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SPECIAL REPORT:

Top 10 U.S. Spirits and Wine Distributors

Leading Wholesalers Adapt As Coronavirus Crisis Takes Hold

THE U.S. DRINKS INDUSTRY—LIKE MOST other industries throughout the world—was adapting to a rapidly shifting landscape at press time, as suppliers, wholesalers, and retailers rushed to adjust their operations to meet the new realities ushered in by the global coronavirus pandemic. With the outbreak of coronavirus exploding in the U.S. in mid-March, on-premise operations effectively shut down across much of the country, while the off-premise initially saw a significant increase in sales as consumers stocked up, preparing for what could be a lengthy period of confinement.

While the next few months will be challenging to say the least, the market's top wholesale players are devoting ample resources to the fight, convening special task forces to monitor and respond to changing conditions both in the market and in their own operations, while sharpening their focus on the off-premise arena, where they hope rising sales will blunt the impact of the on-premise shutdowns.

"We're all operating in an unprecedented environment, and we're committed to being a responsible and attentive partner across
page 12 >>>

Interview

After Young's Deal, RNDC Looks Ahead

To say Republic National Distributing Company (RNDC) has been in expansion mode lately is an understatement. Following a setback early last year with the disintegration of its planned merger with Breakthru Beverage due to FTC competition concerns, RNDC rapidly got back on track, adding 10 states and more than \$3 billion in revenues via a new joint venture with the Underwood family's Young's Holdings. RNDC president and CEO Tom Cole calls the Young's deal, "a strong foundation for our expansion to the West Coast." Across both legacy RNDC markets and the new Young's joint venture—totaling 32 states—RNDC had revenues of nearly \$12 billion last year. As RNDC has expanded its geographical footprint, it has also been investing heavily in technology, most notably by bringing "online distributor" LibDib into its fold. According to Cole, that alliance has accelerated the wholesaler's broader e-commerce initiative, eRNDC, which is intended to upgrade and streamline its operations for its suppliers, **page 32 >>>**

The 44th Annual
IMPACT MARKETING SEMINAR

coverage begins on page 18

Leading U.S. Wholesalers Scramble To Reorient Their Businesses As COVID-19 Disrupts Industry

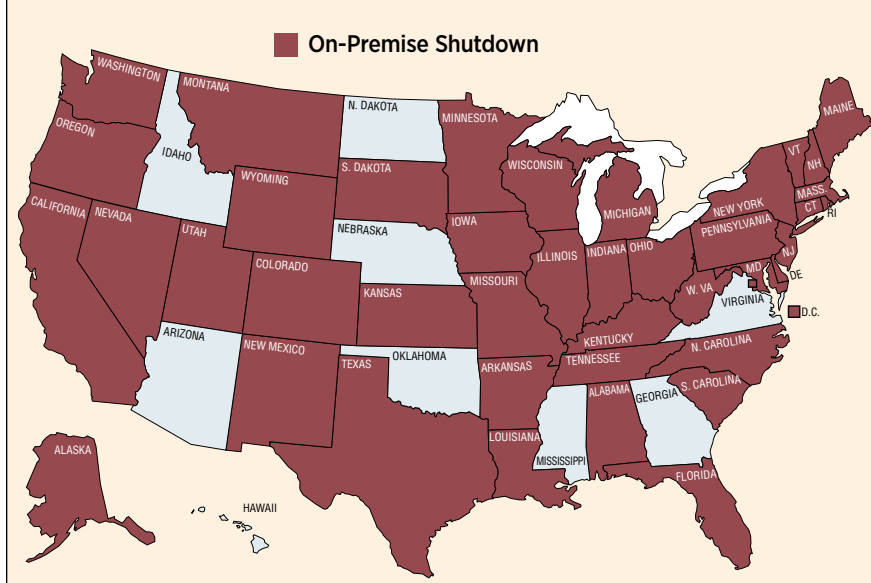
our U.S. and Canadian markets,” says Greg Baird, president and CEO of third-ranked wholesaler Breakthru Beverage Group. “We’re putting the health and well-being of our associates, customers, and supplier partners at the center of our decisions.”

