



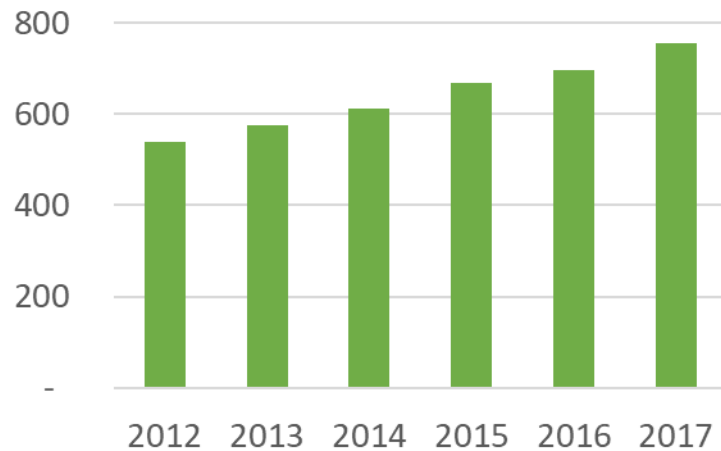
Washington State DTC Trends

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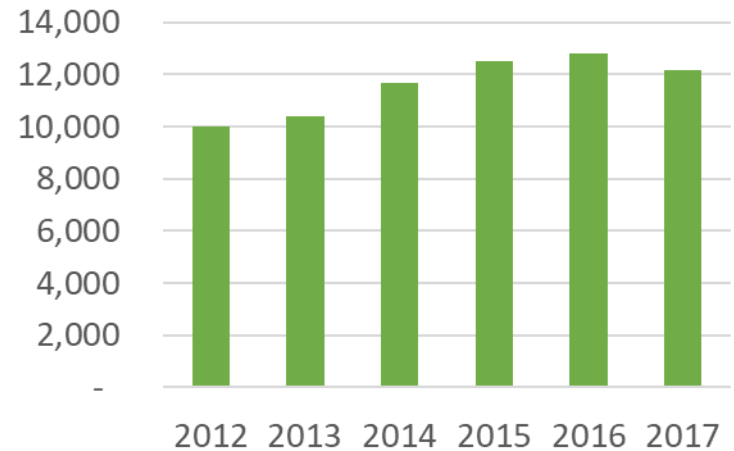
DTC Growth

Washington DTC sales expanding at a 7% annual rate

DTC Shipments (000s of cases)



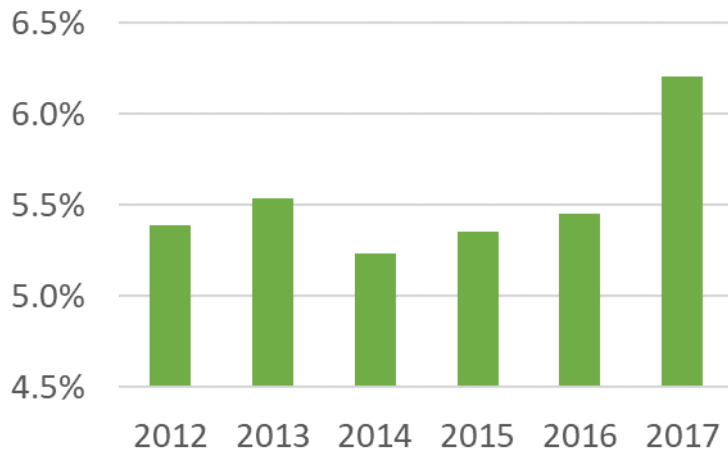
Total Shipments (000s of cases)



