10%	\$13.99
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	37%	▼ 0.9%	\$13.64
	RESORTS	1.2K	47%	▲ 3.0%	\$13.50
NIGHTLIFE	ALL NIGHTLIFE	2.4K	22%	▼ 11%	\$11.84
MISCELLANEOUS	GOLF COURSES & COUNTRY CLUBS	1.0K	31%	▼ 13%	\$10.66

For example: In the 12-month period ending September 30, 2026, 57% of independent Steak Restaurants with a wine menu featured at least one Merlot BTG, the highest percentage of any Restaurant trade channel. The average Merlot BTG price in this trade channel is \$13.69.

Channels with Fastest-Growing Menu Share (YoY)

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
HOTELS & RESORTS	RESORTS	1.2K	47%	▲ 3.0%	\$13.50

For example: Resorts are the fastest-growing trade channel among independent Hotels & Resorts for Merlot BTG, increasing menu share by 3.0% YoY. In the 12-month period ending September 30, 2026, 47% of accounts in this trade channel offered Merlot BTG, with an average price of \$13.50.

Note: Limited to the top half of trade channels based on number of accounts with wine on menu (at least 975 accounts)



KTCs with Highest Merlot BTG Menu Share

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	30%	▼ 13%	\$11.27
	ELEVATED + FINE DINING STEAK RESTAURANTS	1.4K	59%	▼ 5.5%	\$15.28
	CASUAL ITALIAN RESTAURANTS	3.2K	43%	▼ 8.3%	\$10.82
	ELEVATED DINING	6.2K	38%	▼ 7.7%	\$12.82
	HIGH-ENERGY DINING	5.1K	38%	▼ 8.5%	\$12.75
	FINE DINING	4.4K	37%	▼ 8.2%	\$15.84
	COCKTAIL-FOCUSED FINE DINING	3.1K	37%	▼ 7.9%	\$16.17
	COCKTAIL-FOCUSED ELEVATED DINING	2.6K	36%	▼ 6.4%	\$13.04
	COCKTAIL-FOCUSED MULTICULTURAL DINING	2.0K	35%	▼ 4.9%	\$13.56
	CASUAL AMERICAN RESTAURANTS	5.9K	35%	▼ 11%	\$10.51
	MODERN FINE DINING	3.7K	34%	▼ 9.2%	\$16.13
	COCKTAIL-FOCUSED MODERN FINE DINING	2.6K	34%	▼ 8.8%	\$16.43
BARS	ALL BARS	22.4K	23%	▼ 12%	\$11.03
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	37%	▼ 0.9%	\$13.64
NIGHTLIFE	ALL NIGHTLIFE	2.4K	22%	▼ 11%	\$11.84

For example: In the 12-month period ending September 30, 2026, 59% of independent Elevated + Fine Dining Steak Restaurants with a wine menu featured at least one Merlot BTG, the highest percentage of any Restaurant KTC. The average Merlot BTG price in this KTC is \$15.28.

Note: Limited to the top half of KTCs based on number of accounts with wine on menu (at least 1394 accounts)

KTCs with Fastest-Growing Menu Share (YoY)

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
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No KTCs had a growing menu share of Merlot year-over-year.



MALBEC

MENU INSIGHTS



 National

Accounts with Any Wine



Accounts with Malbec (Any Format)



Accounts with Malbec By the Glass



Average Malbec By-the-Glass Price



For example: Of independent accounts nationally with a wine menu, 32% list any Malbec, while 25% specifically list Malbec by the glass (BTG). The average Malbec BTG price is \$12.22.

