WSWA-ACCESS

A HUB FOR CRAFT, START-UP AND SMALL PRODUCTION WINE & SPIRITS

- *LIVE WEBINAR*

FROM ONE CASE TO ONE MILLION

WHAT HAPPENS AFTER YOU GET TO MARKET?

THURSDAY, MARCH 3 @ 1:00 PM EST

Meet Our 2021 Brand Representatives!

Kat Hantas
21 Seeds Tequila

Phillip Rawleigh
291 Colorado Whiskey

Scott Neil
American Freedom Distillery

Patrick Jean-Baptiste
Crafthouse Cocktails

Bob Gunter
Koloa Rum Company

Mimi Buttenheim
Mad River Distillers

Subir Singh
Mico Spirits

Alexei Khimenko
MyStory Wine Company

Susan Lambert
Remington Family Distillers

John Bilello
Sweet Amber Distilling

Atlas Cheek
Treaty Oak Distilling

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Steven & Brittany Yeng,
Founders Skrewball Whiskey

SKREWBALL
PEANUT BUTTER WHISKEY

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Merrilee Kick,
CEO and Founder
Buzzballz/ Southern Champion

SOUTHERN CHAMPION®

BuzzBallz®

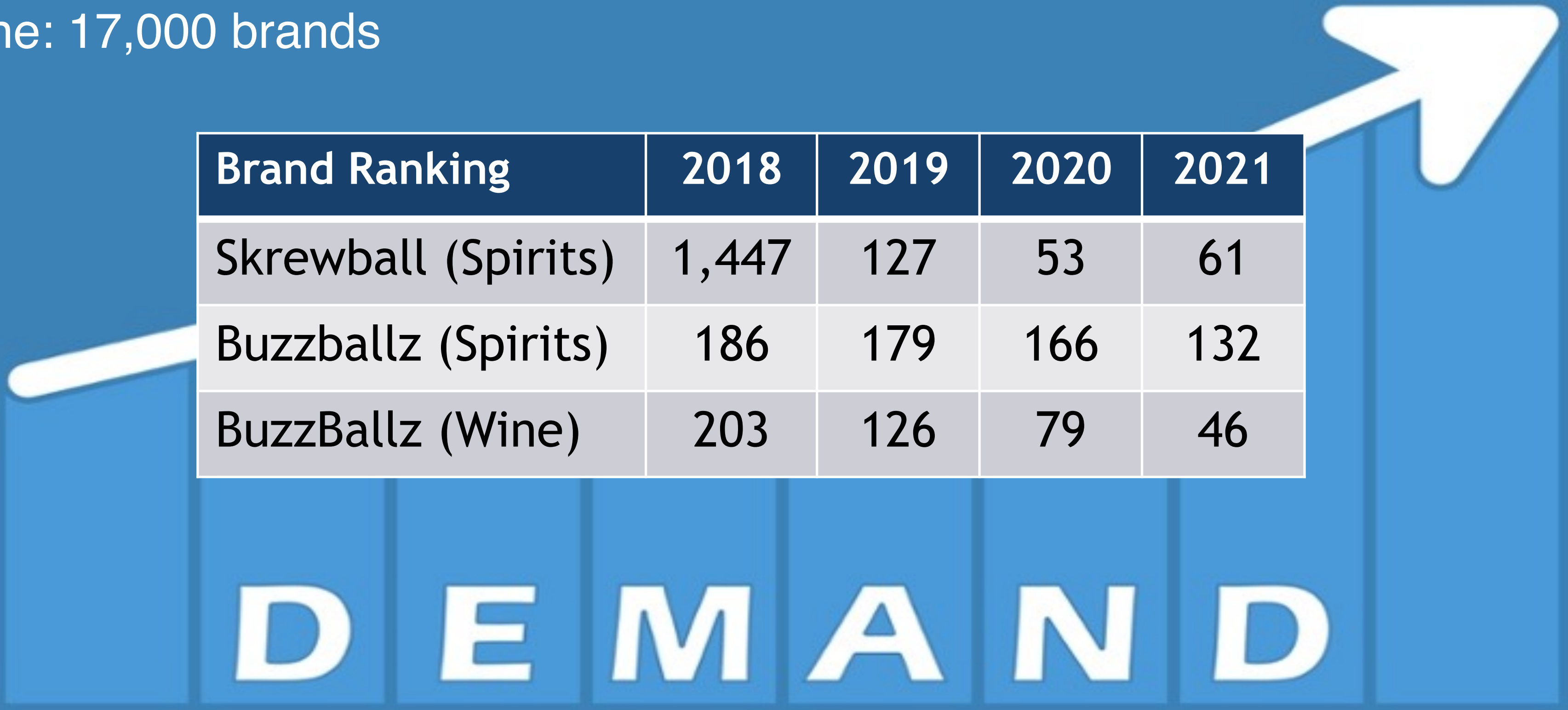
Danny Brager,
WSWA's SipSource Analyst

6 Broad Consumer Drivers

1	Total Beverage Alcohol	Growing cross category drinking
2	Experience	Authenticity; Discovery; Entertainment
3	Flavors	Flavor seekers
4	Convenience	Shopping; Right pack type/size
5	Wellness – for ‘me’ & ‘we’	Healthier choices/ transparency; Sustainability/CSR
6	Trading up	Drinking “better”

NielsenIQ Off Premise:

- Spirits: 6,400 brands
- Wine: 17,000 brands

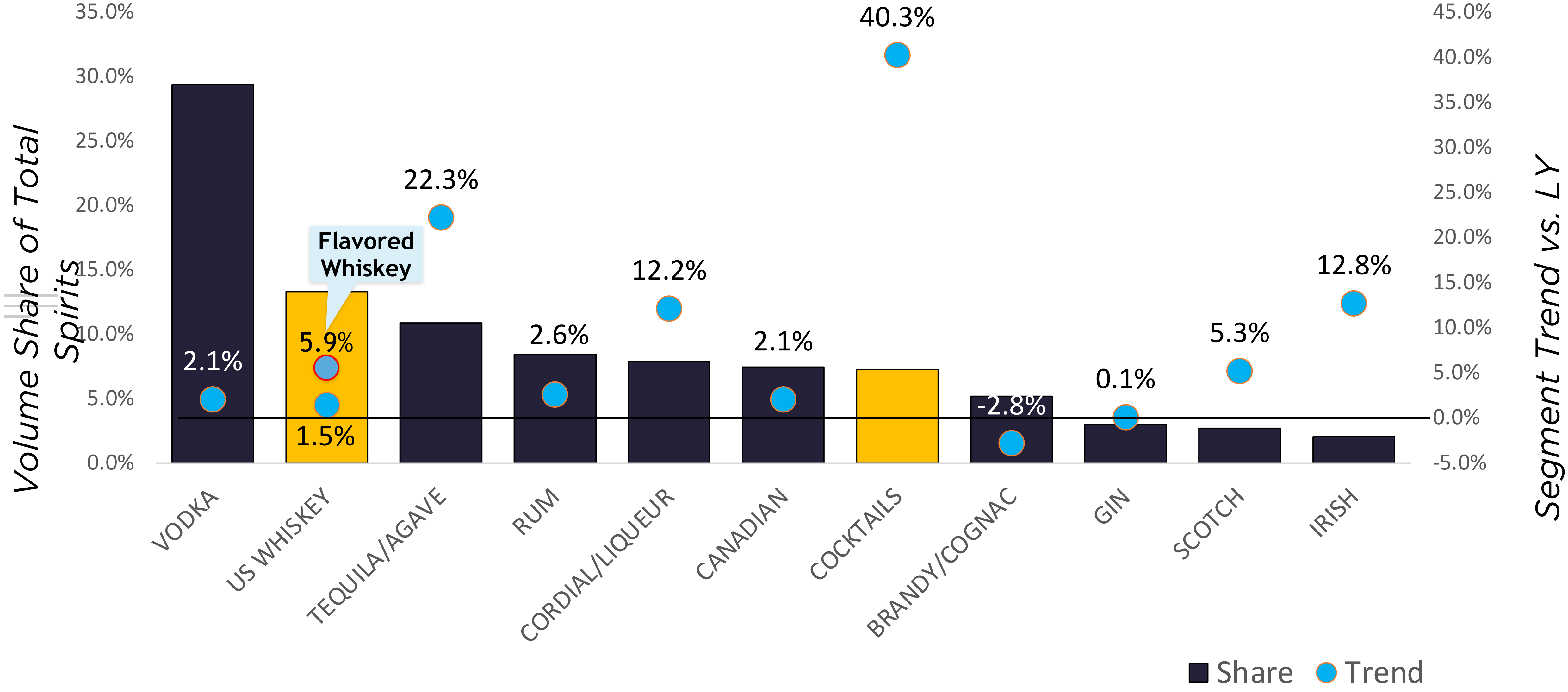


Brand Ranking	2018	2019	2020	2021
Skrewball (Spirits)	1,447	127	53	61
Buzzballz (Spirits)	186	179	166	132
BuzzBallz (Wine)	203	126	79	46