Coronavirus Response

The pandemic has spurred distributors like Southern Glazer’s, Republic National Distributing Co., and Breakthru to overhaul their activities with an eye toward keeping their employees and partners safe while continuing to lead their businesses forward. “Breakthru established a cross-functional task force to evolve policies and prioritize activities as the outbreak occurred,” Baird notes. “This group has a regularly scheduled daily call to assess the implications of the situation. We’ve taken a number of steps within our own operations to limit the spread of this virus including restricting travel, instituting remote work policies, and limiting third-party interactions.”

Southern Glazer’s likewise activated its “Crisis Management Center” early on as the outbreak spread, according to CEO Wayne Chaplin. “We established an executive-level task force to coordinate our coronavirus-related business continuity plans, monitor the situation as it unfolds, and safeguard the health and well-

States With On-Premise Shutdowns At Press Time



being of our employees and customers,” he told IMPACT.

The \$19 billion wholesale giant suspended air travel for employees, moved all meetings to video or phone conferencing, increased the frequency of cleaning and sanitizing its facilities, created a robust and sustained remote working system, and enhanced hygiene protocols for all employees who directly interact with

customers and suppliers, including its drivers, sales people, and merchandisers.

“First and foremost we at RND/Young’s are concerned about the safety of our associates, their loved-ones, and our customer partners,” says RND/Young’s president and CEO Tom Cole, adding, “We will continue to serve our customers and suppliers, while protecting the health and welfare of our communities in full compliance with government guidelines.”

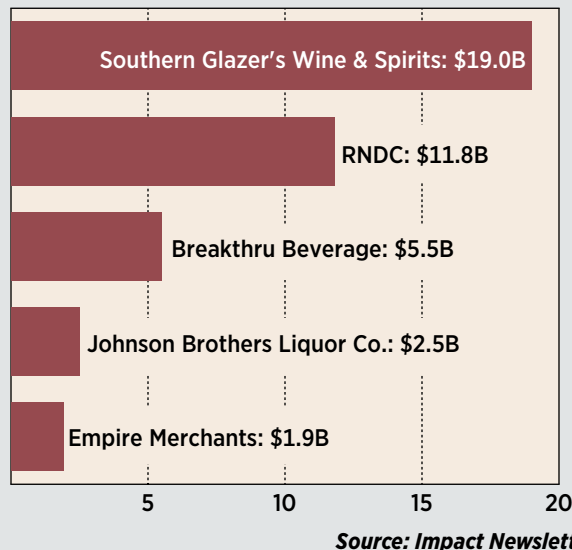
On the business side, distributors are adapting to a new environment defined almost entirely by the off-premise. “We’re reallocating our resources away from the on-

premise channel to the retail trade, where we are experiencing significant business increases,” Cole says.

Baird adds, “While our off-premise accounts have been extremely busy, on-premise activity is being adversely impacted by broad social distancing and government restric-

