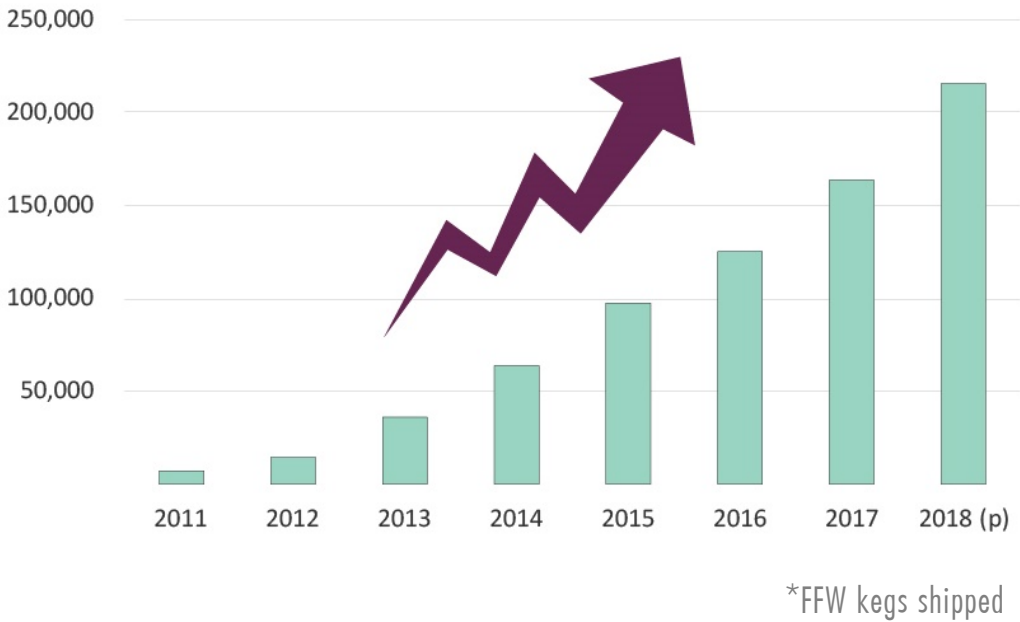


FREE FLOW

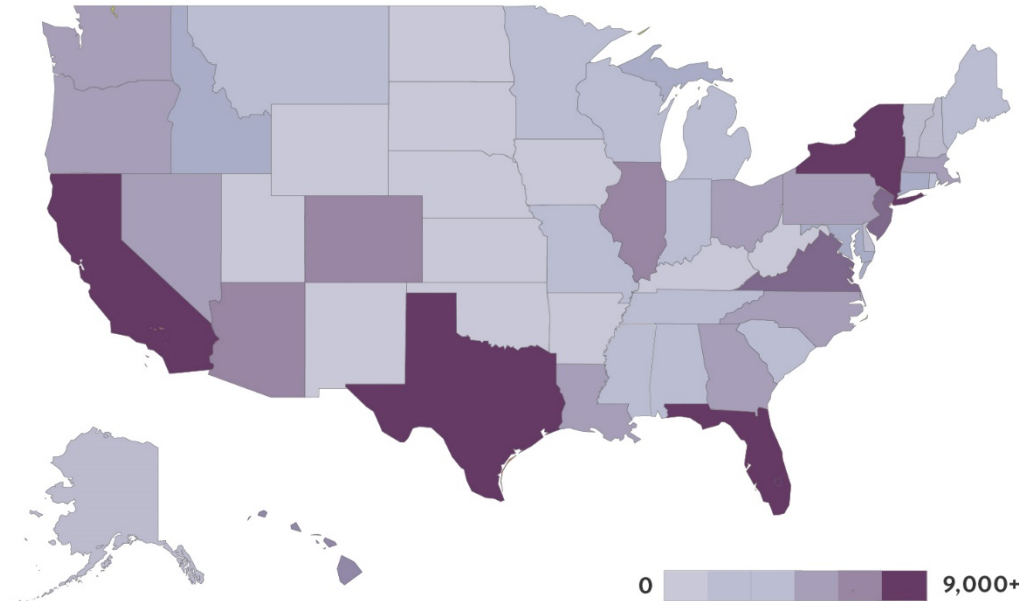
ALTERNATIVE PACKAGING

Wines & Vines Packaging Conference
August 9th, 2018

RAPID EXPANSION OF THE WINE-ON-TAP CATEGORY



KEGS SALES



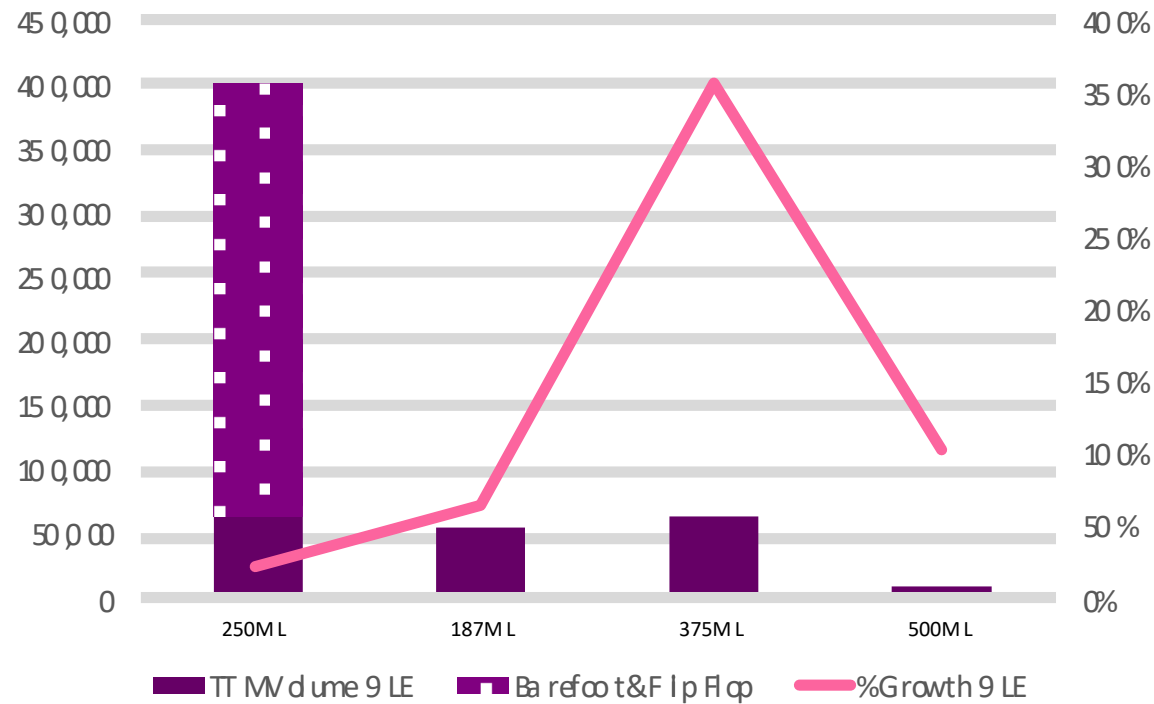
KEGS SOLD PER MARKET

WHAT'S ON THE SHELF?