NielsenIQ

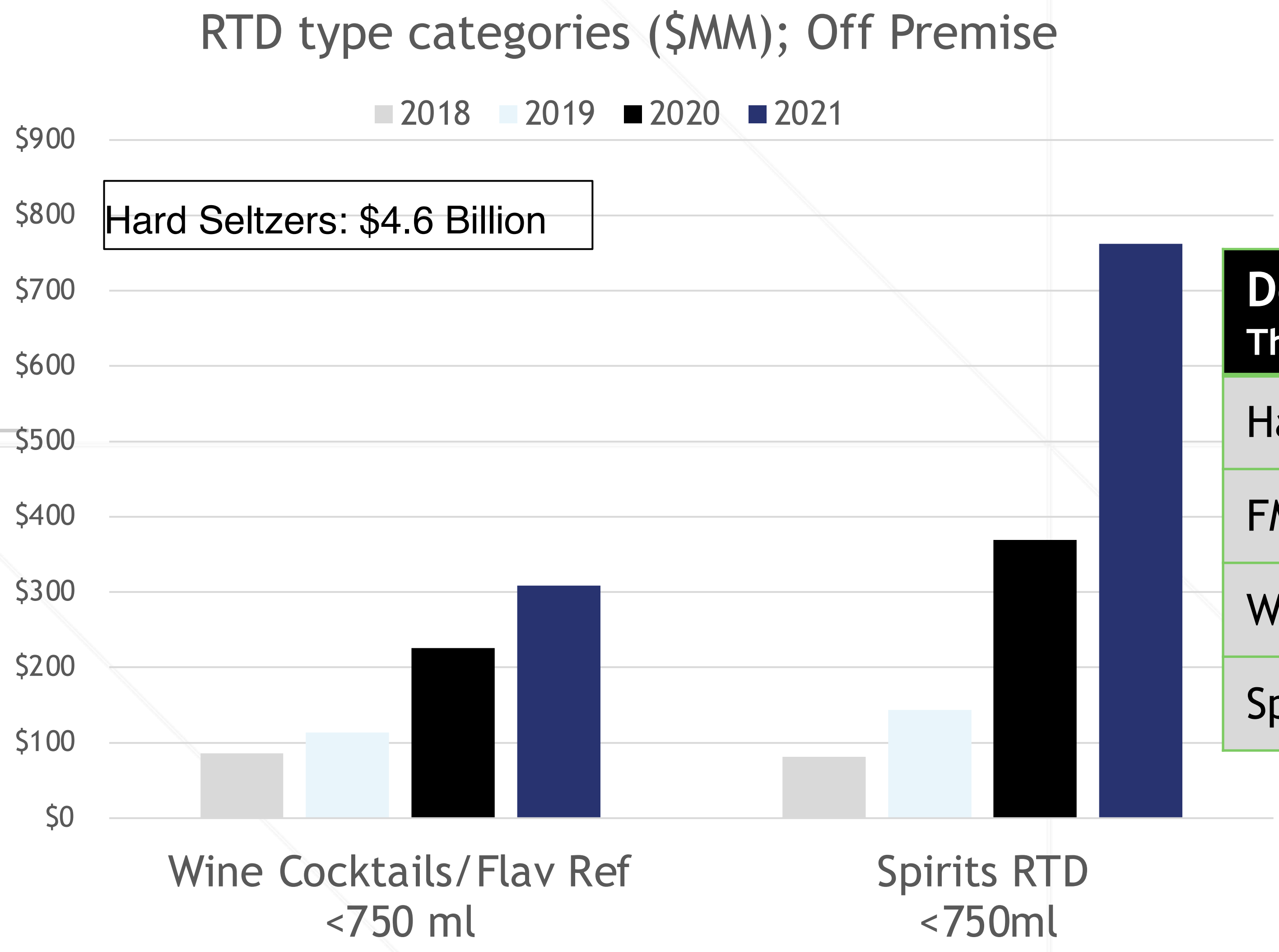
Source: NielsenCGA measured off premise channels (Calendar Years - dollars);

Broad growth for most Spirit classes, led by RTD Cocktails; Flavored Whiskeys expanding



