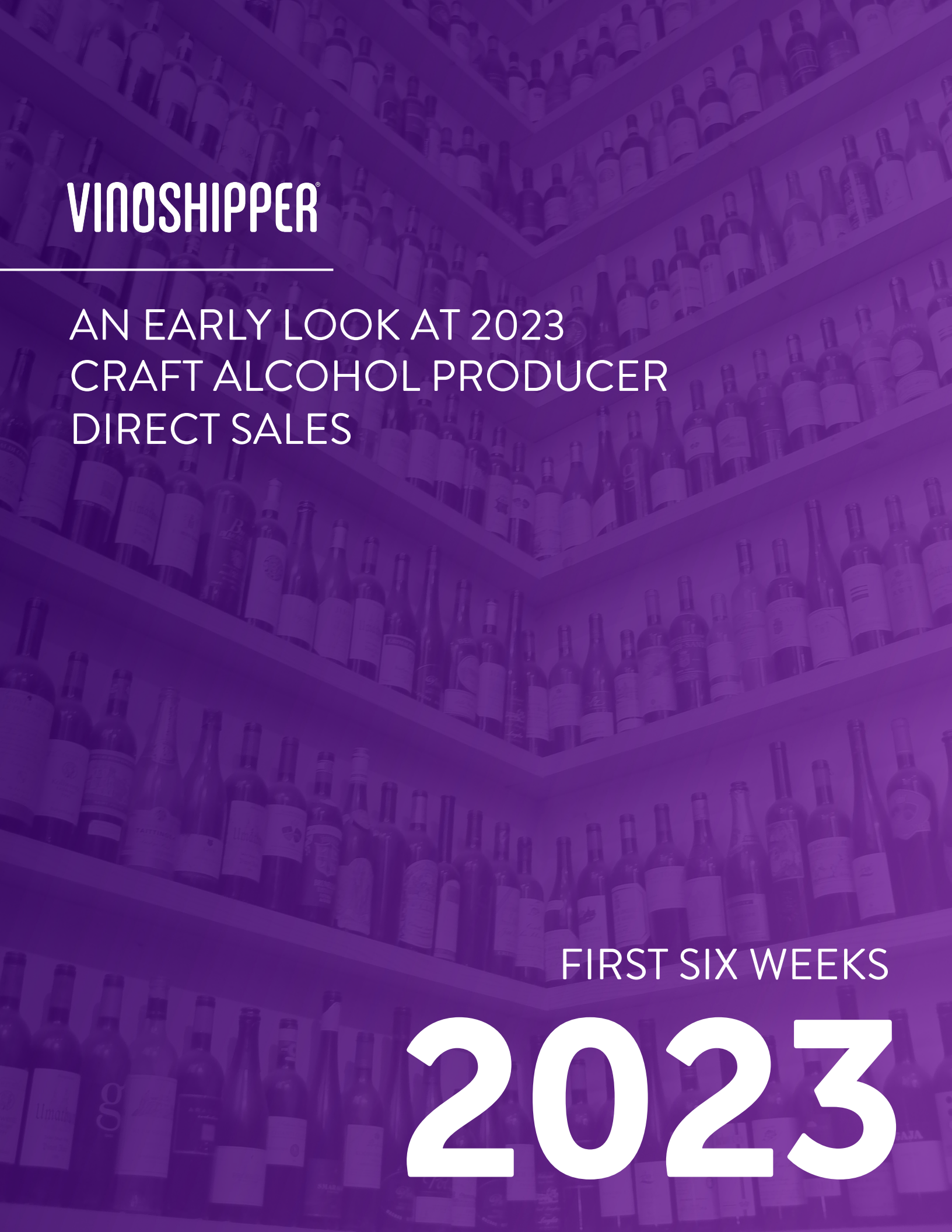


VINOSHIPPER®

AN EARLY LOOK AT 2023 CRAFT ALCOHOL PRODUCER DIRECT SALES

FIRST SIX WEEKS

2023

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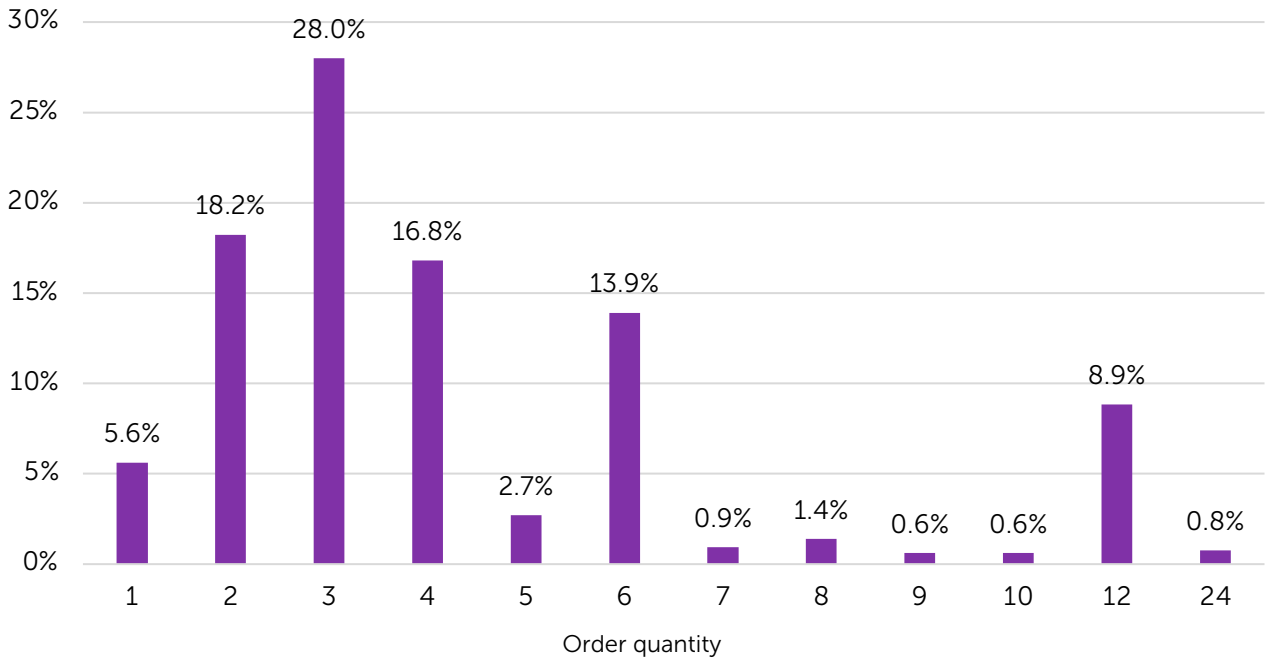
SUMMARY

2023 is off to an exciting start with direct sales being made across the United States. Here is a look into what is happening so far in 2023.

- Consumers are showing a preference for purchasing multiple bottles of wine online, with three 750ml bottles being the most popular order.
- The most popular order format for consumers of canned cider is a single 12-pack of 12oz cans.
- Pinot Noir is the most purchased varietal by value.
- The average order value for Generation-Z has increased by $30 in two years.
- Generation-X, Boomers and Millennials, account for 95% of the total industry spend.
- California is the largest seller of alcohol direct-to-consumer.

