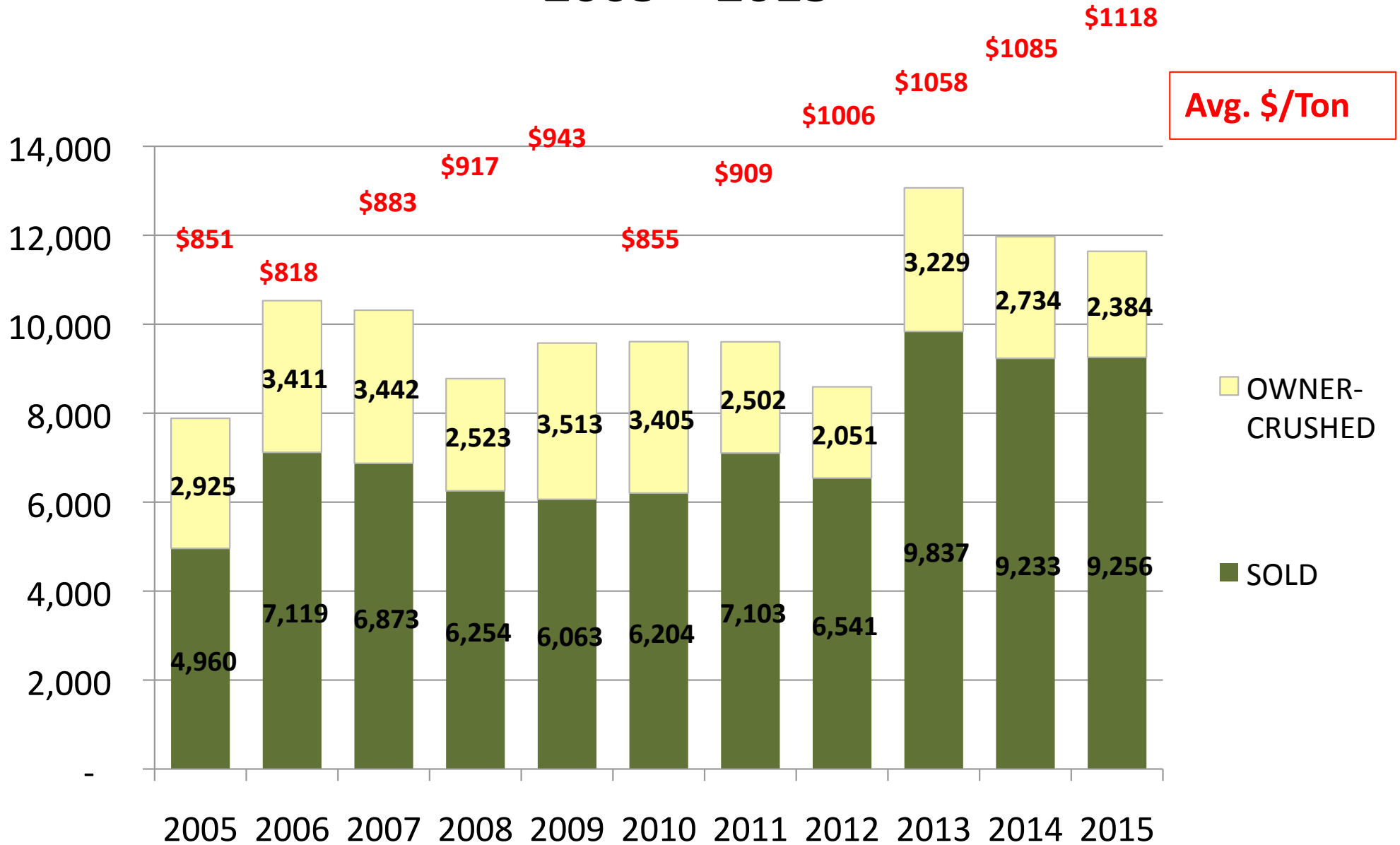


Sauvignon Blanc



