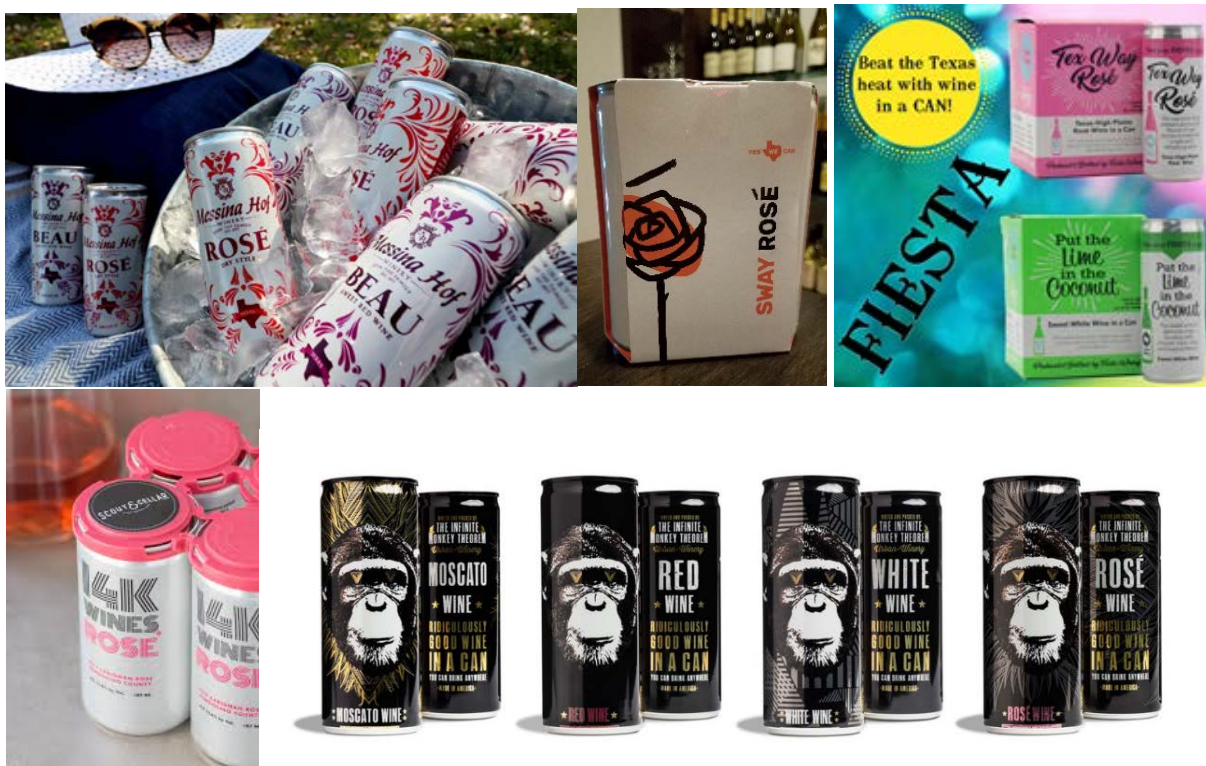




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## GROWTH OF THE WINE-IN-A-CAN MARKET



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## **ABSTRACT**

This study examines the drivers and idiosyncratic assets/benefits associated with packaging wine in cans. Secondary data were analyzed to determine current production and distribution practices for over 350 wine-in-a-can products. Additionally, findings from two online surveys (totaling nearly 1,000 respondents) contributed to assessing general and brand-specific awareness and consumer perceptions. Differences between awareness, trial/tasting, and purchase practices of respondents across subjective wine knowledge, education, gender, and generations were analyzed. Unlike objective knowledge (what consumers really know about a product), subjective knowledge can be defined as what consumers think they know about the product (wine in this case). No differences exist between gender, education, nor individuals with high vs. low subjective wine knowledge. Minor yet significant differences between generations were found. Convenience, portion packaging and expanded occasion/location wine consumption opportunities were cited as dominant reasons for trying and enjoying wine in a can.

**Keywords:** wine in cans, wine packaging, subjective wine knowledge scale, brand awareness, expanded occasion wine consumption.

## INTRODUCTION

The use of packaging as part of the marketing mix has been a powerful method to differentiate a product offering and provides one of the last chances to influence a customer in the consumer decision-making process (Rigaux-Bricmont, 1982; McDaniel & Baker, 1977). When it comes to wine packaging, for centuries the glass bottle has been the package of choice. The wine bottle represents quality and a host of inter-related components that convey different types of messages to consumers (Johnston & Velikova, 2016). For over a century, packaging characteristics commonly used to differentiate wine products/brands had been limited to the bottle shape and color, closure type and a fixed label presentation (Johnston & Velikova, 2016; Barber & Almanza, 2016). Past research routinely reinforced that when it came to wine, consumers associate the bottle size, shape and color directly with the quality of the product within (Jennings & Wood, 1994; Reidich, 2003). Studies report that consumers and wine-makers perceived screw-top closures [vs. corks], oddly shaped bottles, non-glass containers and boxed wines – as lesser quality wine product (Reidich, 2003).

More recent studies propose that consumer perceptions are changing, particularly those of the Gen Z and Millennial generations and wine makers are experimenting with alternative packaging to differentiate their products on crowded retail shelves. Today's wine consumers show increased enthusiasm towards convenient, vibrant, functional econ-friendly, alternative wine packaging (Haderspeck, 2014; Johnston & Velikova, 2017). This alternative wine packaging entails any type of container that holds wine for retail sale that is not a traditional 750ml glass bottle. This includes packaging alternatives such as Tetra packs, wine-on-tap, bag in box, mini aluminum cans and individual serving sized plastic pouches. Large and small production winemakers have been experimenting with these alternative packaging forms to address expanding wine drinking occasions and locations and to coincidentally differentiate their products on crowded retail shelves. All of the mentioned alternative wine packaging methods address convenience, portion and quality control issues that are of continual concern to wine consumers and distributors. However, the iconic wine-in-can alternative also provides the added value of 360 degree individualized branding messages and seems to excite the most interest and the greatest adoption among today's Instagram-focused wine consumers.

Adoption of alternative packaging is strongly influenced by the degree of radicalness associated with the alternative package design (Ram & Sheth, 1989). In the case of wine-in-a-can, people have been consuming assorted beverages in cans (soda, juice, beer, craft beer) over the last 70 years. Although considered new for wine, the can is not considered a radical new packaging vehicle for a beverage. Yet, because wine is a complex product; its quality is difficult to assess prior to drinking and to some extent its cachet is dependent upon branded images and overall product and corporate [winery] brand identity. Therefore, wine drinking customers tend to rely heavily upon extrinsic cues that are part of the wine label, wine description, and the wine's branded reputation (Atkin & Newton, 2012; Sherman & Tuten, 2011). The 360 degree wine-in-a-can design is a means for winemakers to provide added intrinsic (image identification) and extrinsic (information) cues to help consumers reduce social and financial risks associated with wine consumption/purchasing. In addition, past research supports the premise that the more consumers are involved in using and purchasing a product [wine], the less likely they are to rely on extrinsic cues in forming perceptions and in accepting the entire product category (Zaichkowsky, 1988). Research specific to wine and involvement reports that the consumer's level of involvement with a product category influences their consideration and understanding of differentiated extrinsic cues (Hollebeek & Brodie, 2009; Speilmann, 2012). Therefore, the degree of radicalness, the available information, and the customers' involvement in the product category innovation [wine-in-a-can] influences the acceptance of the innovation (Nesselhauf, Decker, & Fleuchaus, 2016).

Amidst a highly competitive and product-saturated market, wine-makers who seek expanded occasions and locations to introduce innovative, more convenient packaging [such as wine-in-a-can] has the potential to positively impact the overall growth trajectory of the U.S. wine market (Johnston & Velikova, 2016; Thach & Olsen, 2016). Yet, little if any research has focused on the awareness, consumption and purchasing practices of the consumers/potential consumers of this new wine-in-a-can category and the location and occasion consumption expansion that it affords. To better understand the potential impact of this new wine category, this report first provides a brief review of the slowing growth within the overall wine industry, the history of wine in a can packaging, and the wine can filling process. It ends by discussing the possibility that packaging *wine-in-cans* is a robust trend as opposed to a short-term fad, and documents how within the past three years it has become an expanding alternative category in the wine industry.

## BACKGROUND

### Current Wine Market

The U.S. wine market (from all production sources) has exhibited markedly slower growth over the last few years, with weak year-to-year growth in both shipments and retail value (1% and 2% respectively) as shown in Table 1. According to the Silicon Valley State of the Wine Industry, 2018 the wineries 10 years from now will be those that adapted to a different consumer with different values (McMillan, 2018).

Table 1: Growth in US Wine Shipments and Retail Value (McMillan, 2018)

Year	Wine Shipments (case)	Yr-Yr Growth	Retail Value \$	Yr-Yr Growth
2017	403.4 million	1%	\$62.2 billion	2%
2016	398.8 million	2.9%	\$61.1 billion	6.4%
2015	378.8 million	2.3%	\$57.4 billion	3.4%
2014	377.5	.003%	\$52.3 billion	.06%

This leveling in traditional wine sales coupled with changing consumer practices is prompting the industry to seek growth in new places; one successful way is packaging wine in cans.

### **Wine-in-Cans Market**

Within the past three years, the application of canned packaging of wine has seen explosive growth. In 2017 wine in can sales totaled \$22.3 million, up from \$14.5 million in 2016, and \$6.4 million in 2016. While the rate of growth is slowing, 2017 sales were still up a commanding 54% (Marketwatch.com, 2018). In contrast to the diminishing growth of on average of 4% or less for all US wine sales, as illustrated in Table 1.

The ranking for wineries and distributors is shown in Figure 1, with E&J Gallo, The Wine Group, and Constellation Brands being the largest US Wineries, and Southern Glazer's and Republic National/Breakthru Beverage (post-merger) being the two largest US Distributors.

Largest Wineries*	Largest US Distributors
<ol style="list-style-type: none"> <li>1) E&amp;J Gallo (70 million cases)</li> <li>2) The Wine Group (53 million cases)</li> <li>3) Constellation Brands (50 million cases)</li> <li>4) Trinchero Family Estates (19 million cases)</li> <li>5) Treasury Wine Estates (16 million cases)</li> </ol>	<ol style="list-style-type: none"> <li>1) Southern Glazer's</li> <li>2) Republic National **</li> <li>3) Breakthru Beverage **</li> <li>4) Young's Market</li> <li>5) Johnson Brother's</li> </ol>
<p>*Some wineries sell more cases outside the US, making them larger in volume than this ranking for the US market</p>	<p>** #2 and #3 have announced a merger (Gordon, 2017)</p>
	<p>(Pemm, 2018; Wines &amp; Vines, 2018)</p>

Figure 1: Winery and Distributor rankings (Thatch, 2018)

Four out of the top five largest wineries also produce wine in a can: E&J Gallo, The Wine Group, Constellation Brands, and Treasury Wine Estates.

The top-selling varietals sold in the U.S., by volume (domestic & imported, Nielsen-measured off-premise sales) are:

- Chardonnay
- Cabernet Sauvignon
- Red Blends
- Pinot Grigio/Gris
- Pinot Noir
- Sauvignon Blanc
- Merlot
- Moscato/Muscat
- Rosé
- White Zinfandel (Advisor Press Release, 2018)

All of the 10 top selling bottle varietals are also packaged in a can. Although only 9<sup>th</sup> in overall sales, Rosé continues to be a phenomenal growth story, with sales jumping 60% compared to 2016 (Advisor Press Release, 2018). The first wine in cans packaged in the U.S. were Sparkling Rosé and Sparkling White (2002 Sophia) followed by Rosé, White and Red (Infinite Monkey Theorem, 2011), then Rosé, Sparkling Rosé, Riesling, Pinot Noir, and Pinot Grigio (Underwood, 2012).

## Historical Wine in a Can Background

This is not the first time within the past century that wine in a can has made a debut. As early as WWI (1917) French soldiers were provided rations of wine in large metal cans, as depicted in Figure 2. In the mid-1930s technology enabled metal canning, and it became popular to can food and drinks. Later, in 1936 Acampo Winery of California began packaging a California Muscatel wine in steel cans under its Acampa brand. Another early brand was Vin-Tin-Age (Figure 3). However, this early tin can packaging was not embraced by the wine producers and wine drinking market, presumably due to the wine's interaction with the metal.



Figure 2: Wine-in-can ration for French soldiers in WWI (Marsano, 2010 )



Figure 3: Acampa, and Vin-Tin-Age wine in a can, circa, 1936 (Advisor, 2018)

In the early 80's there was another attempt to persuade consumers to consider wine in an aluminum can. During this time period, Taylor California Cellars winery made efforts to convince airlines to consider lightweight single serve aluminum cans for their wine drinking flyers. However, small single-serve glass and/or plastic packaging won out instead. No formal market research studies on this situation could be found: sparse anecdotal evidence reports that consumers preferred the small glass bottles. Likewise information confirming the type, size or thickness of the can nor the quality of the lining could not be found. Hence, the exact reasons that wine-in-a can did *not* catch on at that time remains ambiguous.



The Guinness Book of Records recognizes the world's largest collection of distinct wine cans owned by Alan Green, a retired vintner from California. His collection contains 574 (and counting) brands of wine in cans dating from 1936.

Other packaging attempts such as wine in a box, keg wine, wine in a bag, and TetraPak paper/plastic containers---have also been recently re-introduced and have gained marginal market shares (Johnston & Velikova, 2017). However, these packaging alternatives, though practical and convenient in various settings, have not gained the popular positive buzz, genuine excitement, and market share that seems to be accompany the latest re-emergence of wine-in-a-can.

