



# shipCOMPLIANT

2016 DIRECT TO CONSUMER WINE SYMPOSIUM

*PRESENTED BY*  
JEFF CARROLL

# ABOUT SHIPCOMPLIANT

- Founded in 2000
- Based in Boulder, CO
- Core values driven company
- 20 million API requests / month
- Powered by Sovos Compliance

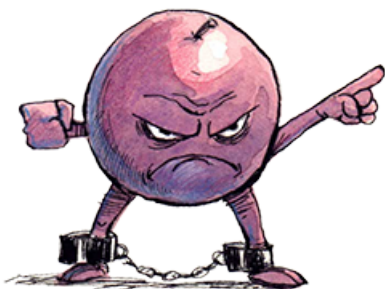


# WE'LL TALK ABOUT

- First look at the 2016 Report
- Key 2015 data insights
- Massachusetts



# THANK YOU



COALITION FOR FREE TRADE

2016  DIRECT TO CONSUMER  
WINE SYMPOSIUM

 FAMILY  
WINEMAKERS  
of CALIFORNIA®

  
WINEAMERICA  
THE NATIONAL ASSOCIATION of AMERICAN WINERIES

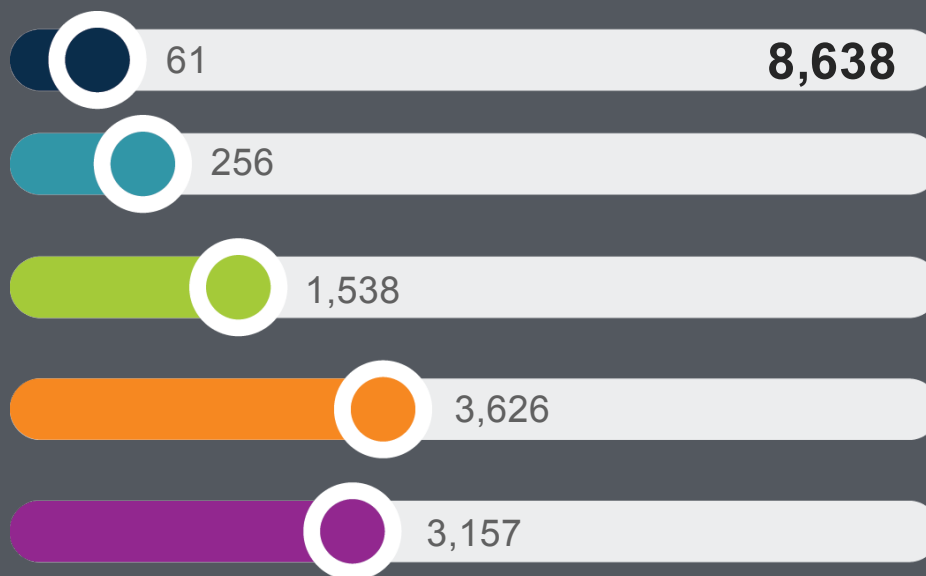
shipCOMPLIANT 

WINES&VINES



# ABOUT THE MODEL

TOTAL WINERIES



Large  
500,000+

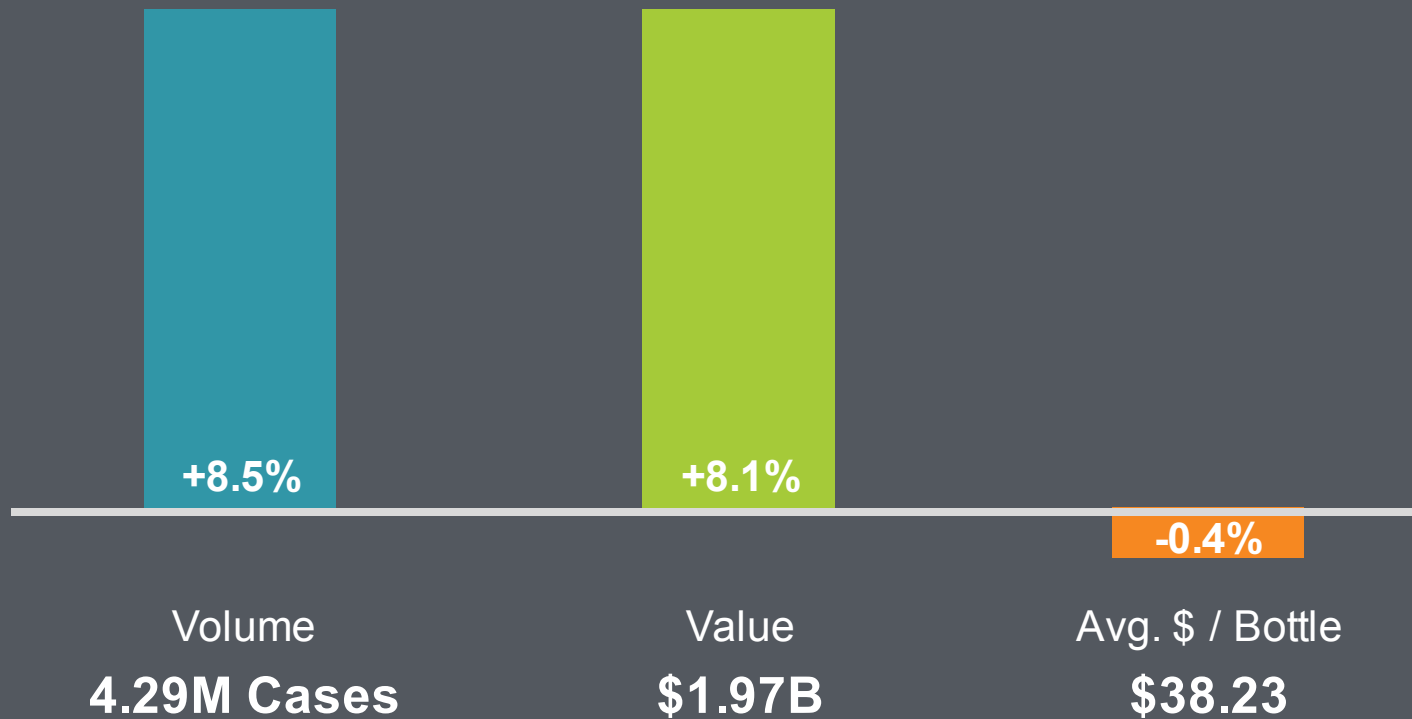
Medium  
50,000-499,999

Small  
5,000-49,999

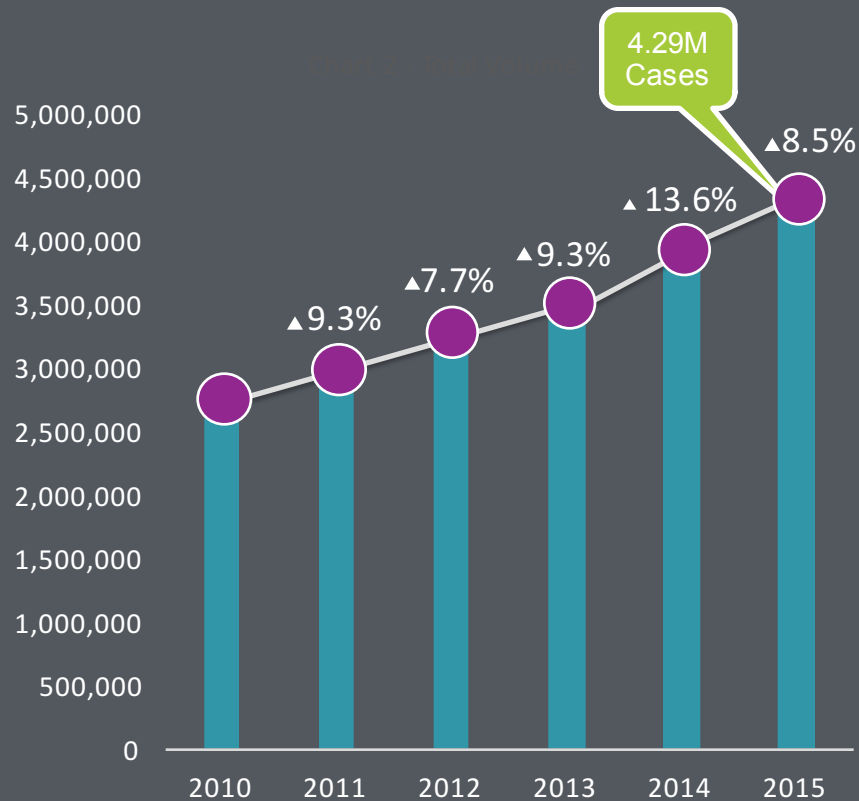
Very Small  
1,000-4,999

Limited Production  
Up to 999 Cases

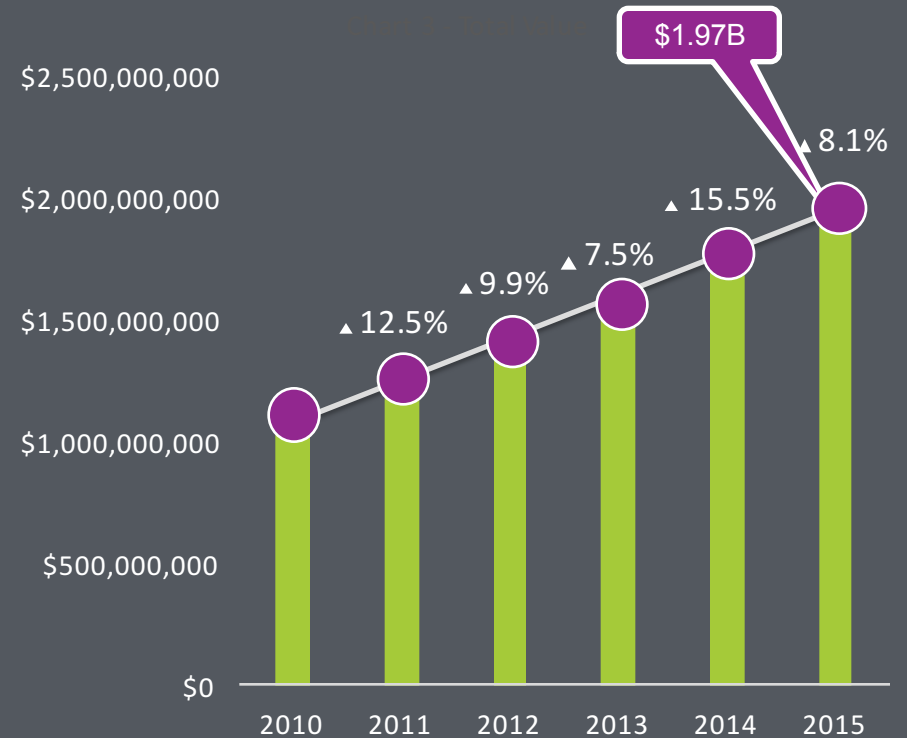