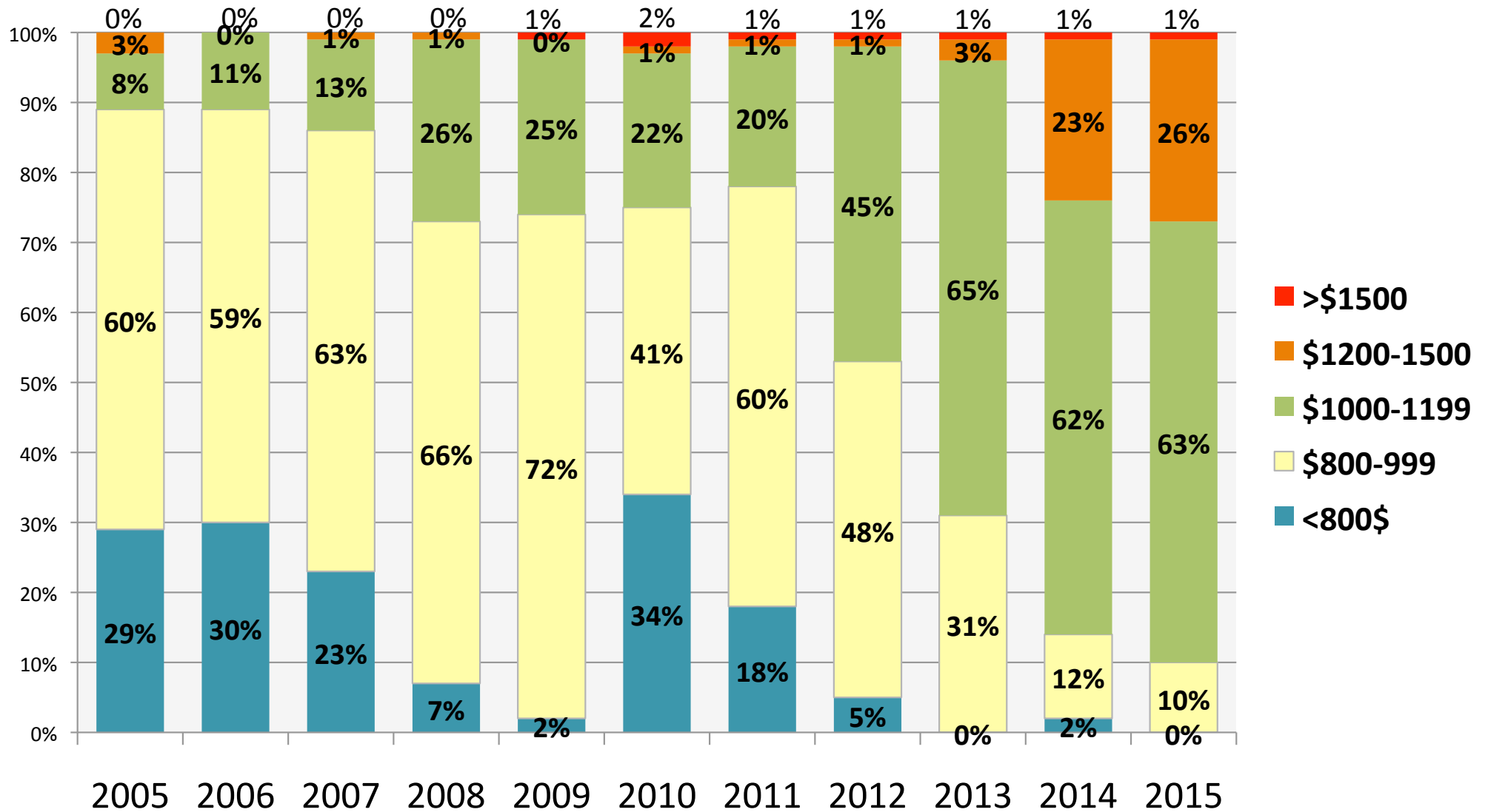
Christian Miller
Lake County MOMENTUM
April 6, 2016