A key factor in the recent boom in wine-in-cans can be traced to the superior developments in the lining that coats the inside of the can, preventing the liquid from interacting with the aluminum. The leader in this field is the Baroke Winery, in Australia. In 1996 they introduced their patented can coating system trademarked as Vinsafe. The use of Vinsafe coating technology and synergy between authorized trained supply chain partners allows fillers in Australia to guarantee canned wine offerings, in some cases for up to five years.

In 2002 the Francis Ford Coppola winery introduced wine in a can under their new Sophia label, and while it enjoyed consistent success, it took years before it gained market acceptance and fast year-over-year growth. Ten years later, Sophia is now a top wine-in-a can U.S. product offering. The most dramatic growth in wine in cans occurred after 2011, with the introduction of The Infinite Monkey Theorem in 2011, Underwood in 2012, Flip Flop in 2014, Seven Daughters, Backpack, Allow Wine Works in 2015, four additional brands in 2016 and 6+ in 2017 (Ball Handout, 2018).

### **The Canning Process**

Packaging wine in cans is a holistic, integrated process that requires coordination between winemakers, can manufacturers and can fillers in order to maintain the integrity of the wine (Stokes, phone call, 2018).

## Can Manufacturing

The largest canner in the U.S. is Ball Corp., and its subsidiary, Rexam, who offer a wide range of can configurations and associated service options to their customers. A video of their canning process: [https://www.youtube.com/watch?time\\_continue=352&v=7dK1VVtja5c](https://www.youtube.com/watch?time_continue=352&v=7dK1VVtja5c)

According to the Can Manufacturing Institute, the following are major U.S. aluminum can makers that produce cans for wine packaging:

- [Ball Corporation/Rexam](#) (U.S. LEADER)
- [Ardagh Group](#)
- [CROWN Holdings, Inc.](#)
- [Anheuser-Busch Packaging Group/Metal Container Corporation](#)

## Can Size

The Alcohol and Tobacco Tax and Trade Bureau (TBB) governs the sale and trade of wine. Wine can legally be canned in 187ml, 250ml, 375ml and 500ml sizes. The most popular can sizes are related to government TBB regulations, and industry serving standards. Only the 187, 500, and 700 ml sizes can be sold as a single serve or multiples, while the 187ml and 250ml sizes can only be sold as multiples. Wine can sizes currently include:

187 ml (5.3 oz., 4 servings to a standard 750ml bottle)	approximately 1 serving
250 ml (8.8 oz.)	approximately 1½ servings
375 ml (12.7 oz., ½ a standard bottle)	approximately 2 servings
500 ml (16.9 oz., 2/3 bottle)	approximately 3 servings

Ball produces 187ml and 250ml cans in Wallkill, NY, and 375ml cans in Fairfield, CA (Ball Handout, 2018). Baroke's Vinsafe technology is only designed for 187ml and 250ml sizes. According to Baroke's Sales & Marketing Director these sizes fit the convenience, portion control, and single serve attributes that they believe consumers of wine-in-a-can value (Stokes, Phone call, 2018). Note that Table 2 in Appendix A does show some outlier can size offerings, such as 200ml, 700ml, as well as some in ounces, such as 10 oz. and 12 oz. (355ml).

## **Coating**

The can coating, also referred to as lining, is key to maintaining the integrity of the canned wine product. In most cases the coating is applied to the can during the can manufacturing process. Can manufacturers then distribute cans to smaller mobile fillers, 3<sup>rd</sup> party fillers, or wineries with in-house canning capabilities that fill and seal the cans.

Not all wines created by wineries are immediately fit for canned packaging. Wine samples must first be analyzed to determine if the wine falls within the acceptable corrosion parameters. Each wine is tested for percent ABV (alcohol content), pH, free SO<sub>2</sub> (ppm), total SO<sub>2</sub> (ppm), copper (ppm) and other chemical properties. Wines that do not meet the chemical parameters must be modified (tweaked) before they can be packaged in cans.

## **Filling Process**

The process of filling an aluminum can with wine can be done in one of three ways. The can is filled either by (1) having a mobile canner (filler) who brings the portable canning line to the winery, (2) by outsourcing canning to a local 3<sup>rd</sup> party filler who has a permanent canning line, or (3) installing an in-house canning line.

### **1. Mobile canning**

Wineries may enter the wine in cans business with less risk and upfront capital expenditures by having a mobile canner come directly to their winery. Mobile Canning Systems Affiliates represents the largest canning group in the world. Since the evolution of the small independent mom-and-pop mobile canners who sprang up to serve the booming craft beer market in the mid-2000's, the mobile canning market is maturing. Recently it was announced that Iron Heart Canning had become the nation's largest mobile canner, with three recent acquisitions: Land of the Sky Canning, River City Canning and Buckeye Mobile Canning. Iron Heart now operates 34 canning lines across 17 locations from Maine to Florida (see map, figure 4). This consolidation reflects a maturing in the mobile canning market. The link below depicts the canning process used by Iron Heart, starting from removing the mobile line equipment from the truck, setup, and operation. <https://www.youtube.com/watch?v=CfdVOsJfJZI>



Figure 4: Mobile Canning Systems Affiliates Coverage

Iron Heart Canning (NH)

**Armadillo Mobile Canning, (Austin, TX)**

**Beer Dudes Mobile Canning (Denton, TX)**

Buckeye Mobile Canning (OH)

Land of the Sky Canning (NC)

River City Canning (MD)

Midwest Mobile Canning (IL)

Sessions Craft Canning (Canada)

Mobile Can Man (NY)

Spokes Mobile Canning (WA)

Mobile West Canning (CA)

Mobile Canning Colorado (CO)

Toucan Mobile Canning (TN)

Beer Monks (CA)

Old Dominion Mobile Canning (VA)

Logos depicting some of the Mobile Canning Systems Affiliates follow in Figure 5.



Figure 5: Logos Depicting Mobile Canning Systems Affiliates

Other canner/fillers include:

- Cask Brewing Systems, the Official Agent for the supply of aluminum cans to customers of Ball, the world’s largest aluminum can producer.
- Varni Brothers Corp. in California fills for Sophia.
- AWDirect (Sonoma CA) works with The Can Van, from San Francisco, CA
- Mother Road Canning, Albuquerque NM and Springfield, MO
- Polymer Canning Systems, Chicago, IL

## 2. Outsourcing

Where it is more convenient, flexible or financially advantageous a winery can deliver its wine to a local canner for filling. Examples of 3<sup>rd</sup> party outsourcing fillers include:

- American Canning in Austin, TX
- Wild Goose, Boulder, CO (also offers mobile canning)
- Eastside Distilling (Portland, WA) brought a custom canning line online to fill for 187ml, 200ml and 250ml for Dear Mom Wine Co.

### 3. In-house canning line

When volumes at a winery get sufficiently large, the winery may migrate from a mobile canner or an outsourced canner, and begin in-house canning. Cask Brewing Systems is a manufacturer of canning lines, and is also the Official Agent for the supply of aluminum cans to customers for Ball Corporation. (note: they also supply cans for products other than wine). Examples include:

- Union Wine Co. in Oregon, which makes Underwood, invested in a new packaging facility to significantly increase their capacity. “By building this new facility we’re setting ourselves up to continue growing our canned brands and confirms the here to stay place of wine in a can.”
- The Infinite Monkey Theorem installed a Cask canning line in its CO location.
- Free Flow Wines launched a canning line in 2017, and is partnering with CanSource, the leader in can sleeving services in the US and Canada.

### Can Design Technology

A 360-degree impression can be created by using applied labels after canning, or before filling using “shrink wrap” plastic covers or direct printing onto the can. Other design features include colored ends or colored tabs. Most wine-in-can producers use either sleeves, or direct-print. Each option has its own pros and cons, but cost & minimum order quantities, delivery time and color are the major factors.

For digital printing, the canner/filler Cask Inc. specifies Ball Corporation requires pre-press complete artwork. Pre-press artwork is artwork that is complete in every detail, shows color separations, wet on wet screen builds, stayaways, etc. and does not require any modifications. This requires the services of a qualified engraver who takes camera ready artwork to the pre-press complete stage. A link explaining the process follows (<https://www.cask.com/cans/the-can-printing-process/>). Ball provides customers with contacts for preferred authorized printers.

This digital printing is used for larger fill runs. In 2016 the minimums for printed cans were very high—around 110,000 for a 375-mL size and 130,000 for the 250-mL can (Mohan, 2017).

Today a minimum order from Ball has increased to 230,000+ cans, depending on size (Pregler, 2018).

“Ball is the company to work with if you’re going to print directly on cans. The issue we had was that their quantities were very high. It would require us to produce more than we wanted to, and we would also have to plan a good solid six months in advance.” (Mohan, 2017)

Sleeves can be delivered to the filler in weeks, whereas direct-print takes at least 6 months.

“With this [wine] brand, it’s more of a just-in-time bottling, so we don’t necessarily know six months from now what we’re going to be doing. When we first put the product in the market, we needed to see how it performed before we could commit to another run” (Mohan, 2017).

While the minimum for direct-print cans versus sleeves was a concern for *Essentially Geared* Wine, they wanted to take advantage of the advancements in printing capabilities, believing that the quality of graphics and overall aesthetic between print and sleeve is like night and day. *Essentially Geared* cans are printed in four colors, but a new design for a brand extension will fully utilize six-color process printing.

While the shrink wrap sleeves are more expensive per can to produce, the sleeves are available in smaller minimum quantities, making this option attractive to wineries with smaller production capacity.

## **METHOD**

A mixed methods approach was used to comprehend the current wine-in-a-can market. It includes secondary data collection and analysis and primary data collected with two surveys, targeted at consumers/potential consumers of wine-in-a-can.

### **Secondary Research**

Competitive market research was conducted to identify those wineries that to date, have successfully entered this packaging market. The wineries, the product lines, the specific wine names/varieties, and the packaging can sizes were gathered and recorded in a database of over 125 wineries.

Additionally, recent blogs, newsletters, trade journals, conference presentations, industry reports and academic papers pertaining to wine-in a can were collected and studied to determine current production, branding and distribution practices for wine-in-a-can. This includes documenting the wine in a can market size, the production and filling process, identifying the technically beneficial aspects of the wine canning process, extrapolating distribution benefits, and discussing the benefits of 360 degree label design. Impressions and quotes were also collected regarding why/how packaging wine in cans became a strategic decision for producers and how it is being received by wine drinking customers.

### **Primary Research**

Two surveys were also conducted with consumers/potential consumers of wine-in-a-can.

As part of a class assignment, undergraduate students in multiple college level marketing classes in a Middle States-accredited University, disseminated a paper and pencil survey comprised of six-questions to 10 people that they knew. Students were instructed to obtain responses across generation/age, and not just from their immediate peer group. This preliminary survey included four closed-ended questions and two open-ended questions. Survey respondents were asked if they had ever heard of wine in a can. If they answered yes, they were then asked subsequent branding and perception questions. The overall awareness and brand specific data responses from this survey were then analyzed across demographics.



The second survey was expanded to include 24 questions that included four open-ended, and 16 multiple choice or closed-ended questions, plus a four-question subjective wine knowledge scale. New students in new marketing classes were again asked to distribute the link to the online survey to 10 people they knew. This time they were told they could only ask two peers of their same age range (21-24). The remaining eight surveys were distributed to people outside of this age demographic, so that the results would not be skewed towards the college drinking age population.

Three researchers reviewed the data separately and then collectively. Frequencies and correlation data were analyzed and the appropriate Chi Square and ANOVA tests were performed. Additionally, the subjective wine knowledge factors were transformed into one construct and used to determine differences between those with high or low self-reported wine knowledge across other variables.

## RESULTS

### Secondary Data Analysis

As of this writing, this study has uncovered over 125 wineries in 13 countries and 18 US states that have invested in packaging wine in cans (Table 2). Table 2, found in Appendix A, depicts over 350 brands and product lines, the size of the can, the types of wine, and in some instances the specific varietals that were chosen for the wine-in-can selections. The Table includes six Texas wine makers that offer 12 brands of wine-in-cans. The table also reveals that although most of the wine in can products emanate from wineries (large and small), there are now players in this canned wine market that are either combinations of wineries or wine makers, or packaging process entities that purchase juice/wine and brand and package it to attract the ever-increasing wine-in-can drinking consumers. One entry, Ava Winery, a San Francisco start-up, actually manufactures a synthetic “wine” using a molecular chemical formula that resembles wine (Baraniuk, 2016). With new wine-in-can products being released almost weekly, this table represents a snapshot in time and not an inclusive all-encompassing list; yet, it provides insights into the dramatic recent growth from 2002’s lone brand – Sophia- to today’s 350+ brands.

#### Top Wine in Can Sellers

The major wine in cans sellers, not in any particular order, are:

E. J. Gallo - Barefoot (IL) and Dark Horse (CA) brands

Union Wine Company - Underwood (OR) brand

Francis Ford Coppola - Sofia and Diamond (CA) brands

The Infinite Monkey Theorem - (CO and TX)

Precept Winery - House (WA), Tangent (CA), West Side brands

Field Recordings – Alloy Wine Works, Fiction, Hoxie and Book Club (all CA) brands

Barokes Wines– Barokes (Australia) brand

The photos below depict some of the creative packaging of wine-in-cans brands.