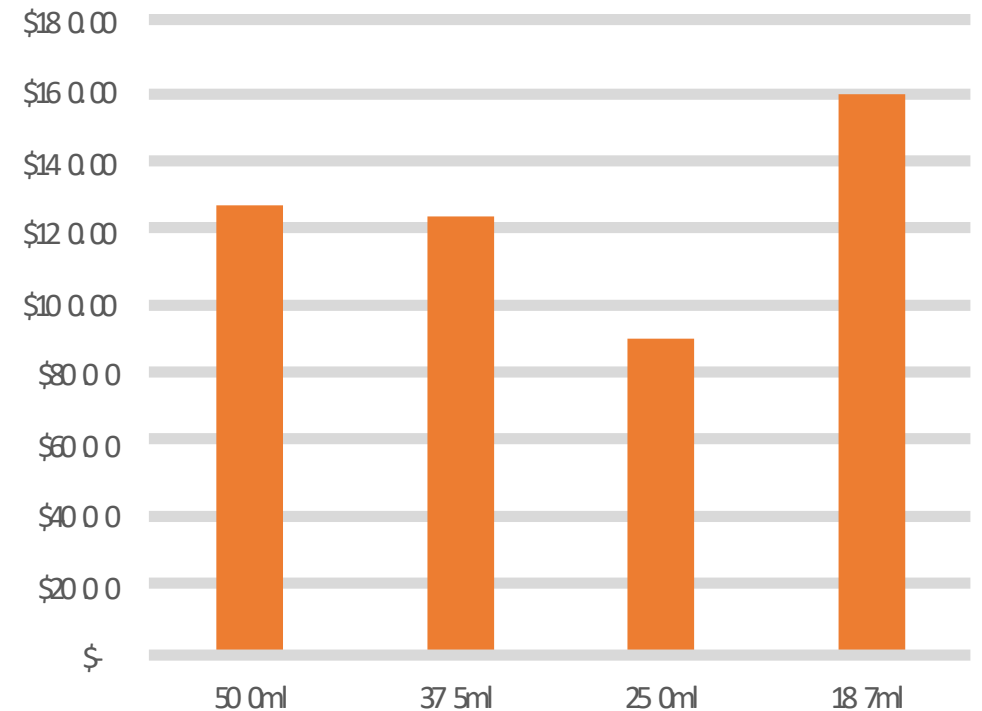


TRENDS | WINE-IN-A-CAN PRICING & CAN SIZE TRENDS

CAN SIZE TRENDS

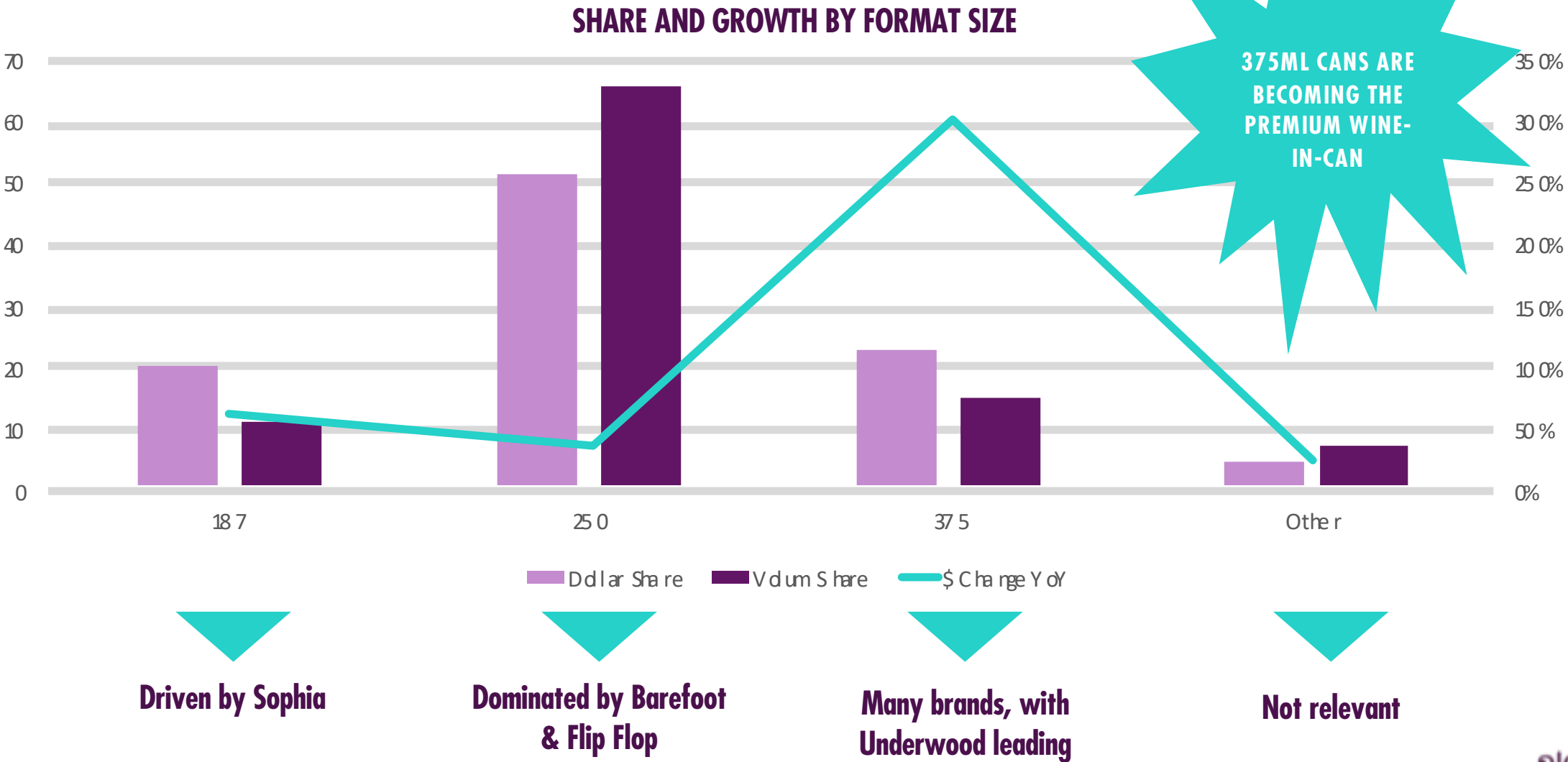


AVERAGE PRICE PER SIZE IN 9LE



WINE-IN-A-CAN

FROM A <\$1M to >\$50M SEGMENT IN 5 YEARS!



CAN-NOMICS VS. THE BOTTLE



#WVPACK

	Bottled (12 x 750ml)	24 Can Case			
		375ml Can	250ml Can	187ml Can	
BOTTLES & CASE	\$6.50	4.08	3.84	4.08	CAN / LID
LABELS/FOILS/CORK	4.20	0.65	2.78	0.57	BOX / PACKING
BOTTLING	2.25	\$4.25	4.25	4.25	CANNING (PER 24)
TOTAL COST	12.95	\$8.98	10.87	8.90	TOTAL COST
COST PER 9LE*	12.95	8.98	16.31	17.80	COST PER 9LE

This is the average for
a mid-size winery.
Large wineries can
reach <\$9

375ml cans present a
savings in packaging,
so brands can invest in
wine quality

Smaller format cans have either
restrictions (250ml in 4 pack) or
small enough volumes that make
packaging costs too high

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