THE U.S. MARKET’S TOP FIVE SPIRITS AND WINE WHOLESALERS

ESTIMATED 2019 REVENUES IN BILLIONS OF DOLLARS



Source: Impact Newsletter

IMPACT'S EXCLUSIVE RANKING OF THE TOP 10 U.S. WINE AND SPIRITS WHOLESALERS^{1,2}

(Millions of Dollars/Wine and Spirits Only)		Sales Revenue		Percent	Market Share	
Rank	Distributor/Markets	2018	2019E	Change	2018	2019E
1	Southern Glazer's Wine and Spirits Alabama, Alaska, Arizona, Arkansas, California, Colorado, Delaware, Florida, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maine, Maryland, Michigan, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Hampshire, New Mexico, New York, North Carolina, North Dakota, Ohio, Oklahoma, Oregon, Pennsylvania, South Carolina, South Dakota, Tennessee, Texas, Utah, U.S.V.I., Vermont, Virginia, Washington, Washington D.C., West Virginia, Wyoming	\$18,225	\$19,000	4.3%	31.8%	32.2%
2	Republic National Distributing Co.³ Alabama, Alaska, Arizona, California, Colorado, Florida, Georgia, Hawaii, Idaho, Indiana, Kentucky, Louisiana, Maryland, Michigan, Mississippi, Montana, Nebraska, New Mexico, North Carolina, North Dakota, Ohio, Oklahoma, Oregon, South Carolina, South Dakota, Texas, Utah, Virginia, Washington, Washington D.C., West Virginia, Wyoming	11,145	11,835	6.2	19.4	20.1
3	Breakthru Beverage Group Alabama, Arizona, Colorado, Delaware, Florida, Illinois, Maryland, Minnesota, Mississippi, Nevada, Pennsylvania, South Carolina, Virginia, Washington D.C., Wisconsin	5,250	5,502	4.8	9.2	9.3
4	Johnson Brothers Liquor Co. Alabama, Arizona, California, Connecticut, Florida, Hawaii, Illinois, Indiana, Iowa, Kentucky, Massachusetts, Minnesota, Nebraska, Nevada, New Mexico, New York, North Carolina, North Dakota, Rhode Island, South Dakota, Washington, West Virginia, Wisconsin	1,960	2,500	27.6	3.4	4.2
5	Empire Merchants New York	1,850	1,900	2.7	3.2	3.2
6	Martignetti Companies Maine, Massachusetts, New Hampshire, Rhode Island, Vermont	1,250	1,300	4.0	2.2	2.2
7	Allied Beverage New Jersey	1,190	1,250	5.0	2.1	2.1
8	Fedway Associates New Jersey	850	930	9.4	1.5	1.6
9	Winebow California, Connecticut, Delaware, Florida, Georgia, Idaho, Illinois, Maryland, Minnesota, New Jersey, New York, North Carolina, Oregon, Pennsylvania, South Carolina, Virginia, Washington, Washington, D.C., West Virginia, Wisconsin	770	750	-2.6	1.3	1.3
10	Horizon Beverage Co. Maine, Massachusetts, New Hampshire, Rhode Island, Vermont	725	735	1.4	1.3	1.3
Top 10		\$43,215	\$45,702	5.8%	75.3%	77.5%
Other Wholesalers		\$14,144	\$13,252	-6.3%	24.7%	22.5%
Total U.S. Market		\$57,359	\$58,954	2.8%	100.0%	100.0%

¹ Specific state-by-state information noted in accompanying charts.

² Distribution totals do not include control state operations, unless otherwise noted in accompanying data.

³ Pro forma, including RND's joint venture with Young's Holdings in 10 U.S. markets, which took effect last year.

Source: Impact Newsletter

tions in a growing number of markets.”

It's unclear just how long the current on-premise closures and other restrictions will remain in effect. “If you use Italy

as an example, many of the same precautions that were done there are being done here—working from home, closing bars and restaurants, suspending sporting and concert events,”

1. SOUTHERN GLAZER'S WINE & SPIRITS

(Spirits and Wine Sales Revenue in Millions of Dollars)
Market Company Name

Market	Company Name	2018	2019E
California	SGWS of California	\$4,100	\$4,200
Florida	SGWS of Florida	2,900	3,000
Texas	SGWS of Texas	2,000	2,100
New York	SGWS of New York	1,750	1,800
Illinois	SGWS of Illinois	1,150	1,200
Nevada	SGWS of Nevada	725	745
Washington/Idaho	SGWS of Washington	625	675
Missouri	SGWS of Missouri	600	620
Indiana	SGWS of Indiana	500	505
Arizona	SGWS of Arizona	475	500
Louisiana	SGWS of Louisiana	450	455
Kentucky	SGWS of Kentucky	350	375
Colorado	SGWS of Colorado	325	330
South Carolina	SGWS of South Carolina	315	325
Ohio	SGWS of Ohio	225	225
Hawaii	SGWS of Hawaii	220	225
Arkansas	SGWS of Arkansas	200	200
Minnesota	SGWS of Minnesota	175	200
Oklahoma	SGWS of Oklahoma	70	200
Oregon	SGWS of Oregon	170	175
Kansas	SGWS of Kansas	160	165
Maryland/Wash. D.C.	SGWS of Maryland/D.C.	125	150
New Mexico	SGWS of New Mexico	135	135
Delaware	SGWS of Delaware	130	135
Alaska	SGWS of Alaska	120	125
Nebraska	SGWS of Nebraska	95	100
Tennessee	SGWS of Tennessee	50	50
Iowa	SGWS of Iowa	35	35
U.S. Virgin Islands	SGWS of the Virgin Islands	25	25
South Dakota/ North Dakota	Southern Glazer's Wine & Spirits	25	25
Total¹		\$18,225	\$19,000