Lake County Sauvignon Blanc Crush & Price 2005 – 2015



Lake County Sauvignon Blanc: Volume by Price

2005-2014



Winemakers/Grape Buyer Survey 2014: “Please rate the typical quality of Lake County grapes by variety, compared to other coastal appellations”

Variety	Lake County is substantially better	Lake County is slightly better	Lake County is about average	Variable - both better and worse	Lake County is slightly worse	Lake County is substantially worse
Cabernet Sauvignon	14%	39%	32%	9%	5%	2%
Merlot	3%	18%	42%	30%	6%	0%
Zinfandel	3%	28%	36%	26%	5%	3%
Sauvignon Blanc	23%	47%	28%	2%	0%	0%

NOTE: 59% agreed and 13% Strongly Agreed that “Lake County has developed a distinct style of Sauvignon Blanc.”

Scanned Sales of Sauvignon Blanc

Volume Share		Wine	Volume	Volume % Change vs YrAgo	Avg Price/ 750 ML
Share of Table Wine	Share of Sauv Blanc				
5.0%	100%	ALL Sauv Blanc	5,886,595	10.4%	\$9.29
2.6%	51%	CA Sauv Blanc	2,987,854	8.6%	\$8.50
0.1%	3%	Napa Sauv Blanc	160,213	8.2%	\$16.35
0.1%	1%	Lake Cty Sauv Blanc	58,730	6.0%	\$9.94
1.8%	35%	New Zealand	2,073,772	16.1%	\$11.20
0.4%	7%	Chilean	424,415	-0.4%	\$6.36
0%	0.5%	South African	28,616	-3.2%	\$8.35
0%	1%	French	51,452	Flat	\$11.70
0%	0.3%	Sancerre	18,106	19.9%	\$22.24
0%	0.1%	White Bordeaux	8,352	-5.7%	\$11.58