BTG RANK	MALBEC BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)		BOTTLE + BTG MENU SHARE (YoY CHANGE)		AVERAGE BTG PRICE (YoY CHANGE)	
1	TERRAZAS DE LOS ANDES	LVMH	5.7%	▲ 4.2%	6.4%	▲ 1.8%	\$12.53	▲ \$0.19
2	ALAMOS	GALLO	5.3%	▼ 0.3%	5.6%	▲ 1.8%	\$10.43	▲ \$0.27
3	CATENA	WINEBOW	4.8%	▼ 4.5%	6.5%	▼ 10%	\$13.25	▲ \$0.22
4	TRIVENTO	CONCHAY TORO	3.7%	▲ 3.2%	4.1%	▲ 1.5%	\$11.18	▲ \$0.07
5	TRAPICHE	WILDMAN	3.0%	▼ 9.0%	3.2%	▼ 9.1%	\$10.73	▲ \$0.23
6	DONA PAULA	Santa Rita	2.5%	▼ 1.6%	2.5%	▼ 3.1%	\$10.71	▲ \$0.24
7 ▲1	ALTA VISTA	KOBRAND	2.3%	▲ 12%	2.6%	▲ 13%	\$12.31	▲ \$0.55
8 ▼1	PIATTELLI VINEYARDS	PIATTELLI VINEYARDS	2.2%	▲ 5.8%	2.5%	▲ 7.7%	\$12.43	▲ \$0.13
9	SANTA JULIA	FAMILIA ZUCCARDI	2.0%	▲ 2.2%	1.9%	▼ 3.8%	\$11.21	▲ \$0.25
10 ▲1	ANTIGAL	CORK ALLIANCE INC.	1.9%	▲ 18%	2.2%	▲ 15%	\$12.82	▼ \$0.08
11 ▼1	LA POSTA	VINE CONNECTIONS	1.6%	▼ 12%	1.8%	▼ 11%	\$12.03	▼ \$0.13
12 ▲1	DOMAINE BOUSQUET	DOMAINE BOUSQUET	1.5%	▲ 3.2%	1.6%	▲ 5.7%	\$11.60	▲ \$0.30
13 ▼1	PORTILLO	PALM BAY	1.5%	▼ 2.9%	1.4%	▼ 2.9%	\$10.61	▼ \$0.07
14 ▲1	GASCON	GALLO	1.5%	▲ 6.7%	1.5%	▲ 8.5%	\$11.41	▲ \$0.40
15 ▲5	GRAFFIGNA	vspt	1.4%	▲ 20%	1.5%	▲ 17%	\$11.47	▲ \$0.06

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period

 National

Accounts with Any Wine



Accounts with Malbec (Any Format)



Accounts with Malbec By the Glass



Average Malbec By-the-Glass Price



For example: Of independent accounts nationally with a wine menu, 32% list any Malbec, while 25% specifically list Malbec by the glass (BTG). The average Malbec BTG price is \$12.22.

BTG Δ RANK	MALBEC BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	GRAFFIGNA		1.4% ▲ 20%	1.5% ▲ 17%	\$11.47 ▲ \$0.06
2	ANTIGAL		1.9% ▲ 18%	2.2% ▲ 15%	\$12.82 ▼ \$0.08
3	THE SHOW		1.2% ▲ 13%	1.1% ▲ 12%	\$10.87 ▲ \$0.08
4	ALTA VISTA		2.3% ▲ 12%	2.6% ▲ 13%	\$12.31 ▲ \$0.55
5	GASCON		1.5% ▲ 6.7%	1.5% ▲ 8.5%	\$11.41 ▲ \$0.40
6	DON MIGUEL GASCON		1.2% ▲ 6.4%	1.5% ▲ 2.1%	\$11.89 ▲ \$0.50
7	PIATTELLI VINEYARDS		2.2% ▲ 5.8%	2.5% ▲ 7.7%	\$12.43 ▲ \$0.13
8	NIETO SENETINER		1.0% ▲ 5.6%	1.1% ▲ 16%	\$12.08 ▲ \$0.25
9	DISENO		1.2% ▲ 5.4%	1.1% ▼ 2.3%	\$10.58 ▲ \$0.49
10	TERRAZAS DE LOS ANDES		5.7% ▲ 4.2%	6.4% ▲ 1.8%	\$12.53 ▲ \$0.19
11	TRIVENTO		3.7% ▲ 3.2%	4.1% ▲ 1.5%	\$11.18 ▲ \$0.07
12	DOMAINE BOUSQUET		1.5% ▲ 3.2%	1.6% ▲ 5.7%	\$11.60 ▲ \$0.30
13	SANTA JULIA		2.0% ▲ 2.2%	1.9% ▼ 3.8%	\$11.21 ▲ \$0.25
14	ALTOS LAS HORMIGAS		1.1% ▲ 1.7%	1.5% ▲ 3.2%	\$12.57 ▲ \$0.46
15	TILIA		1.0% ▲ 0.6%	1.0% ▲ 1.9%	\$10.12 ▲ \$0.32

