



2026 PLAYBOOK

August 2026



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Stella Rosa:

WHY?

- Is a **leading recruiter** of new shoppers into the Wine category. 22.8% of new Stella Rosa buyers are also new to the Wine Category
- Builds stronger **loyalty** among new Wine buyers. 24.0% of new Stella Rosa buyers are making repeat purchases
- Delivers best-in-class **velocity** across the categories that matter most (2x to 3x category average)

GOAL:

Establish Stella Rosa as the #1 selling wine brand across the wine industry.



Sparkling



Non-Alcoholic



250ml Single Cans

1+ BOTTLE
OF STELLA ROSA
IS SOLD
PER SECOND

COMPETITORS

Total Wine Category:

- Barefoot
- Josh

Specialty/Fruit Flavored Wine Category:

- Barefoot Fruitscato
- Roscato
- Oliver
- Bartenura

Sweet Sparkling (Moscato Rose, Black, Cranberry)

- Roscato
- Cupcake Sparkling Rose

Prosecco

- La Marca
- Luc Bellaire

Non-Alcoholic Brands:

- Sutter Home Fre
- Ariel
- Mionetto
- Frexinet

Wine in Can Brands

- Underwood
- House Wine

SRP

750ml - \$12.99/\$11.99
1.5L - \$25.99/\$24.99

Sweet Sparkling \$17.99/\$15.99

Prosecco/Prosecco Rose
\$17.99/\$15.99

Prosecco Gold VS/Prosecco Rose
VS - \$27.99/\$24.99

Naturals - \$10.99/\$9.99
Naturals Sparkling -
\$12.99/\$11.99

E/D \$2.99

THE CORE 6

- Black
- Moscato d' Asti
- Rosso Red Berry
- Peach
- Red
- Blueberry



- ✦ Merchandise 'Core 6' on eye level shelf
- ✦ Position Stella Rosa Black in the **#1 position** within the set (3 facings in middle of the brand set, minimum 2 facings each adjacent SKUs).
- ✦ All items color blocked by label color
- ✦ Secondary Flavors blocked and placed adjacent/under Core 6

8FT - SWEET SECTION

Includes Sweet Sparkling Items' (INDY CHANNEL)



- ✦ Stella Rosa blocked at start of section
- ✦ Position Stella Rosa Black in the **#1 position** within the set (3 facings in middle of the brand set, minimum 2 facings each adjacent SKUs).
- ✦ All items color blocked by label color
- ✦ Spicy Series merchandised together
- ✦ Ideally, Sweet Sparkling items (*Moscato Rosé, Black Sparkling and Cranberry*) merchandised in Sweet Set (vs Sparkling set); top shelf within the Stella Rosa brand block where possible
- ✦ 1.5L on top shelf

8FT - SPARKLING (INDY CHANNEL)



- ✦ Stella Rosa Prosecco DOCG adjacent to category leaders such as La Marca, Josh, Mionetto
- ✦ Prosecco Gold VS and Prosecco Rose VS adjacent to Imported Luxury Sparkling (Luc Belaire)

8FT - SWEET SECTION (CHAINS)



- ✦ Lower-ABV items (Stella Rosa) placed on the left side of set, and progress toward higher-ABV items on the right (Magnum VS, Turnt Up, XXL, Lolli)
- ✦ Stella Rosa 'Core 6' on eye level shelf
- ✦ Remaining items placed below
- ✦ All items color blocked
- ✦ Spicy Series merchandised together
- ✦ Higher-ABV San Antonio items (Pink Passion, Grape Red) should be placed adjacent to higher ABV comp set
- ✦ Merchandise Magnum VS and Turnt Up away from Stella Rosa, adjacent to higher-ABV items

8FT - SPARKLING (CHAINS)



- ✦ Stella Rosa Sparkling brand family should be placed adjacent to category leaders such as La Marca, Josh, and Mionetto
- ✦ Prosecco Gold VS and Prosecco Rose VS adjacent to Imported Luxury Sparkling (Luc Belaire)

Typically, retail chains merchandise *all* Sparkling items (including sweet sparkling items) in the Sparkling set