¹Revenue totals do not include control state operations in Alabama, Idaho, Iowa, Maine, Michigan, Mississippi, Montana, New Hampshire, North Carolina, Ohio, Oregon, Pennsylvania, Utah, Vermont, Virginia, West Virginia, and Wyoming (wine sales are included in control states where wine business has been privatized).

Source: Impact Newsletter

states. Initially, Proof has targeted independent accounts, with national accounts in both the on- and off-premise markets to follow in the coming months. From March 1, 2019 through March 1, 2020, the e-commerce site generated revenue of \$140 million, according to Southern Glazer's chief commercial officer John Wittig. "We're getting a ton of feedback on the site and the efficiency and the ease to order," he says, adding that the platform also serves as "a 24/7 sales assistant to our commercial sales teams. It's augmenting their work so that they have more time to spend on consulted selling, with basic orders handled by the site. Our quality sales visits, the way we're measuring it, are up exponentially."

RNDC is also investing aggressively in e-commerce. The company has forged a partnership with online distributor LibDib, which has accelerated its e-commerce push. LibDib is essentially a three-tier-compliant online store from which retail, restaurant, and bar accounts may order products listed by their suppliers. Founder Cheryl Durzy says the platform has been particularly effective at allowing smaller suppliers—such as boutique wineries and craft distillers—to gain distribution in new markets. At press time, LibDib was present in five states—California, Colorado, Florida, New York, and Wisconsin—with 11 licenses pending.

says Cole. "We've been told that it may take another couple months for Europe to begin to get back to normal."

E-Commerce Angle

One of the key developments over the past year at the wholesale level has been leading distributors' efforts to upgrade and streamline their operations for the digital age. The move to e-commerce could not have come at a better time, with online operations becoming a major focus amid the pandemic.

At press time, Southern Glazer's had launched its customer-facing Proof e-commerce platform in 28 states, while its accompanying salesforce-facing component was active in 26

ing. Of the partnership, Cole says, "I quickly found out that it was not just purely a method to get brands to market, but was a leap forward in terms of technology as well. I saw it as giving RNDC an in-house resource that no one else would have—and a competitive advantage." If smaller brands do well within the LibDib platform, he adds, they can easily graduate into the RNDC portfolio.

In addition to LibDib, the company is also rolling out a broader eRNDC e-commerce initiative, which is built in a similar manner to the LibDib platform, but also includes salesforce-facing tools to streamline the selling process. The eRNDC platform includes about 30 million product lines and pricing records updated every night, allowing custom-

ers to see real-time inventory, pricing, and the products that they're able to buy under their license. "Everything we do in our legacy RNDC markets we'll also be doing in the RNDC-Young's markets," Cole adds. (For more on the RNDC-Young's integration, see the interview beginning on page 1.)

Breakthru, meanwhile, has a variety of e-commerce activities underway, including a partnership with online platforms Seven-Fifty and Provi, a Trident Almanac app focused on craft offerings, as well as the rollout of SAP software across the business. Baird says Breakthru's e-commerce tools are "capturing data that will help us deliver important insights to our suppliers and customers which will help us better position our products and generate increased sales for everyone."