Texas wine-in-can winemakers are depicted in the photos that follow (Figure 6) and include:

Messina Hof – Rosé and Beau (sweet red)

Yes We Can Wines – Sway Rosé and Sway Blanc

Fiesta – Tex Way Rosé and Put the Lime in the Coconut

The Infinite Monkey Theorem – Moscato, Red, White and Rosé

Scout & Cellar – 14K Rose

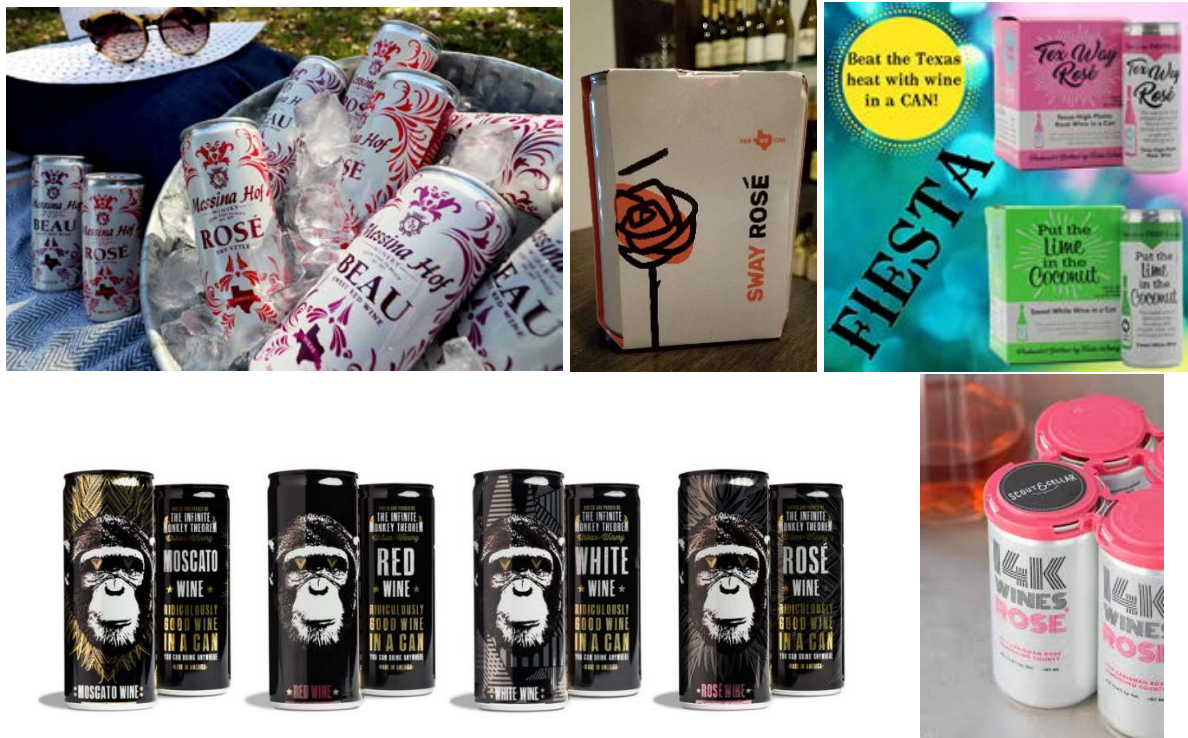


Figure 6: Photos of Texas Wine Brands

### Distribution / Retailing Wine in Cans

There are many retailers in the wine in can and traditional wine market. Retailers are affected by customer demand, distributor and Direct-to-Consumer (DTC) issues. Retail outlets include wineries themselves, as well as wine & liquor stores, supermarkets, convenience stores, and other outlets, depending upon individual state and federal regulations.

- The majority of wine in cans in the U.S. are still mostly available in/through the wineries themselves, but larger wineries such as Gallo and Francis Ford Coppola have regional and

national retail/restaurant coverage, and their wine in cans are more easily integrated into the larger scale wine distribution system. But retail availability is growing, as examples below describe: The Infinite Monkey Theorem recently landed shelf space at big grocery chains Foodland, Meijer (236 stores) and Harris Teeter (250 stores).

- Underwood and Barefoot have received shelf space in State controlled liquor stores in Pennsylvania, and Barefoot has also placed their Refresh Moscato Spritzer in Walmart.

Wine in cans are also finding their way into restaurants and are being marketed to venues that have not traditionally served wine (stadiums, beach and pool, boating clubs, zoos, etc.).

- The co-founder of Old Westminster began canning their existing vineyard wine after a friend who owned a restaurant at the Maryland shore lamented lost sales when customers could not take a glass of wine to the beach.
- CH & Co Group is now serving Winestar wine in sustainable packaging [cans] at ZSL London Zoo, Wakehurst Place, Tower of London, Elstree Studios, Royal Botanic Gardens, Kew and Birmingham Botanical Gardens through its specialist commercial business, Ampersand (Hospitality, 2017).
- In Japan wine in cans are very popular, but even more popular (and perhaps driving sales) is Japan's embrace of vending machines to deliver wine in cans, as well as fancy gift boxes for a more upscale presentation, as depicted in Figure 7. According to Baroke, the Japanese market readily accepted wine in can packaging because cans represented quality to the traditional Japanese food/beverage consumer. (Stokes, phone call, 2018)



Figure 7: Japanese liquor vending machines; Barokes gift pack.

Conversely, offerings from small wineries are limited to smaller distribution outlets, and are often based upon personal relationships or local idiosyncratic attributes.

- Yes We Can Wines is the creation of the son of the Vintner from Lost Draw Vineyard (Brownfield, TX ) and Lost Draw Cellars (Fredericksburg, TX) that feature 100% Texas Wines and carry the 100% Texas wine logo. Places that carry the Lost Draw wine in a bottle were offered promotional trials of the canned Sway Rosé (Personal discussion).
- Nomadica (CA) uses local artists to create unique, individual label designs for each of their brands, and have developed an Instagram following.
- Blue Lobster Wine Co. (ME) sells wine only in cans and kegs, and has grown from selling wines to a handful of stores around Portland, to venues all over Maine.

### **Pricing of Wine in Cans**

A detailed price analysis is not part of the scope of this report, due in part to the fact that as a category relatively early in its Product Life Cycle, the effects of competitive price, promotional pricing to increase volume, etc. have more of an impact on a mature industry (like bottles). However, for the past decade it appears that most wine in cans sells for approximately the same price point range based upon the size of can. For example, a 375ml can (approximately 12.68 oz., which is the equivalent of two servings), sells for \$7-8 dollars/can. The 250ml can (approximately 8.45 oz., which the equivalent of approximately 1½ servings), sells for \$4-6 dollars/can. A 187ml can (approximately 6.3 oz., which is the equivalent of a single serve) sells for \$1-5 dollars/can.

However, as the wine in can phenomenon becomes more accepted and remains a high consumer demand, premium wine offerings are entering this space, more competitors are entering (with or without a winery, and the pricing dynamic should become more of a segmentation factor. For example, Sans sells a 375 ml Cabernet Sauvignon '17 wine in a can, the equivalent of a half bottle, for \$25, which is only sold in a 3-pack (\$75) (Figure 8), a Carbonic Carignan '17 (375ml) sold for \$15 only in a 3-pack (3 for \$45), and a Rutherford Riesling '17 (375ml) for \$15 sold only in a 3-pack (3 for \$45).



Figure 8: Napa Valley Cabernet Sauvignon '17 (375ml - \$25); sold only \$75 (3 cans package)  
Sans Wine Co (Sans Website, 2018)

### **Five Main Drivers (Themes)**

Our Secondary Data Analysis also uncovered five main drivers (themes) which stimulate interest in and are promoting the expansion of the wine-in-cans market. These inter-related consumer pull and supplier push drivers are: 1) convenience, 2) occasion expansion, 3) sustainability/cost savings, 4) quality and 5) visual image/branding. Each driver is complex, multi-dimensional, and in some instances overlaps with one or more of the other drivers. Perhaps the most important driver of the wine in cans market is Convenience, but it is heavily linked to Occasion Expansion.

### **Convenience**

Convenience aspects include: opening the can, portion control, and variety.

#### Opening and Finishing

- It is less cumbersome to open a can vs a bottle, since it doesn't involve a foil cutter or cork screw; consuming the wine doesn't necessarily involve. For example, Backpack was conceived after founder Jim Doehring failed to bring a corkscrew to a picnic, causing the occasion to be "less romantic".

### Portion control

- Individually-sized portions per can means consumers do not need to open a full bottle of wine to enjoy one or two glasses of wine whether at home or away.
- Restaurants that have embraced wine in a can find it a perfect portion controlled pour - no guess work, no over- or under-pours. It can be poured at table side by servers or at the bar, or by the customer him or herself. In casual settings the wine is often drunk from the can itself. Francis Ford Coppola's Sofia brand is sold with an attached straw that consumers find appealing. The small size of the can also means it's less likely to have to deal with the issue of unfinished wine, resulting in transporting an open container (illegal in most states).

### Variety/Sample

- Wineries that adopted wine in cans generally entered with one or two brands/varietals and quickly added a full range/variety of choices.
- Not constrained by the quantity in a full bottle, consumers can drink a glass by themselves, and even match single glasses of different wines with various meal courses and food pairings. Likewise, a wide range of types or varietals of wine can be offered to friends.

## **Occasion Expansion (Location and Event)**

Another primary reason that wine in a can is exploding so rapidly is that its convenience and portability enable it to be served in places that traditional wine in bottles/glass cannot.

The convenience and portability associated with packaging wine in aluminum cans permits new wine consumption based on two new occasion dimensions: (1) location and (2) event. Location occasion involves places where traditional bottles are not practical: on boats, at the beach, hiking, camp-grounds, tailgating, pool parties, and other active lifestyle situations. Event occasions where offering single-serve wine is desirable, including events such as: bridal or baby showers, weddings, graduation parties and family BBQ.

For example, it is reported that Francis Ford Coppolla created the U.S. wine-in-can category packaging his wine in 2002 (and named it Sofia, after his daughter) to serve at her pool-side wedding.



The consumer demand generated from such new-occasions is a main driver to total increases in sales – as opposed to cannibalizing existing sales of bottled wines. The fast double-digit growth of wine in cans is not stealing business from the already strained wine market growth of 2-4%, it bolsters overall wine sales.

### **Sustainability/Cost Savings**

Aluminum is 100% recyclable, and packaging wine in cans results in a very small environmental footprint. For example, Rexam (a Ball subsidiary can manufacturer) is offering Cradle-to-Cradle Certification to illustrate the value that aluminum cans offer. This Certification means the process starts with an aluminum ingot, is processed into a beverage can, is filled, consumed, and the recycled can is melted down and turned back into an ingot again. The eco-friendly aspect of wine in can packaging also attracts attention from the ever-increasing eco-conscious consumers who value sustainability.

Packaging in aluminum cans versus glass bottles also yields savings of approximately 15-20%, with some producers claiming as high as 40%, due to lighter weight during shipping and handling, reduced breakage and efficient stacking (Advisor, 2018). A study conducted in the UK found that transporting the same total volume of packaged wine slim cans (250ml) has half the CO2 emissions of wine transported in glass bottle packaging (Scientist Live, 2018). Establishments that sell by the glass also can experience savings due to the accuracy of correct portion control. These savings improve operating profits and/or lower the retail price, even at low volumes. Boutique brands with limited production see canning as a way to make their artisanal wines available at affordable customer price points.

### **Quality**

Wine that is packaged as a still product (no carbonation) must remove oxygen from the package and also create pressure inside the can. By adding a dose of liquid nitrogen immediately after the can is filled, then adding and sealing the lid, as the trapped nitrogen expands the oxygen is pushed out while simultaneously giving the can pressure (Beerdude Handout, 2018). This results

in a superior dark, oxygen-free environment for storing/holding still wine. Likewise, when bubbly wines are canned the intended effervescence is protected within the small space.

*“You actually have a really stable environment in a can...There’s no UV penetration or oxygen exchange like there would be through a cork and glass bottle”* (Drinks News, 2018, p.5).

There are two major proprietary can coating methods. Wine-in-cans in the U.S. use a coating technology offered by Ball, a U.S. corporation. Often the cans are lined with an epoxy resin “that acts as a protective barrier between the wine and the aluminum,” says Ryan Harms, owner and winemaker of Union Wine Co. in Tualatin, Ore., which produces the Underwood brand of canned wine using the Ball technology (Advisor 2018). The other technology, Vinsafe, was developed by the Australian winery Barokes, and is the defacto standard in Asia, Europe, Australia, and New Zealand. The Vinsafe technology is the only globally recognized, patented wine-in-a-can packaging system that has been proven to deliver consistent quality, stability and longevity in canned wine (Stokes, phone call, 2018). In the past years, Vinsafe wines have been awarded over 125 wine competition medals (Stokes Phone call, 2018). Vinsafe has also been licensed by Ball Packaging Europe, one of the leading European beverage can manufacturers. Ball Packaging Europe also recently licensed Vinsafe fillers located in the major wine regions of Valencia, Spain (Font Salem) and Bordeaux, France (Cacolac) (Mans, 2011). The Vinsafe technology patented by Barokes is important to the wine in can market because Baraokes owns both product and process patents for wine in a can, so “even if people try and avoid the patent by not using the whole process they generally fall within the [Baroke] product patent” (Advisor Press Release, 2018, page 1). Millions of dollars and multi-years of research to produce an effective technology precipitates Barokes vigorous protection of their patents.

A key difference between the two coating technology processes pertains to the length of the product’s guarantee after filling. The guarantee offered by fillers using Ball technology is 6 months after filling, a fairly short stable shelf life; whereas, Vinsafe coating technology has been guaranteed from 1-5 years.

While Ball has licensed the Vinsafe coating technology in Europe it does not currently use this technology in the U.S. market. The Ball Corporation was negotiating for a licensing agreement with Barokes in 2011 to bring canned wines to the Americas, and two American wineries had been

working with Ball to introduce Vinsafe wine in a can (Schlacter, 2011). However, confirmation with the Marketing & Sales Director at Barokes confirmed there are no canners/fillers or winemakers that use the Vinsafe technology in the U.S., yet (Stokes, phone call, 2018).