Display Standards: Core 6

Primary Displays



High Traffic: 40+ cases



Medium Traffic: 24+ cases



Low Traffic: 12+ cases (focus on Core 6)

Primary Display - Core 6 " + 2" Display Standards



HT Displays
40 - 50 case average



MT Displays
24 - 36 case average



LT Displays
12 - 24 case average

Product Mix:

- 85% of display with "Core 6"
 - Black (1/3 of displayed cases)
 - Moscato d' Asti DOCG
 - Peach
 - Red
 - Rosso Red Berry
 - Blueberry
- + 15% of display with additional items FOR High/Medium Traffic:
 - Drive Innovation (ex: Stella Rosa Grape)
 - New POD opportunity
 - Trending SKUs
 - Regionally Relevant SKUs

"Core 6"



Secondary Display Standards (In addition to primary display in the store)



HT Displays
9 to 12 case average



MT Displays
6 to 9 case average

Product Mix:

- Focus on Black



High Traffic: 9+ cs



Medium Traffic: 6+ cs

Core 6 Priority SKUs

1. Black
2. Moscato d' Asti DOCG
3. Peach
4. Red
5. Rosso Red Berry
6. Blueberry



4-Shelf Cold Box



5-Shelf Cold Box

COLD BOX STANDARDS (in priority order)

#1 Priority

Stella Rosa Frizzante - 750ml

1. Black
2. Moscato d' Asti DOCG
3. Peach
4. Red
5. Rosso Red Berry
6. Blueberry

Stella Rosa Sparkling

1. Moscato Rose
2. Prosecco

Stella Rosa Naturals - 750ml

1. Black
2. Peach
3. Strawberry Rosé

Stella Rosa Cans:

1. Black
2. Peach
3. Tropical Mango

Stella Rosa Frizzante - 1.5L

1. Black
2. Rosso Red Berry
3. Strawberry Rosé

If set includes 1.5L items

Minimum 4 Stella Rosa SKUs in Cold Box

STELLA ROSA FRIZZANTE 750ml

'Top 20'

1. Black
2. Moscato d' Asti DOCG
3. Peach
4. Red
5. Rosso Red Berry
6. Blueberry
7. Grape (NEW)
8. Berry
9. Pink
10. Watermelon
11. Black Cherry
12. Blackberry
13. Tropical Mango
14. Pineapple
15. Strawberry Rosé
16. Golden Honey Peach
17. Cranberry
18. Pineapple & Chili (Spicy Series*)
19. Green Apple
20. Mango & Chili (Spicy Series)
21. Watermelon & Chili (Spicy Series)

Target SKU counts for Stella Rosa:

High Traffic Stores: 20 SKUs
 Medium Traffic Stores: 15 SKUs
 Lower Traffic Stores: 10 SKUs

STELLA ROSA SPARKLING

- Moscato Rosé
- Sparkling Black
- Prosecco DOC



- Gold V.S. Prosecco DOC
- Rose V.S. Prosecco Rose DOC

STELLA ROSA 250ml CANS

- Black
- Peach
- Blueberry
- Tropical Mango



- Black Non Alc

STELLA ROSA NATURALS (NON-ALCOHOLICS)

- Peach Sparkling
- Rosé Frizzante
- Black Sparkling
- Peach Frizzante
- Red Frizzante
- Cranberry Sparkling



STELLA ROSA MAGNUMS 1.5L

- Black 1.5L
- Rosso Red Berry 1.5L
- Strawberry Rosé 1.5L



Driver SKU(s) in GREEN

PRIORITY

1

- 750ml Moscato d' Asti DOCG
- 750ml Black



ON PREMISE CHANNEL TARGET



Any On Premise Account with Moscato d'Asti on the menu

STELLA ROSA CANS

2

- Black
- Peach
- Black Non-Alcoholic



Hotel Mini Bars, Grab & Go, Poolside, Travel, Events; perfect as mixer too.