## 2015 – THE BIG PICTURE



## AMAZING 6-YEAR GROWTH



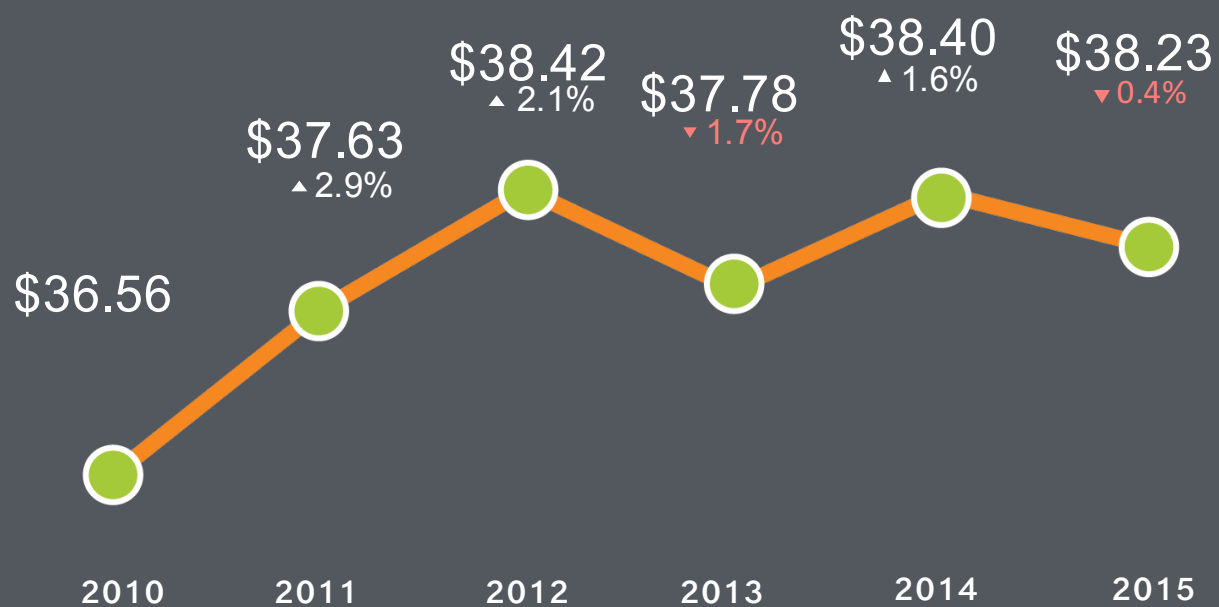
Total Volume



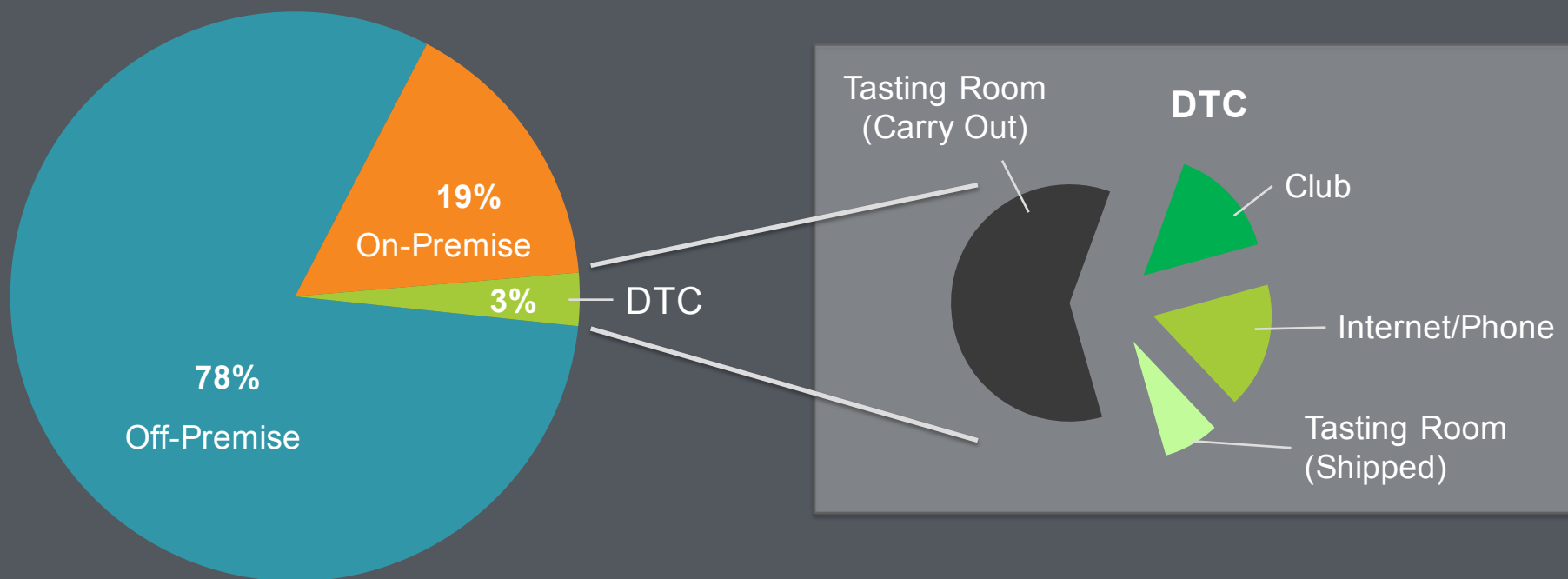
Total Value



## PRICE PER BOTTLE DIPS

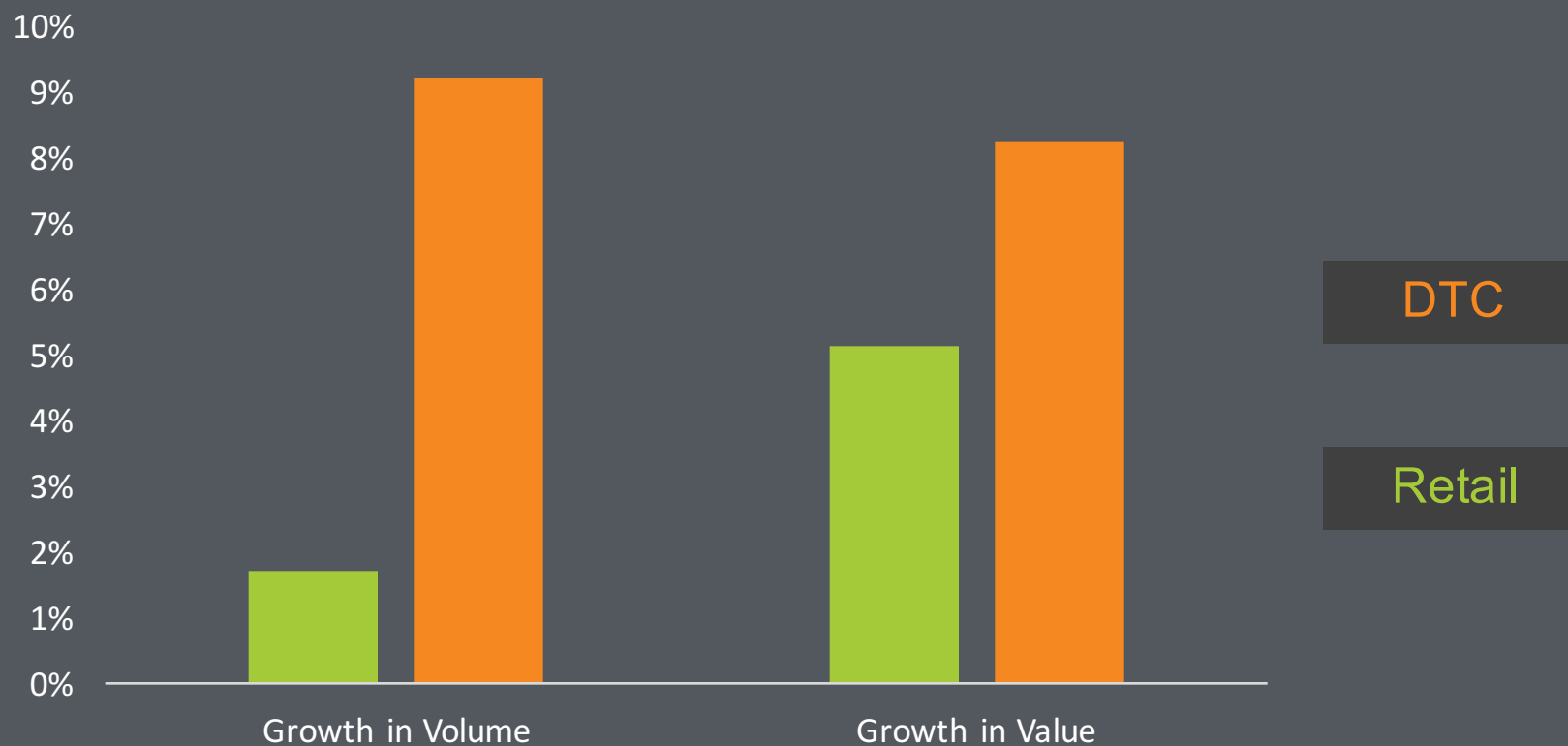


# LOTS OF ROOM TO GROW



Source: Wines and Vines Analytics 2015

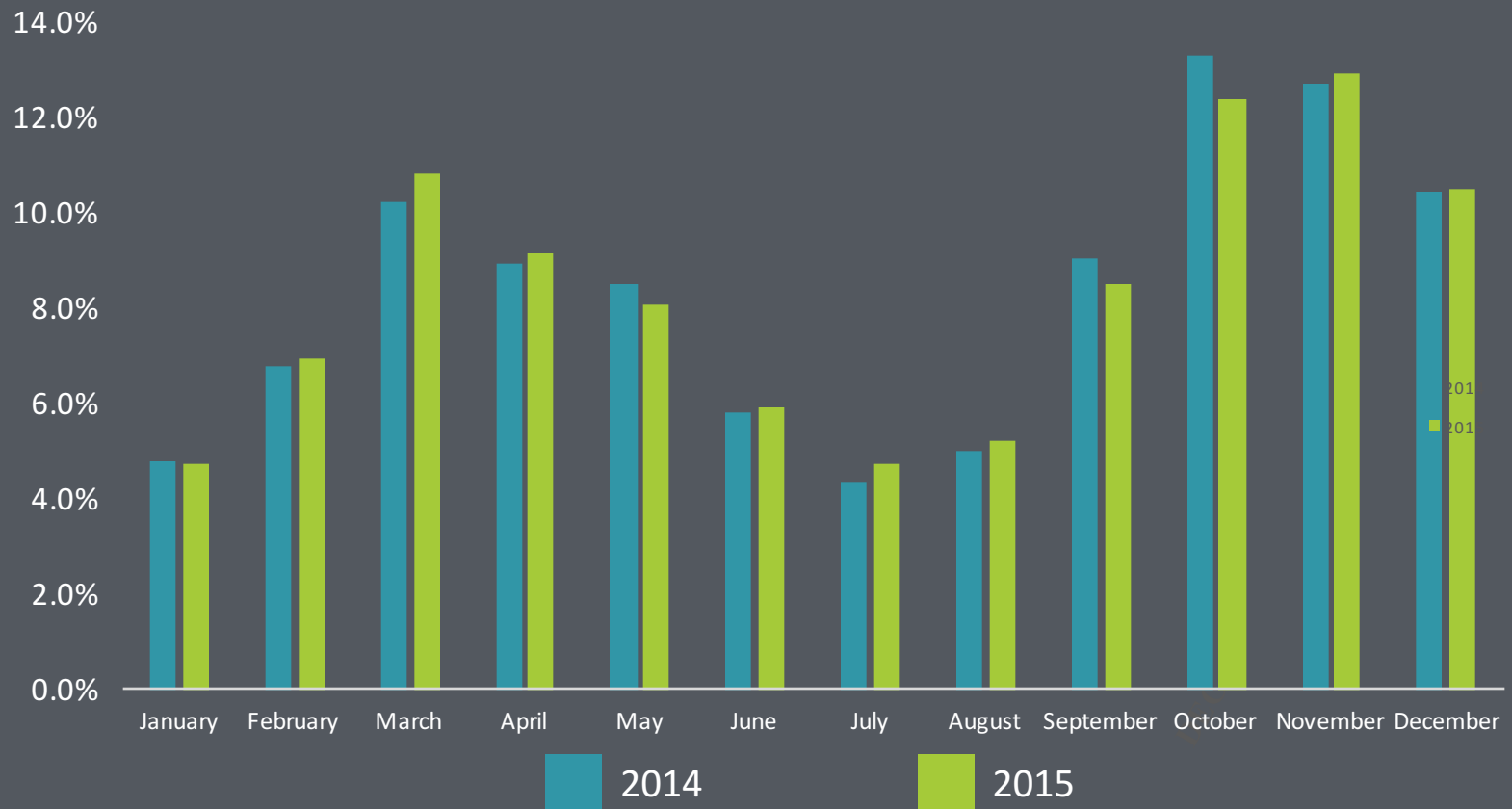
# DTC OUTPACES OFF-PREMISE RETAIL GROWTH



Source: Nielsen January–November 2015



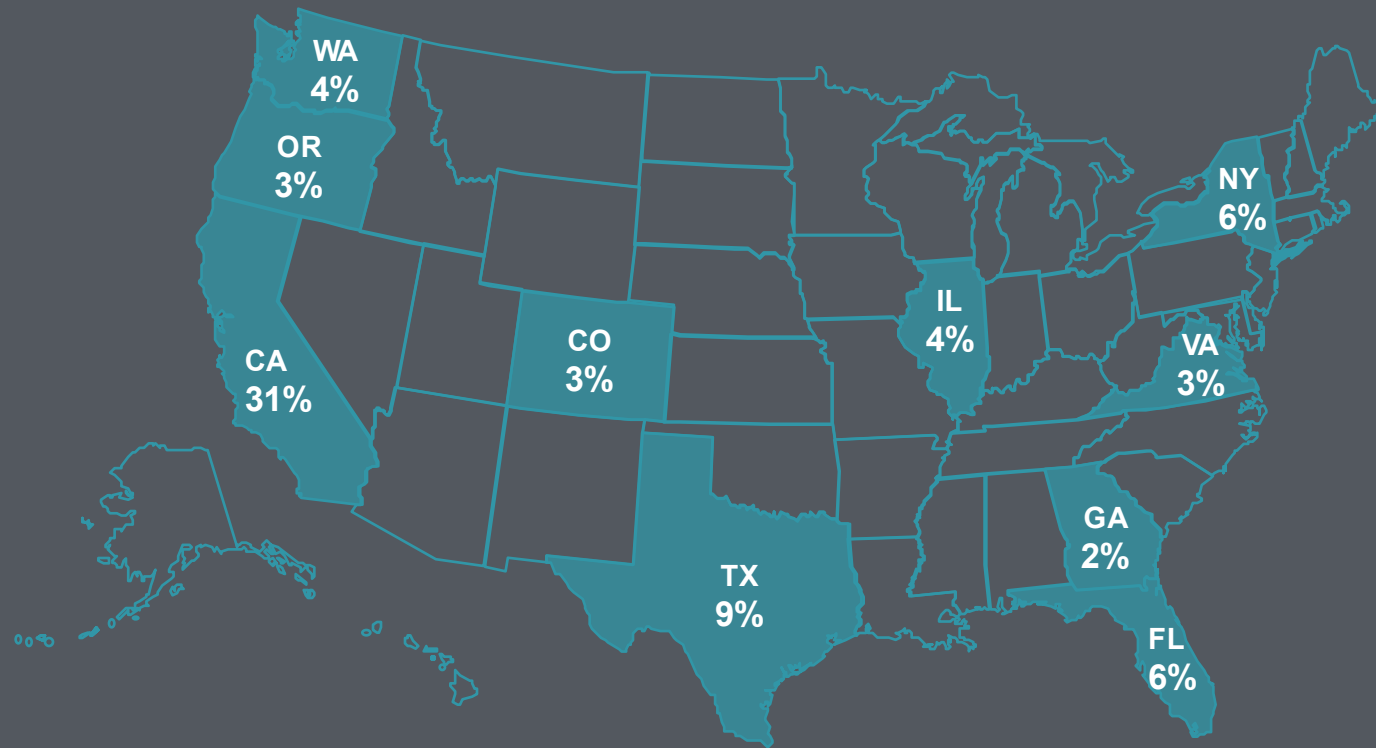
# SEASONALITY SMOOTHING?