Betting On Spirits

While the coronavirus situation is changing the complexion of the business, wholesalers are also monitoring underlying consumption trends, which have seen spirits continue to increase and wine decelerate lately. "We're very bullish on the spirits business. A few categories are incredibly strong, with really nice growth rates in both volume and value," Chaplin notes. "The wine business is challenging, but we feel that with our people being highly trained, educated, and aggressive, we can grow our wine business by increasing our share of the overall pie." Hard seltzer also continues to be a trend to watch. "I think the big question is the effect of hard seltzer on wine and spirits," Chaplin says, adding that prior to the outbreak seltzers were beginning "to take up a lot of on-premise drinking occasions, and some of those are coming out of wine and spirits."

Still, some see a potential silver lining in the hard seltzer craze. "Hard seltzer reminds me of 20 some years ago, when Zima hit," says one large Midwest-based wholesaler. "It can be a way for a lot of people to enter the beverage alcohol category and eventually try other things, like wine and spirits. Overall, I think this is probably a plateau year for wine, and hopefully you'll see an uptick again in a year or two."

2. REPUBLIC NATIONAL DISTRIBUTING CO.

(Spirits and Wine Sales Revenue in Millions of Dollars)

Market	Company Name	2018	2019E
Texas	Republic National Dist. Co. of Texas	\$2,205	\$2,350
California	Young's Market Co. ¹	\$2,000	\$2,150
Florida	Republic National Dist. Co. of Florida	980	1,070
Michigan	RNDC-National Co. of Michigan ²	725	770
Colorado	Republic National Dist. Co. of Colorado	510	640
Georgia	Republic National Dist. Co. of Georgia	500	520
South Carolina	Republic National Dist. Co. of South Carolina	470	485
Maryland	Republic National Dist. Co. of Maryland	460	470
Louisiana	Republic National Dist. Co. of Louisiana	430	440
Indiana	Republic National Dist. Co. of Indiana	395	435
Washington	Young's Market Co. of Washington ¹	450	350
Virginia	Republic National Dist. Co. of Virginia	310	320
Arizona	Young's Market Co. Southwest ¹	280	290
Kentucky	Republic National Dist. Co. of Kentucky	235	260
Oklahoma	Republic National Dist. Co. of Oklahoma ³	155	230
New Mexico	Republic National Dist. Co. of New Mexico	185	200
Nebraska	Republic National Dist. Co. of Nebraska	170	180
Washington, D.C.	Republic National Dist. Co. of Washington	165	165
Hawaii	Young's Market Co. of Hawaii ¹	110	120
Oregon	Young's Market Co. of Oregon ¹	150	115
Alaska	K&L Wine & Spirits ¹	75	80
South Dakota	Republic National Dist. Co. of South Dakota	70	75
North Dakota	Republic National Dist. Co. of North Dakota	60	60
Idaho	Young's Hayden Idaho ¹	55	60
	Total⁴	\$11,145	\$11,835

¹ A joint venture between RNDC and Young's Holdings, with RNDC serving as operating partner.

² 2019 revenue equals total invoices billed and delivered in Michigan by RNDC.

³ Oklahoma switched to a three-tier system in April 2018.

⁴ Revenue totals do not include control state operations for Alabama, Mississippi, North Carolina, Ohio, Virginia (wine sales only listed above), and West Virginia, which are not listed above. However, RNDC's control state operations in these six states totaled an estimated \$80 million in 2019.

Source: Impact Newsletter

"The wine business is challenging, but we feel that with our people being highly trained, educated, and aggressive we can grow our wine business by increasing our share of the overall pie."

—Wayne Chaplin, Southern Glazer's

Wholesalers say the trend toward spiking hard seltzers with spirits is one way to leverage the fast-emerging category. Also, notes Cole, "There are now a lot of spirits-based hard seltzers coming out now, and there will be more of those." Up to now, malt-based seltzers along the lines of White Claw

3. BREAKTHRU BEVERAGE GROUP

(Spirits and Wine Sales Revenue in Millions of Dollars)

