

JAPANESE SAKE IS PRIME FOR OFF-PREMISE OPPORTUNITIES



VINE CONNECTIONS IS YOUR ONE-STOP SHOP FOR THE BEST IN JAPANESE SAKE!
Diverse portfolio, sought after brands, staff trainings, private label opportunities, turnkey operations

LEADERS IN THE CATEGORY

19%

of all sake imports to the US come from Vine Connections.

Source: USDA, US Dollars

+17%

Vine Connections 5 year CAGR imported cases

Source: USDA

CONSUMER DEMAND IS BOOMING

+36%

increase in retail sake sales through 2020

Source: Nielsen TTL US XAOC PLUS PACKAGE WINE 52 WK PE 01.23.21

+75%

growth in VC Sake in Chain Grocery in 2020 & up 78% in Q1

Source: Internal Data 3.31.2021

\$59.2M

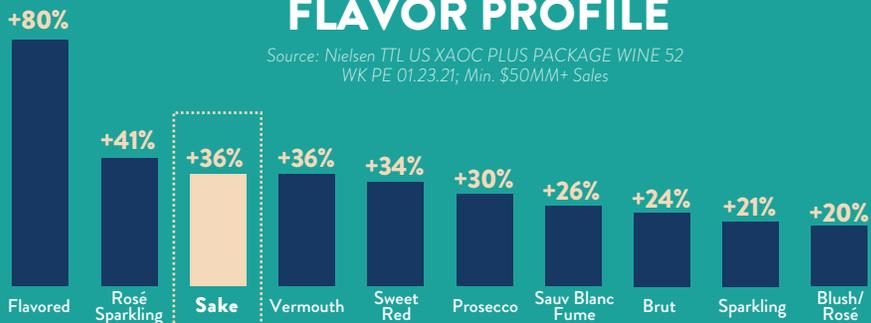
in sake retail sales in the US in 2020

Source: 2020 Nielsen Data



SAKE IS THE 3RD FASTEST GROWING FLAVOR PROFILE

Source: Nielsen TTL US XAOC PLUS PACKAGE WINE 52 WK PE 01.23.21; Min. \$50MM+ Sales



JAPANESE CULTURE & CUISINE HAS NEVER BEEN MORE RELEVANT AND OF INTEREST

+24% Expected Growth Of Japanese Restaurant Industry In The US In 2021 Source: ibisworld.com

CONSUMERS ARE EXPERIENCING SAKE IN ALL FORMATS, NOT JUST SMALL



ONCE OPENED, SAKE CAN STAY FRESH FOR SEVERAL WEEKS

720mls are the fastest growing format as consumers become aware of the extended life after being opened.

Source: Nielsen TTL US XAOC PLUS PACKAGE WINE 52 WK PE 01.23.21



VINE CONNECTIONS

www.vineconnections.com



JapaneseSake



THE SAKE CONSUMER

- 57% Caucasian (including Hispanic)
- 23% Asian
- 11% Other
- 9% African American
- 36% GenX
- 33% Millennials
- 27% Boomers
- 70% Married
- 37% Have Kids
- 17% Single



SAKE IS PERFECT FOR RETAILERS THAT HAVE A GOOD E-COMMERCE EXPERIENCE

Sake consumers over index at 136 with internet search & buying sake online as well as in-store demos at 142

Source: IRI Shopper Insights

CHAIN RETAILERS ARE QUICKLY EXPANDING SAKE OFFERINGS AND EXPERIENCES



- WFM: **+57%**
- Bevmo: **+75%**
- Total: **+124%**
- HEB Grocery: **+157%**
- Central Market: **+78%**
- ABC: **+127**
- Spec's: **+70%**
- Raley's: **+39%**
- Kroger: **+129%**
- Trader Joe's: **+468%**

Source: 2020 Internal Data

Tozai

Your gateway to a bigger world

Tozai offers a solution for any on-premise account. Perfect for takeout, dine-in & cocktails

3RD
largest imported sake brand in the US
Source: 2020 Nielsen Data



+82%
in Chain Grocery in 2020
+79% in Q1 2021

+82%
in Retail Chain in 2020
+64% in Q1 2021

Source: Internal Data 3.31.2021

NIGORI IS BECOMING KING & TOZAI SNOW MAIDEN IS ITS QUEEN



+50% Growth in Nigori sake sales
+74% Snow Maiden sales outpacing industry growth
Source: Nielsen TTL US XAOC PLUS PACKAGE WINE 52 WK PE 01.23.21 and Internal data, 2020

BUSHIDO[®]

JAPANESE SAKE



3RD
LARGEST BRAND IN THE SINGLE SERVE CATEGORY

+209%
THE FASTEST GROWING SAKE CAN BRAND IN THE US
Source: Nielsen May 2020

+30%
IN 2020

+54%
IN Q1 2021

Source: Internal Data 3.31.2021



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JapaneseSake