## BOTTLES PER SHIPMENT



# WHERE IS IT GOING?



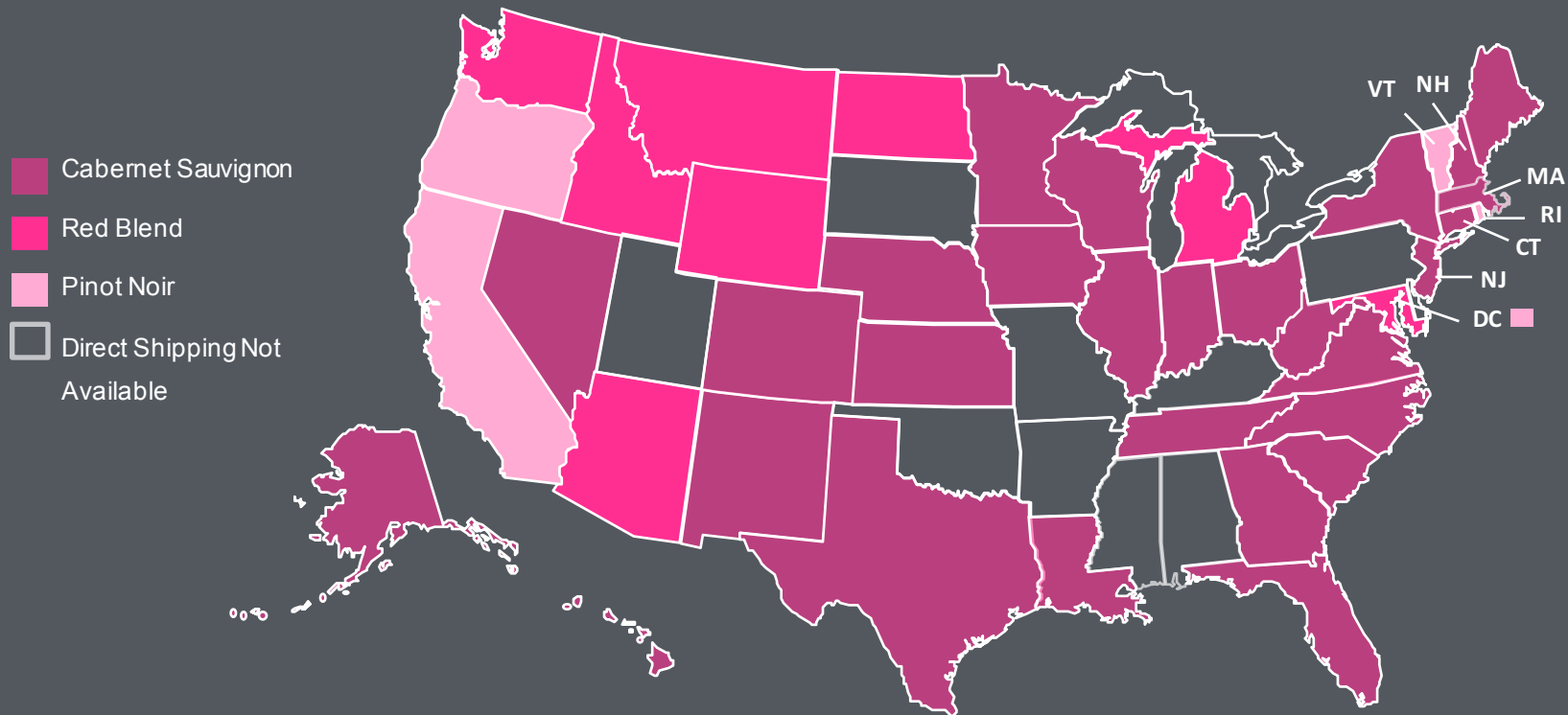


# TOP TEN LIST

1	California	30.8%
2	Texas	9.0%
3	New York	6.2%
4	Florida	5.8%
5	Illinois	4.4%

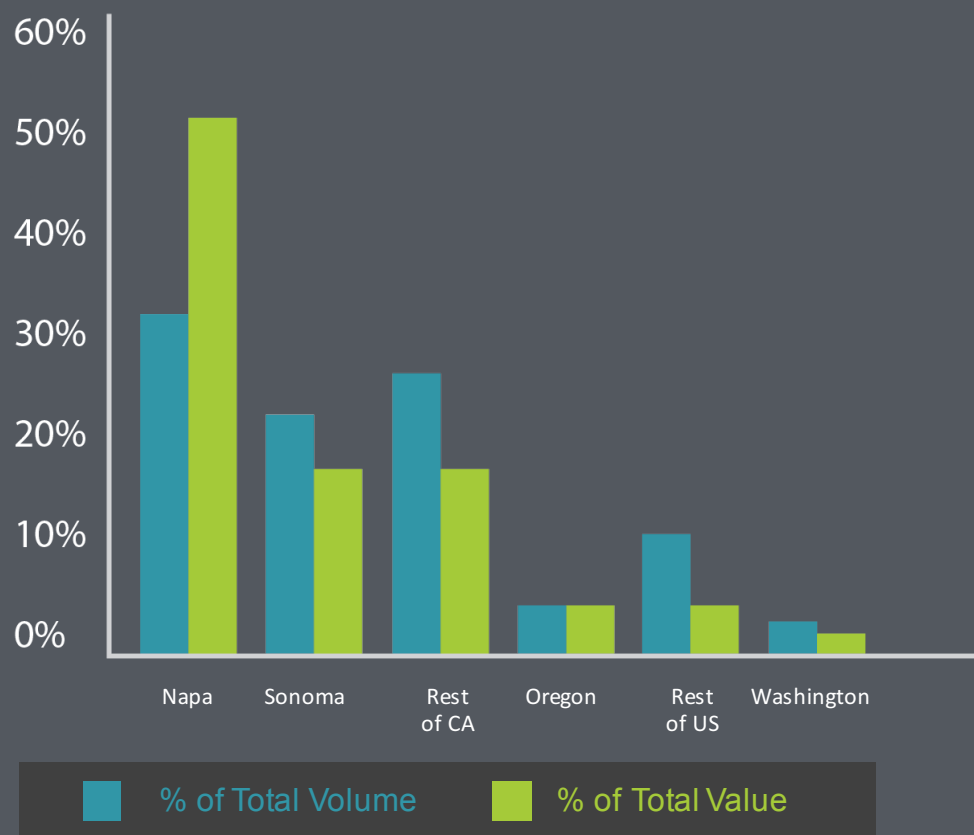
6	Washington	4.4%
7	Colorado	3.3%
8	Virginia	3.3%
9	Oregon	2.5%
10	Georgia	2.3%

# TOP VARIETAL BY DESTINATION STATE



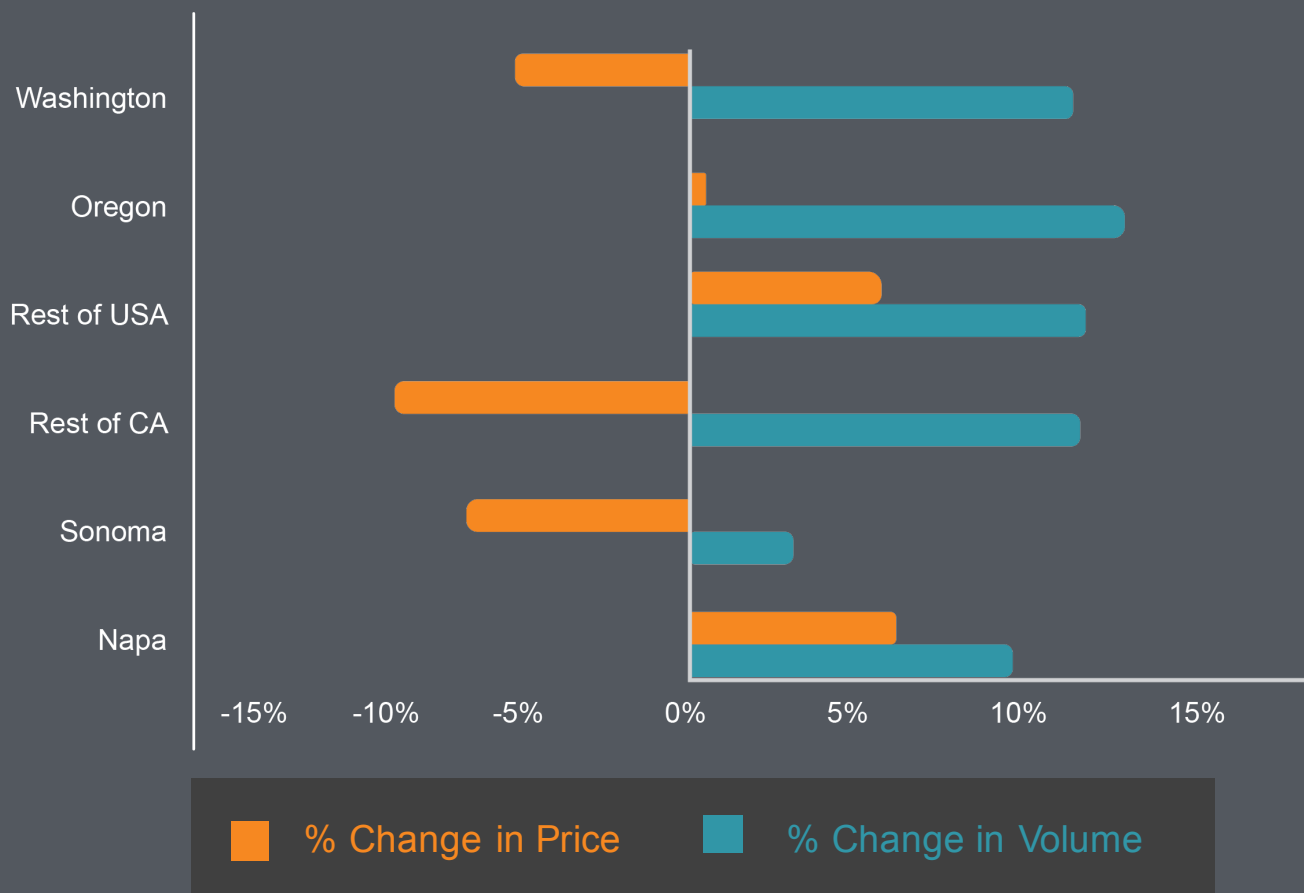
# NAPA REACHES \$1B AND 50% OF MARKET VALUE!