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period. Minimum 1.0% BTG Menu Share

Channels with Highest Malbec BTG Menu Share

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	27%	▼ 9.7%	\$12.17
	STEAK RESTAURANTS	2.5K	57%	▼ 0.7%	\$13.60
	GASTROPUBS	1.4K	41%	▼ 4.6%	\$11.24
	AMERICAN RESTAURANTS	9.4K	38%	▼ 8.1%	\$11.92
	FRENCH RESTAURANTS	975	35%	▼ 13%	\$14.01
	SEAFOOD RESTAURANTS	3.3K	35%	▼ 5.7%	\$11.94
	ITALIAN RESTAURANTS	6.5K	33%	▼ 4.0%	\$12.29
	LATIN AMERICAN RESTAURANTS	1.2K	32%	▼ 15%	\$12.67
	MEDITERRANEAN RESTAURANTS	1.4K	31%	▼ 12%	\$12.19
BARS	ALL BARS	22.4K	22%	▼ 9.5%	\$11.77
	WINE-FOCUSED BARS	1.1K	49%	▼ 1.2%	\$12.92
	COCKTAIL-FOCUSED BARS	2.2K	26%	▼ 12%	\$13.48
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	35%	▲ 5.9%	\$13.99
	RESORTS	1.2K	38%	▲ 13%	\$13.86
NIGHTLIFE	ALL NIGHTLIFE	2.4K	20%	▼ 6.2%	\$12.76

For example: In the 12-month period ending September 30, 2026, 57% of independent Steak Restaurants with a wine menu featured at least one Malbec BTG, the highest percentage of any Restaurant trade channel. The average Malbec BTG price in this trade channel is \$13.60.

Channels with Fastest-Growing Menu Share (YoY)

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
HOTELS & RESORTS	RESORTS	1.2K	38%	▲ 13%	\$13.86

For example: Resorts are the fastest-growing trade channel among independent Hotels & Resorts for Malbec BTG, increasing menu share by 13% YoY. In the 12-month period ending September 30, 2026, 38% of accounts in this trade channel offered Malbec BTG, with an average price of \$13.86.

Note: Limited to the top half of trade channels based on number of accounts with wine on menu (at least 975 accounts)



KTCs with Highest Malbec BTG Menu Share

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	27%	▼ 9.7%	\$12.17
	ELEVATED + FINE DINING STEAK RESTAURANTS	1.4K	65%	▼ 0.2%	\$14.49
	COCKTAIL-FOCUSED ELEVATED DINING	2.6K	50%	▼ 4.3%	\$13.11
	COCKTAIL-FOCUSED FINE DINING	3.1K	47%	▼ 2.8%	\$14.89
	COCKTAIL-FOCUSED MULTICULTURAL DINING	2.0K	46%	▼ 4.2%	\$13.51
	HIGH-ENERGY DINING	5.1K	45%	▼ 5.7%	\$12.80
	FINE DINING	4.4K	45%	▼ 2.5%	\$14.73
	COCKTAIL-FOCUSED MODERN FINE DINING	2.6K	45%	▼ 3.5%	\$14.97
	MODERN FINE DINING	3.7K	43%	▼ 3.0%	\$14.82
	COCKTAIL-FOCUSED DINING	15.8K	43%	▼ 5.7%	\$12.78
	ELEVATED DINING	6.2K	43%	▼ 6.8%	\$12.77
	CASUAL AMERICAN RESTAURANTS	5.9K	35%	▼ 8.4%	\$11.11
BARS	ALL BARS	22.4K	22%	▼ 9.5%	\$11.77
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	35%	▲ 5.9%	\$13.99
NIGHTLIFE	ALL NIGHTLIFE	2.4K	20%	▼ 6.2%	\$12.76

