



2026 Pitch Deck





A LEADER IN PREMIUM WHITE WINES

- #1 Premium White Wine Brand
- Top SKUs Lead Premium Segment & Deliver Value
 - #1 Premium Sauvignon Blanc
 - #1 Premium Pinot Grigio, #1 Premium BFY Pinot Grigio
 - #2 Premium Chardonnay Brand
 - #5 Overall Prosecco

STRONG CONSUMER APPEAL

- A Top 10 Household Penetration brand in the total wine category
- Driving Multiple Bottle Purchases & Basket Ring
- Innovation capitalizes on trends that appeal to younger and multi-cultural consumers with non-alcoholic wine & pre-mixed cocktails

DELIVERS ON QUALITY

- Grown in the finest wine regions on earth including Italy, Marlborough, New Zealand and Monterey County, CA - rare in the Premium segment
- 92 point scores and WE Best Buys across leading varietals including Sauvignon Blanc, Chardonnay, Pinot Grigio and Prosecco

CUPCAKE VINEYARDS IS THE #1 PREMIUM WHITE WINE BRAND



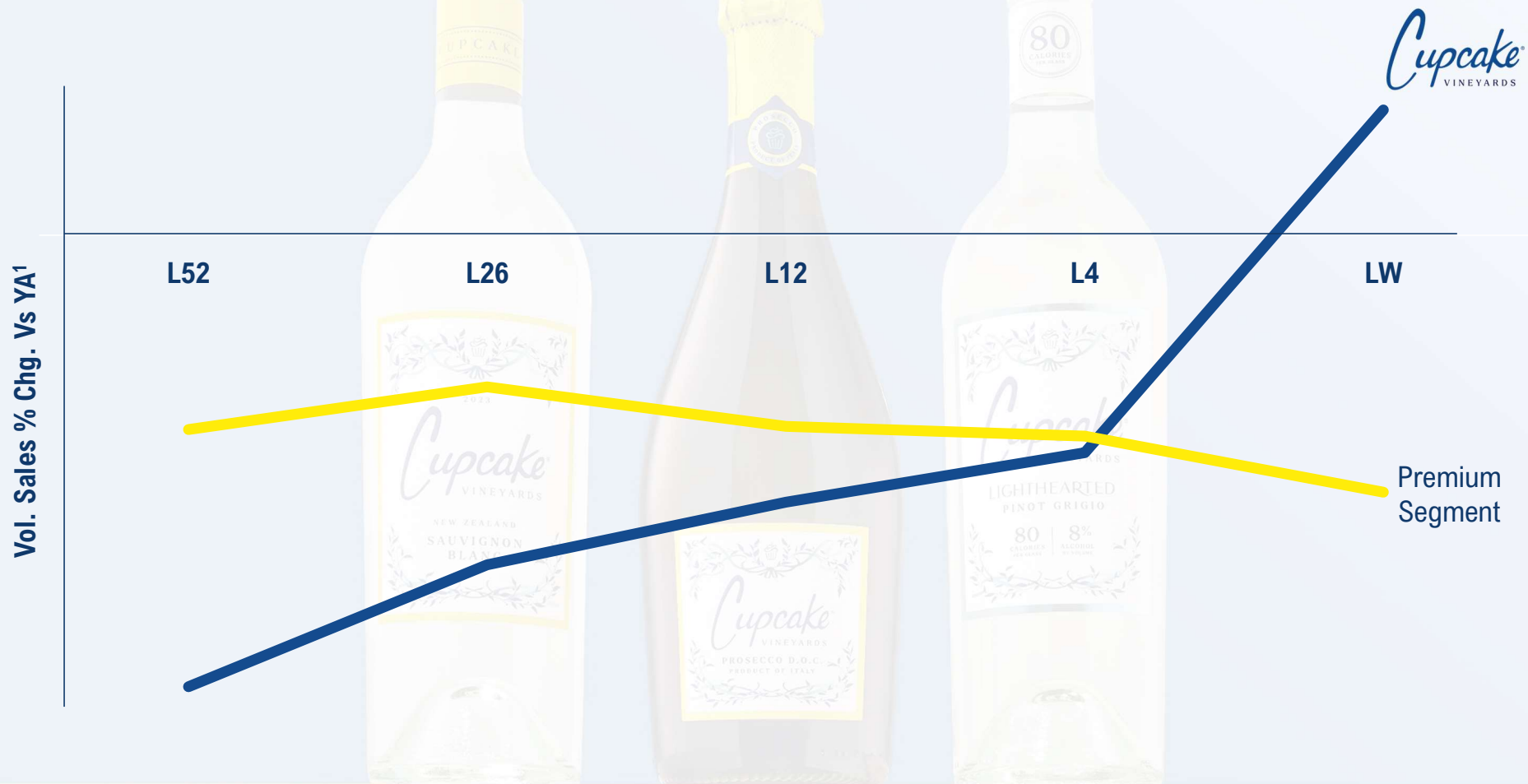
#1 PREMIUM
SAUVIGNON
BLANC

#2 PREMIUM
CHARDONNAY
BRAND

#1 PREMIUM
PINOT
GRIGIO

#4 SUPER
PREMIUM
PROSECCO

REGAINING MOMENTUM AS A LEADER IN THE PREMIUM SEGMENT



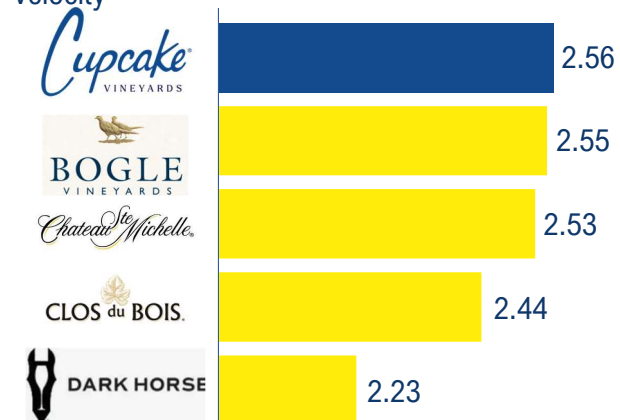
CUPCAKE SAUVIGNON BLANC IS DRIVING THE PREMIUM SB SEGMENT



#1
Premium
Sauvignon Blanc¹

2x
Size of Closest
Competitor¹

Top 5 Premium Brands
Velocity²



Sourced from
Marlborough, New Zealand



SOURCE: ¹IRI TOTAL US - MULTI OUTLET + CONV, 9L VOL SALES & CS VOL CHG VS YA, L26 W/E 11/02/25; ²IRI TOTAL US - MULTI OUTLET + CONV, U/S/W, L52 W/E 11/02/25



CUPCAKE PINOT GRIGIO LEADS AND DOMINATES



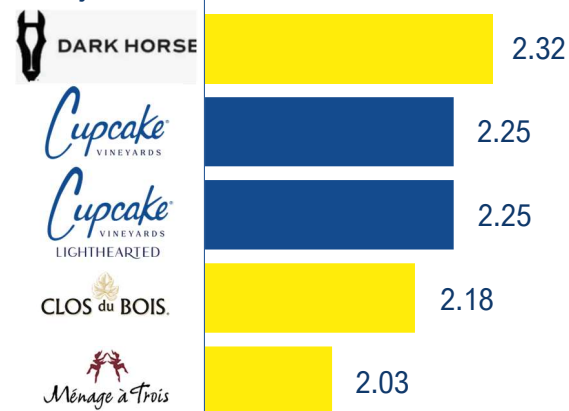
#1

Premium
Pinot Grigio¹

~2x

Size of Closest
Competitor¹

Top 5 Premium Brands
Velocity²



Sourced from
Delle Venezie D.O.C., Italy



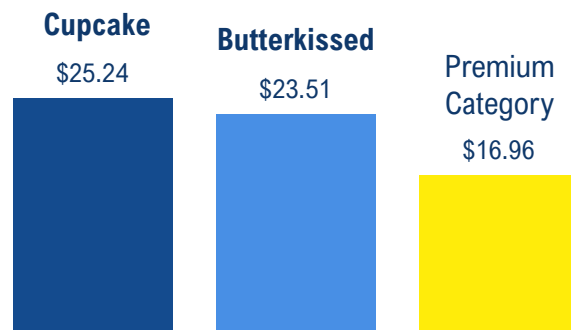
CUPCAKE CHARDONNAYS DELIVER VALUE & QUALITY