BY REGION

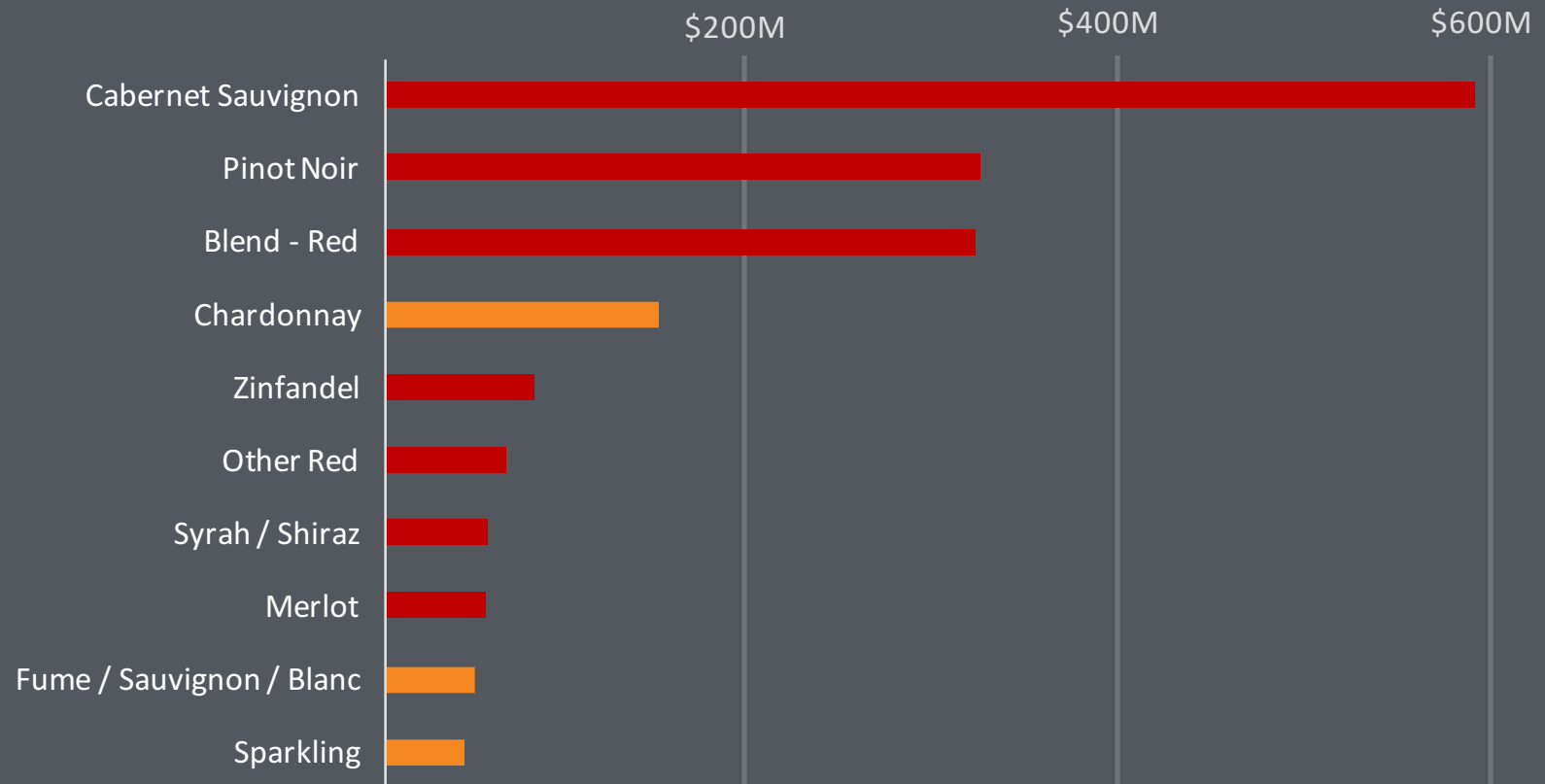




# CHANGE IN PRICE AND VOLUME BY REGION

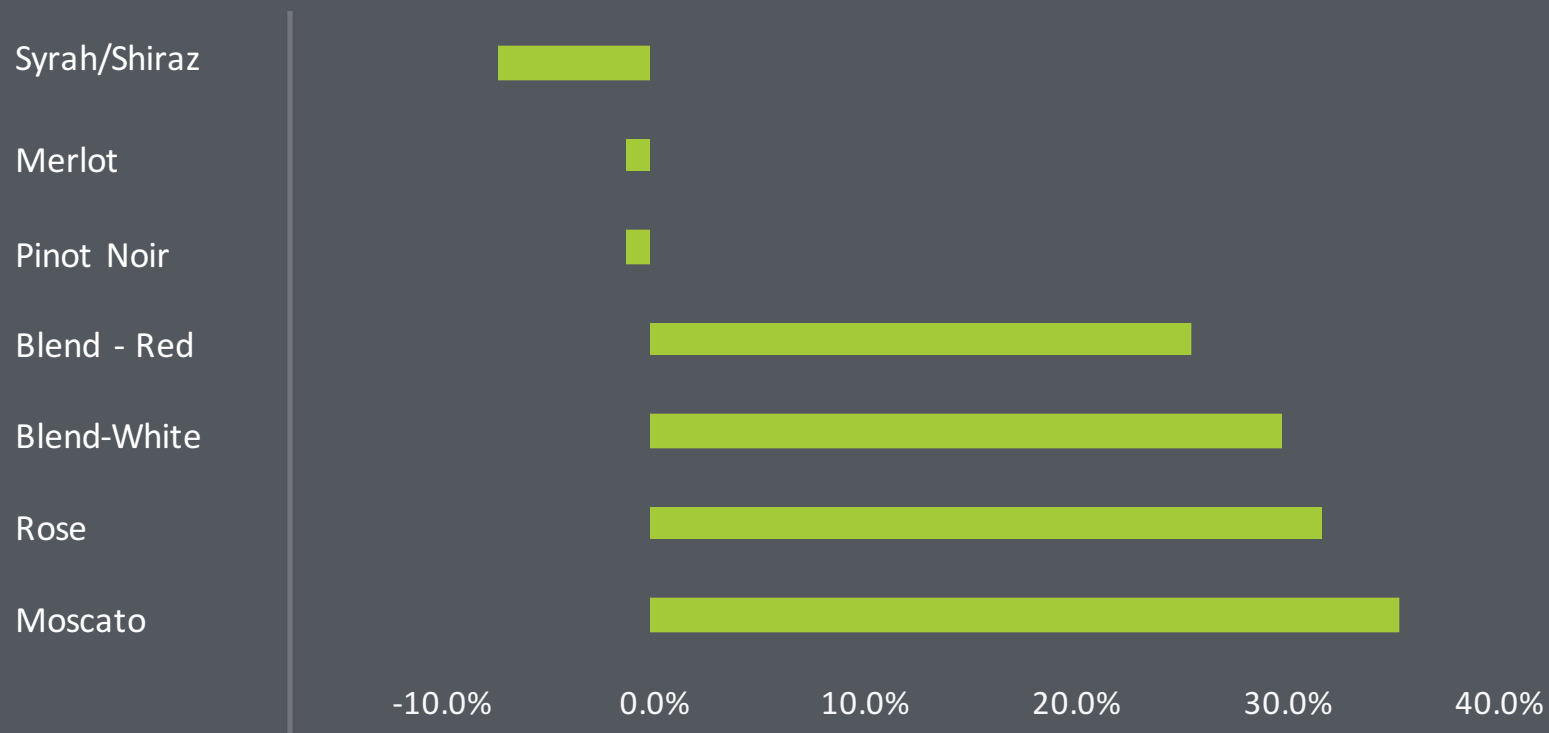


# REDS RULE: BY VARIETAL

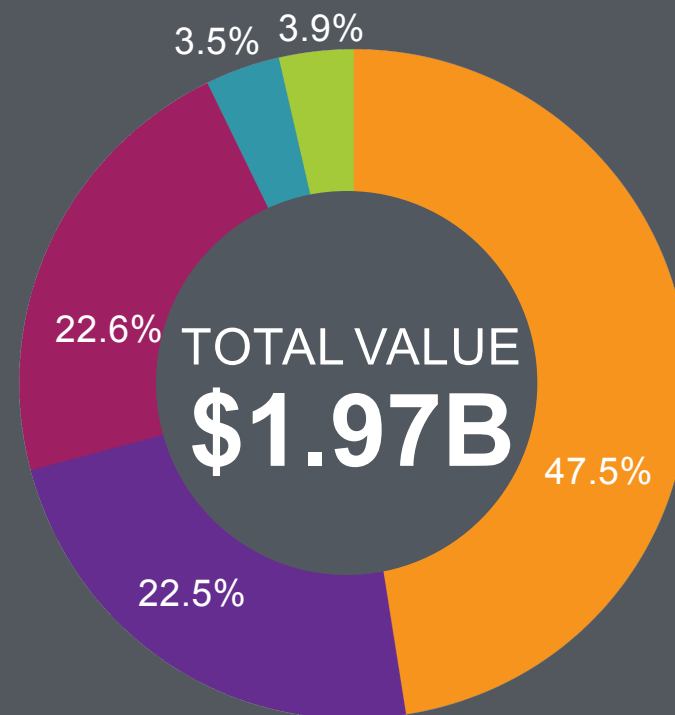
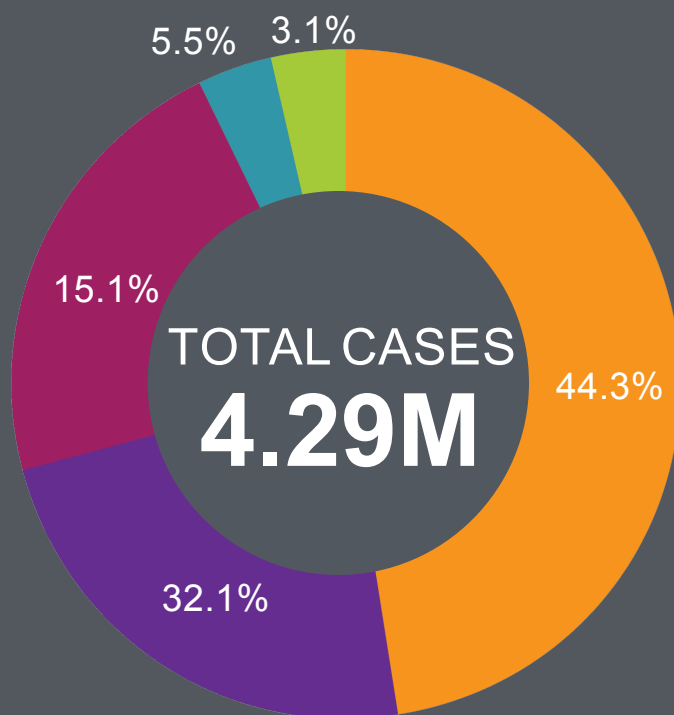


# SYRAH STRUGGLES: CHANGE IN VOLUME 2014-2015

Change in Volume by Variety