## Visual Image/Branding

In this image-fueled Instagram-currency world, the potential of advertising/design options is limitless. Wine packaged in traditional glass bottles is generally limited to front and rear labels. Conversely, aluminum cans permit a 360 degree label, either by using a paper label wrapped completely around the can, a shrink-wrapped sleeve, or digital printing directly on the can. This 360 degree labeling allows designers to convey unique and dramatic brand images, even going so far as using glow-in-the-dark ink. The aspect of the 360 degree printing, especially when coupled with the individual aspect of packaging wine in a can, enables a brand to use their packaging graphics to highlight their differentiated competitive advantage.

This labelling potential is especially valued by smaller wineries trying to stand out on a crowded retail shelf. Example of artist-designed Nomadica cans (Nomadica Website, 2018).



Figure 9: Nomadica’s Artist-Designed Cans (Nomadica Website, 2018).

Simultaneously, when these cans are packaged 3, 4, or 6 to a pack, the exterior packaging provides another level of advertising possibilities. Both forms help to create powerful images for the winery brand (figure 10).



Figure 10: Examples of multi-can exterior packaging

The Internet is full of selfies of customers next to colorful, creative wine in cans, less so than selfies next to bottles of wine! The fun, progressive, festive nature of many of the designer cans inspires social media blog entries, hashtags, selfies and pictures of friends enjoying these single or double-serve cans. Examples of blog entries include:

“Oh my goodness, this brut Rosé is a must have for every fashion lady. And it’s so Instagram worthy 😊”

“Oh my gosh this is BEAUTIFUL. I would buy this just to stare at it all day! And that packaging design is gorgeous too!!!” (Temsah-Denis, 2017).

Popular hashtag references to wine-in-cans and what they convey:

(#CanTheCork) – convenience

(#WineWithAView) – occasion/location

(#simplerbrandwines) – cost savings

(#YesWeCan) – quality

(#PinkiesDown) – image – unpretentiousness.

## Primary Survey Results

Findings from two surveys (totaling 984 respondents) contributed to assessing general and brand specific awareness and consumer perceptions of wine-in-a-can across gender and generations. Differences between respondents with high versus low reported subjective wine knowledge and purchase/consumption intent was also studied (only in survey 2). The questions in each survey were not identical, therefore data from each survey were analyzed separately.

### Demographics

Out of the total number of Survey 1 respondents (N= 486), 41% (200) were aware of wine-in a can and 59% (286) had never heard of wine-in a can. Gender was recorded for 390 respondents -- 44% were males and 56 % were female. The Respondents ranged from 21- 83 years old, with an average age of 33.

Out of the total number of Survey 2 respondents (N= 498), 40% (n=197) were aware of wine-in a can and 60% (301) had never heard of wine-in a can, percentages very similar to the survey 1 respondents that were 41 and 59, respectfully. Of those that had heard of wine in a can, only 14% had tried it, and had mostly favorable impressions. Gender was recorded for 419 respondents -- 32% (133) were males and 68% were female (286). Respondents ranged in age from 21-88 with an average age of 35.

Out of those that had heard of wine in a can, 36% (Survey 1) and 43% (Survey 2) had tried it, with mostly favorable impressions. If respondents said they tried wine-in-a-can they were then asked: *You indicated that you have tried wine-in-a can. Please tell us your thoughts about this wine product.* The answers/comments provided in response to the question were divided into favorable (64) neutral or ambivalent (21) or negative (15) comments. The entire list of open-ended survey 1 and 2 respondent comments about their wine-in-a-can experience(s) is in Appendix B.

### Gender [no differences]

Males and females were not statistically different in any way across awareness, trying/tasting, or the purchasing of wine in a can.

*Awareness across Gender:*  $\chi^2 = 0.074$ ,  $N = 418$ ;  $df = 1$ ,  $p = 0.786 > .05$ .

*Trying/Tasting* across Gender:  $\chi^2 = 0.460$ ,  $N = 418$ ;  $df = 1$ ,  $p = 0.497 > .05$ .

*Purchasing* across Gender:  $\chi^2 = 0.180$ ,  $N = 418$ ;  $df = 1$ ,  $p = 0.671 > .05$ .

### **Educational Background [no differences]**

Respondents from different educational backgrounds also were not different in any way across awareness, trying/tasting, or the purchasing of wine in a can.

Awareness across Education:  $\chi^2 = 4.226$ ,  $N = 419$ ;  $df = 3$ ,  $p = 0.234 > .05$ .

Trying/Tasting across Education:  $\chi^2 = 0.498$ ,  $N = 419$ ;  $df = 3$ ,  $p = 0.173 > .05$ .

Purchasing across Education:  $\chi^2 =$ ,  $N = 71$ ;  $df = 3$ ,  $p = 0.099 > .05$ .

High School and Less	n = 45
Associates and Some College	n = 139
Bachelors	n = 175
Masters & Higher	n = 61
Total	N = 420

### **Generations (Age) [significant differences]**

Respondents from different generations exhibited statistically significant differences regarding *awareness* of wine in a can;  $\chi^2 = 11.946$ ,  $N = 479$ ;  $df = 3$ ,  $p = 0.008 < .05$ .

Respondents from different generations exhibited statistically significant differences regarding *trying/tasting* wine in a can;  $\chi^2 = 23.278$ ,  $N = 482$ ;  $df = 3$ ,  $p < 0.000 < .05$ . Respondents from different generations did not exhibit differences regarding *purchasing* wine in a can;  $\chi^2 =$ ,  $N = 71$ ;  $df = 3$ ,  $p = 0.490 > .05$ .

Gen Z and Millennial generation's exhibit higher awareness. Millennials also exhibit higher than expected for tried/tasted wine in a can, whereas Gen X and Baby Boomer exhibited lower than expected for both awareness and tried/tasted. Purchasing was as expected in all four generational categories. Table 5 illustrates the differences and lists residuals for any cells higher or lower than expected.

Table 3: Generations and Wine-in-Can Awareness, Tasting and Purchasing Practices

	<b>Gen Z</b>	<b>Millennial</b>	<b>Gen X</b>	<b>Baby Boomer</b>
<b>Awareness</b>	Higher than expected Residual (11.3)	Higher than expected Residual (6.3)	Lower than expected Residual (-7.6)	Lower than expected Residual (-10.1)
<b>Tried/Tasted</b>	As expected	Higher than expected Residual (+14)	Lower than expected Residual (-9.4)	Lower than expected Residual (-5.5)
<b>Purchased</b>	As expected	As expected	As Expected	As expected
<b>N = 482</b>	187	109	99	87

### Subjective Wine Knowledge

Survey 2 also asked respondents four subjective wine knowledge questions that used a 6-point Likert-style scale. The scale questions used in the survey are in Table 4.

Table 4: Four-question subjective wine knowledge scale (adapted from Flynn & Goldsmith, 1999)

- Q 1*      *I am confident in my wine knowledge.*
- Q 2*      *Among my friends I am the wine expert.*
- Q 3*      *I don't know much about wine.\* (reverse coded)*
- Q 4*      *I know more about wine than others do.*

The third variable was recoded. Then the Cronbach Alpha coefficient of reliability was performed to determine internal consistency and whether the four factors could be converted into a single score that reflects subjective wine knowledge. For this analysis, N = 418 constitutes the valid response rate (cases). The N of items (variables) = 4. Cronbach's alpha, written as a function of the number of test items and the average inter-correlation among the items was  $\alpha = 0.917$ ,  $> 0.7$  (the minimum standard accepted value), suggesting that all four items do form a closely related group. As Table 5 illustrates, the individual communalities were all proportionally high as well.

Table 4: Subjective Wine Knowledge Individual Communalities

	<i>Mean</i>	<i>Factor <math>\lambda</math></i>
<i>Q1 I am confident in my wine knowledge</i>	<i>M = 3.69</i>	<i><math>\alpha = 0.899</math></i>
<i>Q2 Among my friends I am the wine expert.</i>	<i>M = 2.99</i>	<i><math>\alpha = 0.898</math></i>
<i>Q3 I don't know much about wine.</i>	<i>M = 3.24</i>	<i><math>\alpha = 0.898</math></i>
<i>Q4 I know more about wine than others do.</i>	<i>M = 3.72</i>	<i><math>\alpha = 0.888</math></i>

To further determine what, if any, underlying structure exists, data were screened for outliers and to assess normality and linearity. Outliers were not found and normality and linearity were assumed.

A factor analysis was then conducted to measure the total amount of variation observed in the four variables. Principal Component Analysis rotation and extraction further analyzed the variables in this distribution. All four variables loaded on one factor. The four factors also explained 100% of the total variance. Likewise, in all cases if the item was extracted from the construct the Cronbach alpha coefficient was lowered from  $\alpha = 0.917$  to Q1 ( $\alpha = 0.890$ ), Q2 ( $\alpha = 0.891$ ), Q3 ( $\alpha = 0.892$ ) and Q4 ( $\alpha = 0.898$ ).

The four questions were then converted to a single wine score construct which was then transformed into a three-level categorical variable that was used to compare differences between respondents with high, medium or low wine knowledge scores. Researchers are confident that the combined score measures subjective wine knowledge.



### **Subjective Wine Knowledge across Gender**

Consistent with industry standards, in this study females self-report higher subjective wine knowledge scores compared to self-reported male scores.  $\chi^2 = 8.273$ ,  $N = 479$ ;  $df = 2$ ,  $p = 0.016 < .05$ .  $M$  (female) = 1.84,  $SD = 0.836$ ;  $M$  (male) = 1.59.  $SD = 0.773$ .

### **Subjective Wine Knowledge across Generations (age)**

No significant differences exist in the subjective wine knowledge scores (3 categorical levels) across four generations;  $\chi^2 = 12.125$ ,  $N = 418$ ;  $df = 6$ ,  $p = 0.059 > 0.05$ .

### **Wine Knowledge across Level of Education**

No significant differences exist in the subjective wine knowledge scores across level of education;  $\chi^2 = 4.266$ ,  $N = 419$ ;  $df = 3$ ,  $p = 0.234 > 0.05$ .

### **Subjective Wine Knowledge across Wine-in-Can Variables**

Individuals with high, medium or low subjective wine knowledge scores were not statistically different in any way across awareness, trying/tasting, or the purchasing of wine-in-a-can.

*Awareness* across Subjective Wine Knowledge:  $\chi^2 = 1.959$ ,  $N = 418$ ,  $df = 2$ ,  $p = 0.375 > 0.05$ .

*Trying/Tasting* across Subjective Wine Knowledge:  $\chi^2 = 2.529$ ,  $N = 71$ ,  $df = 2$ ,  $p = 0.282 > 0.05$ .

*Purchasing* across Subjective Wine Knowledge:  $\chi^2 = 1.959$ ,  $N = 418$ ,  $df = 2$ ,  $p = 0.140 > 0.05$ .

## Open-ended Responses

### *Where the wine in can is purchased*

When respondents in Survey 2 were asked --Where was the wine in a can purchased? – they indicated the following places:

#### Purchased for an Occasion or Event

Beer Distributor & Wine outlet/liquor store/wine & spirits/package store/retail shop/Total Wine/

Grocery store/supermarket

Weis Market/Stop & Shop/ Target/Walmart/Trader Joe’s/Whole Foods

#### Purchased because of a Location.

MD/Carolina/Ocean City, N.J./the beach

Poolside

Vacation

Various

### *Type/variety of wine purchases*

When respondents in Survey 2 were asked –What varieties or types of wine were the cans that you purchased or tasted? – they indicated the following:

White	Named Varietals	Miscellaneous
Rosé	Cabernet	Sweet Wine
Blush	Chardonnay	Sangria
Pink Rosé	Pinot Grigio	Grapefruit
Red	Merlot	Spritzers
Sparkling	Moscato	Fizzy Strawberry Flavor
Sparkling Rosé	White Moscato	Peach
Sparkling Italian	Pinot Noir	
	Albarinio	

The top types/varietal of wine-in-a-can that were tasted or purchased by Survey 2 respondents were: White (21.2%), Rosé (20%), Red (9.4%), Sparkling (5.9%), Named Varietals (18.8%), Misc. (5.9%), Unknown (18.8%).

***Where the wine-in-a-can is consumed***

When respondents in Survey 2 were asked –Where (or on what occasions) have you consumed wine-in-a-can? – they indicated the following:

- With friends

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- Casually hanging out with friends

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- With friends at a party

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- Party/Parties/Social

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- Graduation Parties

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- BBQs/Family BBQ

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- Family Party

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- At dinner/Dinners

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- Summer Holidays and outings

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- Wedding

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- Social outing

---

- Tailgate/Tailgating/Tailgating at a football game

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- At a pregame

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- Beach, on the beach/beach weekends!/sitting on the beach

---

- Poolside

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- Concerts/Concert

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- Super Bowl

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- In a beer and wine store when they were passing out samples

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- Supermarket

---

- Restaurant

---

- In Friends home

---

- Watching movie with friends at home

---

Home

---

Relaxing

---

Casually

---

Casually, around the house/Casually at home/At home, relaxing

---

Casually in room/My room

---

Dinner with my wife

---

Cooking at home

---

It was consumed in my home, purchased out of curiosity, and regretted almost immediately.

---

No specific occasions, just enjoyed randomly!

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Casual drinking

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When I'm super upset

### ***Brands remembered by respondents***

Survey 1 respondents identified 20 different wine-in-can brands. The top brands recognized by Survey 1 respondents were: Barefoot (38%), Underwood (12%), Sophia (10%), Bollicini (9.3%), Porch Pounder (4.7%), Miscellaneous brands under 3% each (21.5%) and Unknown (17.8%). Survey 2 respondents identified 15 different wine-in-can brands. The top brands recognized by Survey 2 respondents were Barefoot (27.7%), Flip Flop Wines (7.7%), Underwood (6.2%), Bollicini (4.6%), Miscellaneous brands under 3% each (24.3%) and Unknown (31%).

Combining Survey 1 and Survey 2, out of 25 different brands recognized, the top brands recognized totaled: Barefoot (34.3%), Underwood (9.9%), Sophia (6.4%), Porch Pounder (4.1%), Miscellaneous brands under 3% each (22.1%) and Unknown (25%).