December 12 Month Rolling % Change vs. LY

Wine/Spirits RTD's driving and leading growth



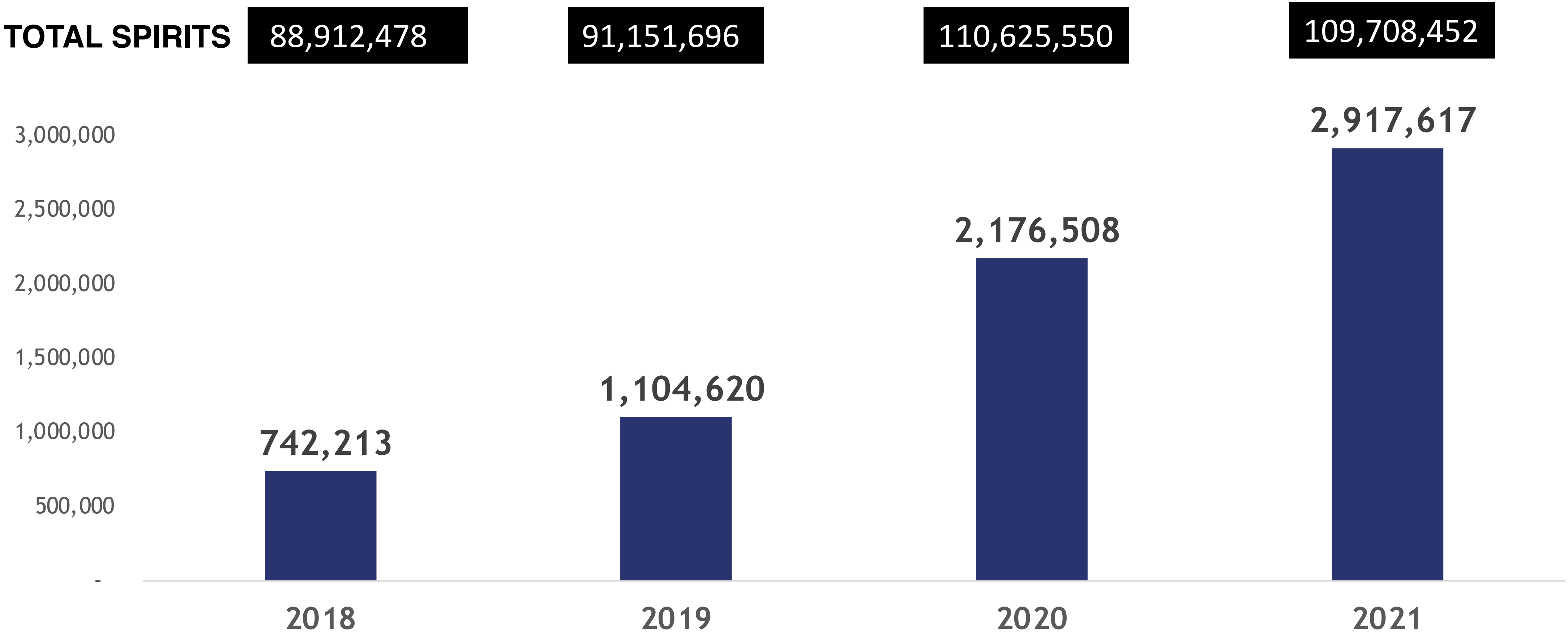
Dollar % Chg Thru 1/29/2022	52 wks	26 wks	13 wks
Hard Seltzers	+8.1%	-0.4%	+0.6%
FMB	+0.8%	+3.2%	+3.8%
Wine RTD's	+34.3%	+29.2%	+33.7%
Spirit RTD'S	+101.2%	+91.3%	+74.8%

NielsenIQ

Source: NielsenIQ Scan Off Premise Channels; 52 weeks ending 1/1/2022

Many start-up, small production, and craft non-RTD Spirit brands continuing to expand off premise, even in 2021