ORDER SIZE

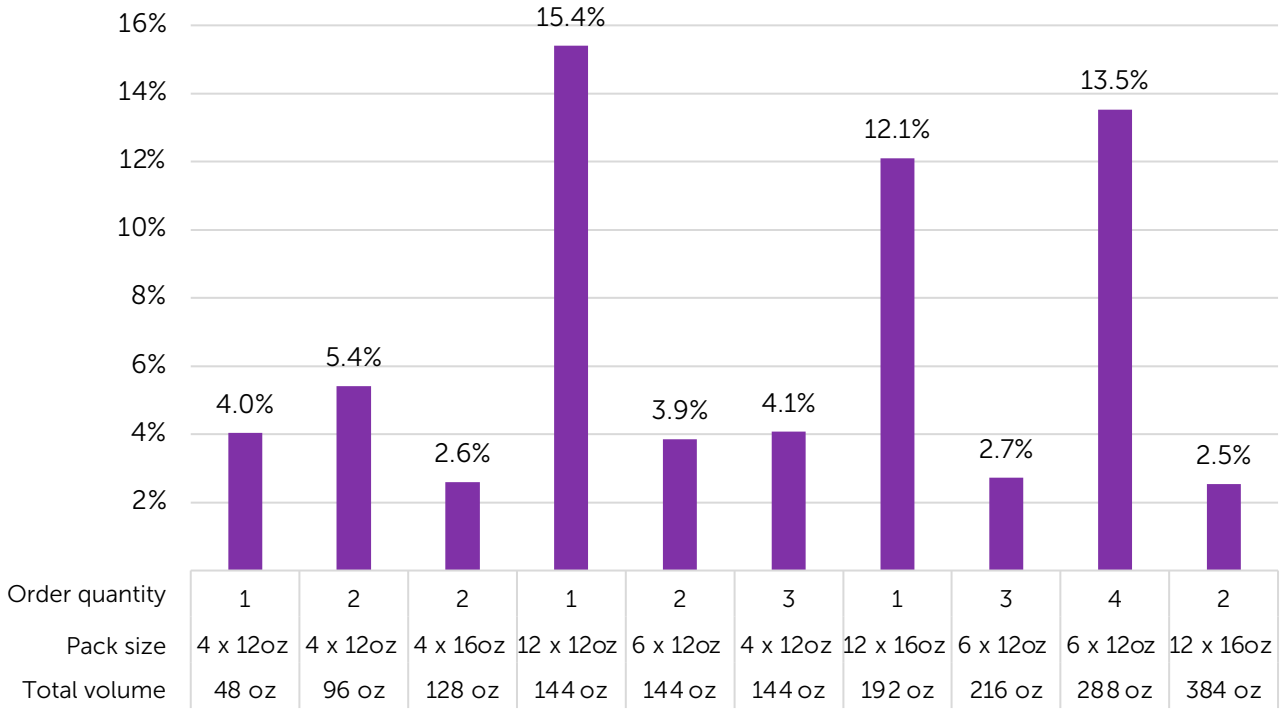
Number of 750 mL Wine Bottles per Order



Three 750ml wine bottles per order is the current trend for the beginning of the year, with 27% of sales being at that level. Two bottles and four bottles follow next, each coming in close to 18%. This shows that consumers are happy and willing to purchase multiple bottles online. Single bottles come in 6th.