# SMALL WINERIES DOMINATE



Large Production  
500,000+

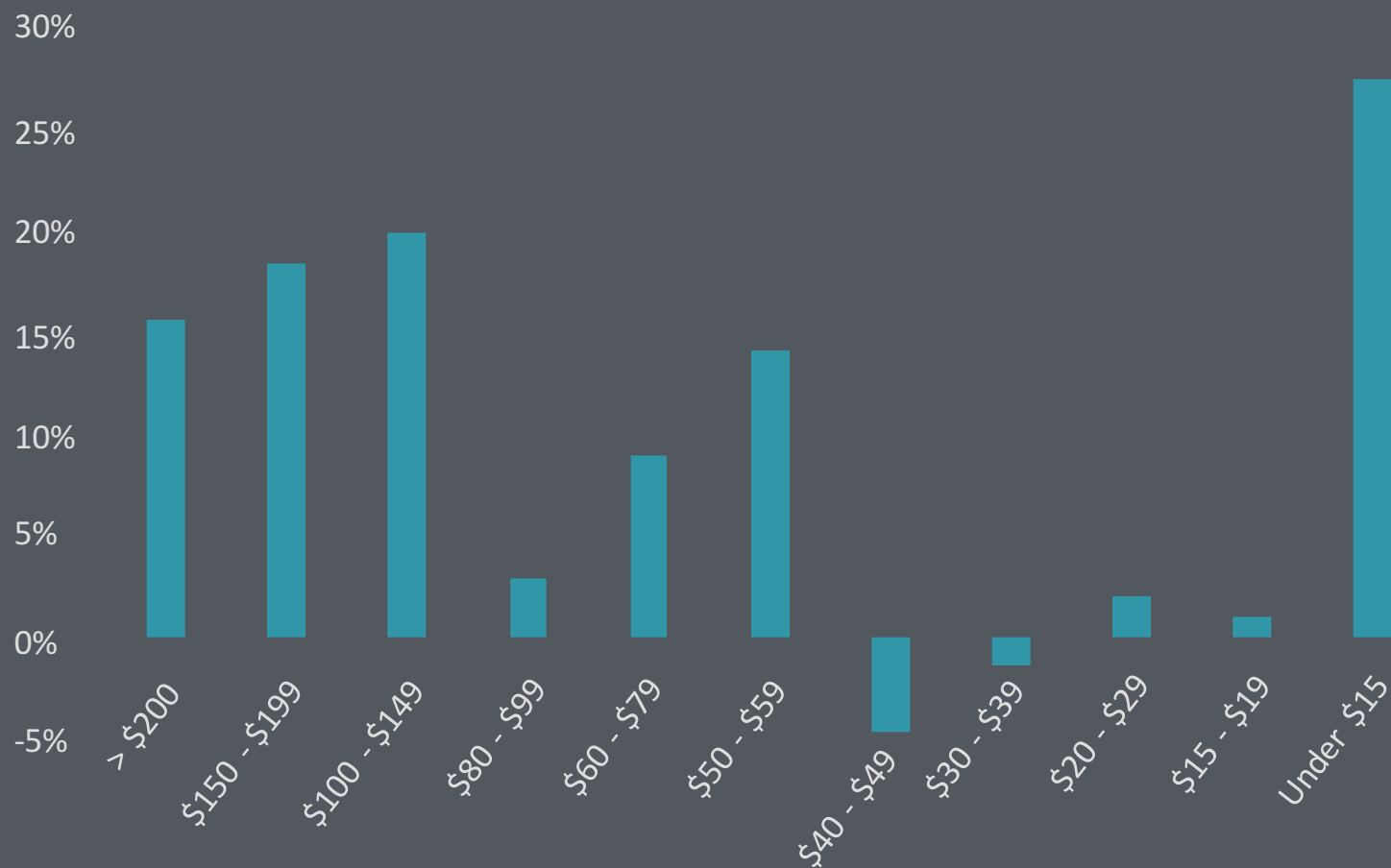
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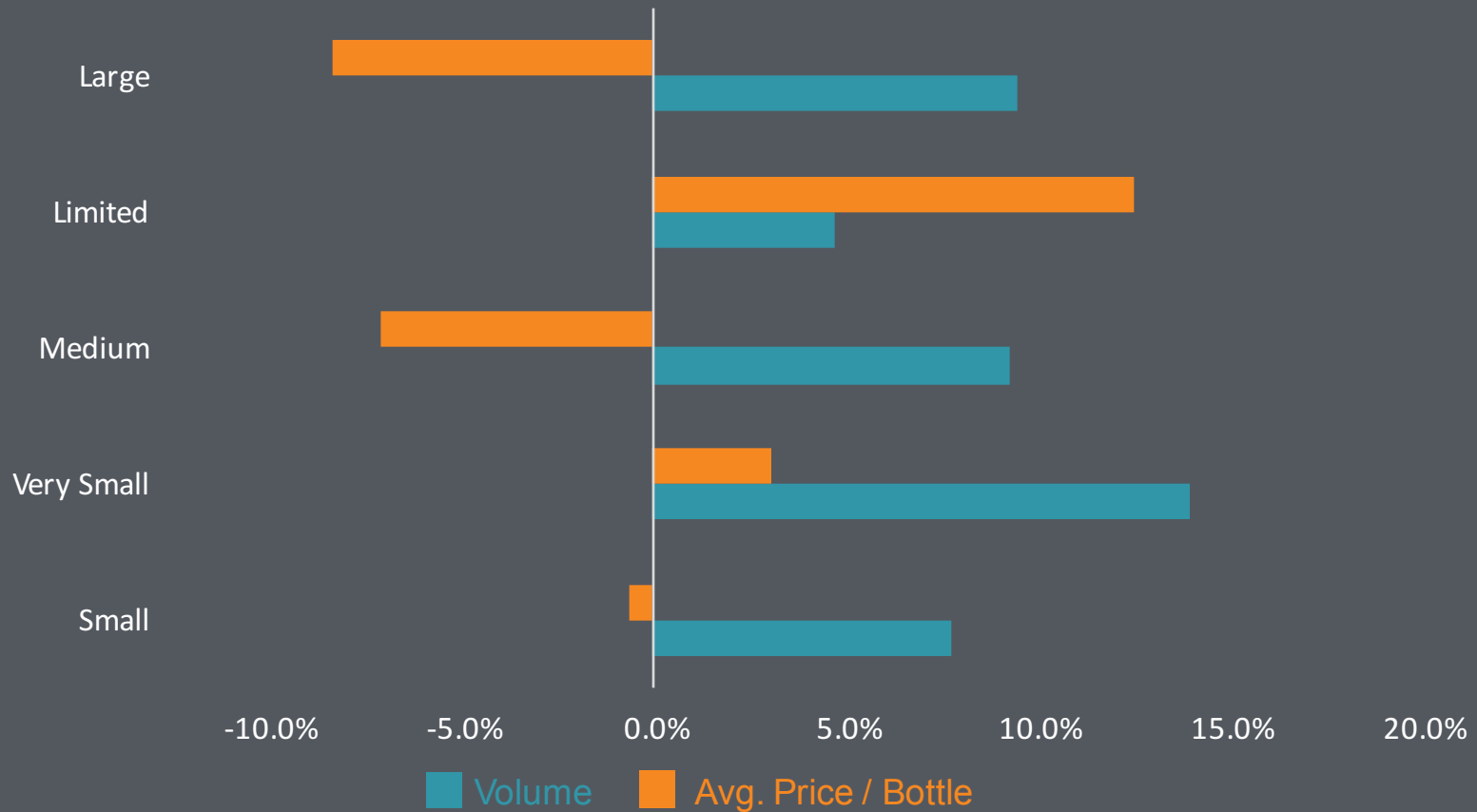
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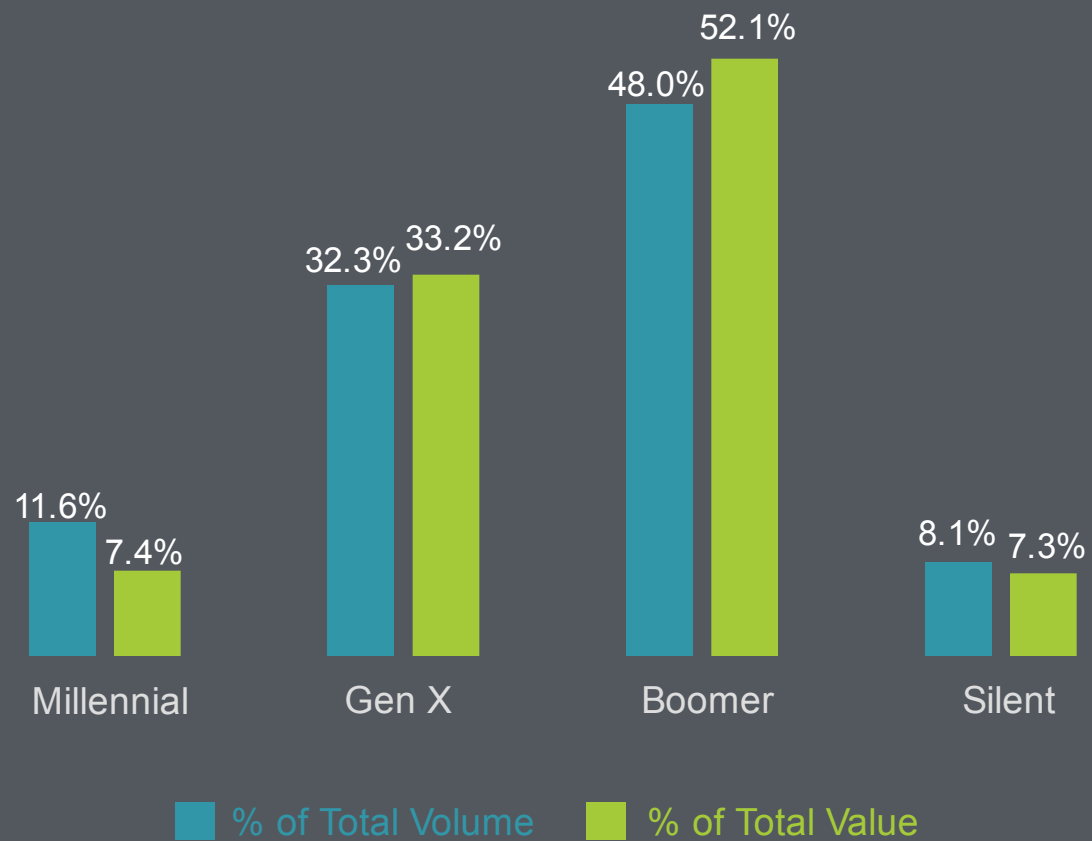
# CHANGE IN VOLUME BY PRICE CATEGORY