There were over 25 different wine-in-can brands identified. Four brands were market leaders: Barefoot was the most recognized brand at 34%, Underwood at 10%, and Sophia and Porch Pounder brands each recorded single digit percentages. Noticeably, with 22% Miscellaneous brands having under 3% awareness, and 25% of the brand Unknown, the results suggest that with nearly half of the brands (47.1%) not having a market presence, there are many competitive brands fighting for recognition.

## DISCUSSION

As the wine-in-can trend strengthens, this new wine category is positioned to contribute to a marked upsurge in the recent leveling of overall wine sales. By evoking one or more of the five drivers identified in this report: 1) convenience, 2) occasion expansion, 3) sustainability/cost savings, 4) quality, and 5) visual image/branding, the wine-in-cans category has great potential to stimulate increased interest in new and existing wine consumers. Additive sales stem from increased life-style segmentation focused on occasion expansion and greater benefits pertaining to convenience, sustainability, cost and quality to both new and existing wine customers.

Occasion expansion refers to new locations or events where offering wine-in-cans as opposed to glass bottles is more practical. Findings of this study reveal that when asked *Where/on what occasions?*, and *Why have you consumed wine-in-a-can?* respondents' top responses were convenience and new locations or events. This suggests that a shift in focus by winemakers, from targeting *the person (demographics)*, to targeting *occasions* should occur.

Looking at purchase by types or varietals also reflects that the occasion at which the wine-in-a-can is being consumed (lifestyle: adventurous, outdoors, carefree, spontaneous) is most important. This is in contrast to the varietal order of overall yearly U.S. consumption of bottled wine, that tilts towards more traditional demographic segmentation preferences. Most notable is that not only is Rose wine-in-a-can a close #2 ranking in our survey results by type/varietal (20.2%), it ranks as the most popular among the 350 brands in Table 2 in Appendix A, yet it only ranks 9<sup>th</sup> (but growing) when packaged in a bottle. Again, the study's analysis of wine types/varietals currently being packaged in cans indicates the winemakers' and consumers' choices in wine type relates more to occasion, than the person (demographics).

The focus away from people segmentation is further supported by the primary data findings of this study. Neither males nor females nor respondents from different educational backgrounds were statistically different in any way across awareness, trying/tasting, or the purchasing of wine in a can. Likewise, the survey respondent's purchasing of wine-in-cans was as expected across all four generational categories (Gen X, Millennials, Gen Z, Baby Boomers). When looking at the person-focused aspect of subjective wine knowledge, the study also revealed no statistical differences across four generations, education, nor across awareness, trying/tasting, or the

purchasing of wine-in-cans. These findings suggest that the traditional ways of segmenting and marketing to consumers of bottled wine may not be the same for this new wine-in-can category.

The study findings reinforce that Millennials tend to be “#PinkysDown” (unpretentious and casual about their wine consumption) and identify with the brand, the can message/image and the taste, blogging such things as:

“It looks cute”

“Just enjoy while you drink it”

“Tastes good”

These low involvement Millennial consumers support Zaichkowsky’s (1988) premise regarding the desire for extrinsic cues (can messages/image), as opposed to high involvement consumers who tend to ignore extrinsic cues and rely more on their own objective and subjective wine knowledge. Since Millennials are buying as expected now, at higher awareness and trial spends, producers may be wasting excess advertising and sampling costs. They are keenly aware of the product category. Therefore if winemakers maintain or even reduce expenditures targeted exclusively towards Millennials, their overall purchasing revenues from this population should not be negatively affected!

Likewise, since Gen X and Baby Boomers are already purchasing at the level of Millennials with lower awareness and trial, the answer for increasing sales to them may be to help them become more aware of wine-in-can’s convenience and its occasion expansion possibilities at both locations and events that already appeal to them. The embedded video link contains a thank you from a Baby Boomer who can now enjoy wine on her sailboat! ([Video](#)) For this older wine in can market segment (Gen X and Baby Boomers) their awareness of the new wine in can packaging seems only important to them in relation to how it expands their wine drinking possibilities at events and locations where bringing a bottle, cork screw and glasses are not as convenient.

Further analysis of this study’s secondary and primary data reveal that Gen Z and Millennials are more keenly aware of wine-in-can products, and their consumption/trial patterns surpass those of Gen X and Baby Boomers. Gen X and Baby Boomers exhibit lower than expected awareness and tried/tasted practices. Likewise, based on their current purchasing practices, which

are no different from other generations – the Gen X and Baby Boomer wine consumers, both with high & low level subjective wine knowledge should become even stronger consumers of wine in cans.

The question then is, what might increase purchasing? Millennials are more primed to purchase, based on higher awareness and trial data, making them more likely to purchase wine-in-a-can the more often it is presented to them. The results of this study also suggest that positive purchasing outcomes could be obtained by promoting and selling wine-in-cans *at expanded* locations or events – making it more available and convenient for wine consumers of all generations.

Perhaps the most significant finding of this study is the fact that regardless of subjective wine knowledge (low, medium, high), awareness trial/tasting and purchasing practices showed no differences. This indicates that current perceptions that assume consumers with high-end wine knowledge will not consider wine-in-cans, may be dramatically faulty.

This study proposes that convenience and occasion expansion trumps wine knowledge and demographic segmentation when it comes to wine-in-a-can awareness, consumption, and purchase practices. The findings suggest that the market for wine-in-cans is not a fad, rather it represents a significant, new wine category.

## **LIMITATIONS & FUTURE WORK**

This mixed methods multi-faceted study incorporated multiple secondary data sources but yet is limited due to the paucity of previous rigorous research conducted on wine in a can. To the knowledge of the researchers, this study is the first to exclusively focus not only on exploring wine in a can packaging, through both secondary and primary research. Since the number of wineries and brands are increasing rapidly, data reported in this survey should be considered a snapshot in time. Since primary surveys were restricted to friends and acquaintances of undergraduate students, and not random respondents, the generalizability of the findings is also limited.

Future research in the area of wine in a can has expansive potential. Studies that focus on branding and new occasion/location possibilities would add to the body of knowledge surrounding this new wine packaging category. Additional research regarding consumer awareness, perceptions and purchase intent regarding wine in a can is recommended. The value between coating shelf-life technologies versus product stability, price, availability, and customer value is also warranted. Research surrounding the distributor's role and distribution aspects of wine in a can, particularly direct-to-consumer and online sales should be conducted. Finally, the packaging benefits of wine in cans parallels the brand development and image perception of craft beer, and comparison between the two could be valuable to those involved in either market.



## IMPLICATIONS & CONCLUSION

In conclusion, findings from this study that triangulates data from multiple primary sources and two distinct qualitative surveys of wine consumers corroborate that the branding and marketing associated with this new wine-in-a-can product category should target the occasion/location and convenience, not just the person. Consumer demographics or characteristics such as gender, age and education do not significantly influence the awareness, consumption or purchasing practices of consumer survey respondents. Likewise, the level of self-reported wine knowledge across the awareness consumption, and purchasing variables reveals no differences. Those consumers with high level wine knowledge were just as likely to taste, purchase and enjoy wine in a can; qualitative comments from the two independent surveys of those who did taste the product were overwhelmingly positive.

Additionally, secondary data analysis supports the strong use of occasion-branding and novel distribution channels (product placement at point-of-occasion, in unique venues) that wine in can producers utilize as they bring their offerings into this new wine category. Early adopter producers of wine in a can see it as an extension of their wine into new markets as opposed to a mere substitution or cannibalization of traditional bottled wine.

As a final point, wine consumers with subjective wine knowledge (low, medium, high), showed no differences in awareness, trial/tasting and purchasing practices of wine-in-a-can, suggesting that perceptions that consumers with high-end wine knowledge will not consider wine-in-cans, are faulty. All generation groups also showed no differences in their purchasing practices. Consequently, consumer wine knowledge and market demographics (gender, age, education) are of less importance than occasion expansion and the convenient placement of wine in can purchasing opportunities that correspond with lifestyle interests across ages. As awareness for this innovative wine packaging continues to grow, it is becoming clear to wine makers, distributors and retailers that, this time around, wine-in-a-can is not a fad, rather it represents a significant, new wine category that is finding a permanent positive place in the overall wine market.

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## APPENDIX A

Table 2: Wine-in-cans database, sorted on Winery (Williams, 2018)

WINERY	BRAND	PRODUCT LINE	WINE STYLE	SIZE	LOCATION	Coating
Adam LaZarre	Cycles Gladiator	Cycles Gladiator	Pinot Noir	375	CA	Ball
Ant + Farm	St. Mayhem	Spicy Lil F.K.R.	Fizzy White	250	CA	Ball
Ant + Farm	St. Mayhem	Tao of Mint	Sparkling Rose	250	CA	Ball
Ant + Farm	St. Mayhem	Huckfest	White Blend	250	CA	Ball
Ant + Farm	St. Mayhem	Ginger Loves Company	White Blend	250	CA	Ball
Archer Roose Winery	Archer Roose	Archer Roose	Carmenere	250	Chile	
Archer Roose Winery	Archer Roose	Archer Roose	Chardonnay	250	Chile	
Archer Roose Winery	Archer Roose	Redsurrection	Red	250	Chile	
Archer Roose Winery	Archer Roose	Archer Roose	Rose	250	Chile	
Archer Roose Winery	Archer Roose	Archer Roose	Sauvignon Blanc	250	Chile	
Archer-Mcrae Beverages	Joij	Joij	Sparkling Rose	250	New Zealand	
Archer-Mcrae Beverages	Joij	Joij	Sparkling White	250	New Zealand	
Atlas Wine Co.	Oro Bello		White	187	CA	
Ava Winery	Ava	synthetic wine	White?		CA	
Backpack	Backpack	Rowdy Red	Red	250	WA	Ball
Backpack	Backpack	Cheeky Rose	Rose	250	WA	Ball
Backpack	Backpack	Snappy White	White	250	WA	Ball
Barokes	Barokes	Bubbly Cabernet Shiraz Merlot	Bubbly Cabernet Shiraz Merlot	250	Australia	Vinsafe
Barokes	Barokes	Bubbly Chardonnay	Bubbly Chardonnay	250	Australia	Vinsafe

Barokes	Barokes	Bubbly Chardonnay Semillon	Bubbly Chardonnay Semillon	250	Australia	Vinsafe
Barokes	Barokes	Bubbly Rose	Bubbly Rose	250	Australia	Vinsafe
Barokes	Barokes	Cabernet Shiraz Merlot	Cabernet Shiraz Merlot	250	Australia	Vinsafe
Barokes	Barokes	Chardonnay Semillon	Chardonnay Semillon	250	Australia	Vinsafe
Barokes	Barokes	Vin de France	Vin de France	250	Australia	Vinsafe
Barrel House Winery	Barrelhouse Bourbon Red		Red	375	CA	Ball
Between The Lines Winery	Outset	Outset Pink Rose	Pink Rose	250	Canada	
Between The Lines Winery	Outset	Outset Sparkling	Sparkling	250	Canada	
Between The Lines Winery	Origin	VQA	White	250	Canada	
Biagio Cru	Rose All Day	Rose All Day	Rose	187	France	
Bliss	Bliss Sparkling	Bliss Sparkling	Sparkling		Europe	
Blue Lobster Urban Wine Co.	Blue Lobster	Blue Lobster	Bayside Blend	375	ME	Ball
Blue Lobster Urban Wine Co.	Blue Lobster	Blue Lobster	Chardonnay	375	ME	Ball
Blue Lobster Urban Wine Co.	Blue Lobster	Blue Lobster	Rose	375	ME	Ball
BNA Wine Group	Butternut	Butternut	Chardonnay	375	CA	Ball
BNA Wine Group	Butternut	Butternut	Rose	375	CA	Ball
Bonny Doon Winery	Fizzy Pink Wine of the Earth	Fizzy Pink Wine of the Earth	Fizzy Pink	375	CA	Ball
Bonny Doon Winery	La Bulle-Moose	La Bulle-Moose de Cigare	Fizzy Pink	375	CA	Ball
Bonny Doon Winery	La Bulle-Moose	La Bulle-Moose Rouse	Fizzy Red	375	CA	Ball
Bonny Doon Winery	La Bulle-Moose	La Bulle-Moose Blanche	Vermentino (Fizzy)	375	CA	Ball