For example: In the 12-month period ending September 30, 2026, 65% of independent Elevated + Fine Dining Steak Restaurants with a wine menu featured at least one Malbec BTG, the highest percentage of any Restaurant KTC. The average Malbec BTG price in this KTC is \$14.49.

Note: Limited to the top half of KTCs based on number of accounts with wine on menu (at least 1394 accounts)

KTCs with Fastest-Growing Menu Share (YoY)

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
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No KTCs had a growing menu share of Malbec year-over-year.

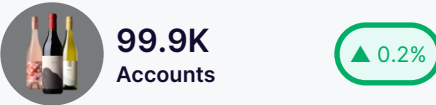


RED BLEND MENU INSIGHTS



 National

Accounts with Any Wine



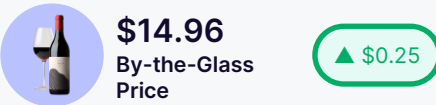
Accounts with Red Blend (Any Format)



Accounts with Red Blend By the Glass



Average Red Blend By-the-Glass Price



For example: Of independent accounts nationally with a wine menu, 48% list any Red Blend, while 35% specifically list Red Blend by the glass (BTG). The average Red Blend BTG price is \$14.96.

BTG RANK	RED BLEND BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	THE PRISONER	 Constellation Brands	4.5% ▲ 8.7%	11% ▲ 7.2%	\$20.21 ▲ \$0.31
2	CONUNDRUM	 Wagner FAMILY OF WINE	3.9% ▲ 26%	3.9% ▲ 23%	\$11.97 ▲ \$0.40
3	DAOU VINEYARDS	 TREASURY WINE ESTATES	2.3% ▲ 5.8%	3.5% ▲ 0.6%	\$14.68 ▼ \$0.08
4	ORIN SWIFT	 GALLO	1.9% ▲ 3.0%	7.5% ▲ 3.9%	\$21.88 ▲ \$0.27
5 ▲1	APOTHIC	 GALLO	1.7% ▲ 14%	1.9% ▲ 15%	\$9.87 ▲ \$0.49
6 ▼1	CAYMUS VINEYARDS	 Wagner FAMILY OF WINE	1.5% ▼ 5.8%	2.1% ▲ 0.1%	\$14.95 ▲ \$0.48
7 ▲1	ALLEGRIINI	 GALLO	1.2% ▼ 1.2%	3.8% ▲ 6.2%	\$16.22 ▲ \$1.33
8 ▲2	MENAGE A TROIS	 TRINCHERO FAMILY WINE AND SPIRITS	1.0% ▲ 2.0%	1.1% ▲ 8.2%	\$9.39 ▲ \$0.05
9 ▼2	19 CRIMES	 TREASURY WINE ESTATES	1.0% ▼ 19%	1.1% ▼ 15%	\$9.50 ▲ \$0.04
10 ▲17	UNSHACKLED	 Constellation Brands	1.0% ▲ 67%	1.1% ▲ 49%	\$14.29 ▲ \$0.05
11 ▲2	BRANCAIA	 GALLO	1.0% ▲ 19%	1.8% ▲ 8.6%	\$15.68 ▲ \$0.15
12 ▼3	CASTELLO BANFI	 BANFI SINCE 1890 FINE WINES & SPIRITS MERCHANTS	1.0% ▼ 2.7%	2.4% ▲ 4.4%	\$14.56 ▲ \$1.25
13 ▲3	VILLA ANTINORI	 ANTINORI	0.9% ▲ 9.4%	1.3% ▲ 6.8%	\$16.34 ▲ \$0.55
14 ▲4	THE PESSIMIST	 TREASURY WINE ESTATES	0.9% ▲ 18%	1.0% ▲ 15%	\$14.30 ▼ \$0.04
15	MASI	 HERITA MARZOTTO WINE ESTATES	0.8% ▲ 6.2%	3.8% ▲ 4.7%	\$15.93 ▲ \$1.37