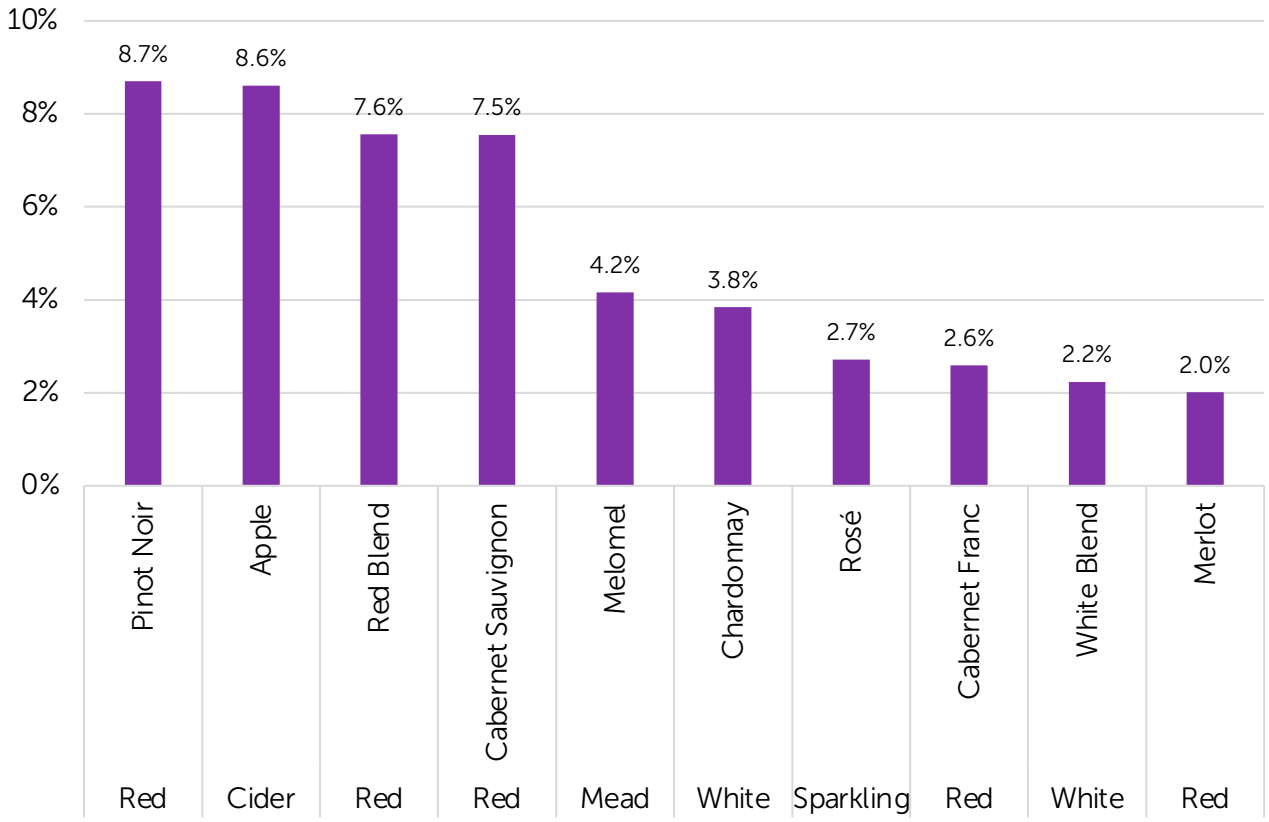
ORDER SIZE

Number of Cider Packs per Order



The most popular order format of canned cider is a single 12 x 12oz pack. Four 6 x 12oz packs and single 12 x 16oz packs come second and third at 13.5% and 12.0%, respectively. 12 oz cans currently make up 75% of the canned cider market. 16 oz cans are the second most popular size.