Selected (39) non-RTD Spirit start-up, small(er) product, craft brands*
9L cases

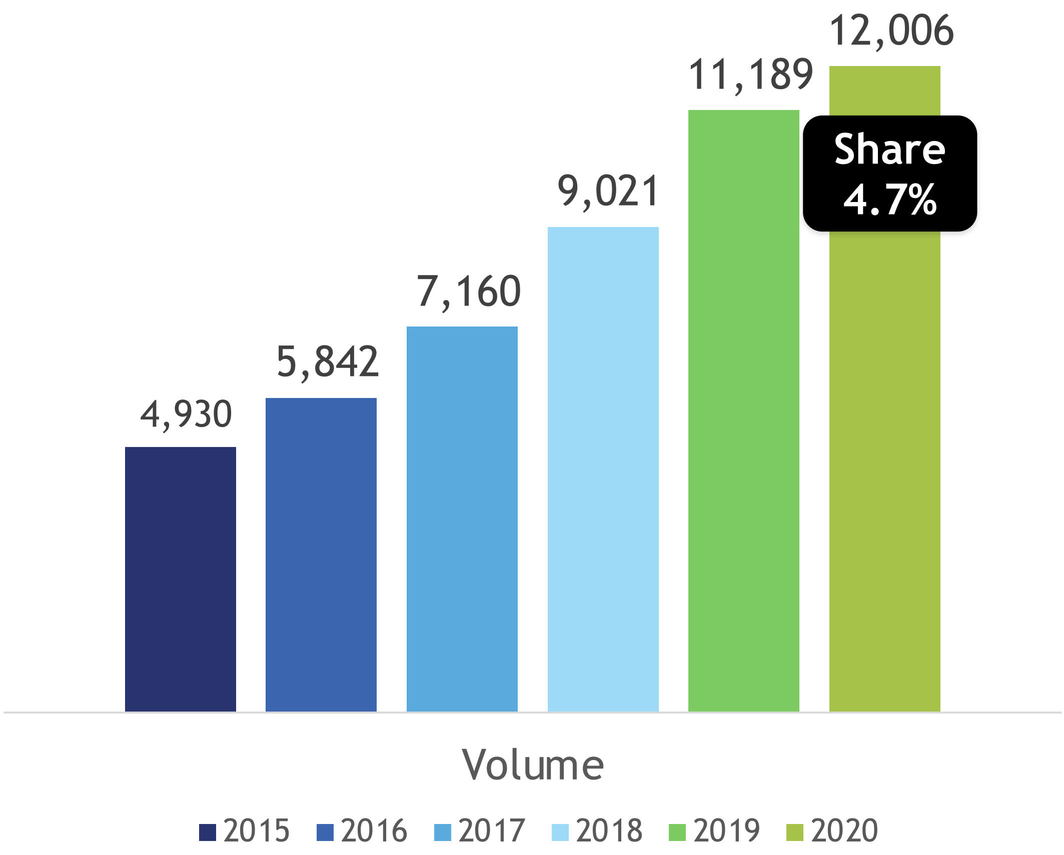


Source: NielsenIQ measured off Premise channels (Calendar periods)

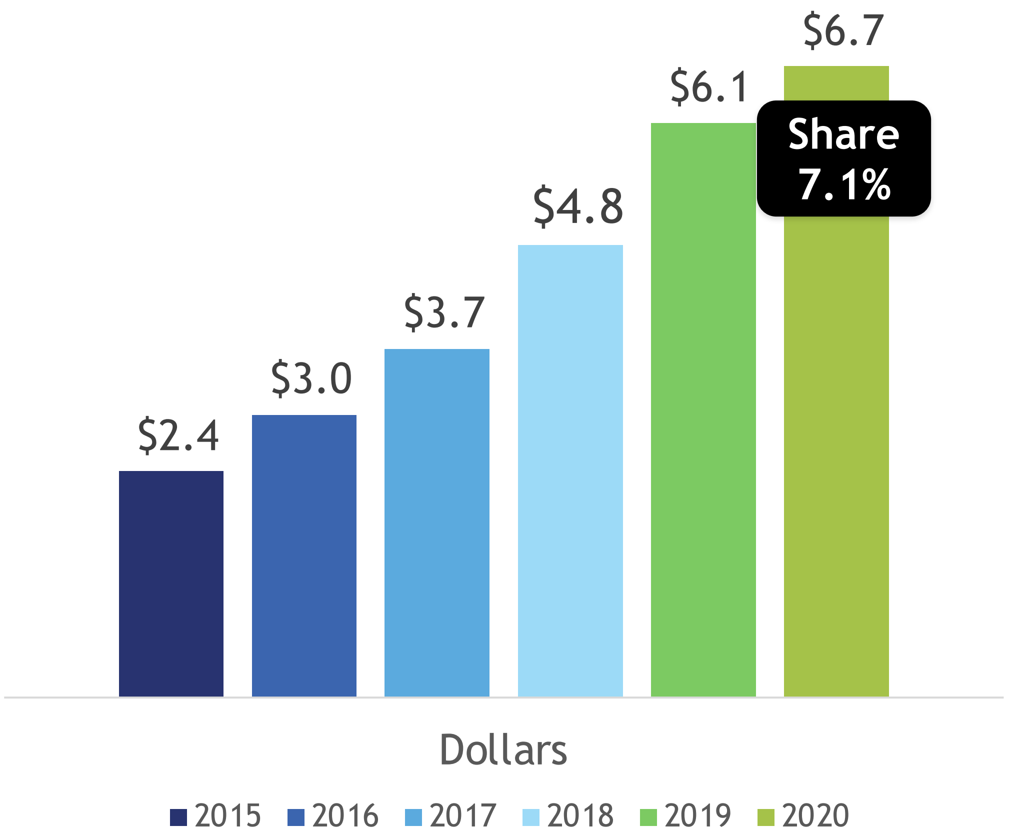
*Independent owned brands + some acquired recently by large Spirit companies
Excludes brands historically owned by large Spirit companies
Brands must have sales in all 4 years