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period

 National

Accounts with Any Wine



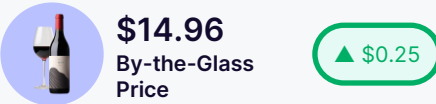
Accounts with Red Blend (Any Format)



Accounts with Red Blend By the Glass



Average Red Blend By-the-Glass Price



For example: Of independent accounts nationally with a wine menu, 48% list any Red Blend, while 35% specifically list Red Blend by the glass (BTG). The average Red Blend BTG price is \$14.96.

BTG Δ RANK	RED BLEND BRAND	SUPPLIER	BY-THE-GLASS MENU SHARE (YoY CHANGE)	BOTTLE + BTG MENU SHARE (YoY CHANGE)	AVERAGE BTG PRICE (YoY CHANGE)
1	UNSHACKLED	 Constellation Brands	1.0% ▲ 67%	1.1% ▲ 49%	\$14.29 ▲ \$0.05
2	CONUNDRUM	 Wagner FAMILY of WINE	3.9% ▲ 26%	3.9% ▲ 23%	\$11.97 ▲ \$0.40
3	BRANCAIA	 GALLO	1.0% ▲ 19%	1.8% ▲ 8.6%	\$15.68 ▲ \$0.15
4	APOTHIC	 GALLO	1.7% ▲ 14%	1.9% ▲ 15%	\$9.87 ▲ \$0.49
5	THE PRISONER	 Constellation Brands	4.5% ▲ 8.7%	11% ▲ 7.2%	\$20.21 ▲ \$0.31
6	DAOU VINEYARDS	 TREASURY WINE ESTATES	2.3% ▲ 5.8%	3.5% ▲ 0.6%	\$14.68 ▼ \$0.08
7	ORIN SWIFT	 GALLO	1.9% ▲ 3.0%	7.5% ▲ 3.9%	\$21.88 ▲ \$0.27
8	MENAGE A TROIS	 TRINCHERO FAMILY WINE AND SPIRITS	1.0% ▲ 2.0%	1.1% ▲ 8.2%	\$9.39 ▲ \$0.05
9	ALLEGRIINI	 GALLO	1.2% ▼ 1.2%	3.8% ▲ 6.2%	\$16.22 ▲ \$1.33
10	CASTELLO BANFI	 BANFI SINCE 1917 FINE WINES & SPIRITS MERCHANTS	1.0% ▼ 2.7%	2.4% ▲ 4.4%	\$14.56 ▲ \$1.25
11	CAYMUS VINEYARDS	 Wagner FAMILY of WINE	1.5% ▼ 5.8%	2.1% ▲ 0.1%	\$14.95 ▲ \$0.48
12	19 CRIMES	 TREASURY WINE ESTATES	1.0% ▼ 19%	1.1% ▼ 15%	\$9.50 ▲ \$0.04

Menu presence at any time during the 12-month period ending September 30, 2026; changes are compared to the previous 12-month period. Minimum 1.0% BTG Menu Share