STELLA ROSA SPARKLING

3

- 187ml SR Prosecco
- 187ml SR Moscato Rose
- Gold V.S. Prosecco DOC
- Rose V.S. Prosecco Rose DOC
- Prosecco DOC 750ml
- Prosecco Rose DOC 750ml



Casual dining/ Nightclubs based on size/type



SPARKLING COLLECTION 750 ml



GOLD VS. PROSECCO D.O.C. Alcohol: 11% Classification: D.O.C. Residual Sugar: 14 g/L Grape Varietal: Chardonnay Green apple & grapefruit	PROSECCO ROSE VS. D.O.C. Alcohol: 11% Classification: D.O.C. Residual Sugar: 14 g/L Grape Varietal: Chardonnay & Pinot Noir Ripe pears & strawberry	PROSECCO D.O.C. Alcohol: 11% Classification: D.O.C. Residual Sugar: 17 g/L Grape Varietal: Chardonnay Delicate notes of pear, yellow apple, and lemon	PROSECCO ROSE D.O.C. TREVISIO Alcohol: 11% Classification: D.O.C. Residual Sugar: 16 g/L Grape Varietal: Chardonnay & Pinot Noir Rose with hints of citrus and honeysuckle	MOSCATO ROSE Alcohol: 6.5% Residual Sugar: 90 g/L Grape Varietal: Moscato D'Arancio Rich nectarine and yellow peach	PROSECCO ROSE D.O.C. TREVISIO Alcohol: 6% Classification: D.O.C.G. Residual Sugar: 100 g/L Grape Varietal: Pinot D'Arancio Orange blossom, fresh apricot, and peach	BLACK LUX Alcohol: 6.5% Residual Sugar: 10 g/L Grape Varietal: Special Blend Blackberry, blueberry, and raspberry	CRANBERRY Alcohol: 6.5% Residual Sugar: 100 g/L Grape Varietal: Brachetto Fresh cranberries
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KOSHER COLLECTION 750 ml



POMEGRANATE Alcohol: 5.5% Residual Sugar: 100 g/L Juicy and refreshing pomegranate	PEACH Alcohol: 5.5% Residual Sugar: 100 g/L Ripe white peach and honey	BLUEBERRY Alcohol: 5.5% Residual Sugar: 100 g/L Fresh, rich blueberry
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FRIZZANTE COLLECTION 750 ml

CORE 6



BLACK Alcohol: 5% Residual Sugar: 90 g/L Ripe blackberry, blueberry, and raspberry	RED Alcohol: 5% Residual Sugar: 100 g/L Luscious raspberry, wild strawberry, and red plum	BLUEBERRY Alcohol: 5% Residual Sugar: 100 g/L Fresh, rich blueberry	ROSSO RED BERRY Alcohol: 5.5% Residual Sugar: 100 g/L Delicious strawberry and red berry	PEACH Alcohol: 5% Residual Sugar: 100 g/L Luscious yellow peach and apricot	MOSCATO D'ARANCIO Alcohol: 5.5% Classification: D.O.C.G. Residual Sugar: 100 g/L Vibrant pear and apple	LEMON LIME Alcohol: 5% Residual Sugar: 100 g/L Fresh lemon lime	GOLDEN HONEY PEACH Alcohol: 5% Residual Sugar: 100 g/L Ripe peach and honey	GREEN APPLE Alcohol: 5% Residual Sugar: 100 g/L Crisp green apple	CLARET Alcohol: 6% Residual Sugar: 90 g/L Peach and honey	GRAPE Alcohol: 5% Residual Sugar: 90 g/L Juicy Grape
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BERRY Alcohol: 5% Residual Sugar: 100 g/L Wild strawberry and blackberry	CRANBERRY Alcohol: 5% Residual Sugar: 100 g/L Fresh cranberries	PINK Alcohol: 5% Residual Sugar: 100 g/L Strawberry and rose petal	STRAWBERRY ROSE Alcohol: 5% Residual Sugar: 100 g/L Fresh, vibrant berry and rose petal	RUBY ROSE GRAPEFRUIT Alcohol: 5% Residual Sugar: 100 g/L Sweet grapefruit with notes of rose	WATERMELON Alcohol: 5% Residual Sugar: 100 g/L Fresh watermelon	BLACK CHERRY Alcohol: 5% Residual Sugar: 100 g/L Fresh black cherry	BLACKBERRY Alcohol: 5% Residual Sugar: 100 g/L Luscious, ripe blackberry	PINEAPPLE Alcohol: 5% Residual Sugar: 100 g/L Tropical pineapple	RED APPLE Alcohol: 5% Residual Sugar: 100 g/L Rich red apple	TROPICAL MANGO Alcohol: 5% Residual Sugar: 100 g/L Ripe mango and passion fruit	MOSCATO Alcohol: 5% Residual Sugar: 100 g/L Delicious pear and apple
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ADDITIONAL FORMATS

MAGNUMS

1500 ml

HALF-BOTTLE

375 ml



MOSCATO D'ASTI
D.O.C.G.