Craft Spirits continues to grow

Craft Spirits – sales volume
9L cases (000)



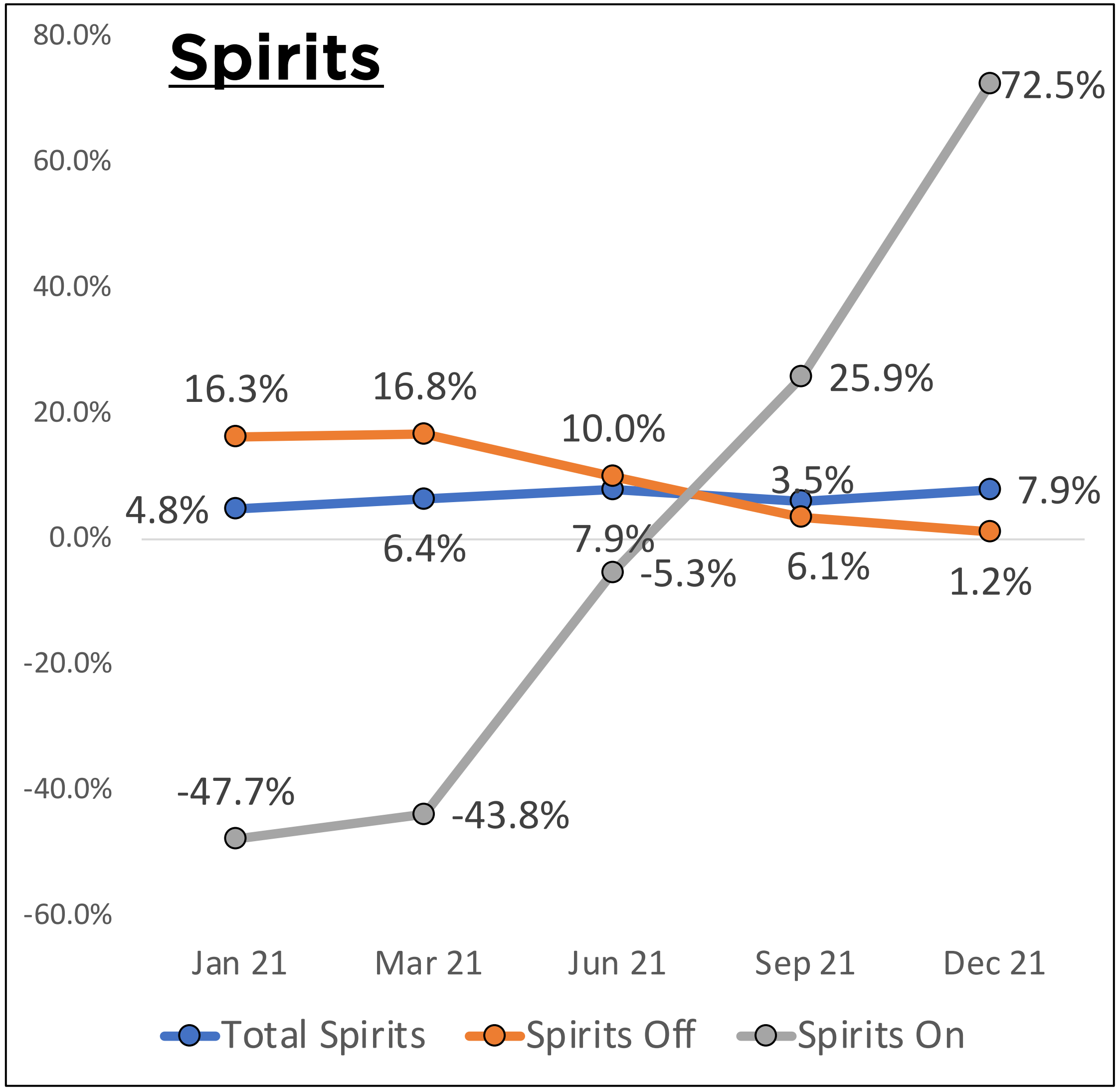
Craft Spirits – sales value
$ Billions

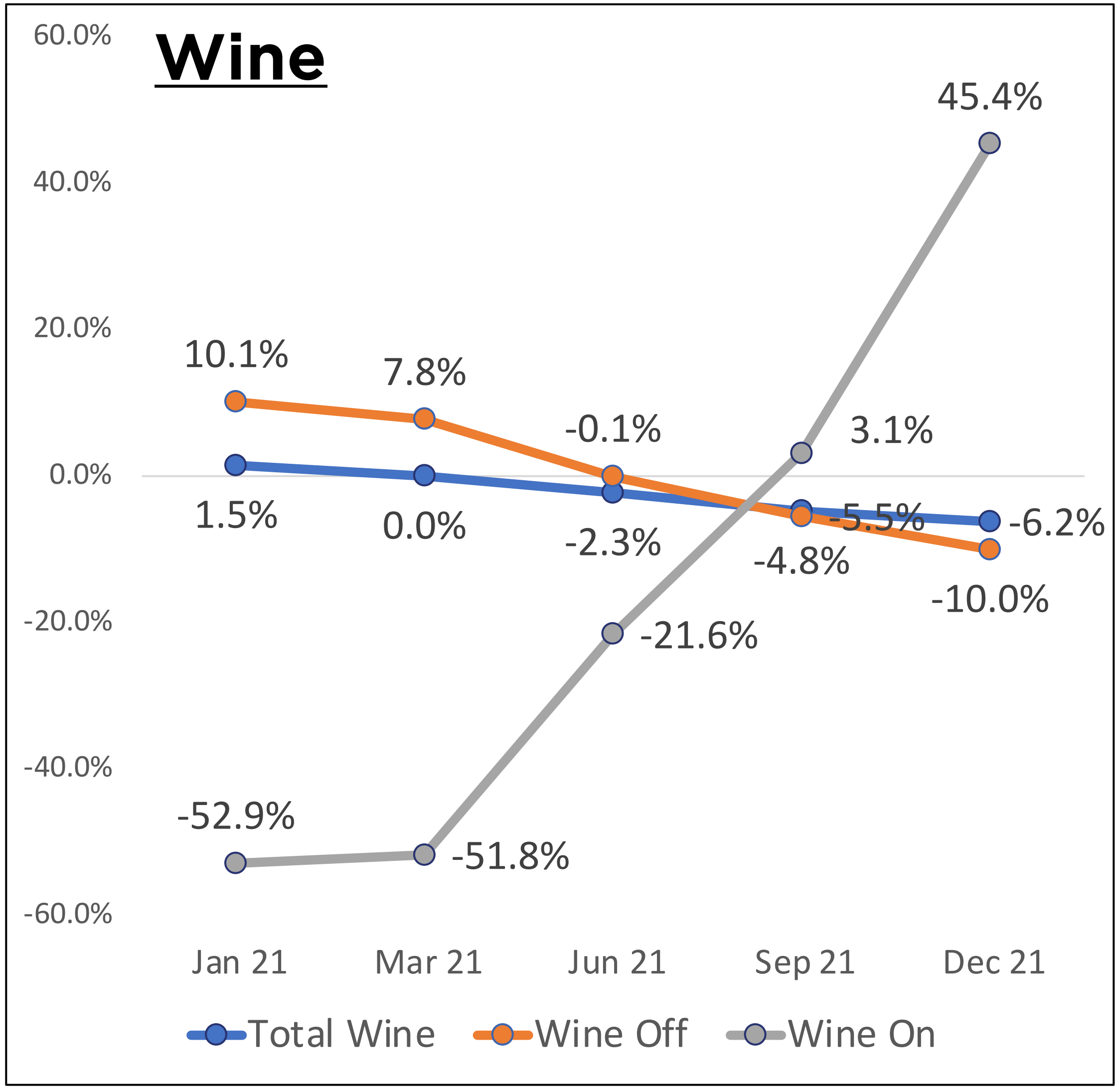


Source: Craft Spirits Data Project (ACSA, Park Street)

U.S. Craft spirits (for purposes of this data project) are distilled spirits that are produced in the U.S. by licensed producers that have not more than 750,000 proof gallons (or 394,317 9L cases) removed from bond, market themselves as craft, are not openly controlled by a large supplier,

On-Premise recovery continues





12 Month Rolling % Change vs. LY

But while On Premise is recovering, it still needs help!