Leading Sauvignon Blancs \$12+

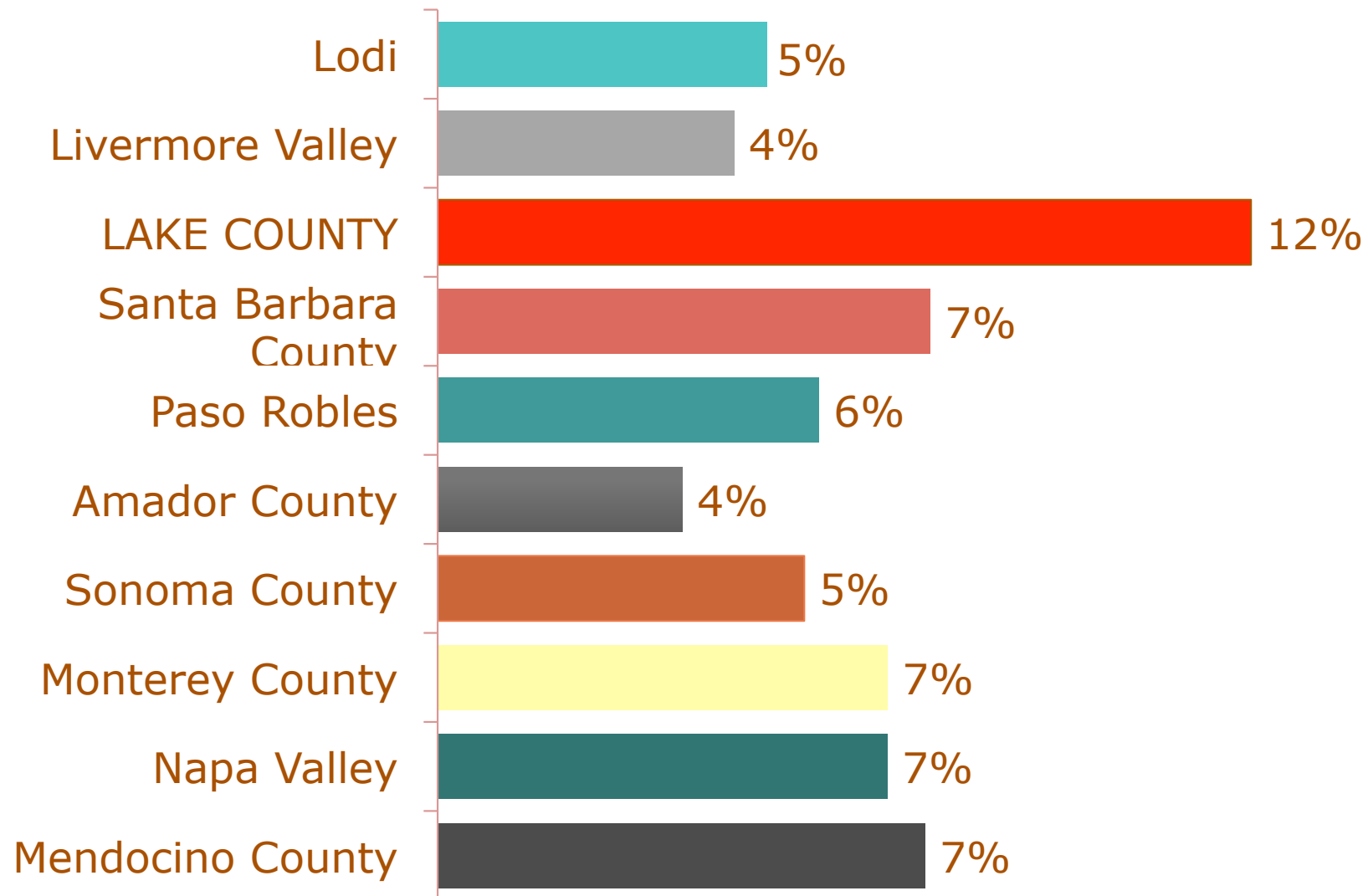
- **On premise:** Cakebread, Duckhorn, Frog's Leap, Ferrari-Carano, St. Supery, Robert Mondavi, Honig, Merryvale, Matanzas Creek, Cupcake, Joel Gott, J. Lohr, Seaglass, Kelly Fleming, Rodney Strong
- **Scan Retail Off-premise (Nielsen):** Simi, Rodney Strong, Honig, Bonterra, Groth, Coppola, Charles Krug, Hanna, Hess, St. Supery, Napa Cellars, Silverado, Guenoc, Benziger, Matanzas Creek, Duckhorn, Frogs leap, Provenance, Beringer
- **Regions**
 - Chile: Coastal vs. Central
 - Loire: Sancerre, Pouilly-Fumé, Reuilly/Quincy/Menetou-Salon, Touraine, Loire
 - Bordeaux: Bordeaux, Entre-deux-mers, Graves, Pessac
 - Northeast Italy: Alto Adige, Friuli
 - South Africa
 - New Zealand
 - Australia

Consumption of Leading White Varieties

Variety	"Currently Drink" (all wine consumers)*	High Frequency Consumers**	
		Drink Weekly	Drink Monthly
Sauvignon Blanc	24%	15%	19%
Pinot Grigio	38%	10%	14%
Riesling	30%	6%	14%
Chardonnay	42%	19%	20%