Market	Company Name	2018	2019E
Illinois ¹	Breakthru Beverage Illinois	\$1,140	\$1,204
Florida	Breakthru Beverage Florida	868	890
Colorado	Breakthru Beverage Colorado	569	595
Maryland ²	Breakthru Beverage Maryland	475	489
Nevada	Breakthru Beverage Nevada	440	463
Arizona	Breakthru Beverage Arizona	403	418
Minnesota	Breakthru Beverage Minnesota	271	295
South Carolina	Breakthru Beverage South Carolina	251	262
Pennsylvania	Breakthru Beverage Pennsylvania	227	253
Delaware	Breakthru Beverage Delaware	182	192
Wisconsin	Breakthru Beverage Wisconsin	181	190
Virginia	Breakthru Beverage Virginia	123	127
Washington, D.C.	Breakthru Beverage Washington, D.C.	121	125
Total³		\$5,250	\$5,502

¹ Includes Tenzing.

² Includes Bacchus.

³ Revenue totals do not include control state sales for Virginia (wine sales only listed above).

4. JOHNSON BROS. LIQUOR CO.*

(Spirits and Wine Sales Revenue in Millions of Dollars)

Market	2018	2019E
Arizona, California, Connecticut, Florida, Hawaii, Illinois, Indiana, Kentucky, Massachusetts, Minnesota, Nebraska, Nevada, New Mexico, New York, New Jersey, North Dakota, Rhode Island, South Dakota, Washington, Wisconsin		
Total	\$1,960	\$2,500

*Revenue totals do not include control state operations for Alabama, Iowa, Mississippi, North Carolina, Virginia, and West Virginia, which are not listed above.

5. EMPIRE MERCHANTS

(Spirits and Wine Sales Revenue in Millions of Dollars)

Markets	2018	2019E
New York	Empire Merchants Metro/ Empire Merchants North	
Total	\$1,850	\$1,900

Source: Impact Newsletter

and Truly have been leading the way. But Gallo, for example, has a vodka-based High Noon entry that recently earned IMPACT “Hot Brand” honors, as well as the new wine-based Barefoot Hard Seltzer.

“Seltzers and spritzers are continuing to perform well in our core big beer markets of Minnesota, Nevada, and Delaware,” Baird adds. He observes that Breakthru has been outpacing the 25% industry growth in the craft spirits category, but acknowledges that plentiful harvests have been propelling private label activity in wine.

With the wine category already seeing its share of challenges, the shutdown of the on-premise due to coronavirus comes as a severe blow. But wholesalers who normally specialize in supplying the fine dining segment have been

making moves to reorient their operations to the off-premise, while supporting key on-premise partners through various initiatives. Wilson Daniels, which had wholesale revenues of nearly \$80 million last year across New York, New Jersey, Connecticut, and Oregon, has moved to sharpen its focus on the retail and e-commerce segments since the crisis hit. “We’ve seen no disruption of business with regards to our capacity or inventory,” says Wilson Daniels president Rocco Lombardo. “But 57% of our business is done on-premise and it’s been devastating. We’re going to have to find ways to support those proprietors who’ve been hurt.” Some on-premise accounts quickly transitioned to takeout and delivery business, he adds, while the off-premise surge has partially compensated for the on-premise shutdown.

At press time, however, the off-premise was also beginning to see heightened restrictions across a number of states, with key markets like California, New York, Illinois, and New Jersey under effective lockdown. That has meant that large retailers like Total Wine and BevMo have been moving—in some cases exclusively—to pickup and delivery

service, asking consumers to order online and not visit the store until they’ve received an email confirmation that their order is ready. Meanwhile, the Pennsylvania Liquor Control Board (PLCB) took the drastic step of closing all of its stores and e-commerce activity. The PLCB said it will re-evaluate its operations in the coming weeks.