<b>Bottle Green / Vinnovation</b>	<b>Wild Pelican</b>	<b>Wild Pelican</b>	<b>Rose</b>	<b>187</b>	<b>S. Africa</b>	
<b>Bottle Green / Vinnovation</b>	<b>Wild Pelican</b>	<b>Wild Pelican</b>	<b>White</b>	<b>187</b>	<b>S. Africa</b>	
<b>Chateau Maris Winery</b>	<b>Maris</b>	<b>Maris</b>	<b>Rose</b>	<b>250</b>	<b>France</b>	
<b>Chateau Maris Winery</b>	<b>Maris</b>	<b>Maris</b>	<b>Shiraz</b>	<b>250</b>	<b>France</b>	
<b>Constellation Brands</b>	<b>Crafters Union</b>	<b>Pinot Gris</b>	<b>Pinot Gris</b>	<b>250</b>	<b>Australia</b>	<b>Vinsafe</b>
<b>Constellation Brands</b>	<b>Crafters Union</b>	<b>Pinot Noir</b>	<b>Pinot Noir</b>	<b>250</b>	<b>Australia</b>	<b>Vinsafe</b>
<b>Constellation Brands</b>	<b>Crafters Union</b>	<b>Rose</b>	<b>Rose</b>	<b>250</b>	<b>Australia</b>	<b>Vinsafe</b>
<b>Constellation Brands</b>	<b>Crafters Union</b>	<b>Sauvignon Blanc</b>	<b>Sauvignon Blanc</b>	<b>250</b>	<b>Australia</b>	<b>Vinsafe</b>
<b>Constellation Brands</b>	<b>Crafters Union</b>	<b>Red Blend</b>	<b>Red Blend</b>	<b>375</b>	<b>CA</b>	<b>Ball</b>
<b>Coyote Moon Vineyards</b>	<b>Coyote Moon</b>	<b>Naked Chardonnay</b>	<b>Chardonnay</b>	<b>250</b>	<b>NY</b>	<b>Ball</b>
<b>Coyote Moon Vineyards</b>	<b>Coyote Moon</b>	<b>Moscato</b>	<b>Moscato</b>	<b>250</b>	<b>NY</b>	<b>Ball</b>
<b>Coyote Moon Vineyards</b>	<b>Coyote Moon</b>	<b>Twisted Sister Red</b>	<b>Red</b>	<b>250</b>	<b>NY</b>	<b>Ball</b>
<b>Coyote Moon Vineyards</b>	<b>Coyote Moon</b>	<b>Fire Boat Red</b>	<b>Red</b>	<b>250</b>	<b>NY</b>	<b>Ball</b>
<b>Coyote Moon Vineyards</b>	<b>Coyote Moon</b>	<b>River Run Rose</b>	<b>Rose</b>	<b>250</b>	<b>NY</b>	<b>Ball</b>
<b>Coyote Moon Vineyards</b>	<b>Coyote Moon</b>	<b>Fire Boat White</b>	<b>White</b>	<b>250</b>	<b>NY</b>	<b>Ball</b>
<b>Crazy Legs</b>	<b>Crazy Legs</b>	<b>Hoppy Red</b>	<b>Red</b>	<b>375</b>	<b>CA</b>	<b>Ball</b>
<b>Crazy Legs</b>	<b>Crazy Legs</b>	<b>Hoppy Sauvy B</b>	<b>Sauvignon Blanc</b>	<b>375</b>	<b>CA</b>	<b>Ball</b>
<b>Crown Castle</b>	<b>Crown Castle</b>		<b>Cabernet Sauvignon</b>	<b>375</b>	<b>Australia</b>	<b>Vinsafe</b>
<b>Dear Mom</b>	<b>Dear Mom</b>	<b>Dear Mom Oregon Red</b>	<b>Red</b>	<b>187</b>	<b>OR</b>	<b>Ball</b>
<b>Dear Mom</b>	<b>Dear Mom</b>	<b>Dear Mom Rose</b>	<b>Rose</b>	<b>187</b>	<b>OR</b>	<b>Ball</b>



Dear Mom	Dear Mom	Dear Mom Sparkling White	Sparkling White	187	OR	Ball
Dear Mom	Dear Mom	Dear Mom White	White	187	OR	Ball
Dobbes Family Estate	Joe to Go	Joe to Go	Pinot Gris	375	OR	Ball
Dobbes Family Estate	Joe to Go	Joe to Go	Pinot Noir	375	OR	Ball
Dobbes Family Estate	Joe to Go	Joe to Go	Rose	375	OR	Ball
Dos Cabezas WineWorks	Dos Cabezas	Methodo Canpenoise	Bubbly	375	AZ	Ball
Dos Cabezas WineWorks	Dos Cabezas		Bubbly Rose	700	AZ	Ball
E.&J. Gallo	Refresh	Moscato Spritzer	Moscato Spritzer	187	CA	Ball
E.&J. Gallo	Refresh	Crisp Red	Crisp Red	250	CA	Ball
E.&J. Gallo	Refresh	Moscato Spritzer	Moscato Spritzer	250	CA	Ball
E.&J. Gallo	Refresh	Red Spritzer	Red Spritzer	250	CA	Ball
E.&J. Gallo	Refresh	Rose Spritzer	Rose Spritzer	250	CA	Ball
E.&J. Gallo	Refresh	White Spritzer	White Spritzer	250	CA	Ball
E.&J. Gallo	Dark Horse	Dark Horse	Pinot Grigio	375	CA	Ball
E.&J. Gallo	Dark Horse	Dark Horse Rose	Rose	375	CA	Ball
Essentially Geared Wine Co.	Essentially Geared	Essentially Geared Bubbly	Bubbly	375	CA	Ball
Essentially Geared Wine Co.	Essentially Geared	Essentially Geared Chardonnay	Chardonnay	375	CA	Ball
Essentially Geared Wine Co.	Essentially Geared	Essentially Geared Red	Red	375	CA	Ball
Essentially Geared Wine Co.	Essentially Geared	Essentially Geared Rose	Rose	375	CA	Ball
Essentially Geared Wine Co.	Essentially Geared	Essentially Geared Sauvignon Blanc	Sauvignon Blanc	375	CA	Ball
Eve Sparkling Pty Ltd	Eve Sparkling	Sparkling Rose	Rose	250	S. Africa	
Eve Sparkling Pty Ltd	Eve Sparkling	Sparkling Brut	White	250	S. Africa	

<b>Eve Sparkling Pty Ltd</b>	<b>Eve Sparkling</b>	<b>Sparkling Vin Doux</b>	<b>White</b>	<b>250</b>	<b>S. Africa</b>	
<b>Fabulous Brands</b>	<b>Winestar</b>		<b>French Rose</b>	<b>187</b>	<b>France</b>	
<b>Fabulous Brands</b>	<b>Winestar</b>		<b>Red</b>	<b>187</b>	<b>France</b>	
<b>Fabulous Brands</b>	<b>Winestar</b>		<b>White</b>	<b>187</b>	<b>France</b>	
<b>Fenn Valley Vineyards</b>	<b>Vino Blanco</b>	<b>Fenn Valley</b>	<b>White</b>	<b>375</b>	<b>MI</b>	<b>Ball</b>
<b>Field Recordings</b>	<b>Hoxie</b>	<b>Hoxie Dry White Spritzers</b>	<b>Dry White Spritzers</b>	<b>250</b>	<b>CA</b>	<b>Ball</b>
<b>Field Recordings</b>	<b>Book Club</b>	<b>Limited edition</b>	<b>Sauvignon Blanc</b>	<b>250</b>	<b>CA</b>	<b>Ball</b>
<b>Field Recordings</b>	<b>Alloy Wine Works</b>	<b>Miss Scarlett</b>		<b>375</b>	<b>CA</b>	<b>Ball</b>
<b>Field Recordings</b>	<b>Alloy Wine Works</b>	<b>Pee Chee Chardonnay</b>	<b>Chardonnay</b>	<b>375</b>	<b>CA</b>	<b>Ball</b>
<b>Field Recordings</b>	<b>Alloy Wine Works</b>	<b>Alloy Works Grenache Rose</b>	<b>Grenache Rose</b>	<b>375</b>	<b>CA</b>	<b>Ball</b>
<b>Field Recordings</b>	<b>Alloy Wine Works</b>	<b>Alloy Works Pinot Noir</b>	<b>Pinot</b>	<b>375</b>	<b>CA</b>	<b>Ball</b>
<b>Field Recordings</b>	<b>Alloy Wine Works</b>	<b>Everyday Red</b>	<b>Red</b>	<b>375</b>	<b>CA</b>	<b>Ball</b>
<b>Field Recordings</b>	<b>Fiction</b>	<b>Fiction Red</b>	<b>Red</b>	<b>375</b>	<b>CA</b>	<b>Ball</b>
<b>Field Recordings</b>	<b>Alloy Wine Works</b>	<b>Tin City Americano</b>	<b>Red</b>	<b>375</b>	<b>CA</b>	<b>Ball</b>
<b>Field Recordings</b>	<b>Alloy Wine Works</b>	<b>Everyday Rose</b>	<b>Rose</b>	<b>375</b>	<b>CA</b>	<b>Ball</b>
<b>Field Recordings</b>	<b>Alloy Wine Works</b>	<b>Martian galaxy</b>	<b>Rose</b>	<b>375</b>	<b>CA</b>	<b>Ball</b>
<b>Field Recordings</b>	<b>Alloy Wine Works</b>	<b>Martian galaxy</b>	<b>Rose</b>	<b>375</b>	<b>CA</b>	<b>Ball</b>
<b>Field Recordings</b>	<b>Alloy Wine Works</b>	<b>Antipasto</b>	<b>Sangiovese</b>	<b>375</b>	<b>CA</b>	<b>Ball</b>
<b>Field Recordings</b>	<b>Foxie</b>	<b>Foxie</b>	<b>Rose spritzer</b>	<b>375</b>	<b>CA</b>	<b>Ball</b>
<b>Fiesta Winery</b>	<b>Fiesta Winery</b>	<b>Tex Way, Rose</b>	<b>Rose</b>	<b>250</b>	<b>TX</b>	<b>Ball</b>
<b>Fiesta Winery</b>	<b>Fiesta Winery</b>	<b>Lime in the Coconut</b>	<b>White</b>	<b>250</b>	<b>TX</b>	<b>Ball</b>

Fourth Wave Wine	Elephant in the Room	Chardonnay	Chardonnay	250	Australia	Vinsafe
Fourth Wave Wine	Elephant in the Room	Pinot Noir	Pinot Noir	250	Australia	Vinsafe
Fourth Wave Wine	Mascareri	Mascareri	Prosecco	250	Australia	Vinsafe
Fourth Wave Wine	Le Chat Noir	Le Chat Noir	Rose	250	Australia	Vinsafe
Fourth Wave Wine	Hootenanny	Hootenanny	Sauvignon Blanc	250	Australia	Vinsafe
Fourth Wave Wine	Take it to the Grave	Shiraz	Shiraz	250	Australia	Vinsafe
Fox Run Vineyards	Fox Run	Arctic Fox	Cayuga grape	375	NY	Ball
Fox Run Vineyards	Fox Run	Chardonnay	Chardonnay	375	NY	Ball
Fox Run Vineyards	Fox Run	Riesling	Riesling	375	NY	Ball
Francis Ford Coppola	Sophia	Sophia	Blanc de Blancs	187	CA	Ball
Francis Ford Coppola	Sophia	Sophia	Sparkling Rose	187	CA	Ball
Francis Ford Coppola	Diamond	Chardonnay	Chardonnay	250	CA	Ball
Francis Ford Coppola	Diamond	Gold Label	Chardonnay	250	CA	Ball
Francis Ford Coppola	Diamond	Pinot Grigio	Pinot Grigio	250	CA	Ball
Francis Ford Coppola	Diamond	Emeral Label	Pinot Grigio	250	CA	Ball
Francis Ford Coppola	Diamond	Sauvignon Blanc	Sauvignon Blanc	250	CA	Ball
Francis Ford Coppola	Diamond	Yellow Label	Sauvignon Blanc	250	CA	Ball
Friends Fun Wine	Friends Fun	Cabernet Coffee Espresso	Cabernet Coffee Espresso	250	FL	Ball
Friends Fun Wine	Friends Fun	Cabernet Merlot	Cabernet Merlot	250	FL	Ball

Friends Fun Wine	Friends Fun	Chardonnay Coffee Cappuccino	Chardonnay Coffee Cappuccino	250	FL	Ball
Friends Fun Wine	Friends Fun	Chardonnay Sauvignon	Chardonnay Sauvignon	250	FL	Ball
Friends Fun Wine	Friends Fun	French Melon	French Melon	250	FL	Ball
Friends Fun Wine	Friends Fun	Peach Moscato	Peach Moscato	250	FL	Ball
Friends Fun Wine	Friends Fun	Rose Moscato	Rose Moscato	250	FL	Ball
Friends Fun Wine	Friends Fun	Strawberry Moscato	Strawberry Moscato	250	FL	Ball
Friends Fun Wine	Friends Fun	White Moscato	White Moscato	250	FL	Ball
Giggle Water	Giggle Water		Frizzante	250	UK	
Goose Ridge Estate	Cascadian Outfitters	Cascadian Outfitters		375	WA	Ball
Goose Ridge Estate	Cascadian Outfitters	Cascadian Outfitters		375	WA	Ball
Grand Canyon Wine Co.	Traveler	Red	Red	250	AZ	Ball
Grand Canyon Wine Co.	Wayfarer		Rose	250	AZ	Ball
Grand Canyon Wine Co.	Traveler	White	White	250	AZ	Ball
Gruet Winery	Jacqueline Leonna	Brut	Brut	187	NM	Ball
Gruet Winery	Jacqueline Leonna	Rose	Rose	187	NM	Ball
Guarachi Wine Partners	Surf Swim	Surf Swim	Chardonnay	250	CA	Ball
Guenoc Winery	Rose	Rose	Rose	250	CA	Ball
Guenoc Winery	Savignon Blanc	Sauvignon Blanc	Sauvignon Blanc	250	CA	Ball
Imported by JAC, Puerto Rico	JAC	Red	Red	250	Argentina	
Imported by JAC, Puerto Rico	JAC	White	White	250	Argentina	

Jacob's Creek Winery	Jacob's Creek	Dots Moscato	Moscato	250	Australia	
Kingston Estate Wineries	Liquid Bullion	Sauvignon Blanc	Sauvignon Blanc	250	Australia	
Kongsgaard Winery	Ferdinand	Albarino	Albarino	375	CA	Ball
Kongsgaard Winery	Ferdinand		Rose	375	CA	Ball
La Fresquera	La Fresquera		White	250	Spain	
La Fresquera	La Fresquera		Red	250	Spain	
Lakewood Vineyards	Lakewood	Bubbly Catawba	Bubbly Catawba	250	NY	Ball
Lattitude Beverage	Lila	Pinot Grigio	Pinot Grigio	250	MA	Ball
Lattitude Beverage	Lila	Rose	Rose	250	MA	Ball
Lattitude Beverage	Lila	Sauvignon Blanc	Sauvignon Blanc	250	MA	Ball
Lattitude Beverage	Lila	Sparkling White	White	250	MA	Ball
Lieb Cellars	Bridge Lane	Chardonnay	Chardonnay	375	NY	Ball
Lieb Cellars	Bridge Lane	Rose	Rose	375	NY	Ball
Lieb Cellars	Bridge Lane	Sauvignon Blanc	Sauvignon Blanc	375	NY	Ball
Lieb Cellars	Bridge Lane	White Merlot	White Merlot	375	NY	Ball
Lieb Cellars	Bridge Lane	Red Blend	Red Blend	375	NY	Ball
Lonely Paddock	Lonely Paddock		Sauvignon Blanc	250	New Zealand	
Lopez de Lacalle Winery	Ah So	Ah So	Rose	250	Spain	
Lubie	Lubie	Lubie			France	
Mad Crush	Mad Crush	Sweet Cherry Red	Red	250	CA	Ball
Mancan Winery	Mancan	Fizzy White	Fizzy White	375	OH	Ball
Mancan Winery	Mancan	Red	Red	375	OH	Ball
Mancan Winery	Mancan	Rose	Rose	375	OH	Ball