#2 Premium
Chardonnay¹

#2 Premium
“Buttery” Chardonnay¹

Premium Category
Velocity, \$/SW²



Sourced from
Monterey County, California



SOURCE: ¹IRI TOTAL US - MULTI OUTLET + CONV, 9L VOL SALES, L26 W/E 11/02/25, ²IRI TOTAL US - MULTI OUTLET + CONV, \$/SW, L26 W/E 12/07/25



CUPCAKE PROSECCO IS A MAJOR PLAYER IN A TRENDING CATEGORY

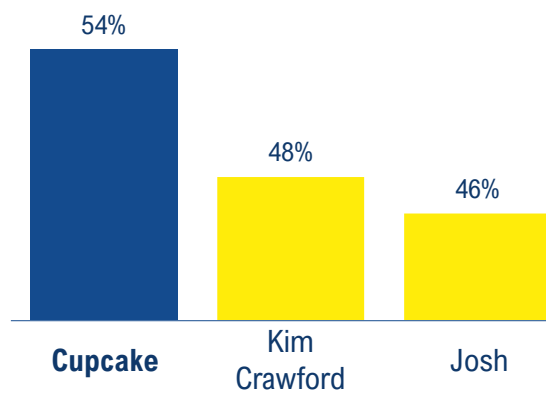


#4 Super Premium
Prosecco¹



Sourced from
Prosecco D.O.C., Italy

Retail Basket Size, 2+ Wine Bottle Purchases²
Prosecco vs. Competitors, %



- Cupcake Prosecco drives higher retail basket size
- Outpaces competitors for 2+ wine bottle purchases