Channels with Highest Red Blend BTG Menu Share

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	38%	▼ 10%	\$15.08
	FRENCH RESTAURANTS	975	65%	▼ 11%	\$17.33
	STEAK RESTAURANTS	2.5K	62%	▼ 2.4%	\$18.32
	ITALIAN RESTAURANTS	6.5K	56%	▼ 5.3%	\$16.13
	GASTROPUBS	1.4K	49%	▼ 1.1%	\$13.09
	AMERICAN RESTAURANTS	9.4K	48%	▼ 5.8%	\$14.50
	MEDITERRANEAN RESTAURANTS	1.4K	47%	▼ 12%	\$14.79
	SEAFOOD RESTAURANTS	3.3K	43%	▼ 2.4%	\$14.69
BARS	ALL BARS	22.4K	33%	▼ 5.5%	\$13.81
	WINE-FOCUSED BARS	1.1K	69%	▼ 1.1%	\$15.31
	COCKTAIL-FOCUSED BARS	2.2K	44%	▼ 1.6%	\$15.80
	BREW PUBS	1.6K	34%	▼ 1.7%	\$10.78
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	48%	▲ 12%	\$17.47
	RESORTS	1.2K	48%	▲ 19%	\$16.34
NIGHTLIFE	ALL NIGHTLIFE	2.4K	26%	▼ 4.8%	\$15.61

For example: In the 12-month period ending September 30, 2026, 65% of independent French Restaurants with a wine menu featured at least one Red Blend BTG, the highest percentage of any Restaurant trade channel. The average Red Blend BTG price in this trade channel is \$17.33.

Channels with Fastest-Growing Menu Share (YoY)

CHANNEL	TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
HOTELS & RESORTS	RESORTS	1.2K	48%	▲ 19%	\$16.34
MISCELLANEOUS	GOLF COURSES & COUNTRY CLUBS	1.0K	33%	▲ 4.7%	\$13.55

For example: Resorts are the fastest-growing trade channel among independent Hotels & Resorts for Red Blend BTG, increasing menu share by 19% YoY. In the 12-month period ending September 30, 2026, 48% of accounts in this trade channel offered Red Blend BTG, with an average price of \$16.34.

Note: Limited to the top half of trade channels based on number of accounts with wine on menu (at least 975 accounts)



KTCs with Highest Red Blend BTG Menu Share

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
RESTAURANTS	ALL RESTAURANTS	62.0K	38%	▼ 10%	\$15.08
	COCKTAIL-FOCUSED MODERN FINE DINING	2.6K	72%	▼ 2.2%	\$19.79
	COCKTAIL-FOCUSED FINE DINING	3.1K	72%	▼ 2.3%	\$19.59
	ELEVATED + FINE DINING STEAK RESTAURANTS	1.4K	71%	▼ 1.3%	\$19.84
	FINE DINING	4.4K	68%	▼ 1.9%	\$19.76
	MODERN FINE DINING	3.7K	68%	▼ 2.0%	\$19.92
	COCKTAIL-FOCUSED ELEVATED DINING	2.6K	64%	▼ 1.7%	\$15.59
	HIGH-ENERGY DINING	5.1K	56%	▼ 5.6%	\$16.52
	COCKTAIL-FOCUSED DINING	15.8K	55%	▼ 4.2%	\$16.11
	ELEVATED DINING	6.2K	55%	▼ 3.7%	\$15.55
	CASUAL ITALIAN RESTAURANTS	3.2K	50%	▼ 8.4%	\$13.54
	COCKTAIL-FOCUSED MULTICULTURAL DINING	2.0K	44%	▼ 8.5%	\$17.55
BARS	ALL BARS	22.4K	33%	▼ 5.5%	\$13.81
HOTELS & RESORTS	ALL HOTELS & RESORTS	4.2K	48%	▲ 12%	\$17.47
NIGHTLIFE	ALL NIGHTLIFE	2.4K	26%	▼ 4.8%	\$15.61

For example: In the 12-month period ending September 30, 2026, 72% of independent Cocktail-Focused Modern Fine Dining accounts with a wine menu featured at least one Red Blend BTG, the highest percentage of any Restaurant KTC. The average Red Blend BTG price in this KTC is \$19.79.

Note: Limited to the top half of KTCs based on number of accounts with wine on menu (at least 1394 accounts)

KTCs with Fastest-Growing Menu Share (YoY)

CHANNEL	KEY TRADE CHANNEL	TOTAL ACCTS	BTG MENU SHARE	YOY %Δ	AVG BTG PRICE
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No KTCs had a growing menu share of Red Blend year-over-year.





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