- On Premise importance/share still below pre-COVID norm
  - Wine: 25% lower
  - Spirits: 17% lower; but importance of On Premise to Cocktails 2x higher vs pre-COVID

- Open on premise accounts down -10% vs Jan 2020 (40K less accounts)

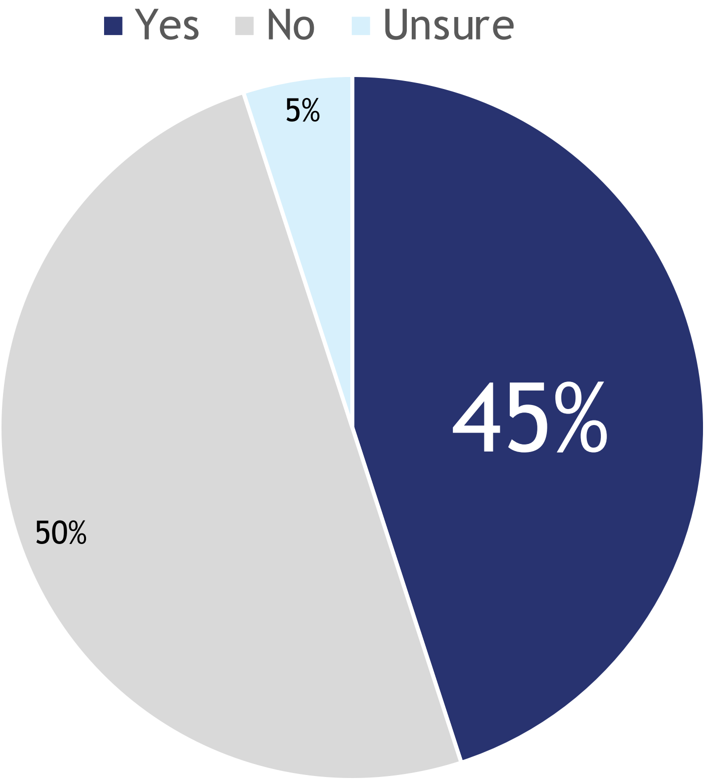
- Listings streamlined

vs 1 YAG

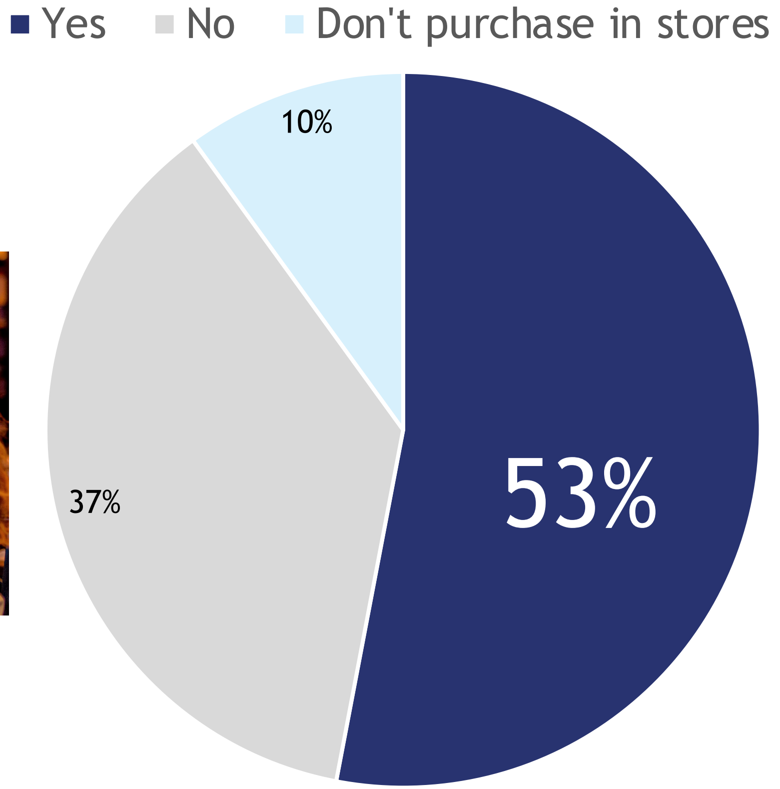
vs 2 YAG
Pre-COVID

On Premise often either represents a different choice than Off Premise, or influences an Off Premise choice

Does your drink preference change depending on whether you're visiting bars and/or restaurants compared to having drinks at home?



Do menu options and drink choice in bars/restaurants influence your alcohol purchases in stores?



Source: CGA COVID-19 Impact Consumer Research 9/2/21, Sample Size: 1972

SOURCE: CGA COVID-19 IMPACT CONSUMER RESEARCH SAMPLE (1993)

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