TOP CATEGORIES & VARIETALS

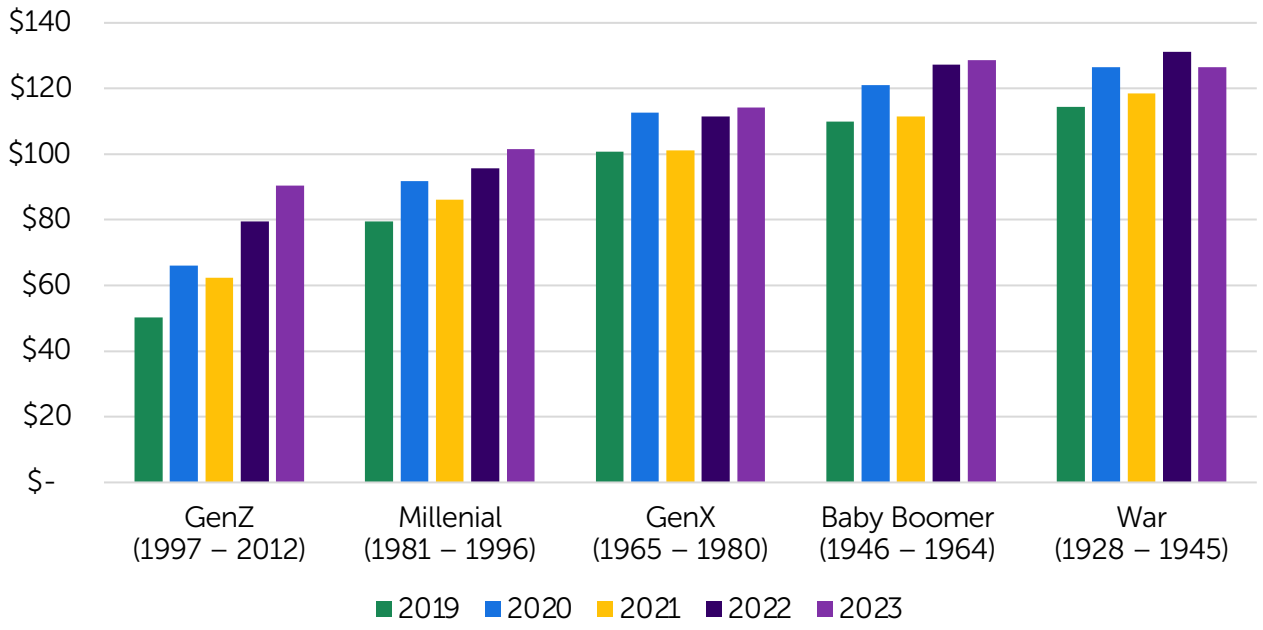


As shown in the chart above, Pinot Noir leads as the most popular varietal, followed by Apple Cider, Red wine Blend, and then Cabernet Sauvignon. Melomel, a fruit mixed mead, takes up the fifth spot. Mead is having a strong start in the year, with Bochet, a mead made from caramelized honey, and Hydromel, a lower alcohol mead, showing big growth in the category.

The remaining 50% of sales are made up of 250+ different varietals.

DEMOGRAPHICS

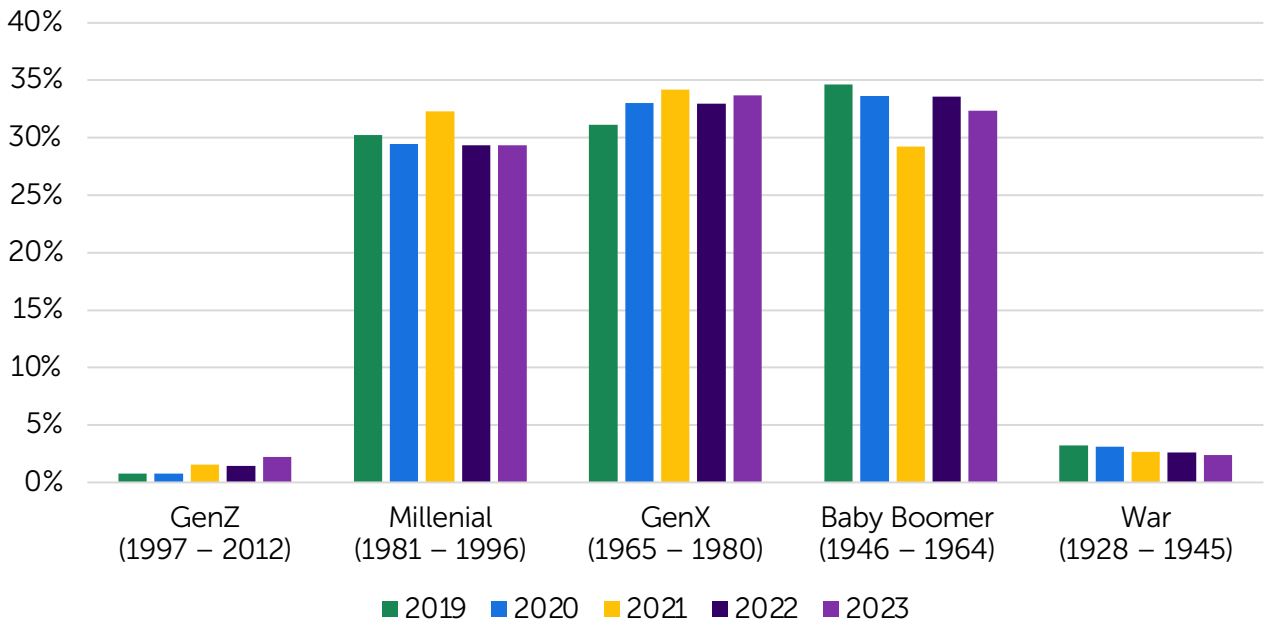
Average Order Value by Generation



The GenZ category is growing and now includes the legal drinking ages of 21 to 26. In a two year period, the average order price for GenZ has risen by $30. Average order prices for Baby Boomers and Post-War have seemingly hit a price ceiling, with average order prices coming close, but not breaking past the $130 mark (excludes taxes and shipping).