<b>Mancan Winery</b>	<b>Mancan</b>	<b>White</b>	<b>White</b>	<b>375</b>	<b>OH</b>	<b>Ball</b>
<b>Margerum</b>	<b>Reviera Rose</b>		<b>Rose</b>	<b>500</b>	<b>CA</b>	<b>Ball</b>
<b>Marval</b>	<b>Marval</b>	<b>You Are Mavelous Rose</b>	<b>Rose</b>	<b>250</b>	<b>France</b>	
<b>Marval</b>	<b>Marval</b>	<b>You Are Mavelous Red</b>	<b>Red</b>	<b>250</b>	<b>France</b>	
<b>Marval</b>	<b>Marval</b>	<b>You Are Mavelous White</b>	<b>White</b>	<b>250</b>	<b>France</b>	
<b>Mascareri</b>	<b>Mascareri</b>		<b>Prosecco</b>	<b>250</b>	<b>Italy</b>	
<b>McCormack-Williamson Winery</b>	<b>Dancing Coyote</b>	<b>Dancing Coyote White</b>	<b>White</b>	<b>250</b>	<b>CA</b>	<b>Ball</b>
<b>Messina Hoff</b>	<b>Messina Hoff</b>	<b>Beau</b>	<b>Beau</b>	<b>250</b>	<b>TX</b>	<b>Ball</b>
<b>Messina Hoff</b>	<b>Messina Hoff</b>	<b>Messina Hoff</b>	<b>Messina Hoff</b>	<b>250</b>	<b>TX</b>	<b>Ball</b>
<b>Messina Hoff</b>	<b>Messina Hoff</b>	<b>Rose</b>	<b>Rose</b>	<b>250</b>	<b>TX</b>	<b>Ball</b>
<b>Milbrandt Winery</b>	<b>Milbrandt Winery</b>		<b>Chardonnay</b>	<b>250</b>	<b>WA</b>	<b>Ball</b>
<b>Milbrandt Winery</b>	<b>Milbrandt Winery</b>		<b>Red Blend</b>	<b>250</b>	<b>WA</b>	<b>Ball</b>
<b>Milbrandt Winery</b>	<b>Milbrandt Winery</b>		<b>Rose</b>	<b>250</b>	<b>WA</b>	<b>Ball</b>
<b>Mionetto</b>	<b>Bollicini</b>	<b>Bollicini Sparkling Cuvee</b>	<b>Sparkling Cuvee</b>	<b>187</b>	<b>Italy</b>	
<b>Mionetto</b>	<b>Bollicini</b>	<b>Bollicini Sparkling Rose</b>	<b>Sparkling Rose</b>	<b>187</b>	<b>Italy</b>	
<b>Mirabeau</b>	<b>Pure Provence</b>		<b>Rose</b>	<b>250</b>	<b>France</b>	
<b>Mission Bell Wines/Accolades</b>	<b>Echo Falls</b>		<b>Pinot Grigio</b>	<b>250</b>	<b>UK</b>	
<b>Mission Bell Wines/Accolades</b>	<b>Echo Falls</b>		<b>White Zinfandel</b>	<b>250</b>	<b>UK</b>	
<b>Misty Cove Wines</b>	<b>Misty Cove Wines</b>	<b>Embezzler</b>	<b>Pinot Noir</b>	<b>250</b>	<b>Australia</b>	<b>Vinsafe</b>
<b>Misty Cove Wines</b>	<b>Misty Cove Wines</b>	<b>Charlatan</b>	<b>Sauvignon Blanc</b>	<b>250</b>	<b>Australia</b>	<b>Vinsafe</b>
<b>Misty Cove Wines</b>	<b>Misty Cove Wines</b>	<b>Hustler</b>	<b>Sparkling</b>	<b>250</b>	<b>Australia</b>	<b>Vinsafe</b>

<b>Most Wanted</b>	<b>Most Wanted</b>		<b>Sparkling Grigio</b>	<b>200</b>	<b>Hungary</b>	
<b>Nomadica</b>	<b>Nomadica</b>	<b>Oregon White Blend</b>	<b>Oregon</b>	<b>187</b>	<b>CA</b>	<b>Ball</b>
<b>Nomadica</b>	<b>Nomadica</b>	<b>Oregon Rose</b>	<b>Oregon</b>	<b>187</b>	<b>CA</b>	<b>Ball</b>
<b>Nomadica</b>	<b>Nomadica</b>	<b>Petite Sirah</b>	<b>Petite Sirah</b>	<b>187</b>	<b>CA</b>	<b>Ball</b>
<b>Nomadica</b>	<b>Nomadica</b>	<b>This is my happy place white</b>	<b>White</b>	<b>187</b>	<b>CA</b>	<b>Ball</b>
<b>Nomadica</b>	<b>Nomadica</b>	<b>Chenin Blanc</b>	<b>Chenin Blanc</b>	<b>250</b>	<b>CA</b>	<b>Ball</b>
<b>Nomadica</b>	<b>Nomadica</b>	<b>Arroyo Pinot Noir</b>	<b>Pinot Noir</b>	<b>250</b>	<b>CA</b>	<b>Ball</b>
<b>Nomadica</b>	<b>Nomadica</b>	<b>Red Wine Blend</b>	<b>Red Blend</b>	<b>250</b>	<b>CA</b>	<b>Ball</b>
<b>Nomadica</b>	<b>Nomadica</b>	<b>Pink River Rose</b>	<b>Rose</b>	<b>250</b>	<b>CA</b>	<b>Ball</b>
<b>Nomadica</b>	<b>Nomadica</b>	<b>Sparkling White</b>	<b>Sparkling White</b>	<b>250</b>	<b>CA</b>	<b>Ball</b>
<b>Nomikai</b>	<b>Nomikai</b>	<b>Nomikai</b>	<b>Fizzy Rose</b>	<b>187</b>	<b>CA</b>	<b>Ball</b>
<b>Nomikai</b>	<b>Nomikai</b>	<b>Nomikai</b>	<b>Red</b>	<b>187</b>	<b>CA</b>	<b>Ball</b>
<b>Nuclear Wine Co. / Lumen</b>	<b>Nuclear</b>	<b>Red</b>	<b>Red</b>	<b>355</b>	<b>CA</b>	<b>Ball</b>
<b>Nuclear Wine Co. / Lumen</b>	<b>Nuclear</b>	<b>White</b>	<b>White</b>	<b>355</b>	<b>CA</b>	<b>Ball</b>
<b>Ocean's Away</b>	<b>Ocean's Away</b>		<b>Sparkling Pineapple</b>	<b>375</b>		
<b>Ocean's Away</b>	<b>Ocean's Away</b>		<b>Sparkling Wine</b>	<b>375</b>		
<b>Off-Piste Winery</b>	<b>PinotPinot</b>		<b>Pinot Grigio Sparkling</b>	<b>200</b>	<b>UK</b>	<b>Ball</b>
<b>Old Westminster</b>	<b>Old Westminster</b>	<b>Carbonic</b>	<b>Cabernet Franc</b>	<b>375</b>	<b>MD</b>	<b>Ball</b>
<b>Old Westminster</b>	<b>Old Westminster</b>	<b>Nitro Rose</b>	<b>Nitro Rose</b>	<b>375</b>	<b>MD</b>	<b>Ball</b>
<b>Old Westminster</b>	<b>Old Westminster</b>	<b>Seeds &amp; Skins</b>	<b>Pinot Gris</b>	<b>375</b>	<b>MD</b>	<b>Ball</b>
<b>Old Westminster</b>	<b>Old Westminster</b>	<b>Raw Rose</b>	<b>Rose</b>	<b>375</b>	<b>MD</b>	<b>Ball</b>
<b>Old Westminster</b>	<b>Old Westminster</b>	<b>Farmer Fizz</b>	<b>Sparkling Chardonnay</b>	<b>375</b>	<b>MD</b>	<b>Ball</b>
<b>Old Westminster</b>	<b>Old Westminster</b>	<b>Bloom</b>		<b>375</b>	<b>MD</b>	<b>Ball</b>

Old Westminster	Old Westminster	Pip & Berry		375	MD	Ball
Old Westminster	Old Westminster	Vine & Vigor		375	MD	Ball
Old Westminster	Old Westminster	Cask & Cluster		375	MD	Ball
Orca Winery	Orca	Red	Red	375	WA	Ball
Orca Winery	Orca	Red Blend	Red Blend	375	WA	Ball
Orca Winery	Orca	Rose	Rose	375	WA	Ball
Orca Winery	Orca	Sparkling White	White	375	WA	Ball
P+F Sparkling House	Pop + Fizz		Sparkling Rose	375	OR	Ball
P+F Sparkling House	Pop + Fizz		Sparkling Wine	375	OR	Ball
Pacific Rim & Co.	Euforia	Euforia Rose	Rose	375	CA	Ball
Pacific Rim & Co.	Euforia	Euforia White	White	375	CA	Ball
Pampelonne	Pampelonne	French 75	French 75	237	France	
Pampelonne	Pampelonne	Rose Lime	Rose Lime	237	France	
Paper Planes Wine	Flight School	Flight School	Rose	250	CA	Ball
Penner-Ash Winery	Free Public	Free Public Red Blend	Red Blend	250	OR	Ball
Penner-Ash Winery	Free Public	Free Public Rose	Rose	250	OR	Ball
Penner-Ash Winery	Free Public	Free Public White	White	250	OR	Ball
PinotPinot	PinotPinot		Pinot Grigio	200	Hungary	
Porch Pounder	Porch Pounder	Chardonnay	Chardonnay	375	CA	Ball
Porch Pounder	Porch Pounder	Red	Red	375	CA	Ball
Porch Pounder	Porch Pounder	Rose	Rose	375	CA	Ball
Precept Wines	West Side	Cabernet Sauvignon	Cabernet Sauvignon	250	CA	Ball
Precept Wines	West Side	Chardonnay	Chardonnay	250	CA	Ball
Precept Wines	Tangent	Rose	Rose	375	CA	Ball



Precept Wines	Tangent	Sauvignon	Sauvignon	375	CA	Ball
Precept Wines	House Wine	House Wine	Brut Bubbles	375	WA	Ball
Precept Wines	House Wine	House Wine	Chardonnay	375	WA	Ball
Precept Wines	House Wine	House Wine	Pinot Noir	375	WA	Ball
Precept Wines	House Wine	House Wine	Red Blend	375	WA	Ball
Precept Wines	House Wine	House Wine	Rose	375	WA	Ball
Precept Wines	House Wine	House Wine	Rose Bubbles (Limited)	375	WA	Ball
Precept Wines	House Wine	House Wine	Sauvignon Blanc	375	WA	Ball
Presto	Presto	Sparkling Cuvee	Sparkling Cuvee	250	Italy	
Presto	Presto	Sparkling Rose	Sparkling Rose	250	Italy	
Quello	Quello	Quello	Semi-Sparkling White	250	UK	
Ron Rubin Winery	WeAreCA	Chardonnay	Chardonnay	187	CA	Ball
Ron Rubin Winery	WeAreCA	Red	Red	187	CA	Ball
Ron Rubin Winery	Ron's Red	Ron's Red	Red	187	CA	Ball
Ron Rubin Winery	Pam's Un- Oaked	Pam's Un-Oaked	White	187	CA	Ball
Sans Wine Co.	Sans	Sans	Cabernet Sauvignon	375	CA	Ball
Sans Wine Co.	Sans	Sans	Carbonic Carignan	375	CA	Ball
Sans Wine Co.	Sans	Sans	Carignan Rose	375	CA	Ball
Sans Wine Co.	Sans	Sans	Riesling	375	CA	Ball
Sans Wine Co.	Sans	Sans	Sauvignon Blanc	375	CA	Ball
Sans Wine Co.	Sans	Sans	Zinfandel	375	CA	Ball
Scarpetta	Frico	Frizzante	Sparkling Trebiano	187	Italy	
Scotto Cellars	Anywhere		Red	250	CA	Ball
Scotto Cellars	Right Now		Rose	250	CA	Ball
Scout & Cellar	14K Rose		Rose	187	TX	Ball