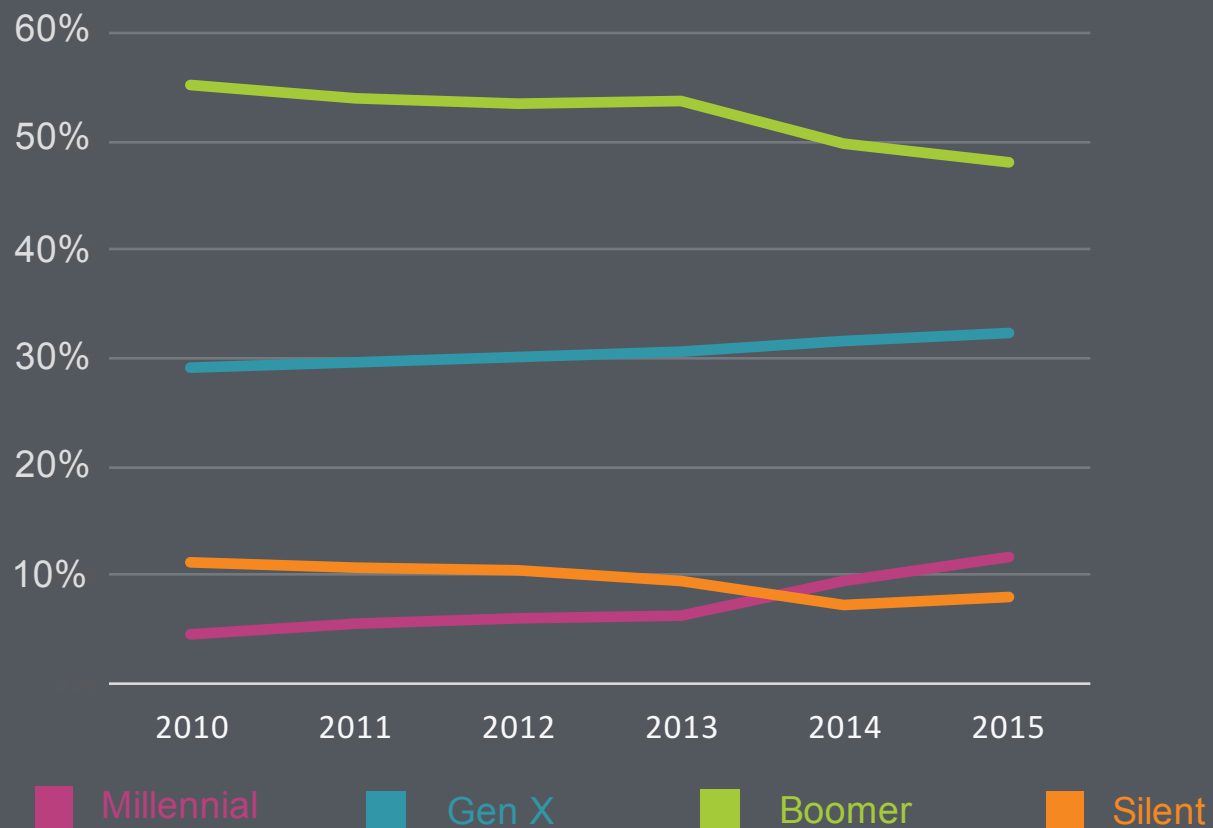
## CHANGE IN VOLUME AND \$ / BOTTLE BY WINERY SIZE