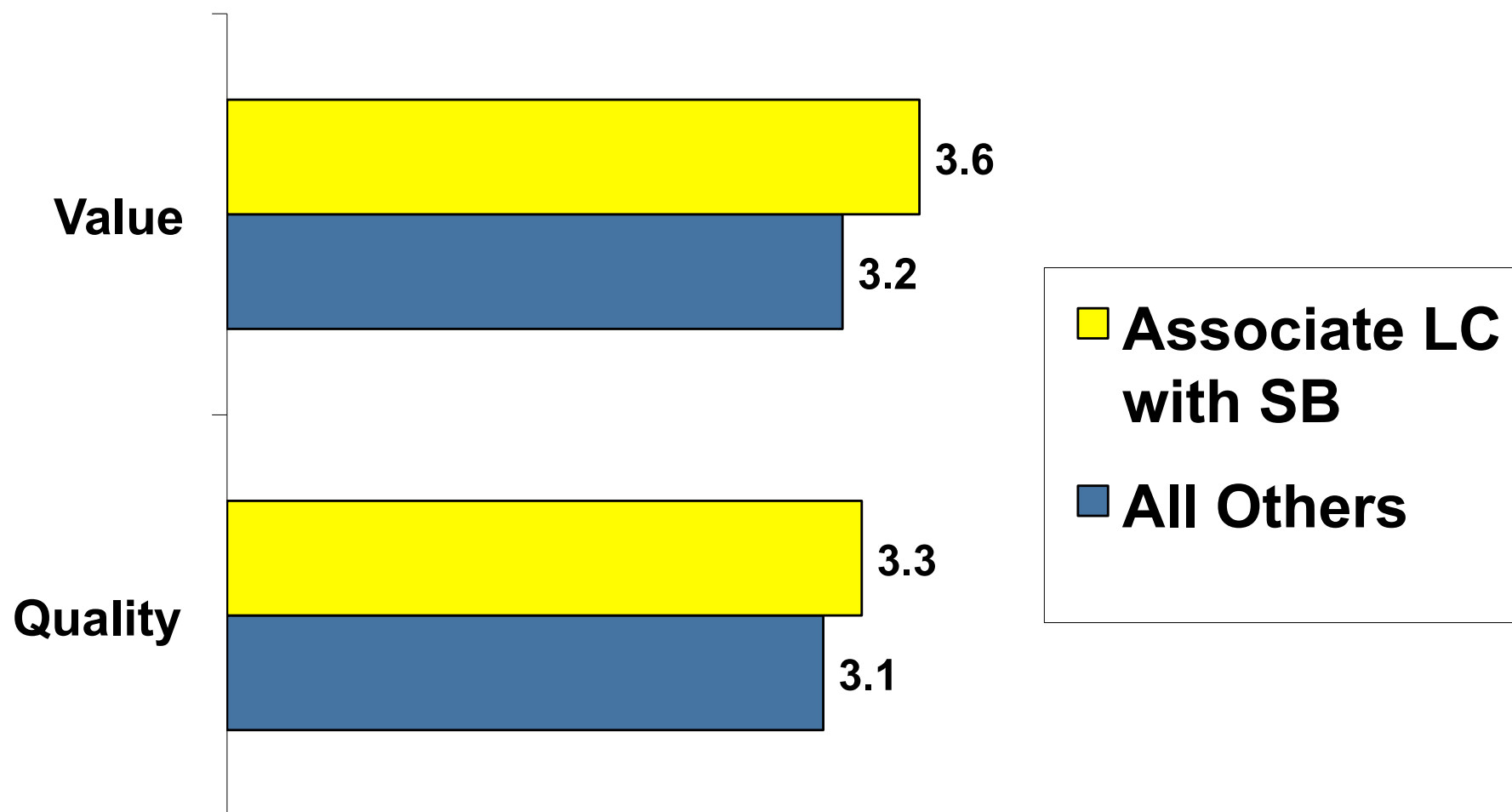
* Wine Market Council June 2015 , **Wine Opinions 2015 High Frequency Consumers (drink wine 2+ times/week)

% Associating Sauvignon Blanc with each Region/AVA



Quality & Value Ratings of Lake County Wines, by Sauvignon Blanc Association

Average rating Lake County on 5-point scale
(1=poor...5=Excellent)



So let's discuss Sauvignon Blanc...



cmm@fullglassresearch.com



www.fullglassresearch.com



[@CMMwine](https://twitter.com/CMMwine)