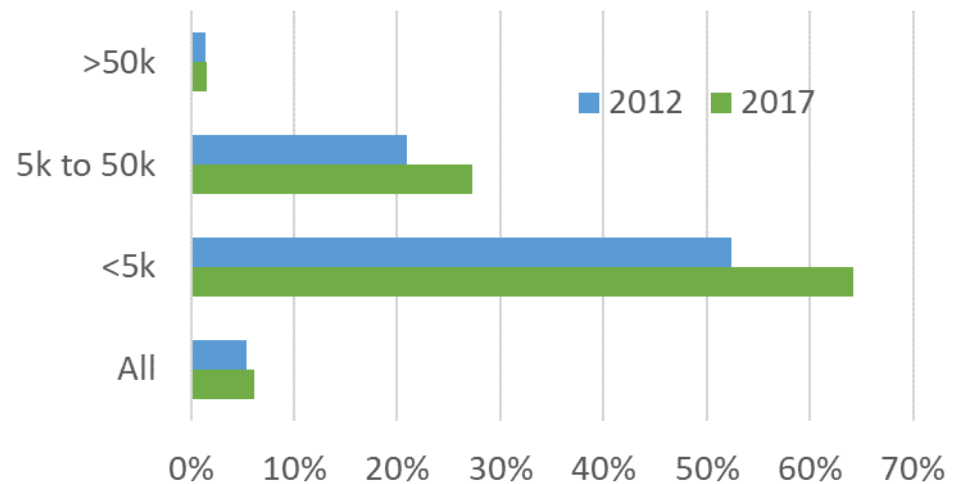
Share of Total Shipments

DTC just over 6% total – but much more important to small wineries

DTC Share of Total



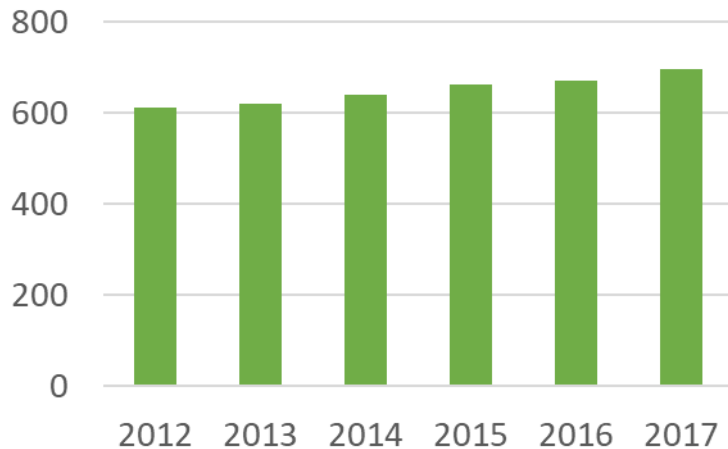
Share by Winery Size (cases)



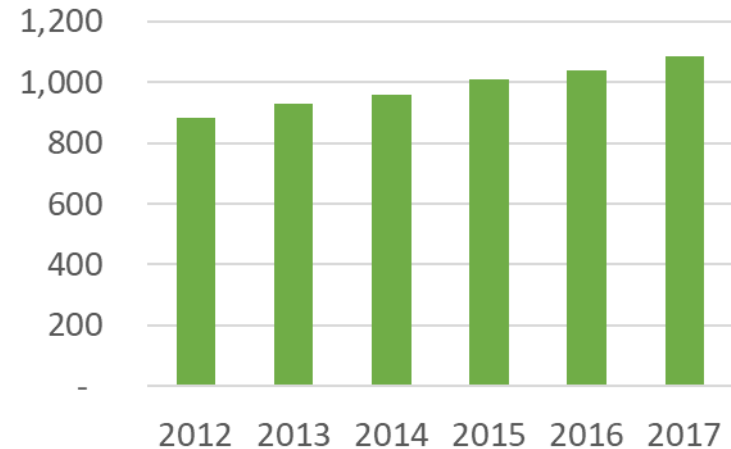
Competitive Pressures

DTC volume expanding at a faster pace than winery count

Wineries Recording DTC



Shipments / Winery (cases)

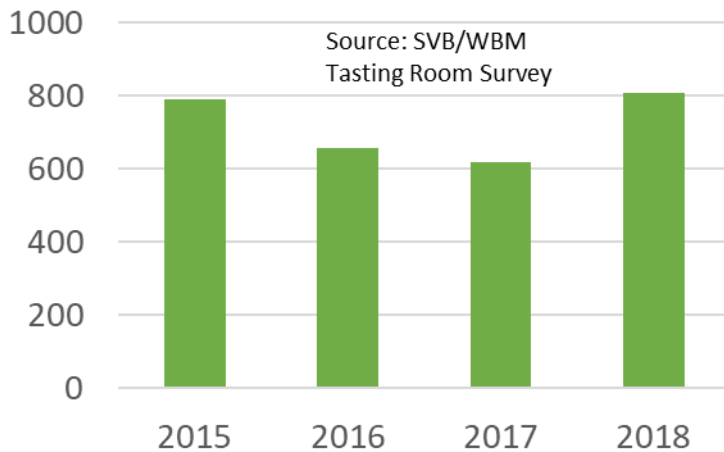


But, number of satellite tasting rooms has swelled to **233!**

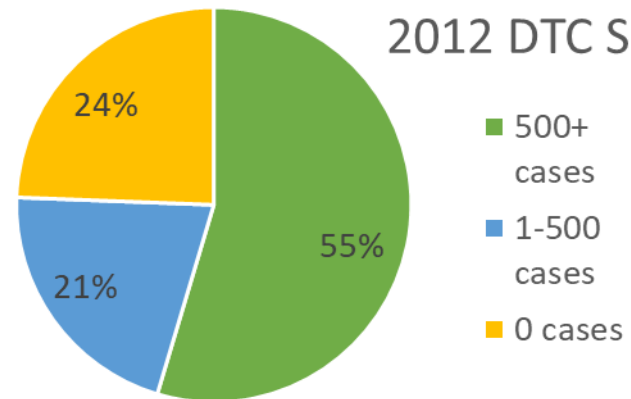
Competitive Pressures

Visitor counts stagnant and new wineries have accounted for one-fourth of DTC volume growth

Average Monthly Visitors



Share of Growth by 2012 DTC Sales





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