CUPCAKE IS A TOP HH PURCHASING BRAND IN TOTAL WINE

#1 
BAREFOOT

#2 
JOSH CELLARS

#3 
KIRKLAND
Signature

#4 
STELLA ROSA

#5 
SUTTER
HOME
FAMILY VINEYARDS

#6 
LAMARCA
PROSECCO

#7 
Cupcake
VINEYARDS

#8 
Ménage à Trois

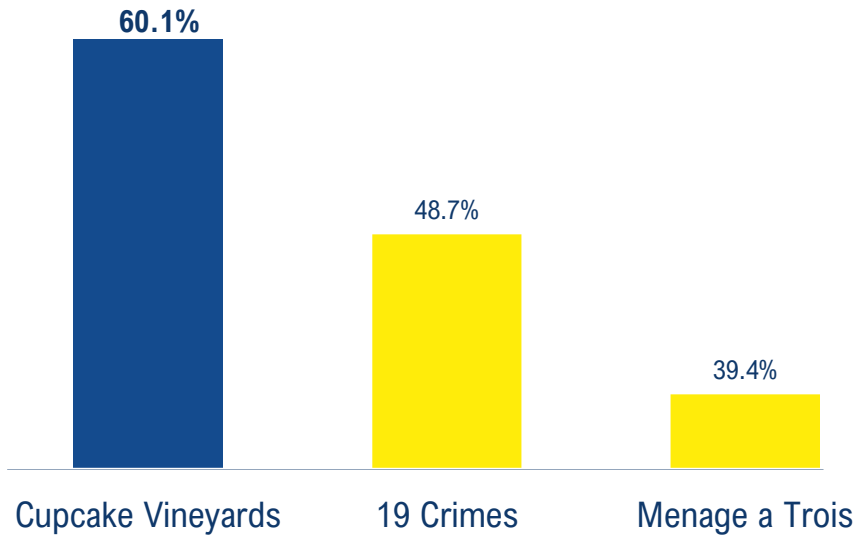
#9 
APOTHIC

#10 
Chateau Ste Michelle

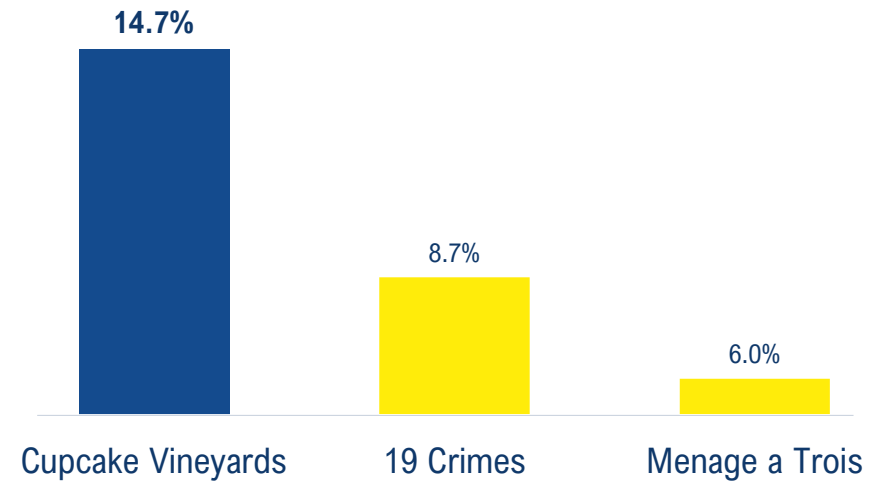


CUPCAKE WHITE WINES DRIVE HIGHER BASKET RING

2+ Quantity Bottle Sales
% \$ Sales, White Table Wine¹



6 Quantity Bottle Sales
% \$ Sales, White Table Wine¹



NEW INNOVATION INVITES A BROADER AUDIENCE TO THE BRAND

Cupcake
VINEYARDS



Custom Pack
Frosted custom bottle mold



Real Fruit Juice
Sparkling Wine + Juice



Moderately Sweet
65-85 g/L of sugar



Young, Affluent Consumer¹
Gen Z & Millennial, College
Educated, Higher Income



SRP: \$11.99
Reinforces cocktail quality



NON-ALCOHOLIC WINE \$ SALES²

Gen Z +50%
Millennial +25%

NON-ALCOHOLIC WINE HH²

Gen Z +49%
Millennial +27%

NON-ALCOHOLIC WINE UNITS²

Gen Z +45%
Millennial +22%

Cupcake Vineyards Alcohol-Removed
Sauvignon Blanc is...

#1

**NEW SELLING PREMIUM TABLE
WINE IN US³**



SOURCE: ¹Circana Shopper Loyalty, L 52 Weeks Ending 08-31-25, Dollar Index to Wine/Buyer Overlap
²LEADING RETAILER SHOPPER LOYALTY CARD DATA, 52 WEEKS ENDING 6/01/24. MINTEL WINE STUDY 2023. REPRESENTS LEGAL DRINKING AGE.
³Circana, Total US Mulo+C, 41 wks ending 9/28/25, ranked dollars selling, among new items in the latest 52 weeks with zero sales in the prior 52 weeks



A HISTORY OF QUALITY FROM RENOWNED GROWING REGIONS

Since its launch in 2008, Cupcake has prided itself on growing grapes from the finest wine regions on Earth



MONTEREY COUNTY,
CALIFORNIA



DELLE VENEZIE DOC,
ITALY



MARLBOROUGH,
NEW ZEALAND

CUPCAKE DELIVERS ON TASTE INSIDE THE BOTTLE

WITH 90+ POINTS AND BEST BUYS ACROSS THE PORTFOLIO



CHARDONNAY
V2023



SAUVIGNON BLANC
V2024



PINOT GRIGIO
V2022



PROSECCO
NV