As conditions continued to worsen, WSWA CEO and President Michelle Korsmo sent a letter to 50 United States Governors urging them to keep local beverage alcohol retail locations open, citing public health and safety as a chief concern. “If closures of these stores across localities or states occur inconsistently, there is an increased chance that people will travel interstate or among localities to find an open store with available supply, increasing risk of spread among com-

6. MARTIGNETTI COMPANIES

(Spirits and Wine Sales Revenue in Millions of Dollars)
Markets

	2018	2019E
Massachusetts, Rhode Island, Maine, New Hampshire, Vermont		
Total	\$1,250	\$1,300

7. ALLIED BEVERAGE GROUP

(Spirits and Wine Sales Revenue in Millions of Dollars)
Markets

	2018	2019E
New Jersey		
Total*	\$1,190	\$1,250

*Breakthru merged its New Jersey operations with those of Allied Beverage in 2017. Allied's total revenues reflect the entirety of the merged business

8. FEDWAY ASSOCIATES

(Spirits and Wine Sales Revenue in Millions of Dollars)
Markets

	2018	2019E
New Jersey		
Total	\$850	\$930

9. WINEBOW

(Spirits and Wine Sales Revenue in Millions of Dollars)
Markets

	2018	2019E
California, Connecticut, Delaware, Florida, Georgia, Idaho, Illinois, Maryland, Minnesota, New Jersey, New York, North Carolina, Oregon, Pennsylvania, South Carolina, Virginia, Washington, Washington, D.C., West Virginia, Wisconsin		
Total	\$770	\$750

10. HORIZON BEVERAGE GROUP

(Spirits and Wine Sales Revenue in Millions of Dollars)
Markets

	2018	2019E
Massachusetts, Rhode Island, Maine, New Hampshire, Vermont		
Total	\$725	\$735

Source: Impact Newsletter

munities,” she wrote. She went on to urge governors to implement provisions in state laws allowing for curbside pick-up from retail locations, or delivery by employees over 21, as well as the bundling of food and alcoholic beverage orders by licensed restaurants.

Due to the uncertainty caused by the Covid-19 crisis, Impact has opted not to publish current-year revenue projections in this issue. We plan to publish those revenue figures at a later date.

Trading Places

As wholesalers revamp their operations to adjust to the fluctuating market conditions, several key players have made changes to their leadership teams in recent months. Among them, Johnson Brothers named former Treasury Wine Estates Americas president Victoria Snyder as executive vice president, chief strategy officer. Johnson Brothers, which has expanded to cover 26 U.S. markets, had 2019 revenues of \$2.5 billion. Empire Merchants appointed Eric Pfeil as president and CEO effective April 1. Pfeil was most recently executive vice president at Breakthru Beverage Florida, where he served for 16 years in a variety of leadership roles. He replaced John Devin, who had led Empire since 2016, and who was subsequently named president, sales and marketing, at New Jersey-based Fedway Associates, effective April 20. Neil Barnett, Fedway's current president, has announced his retirement after four decades with the company, but will continue to serve in an advisory capacity.

As some key executives have shifted between companies, so too have some significant brand lines. Most notably, Beam Suntory has opted to consolidate its U.S. distribution with Southern Glazer's Wine & Spirits across 43 markets, shifting from RNDC in nine states effective April 1. “Utilizing our nationwide network and resources will significantly increase efficiencies for Beam Suntory and allow us to use economies of scale to achieve our joint business priorities,” said Chaplin. Southern Glazer's other national—or nearly national—partners include Bacardi, Campari, and Jägermeister. Southern also added the Rémy Cointreau portfolio in New York recently, where Rémy's brands were previously handled by Empire. Meanwhile, RNDC added Pernod Ricard's brands in Indiana effective April 18, replacing Southern. With that deal, RNDC now distributes Pernod Ricard spirits in nine markets, and its wines and Champagnes across 12 markets.

In another recent move, the Wirtz family expanded its presence in the Missouri market's wholesale tier, agreeing to acquire control of wine, spirits, and beer distributor Major Brands, in which it already held an undisclosed stake. The Wirtz family acquired the ownership shares of Major Brands CEO Sue McCollum, who will continue to lead the company.

Most key players say it's simply too soon to determine the impact of the outbreak on their businesses. Booming retail sales will no doubt offset part of the on-premise decline, but to what degree is ultimately unknown. In the meantime, the middle tier's leading companies will marshal the full force of their multi-billion dollar organizations not only to preserve their businesses and the wine and spirits industry as a whole, but also to lessen the social costs of the crisis for their employees, customers, and partners. —Daniel Marsteller