DEMOGRAPHICS

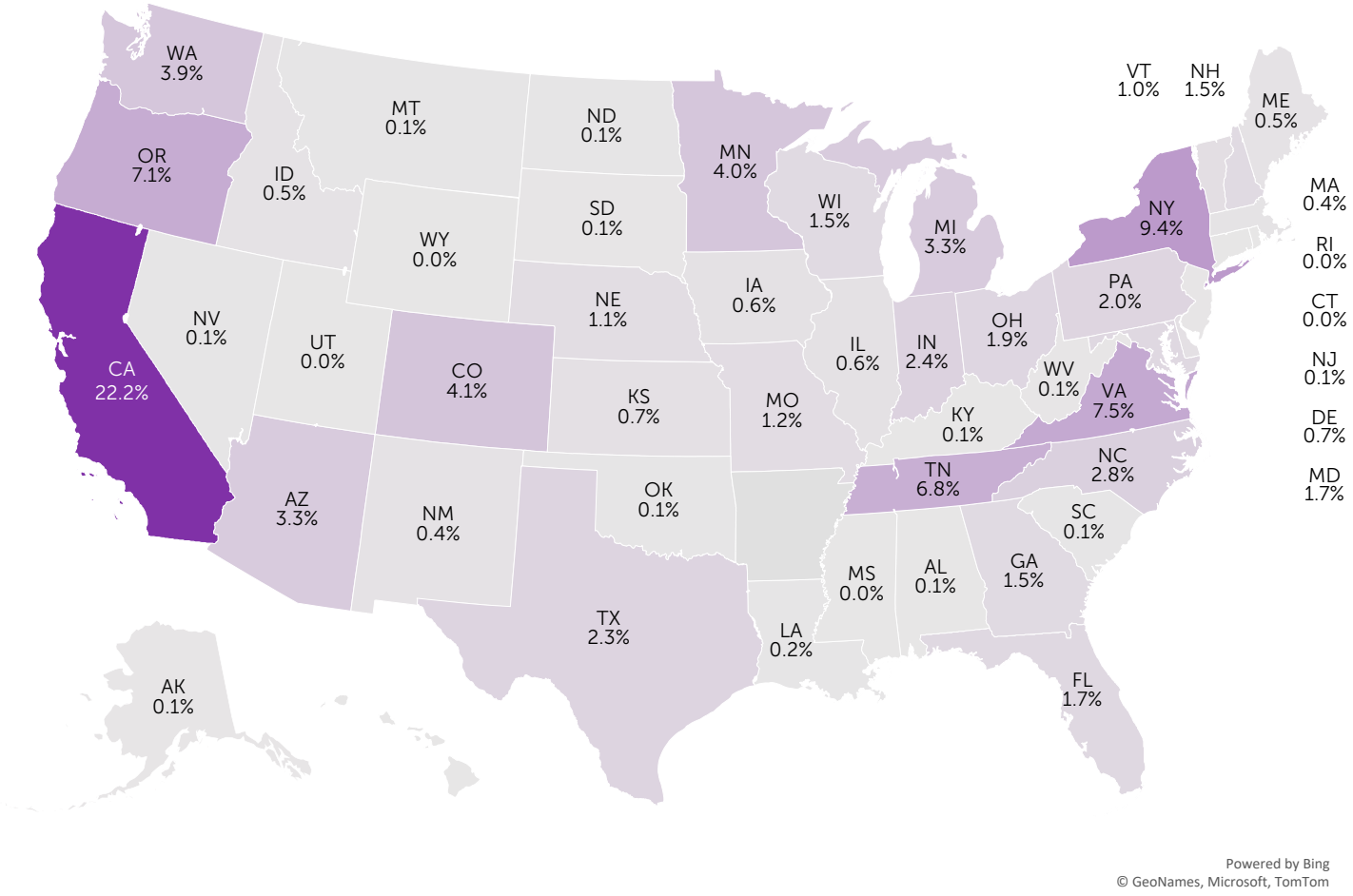
Percentage of Sales by Generation



So far in 2023, the largest buyers of alcohol products has been GenX, followed by Baby Boomers, then Millennials. Combined, the three age groups encapsulate 95% of total spend in the industry. Share of spend for GenX continues to rise, while we may have seen a peak share, in 2019, for Baby Boomers.

ALL PRODUCTS

Percentage of Sales by State



Currently, California producers lead the way in direct-to-consumer sales, followed by New York, Virginia, and Oregon. Tennessee ranks just behind Oregon due to strong cider sales in the state.

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pr@vinoshipper.com

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