# BOOMERS BOOM

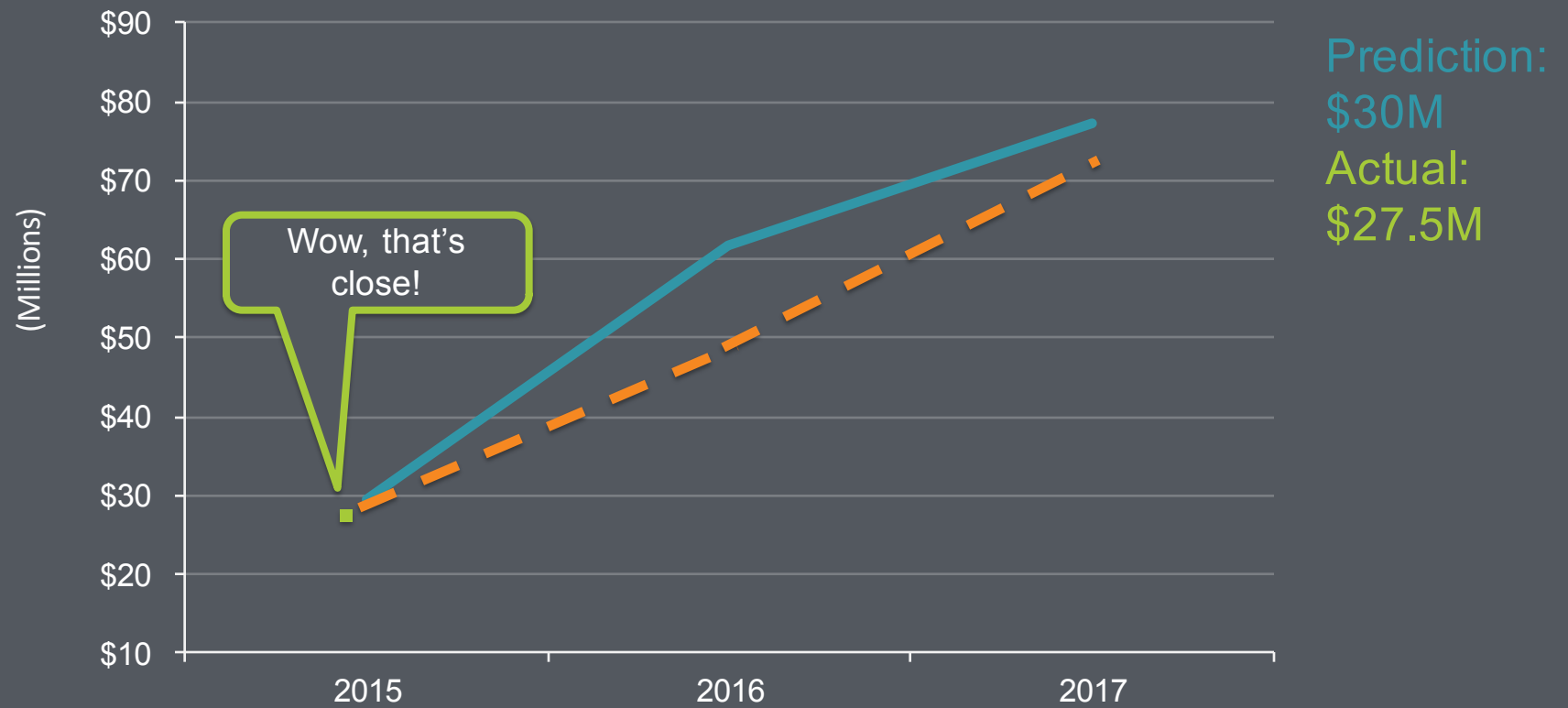


## BUT CHANGE IS IN THE AIR – 5 YR CHANGE IN VOLUME

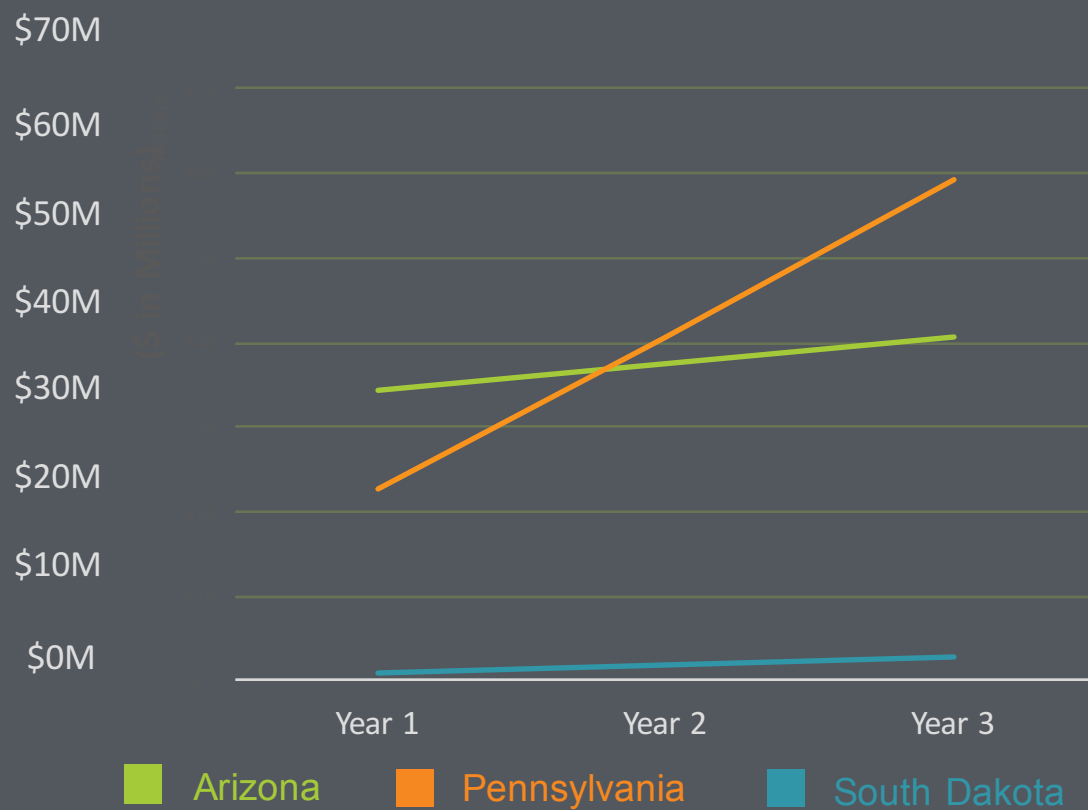




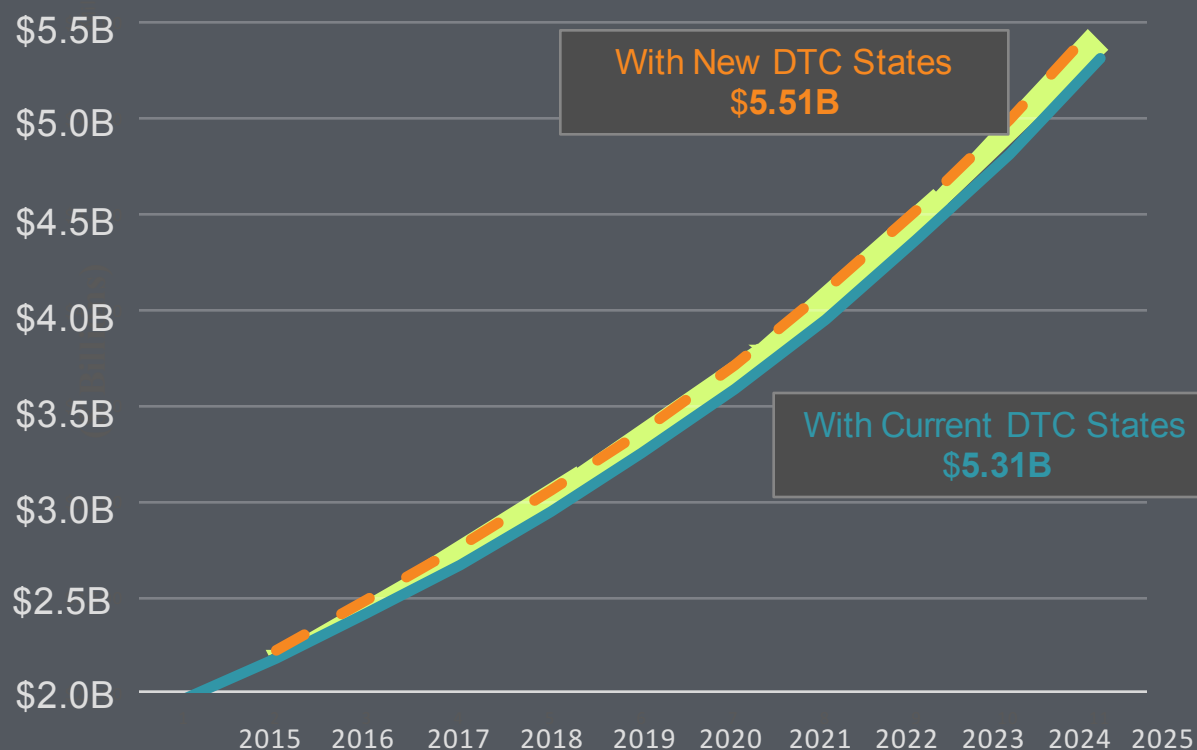
# MASSACHUSETTS UPDATE



# NEW AND PROSPECTIVE STATES



# FREE THE GRAPES, FTW!



Area under the curve = lost revenue!

**\$1.26B** (over 10 years)

**\$14K** per winery per year

## DOWNLOAD THE REPORT

Sign up on our website to get the report emailed to you:

<http://www.shipcompliant.com/dtcreport>