Scribe Winery	Una Lou	Una Lou	Rose	375	CA	Ball
Shelburne Vinyards	Capsize		Rose	250	VT	Ball
Shelburne Vinyards	Capsize		White	250	VT	Ball
Social Enjoyments	Social	Strawberry Rose	Rose	10 oz	IL	Ball
Social Enjoyments	Social	Sparkling Toasted Coconut Almond		10 oz	IL	Ball
Sonoma Cider	Ahoy!		Red	250	CA	Ball
Sonoma Cider	Ahoy!		Sparkling Rose	250	CA	Ball
Sonoma Cider	Ahoy!		White	250	CA	Ball
Split Rail Winery	Strange Folk	Le Commandante	Red	375	ID	Ball
Split Rail Winery	Strange Folk	La Boheme	Riesling	375	ID	Ball
Stephen Ross Winery	Jackhammer	Chardonnay	Chardonnay	500	CA	Ball
Stephen Ross Winery	Jackhammer	Pinot Noir	Pinot Noir	500	CA	Ball
Strim Wine Co.	Companion	Companion	Malvasia	375	CA	Ball
Strim Wine Co.	Companion	Companion	Riesling	375	CA	Ball
Sunny Side	Sunny Side	Sunny Side Sauvignon Blanc	Sauvignon Blanc	375	Australia	Vinsafe
Swish Beverage	Babe	Babe Rose Bubbles	Rose	250	CA	Ball
Swish Beverage	Babe	Babe Grigio w/ Bubbles	White	250	CA	Ball
Swoon	Swoon	Raspberry Rose	Rose	250	CA	Ball
Tailored Bev. Group/Rose Rose	Rose Rose		Rose	250	Australia	
Terlato Wines	Seven Daughters	Moscato Veneto	Moscato Veneto	250	Italy	
Terlato Wines	Seven Daughters	Pinot Noir	Pinot Noir	250	CA	Ball
The Drop Wine Co.	The Drop	Cali Red	Red	250	CA	Ball

The Drop Wine Co.	The Drop	Cali Rose	Rose	250	CA	Ball
The Drop Wine Co.	The Drop	Cali White	White	250	CA	Ball
The Drop Wine Co.	The Drop	Resealable Rose	Rose	375	CA	Ball
The Great Oregon Wine Co.	The Great Oregon Wine	Pinot Grigio	Pinot Grigio	187	OR	Ball
The Great Oregon Wine Co.	The Great Oregon Wine	Rascal Pinot Noir	Pinot Noir	187	OR	Ball
The Great Oregon Wine Co.	The Great Oregon Wine	Rose	Rose	187	OR	Ball
The Infinite Monkey Theorem	Infinite Monkey Theorem	Red	Red	250	CO	Ball
The Infinite Monkey Theorem	Infinite Monkey Theorem	Rose	Rose	250	CO	Ball
The Infinite Monkey Theorem	Infinite Monkey Theorem	White	White	250	CO	Ball
The Pinot Project	The Pinot Project	The Chard Project	Chardonnay	250	CA	Ball
The Pinot Project	The Pinot Project		Pinot Grigio	250	CA	Ball
The Pinot Project	The Pinot Project		Pinot Noir	250	CA	Ball
The Pinot Project	The Pinot Project		Rose	250	CA	Ball
The Sonoma Brew	The Sonoma Brew	Red Blend with Cola	Red Blend	250	CA	Ball
The Sparkke Change Bev. Co.	Say I Do	Sparkke	White wine bubbles	250	UK	
The Wonderland Project	The White Queen		Chardonnay	375	CA	Ball
Trader Joe's/Bronco	Simpler Wine	Vino Frizzante	Sparkling Peach	187	CA	Ball

Trader Joe's/Bronco	Simpler Wine	Vino Frizzante	Sparkling Red	187	CA	Ball
Trader Joe's/Bronco	Simpler Wine	Vino Frizzante	Sparkling White	187	CA	Ball
Trader Joe's/Bronco	Simpler Wine	Too Uncanny	Cabernet Sauvignon	375	CA	Ball
Trader Joe's/Bronco	Simpler Wine	Too Uncanny	Chardonnay	375	CA	Ball
Trader Joe's/Bronco	Simpler Wine	Too Uncanny	Red	375	CA	Ball
Trader Joe's/Bronco	Simpler Wine	Too Uncanny	Rose	375	CA	Ball
Trader Joe's/Bronco	Simpler Wine	Too Uncanny	White	375	CA	Ball
Treasury Wine Estates	A'tivo Rose		Rose Spritzer	250	Australia	Vinsafe
Treasury Wine Estates	A'tivo White		White wine Spritzer	250	Australia	Vinsafe
TWG Ava Grace Winery	Ava Grace	Ava Grace	Pinot Grigio	375	CA	Ball
TWG Ava Grace Winery	Ava Grace	Ava Grace	Rose	375	CA	Ball
TWG Big House Wine Company	Big House	The Birdman	Pinot Grigio	250	CA	Ball
TWG Big House Wine Company	Big House	The Siren	Rose	250	CA	Ball
TWG Big House Wine Company	Big House	Cardinal Zin	Zinfandel	250	CA	Ball
TWG Flip Flop Wines	Flip Flop	Chardonnay	Chardonnay	250	CA	Ball
TWG Flip Flop Wines	Flip Flop	Fizzy Chilled	Fizzy Red	250	CA	Ball
TWG Flip Flop Wines	Flip Flop	Fizzy Sangria	Fizzy Sangria	250	CA	Ball
TWG Flip Flop Wines	Flip Flop	Fizzy White	Fizzy White	250	CA	Ball
Union Wine Co.	Underwood	Pinot Gris	Pinot Gris	375	OR	Ball

Union Wine Co.	Underwood	Pinot Noir	Pinot Noir	375	OR	Ball
Union Wine Co.	Underwood	Riesling	Riesling Radler	375	OR	Ball
Union Wine Co.	Underwood	Rose	Rose	375	OR	Ball
Union Wine Co.	Underwood	Rose Bubbles	Sparkling Rose	375	OR	Ball
Verve Wine Co.	Ramona	Ramona	White wine infused	250	NY	Ball
Verve Wine Co.	Vinny	Vinny	Riesling		NY	Ball
Villa Bellangelo Winery	Can Do	Can Do	Cabernet Franc F2018	375	NY	Ball
Villa Bellangelo Winery	Can Do	Can Do	Chardonnay F2018	375	NY	Ball
Villa Bellangelo Winery	Can Do	Can Do	Muscato	375	NY	Ball
Villa Bellangelo Winery	Can Do	Can Do	Riesling F2018	375	NY	Ball
Villa Bellangelo Winery	Can Do	Can Do	Rose	375	NY	Ball
Vinalliansen	Bouncy		Blanc Spritzer	375	Portugal	
Vinalliansen	Bouncy		Rose Spritzer	375	Portugal	
Vinbroteca	Vinbroteca	The Bubbles	Sparkling White	375	Germany	
Vino Noceto	Frivolo	Frivolo	Moscato Bianco	187	CA	Ball
We Are The Uncommon Ltd	The Uncommon	The Uncommon	Sparkling White	250	UK	
West + Wilder	West + Wilder		Rose	250	CA	Ball
West + Wilder	West + Wilder		Sparkling White	250	CA	Ball
West + Wilder	West + Wilder		Sparling Rose	250	CA	Ball
William Heritage Winery	W H	W H	Rose	375	NJ	Ball
Winc	Ruza	Rose	Rose (4/box)	187	CA	Ball
Winc	Ruza	Rose	Rose (3/box)	250	CA	Ball
Wine + Society	Tempt	Tempt		500	CA	Ball
Wine on tap	Gotham Project		Rose (2-pak)	250	Spain	
Wine Society	Chance	Chance		500	CA	Ball

<b>Wine Society</b>	<b>Fate</b>	<b>Fate</b>		<b>500</b>	<b>CA</b>	<b>Ball</b>
<b>Winebow Group</b>	<b>Stella</b>	<b>Stella</b>	<b>Pinot Grigio</b>	<b>250</b>	<b>CA</b>	<b>Ball</b>
<b>Winebow Group</b>	<b>Amble + Chase</b>	<b>Rose</b>		<b>250</b>	<b>France</b>	
<b>Winesellers Ltd</b>	<b>Tiamo</b>	<b>White</b>	<b>White</b>	<b>250</b>	<b>IL</b>	<b>Ball</b>
<b>Winesellers Ltd</b>	<b>Tiamo</b>	<b>Rose</b>	<b>Rose</b>	<b>375</b>	<b>IL</b>	<b>Ball</b>
<b>Wrath Wine</b>	<b>AL</b>	<b>AL</b>		<b>375</b>	<b>CA</b>	<b>Ball</b>
<b>Yes We Can Wines</b>	<b>Sway</b>	<b>Sway Blanc</b>	<b>Blanc</b>	<b>250</b>	<b>TX</b>	<b>Ball</b>
<b>Yes We Can Wines</b>	<b>Sway</b>	<b>Sway Rose</b>	<b>Rose</b>	<b>250</b>	<b>TX</b>	<b>Ball</b>
<b>Zonte's Footsteps</b>	<b>Bolle Felici</b>	<b>Bolle Felici</b>	<b>Prosecco</b>	<b>330</b>	<b>Australia</b>	<b>Vinsafe</b>
<b>Zugibe Vineyards</b>	<b>Zugibe</b>	<b>Sparkling Riesling</b>	<b>Sparkling Riesling</b>	<b>250</b>	<b>NY</b>	<b>Ball</b>

## APPENDIX B

Table 4: Open-ended survey respondent comments about their wine-in-a-can experience(s)

### Survey 1 Favorable Respondent Comments

Very good, loved the convenience and style while being at a tailgate.
Tasty, would drink again, perfect for tailgate
Tasty alternative to your typical beer in a can.
Tasted OK, convenient liked that wit could be brought to parks/c.g's
Tasted just like bottled wine
Tasted good for price
Sweet, tasty like glass
Surprisingly good taste
Surprised, Drink was very bubbly, more of a lime soda taste
Surprised Red Robin carried canned wines, the spritzer was light, bubbly refreshing.
Sparkling wine is preferred over dry wine. The dry wine in a can is as if you popped the cork of a new cabernet, then proceeded to drink it right from the bottle. There is a greater atmosphere (air mix and aroma) when (red) poured into a glass compared to right from can.
She liked the fruitiness and it wasn't too strong alcoholically. Would definitely drink again.
Went down easy
Really bubbly -- champagne like
Preferred bottled wine
Poured it from the can to the glass, it was exceptional. For red, articulation and swirl adds to the legs. Whereas the can, you can't expect the wine to have or create the same aroma from the tiny mouth of the can -- it's not possible. glass > can.
I like the name!
Nice -- like that it's in convenience of a can
Loves the Ballocinni Rosé, enjoys the convenience (lack of a glass). Seen as classier than cider.
Liked it but wouldn't buy myself due to suspected high price
It was very convenient/easy at a get-together
It was just like from a bottle but more convenient
It was good, fun for a night out, or concert

It was good, but there was too much sugar. May have been better if it was cut with seltzer.

I thought it was good for a summer drink

I love it.

I liked it. Reminded me of Champagne.

I liked it a lot and thought it was easy to use and more easily drinkable at parties w/ less judgement

I liked Infinite Monkey Theorem the most

Great to sneak into no alcohol events

Good, easier than pouring out of a bottle into glasses, good for events.

Good, but not an every-time buy

Good Great idea for tailgates or camping/hiking

Enjoyed the taste

Don't drink wine, but the packaging is cute, if I drank wine I would try it.

Convenient, surprisingly good taste

Convenient

Liked it, convenient. you can enjoy wine without having to open entire bottle

Polka-dot cans were wicked cute" (she posted it on Instagram) good taste, didn't notice difference from bottle

"Boss"

It tasted great

### **Survey 2 Favorable Respondent Comments**

What I like most about it is the convenient glass size

Tasty, easy to carry, more like a soft drink

I liked it

I liked it, tasted like regular wine

It was fine I don't really drink wine

Loved it, convenient

I liked it easy to travel with

It was refreshing and bubbly



I prefer it out of a bottle 99% of the time, but it is great in certain situations. We bought it to take to the beach and it was perfect!

Simpler wines from Trader Joe's were \$1 a can and tasted okay!

It was ok, some were quite nice

Sweet and good for on the go.

Convenient and sweet

It's great

These product are cheaper and better to drink

It was good

Like the convenience; perfect amount; taste was good

Ok

It's okay

The brand that I specifically buy has a wide selection which I really enjoy. These flavors are pinot noir, Rosé and champagne these are easy on the go wines.

Great way to have wine without opening an entire bottle. Quality doesn't typically match bottled wine so good alternative to cheap wines.

I really liked it! I like that it's portable and makes you feel like you're having a tailgating-style experience even if you don't like the taste of beer. I find that it tasted good, as well!

Like it, convenient

Easy to drink and take, suitable for many conditions

### **Survey 1 Neutral or Ambivalent**

It was OK, I like the mini size and straw concept. Was not crazy about the wine itself.

Good but not better than bottled wine

It was good, but you need to drink a lot to get drunk and they didn't like that esp. for price paid.

Three out of five rating

Underwood -- did not like; Barefoot -- did like

Thought the taste was different

Decent wine for a Merlot, but overpriced and would rather drink in a nicer container for that price. This person drinks lots of boxed wine because it's cheaper.

Good but not great

3/5 rating

It was different –Carbonation

Same as regular wine I don't get the need for cans.

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"White trash elegance"

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### **Survey2 Neutral or Ambivalent Comments**

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Was not a huge fan. Liked the idea but prefer wine in a glass

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Too sweet, but convenient for traveling

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It was fine but had the metal/can taste slightly

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It was decent! Not the best, but decent.

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Sweet but not refreshing enough

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It wasn't bad, but I prefer wine from a bottle because there is more.

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It's okay, but not as good as the glass bottle one.

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Definitely more prominent out on the west coast

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More like a soft drink

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### **Survey 1 Negative Respondent Comments**

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Underwood -- did not like it

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They were Ok, but I prefer wine out of a bottle.

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Was not as good as bottled wine

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Not better than beer

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Not as good as bottled wine

---

Sub-par, Not the best, weird aluminum taste

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Who wants to drink wine out of a can?

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Felt weird drinking wine out of metal

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### **Survey 2 Negative Respondent Comments**

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Not great.

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Feels pretty weird 😊

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Did not like it.

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I think wine tastes better out of a glass bottle with a cork.

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Wasn't as good as a bottle

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The wine had the flavor of aluminum and was generally unpleasant.

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# APPENDIX C

## Additional Photographs of Wine-In Cans