BLACK

ROSSO

ROSÉ

MINIS

187 ml



PINK

PROSECCO

ROSSO

ROSSO LUX

BLACK LUX

MOSCATO

MOSCATO ROSÉ

PEACH

RED

WATERMELON

TROPICAL MANGO

CANS

250 ml



BLACK

BLUEBERRY

PEACH

TROPICAL MANGO

NON-ALCOHOLIC COLLECTION

FRIZZANTE

750 ml

SPARKLING

750 ml



BLACK

PEACH

RED

ROSÉ

BLUEBERRY

PEACH

CRANBERRY

TROPICAL MANGO

NEW

CANS

250 ml



BLACK

BLUEBERRY

PEACH

ORGANIC COLLECTION



ORANGE FUSION
Alcohol 6%
Residual Sugar: 140 g/L
Bright and tropical orange

RED FRUIT FUSION
Alcohol 6.5%
Residual Sugar: 120 g/L
Refreshing strawberry and red berry

CLASSIC ROSSO
Alcohol 6.5%
Residual Sugar: 120 g/L
Refreshing strawberry and red berry

SPICY SERIES



MANGO & CHILI
Alcohol 5%
Residual Sugar: 100 g/L
Tropical mango and Italian chili peppers

LIME & CHILI
Alcohol 5%
Residual Sugar: 100 g/L
Fresh lime and Italian chili peppers

PINEAPPLE & CHILI
Alcohol 5%
Residual Sugar: 100 g/L
Tropical pineapple and Italian chili peppers

WATERMELON & CHILI
Alcohol 5%
Residual Sugar: 100 g/L
Fresh watermelon and Italian chili peppers

HIGHER ABV



ROYALE ROSSO
Alcohol 8%
Residual Sugar: 95 g/L
Strawberry raspberry and red berry

APPENDIX

Stella Rosa is a **leading recruiter** of new shoppers into the Wine category



New Wine Buyer: % of New to Wine Category

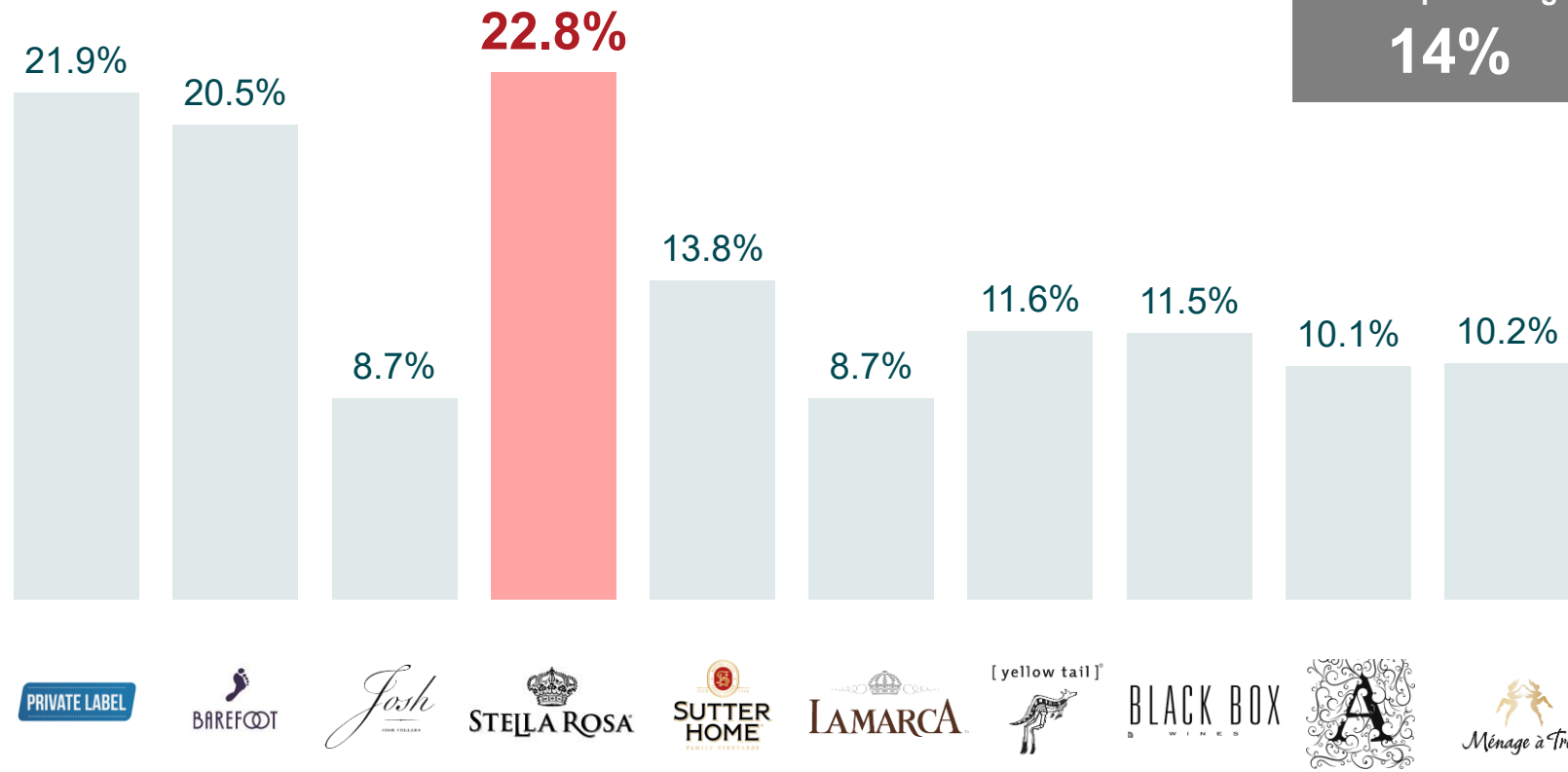
% of New Brand buyer that are new to Wine Category

22.8%

Of new **Stella Rosa** buyer are also new to the Wine Category

Far above the competitive average, demonstrating Stella Rosa's ability to recruit new shoppers into the wine category

Competitive landscape Average:
14%



Data source: Numerator Insights, Narrative & New Buyer Analysis, L12 Months Ending 04/30/26

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Stella Rosa builds stronger **loyalty** among new Wine buyers



New Wine Buyer: Repeat Households

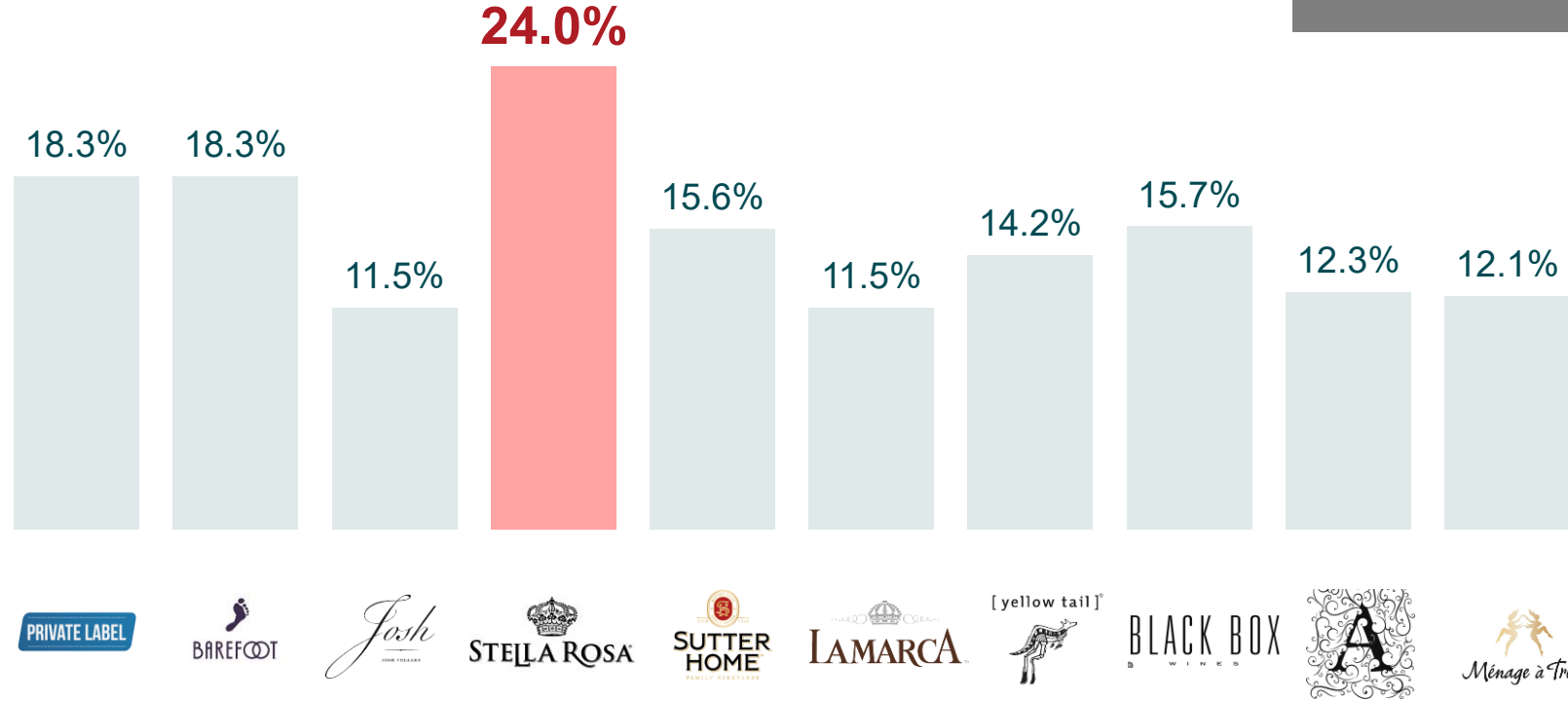
% of new Wine households who make 2+ product trips

Category Average:
11.2%

24.0%

Of new **Stella Rosa** buyer are making repeat purchases

Converting new buyers into repeat purchasers at a much higher rate



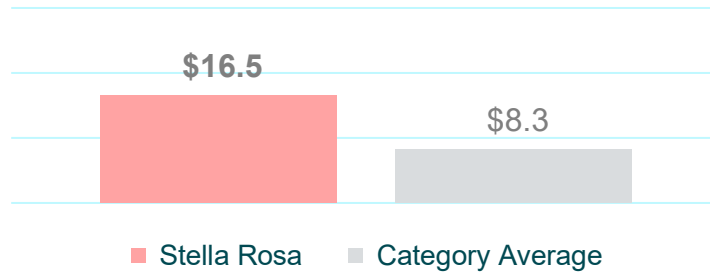
Data source: Numerator Insights, Trended Metrics Scorecard, L12 Months Ending 04/30/26

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Stella Rosa delivers best-in-class **velocity** across the categories that matter most

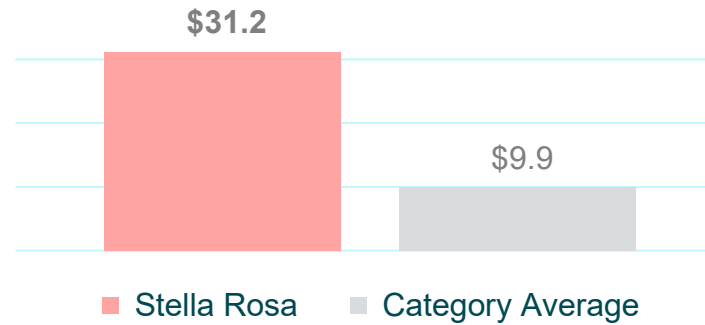


\$ / item / store / week: **Flavored Wine**



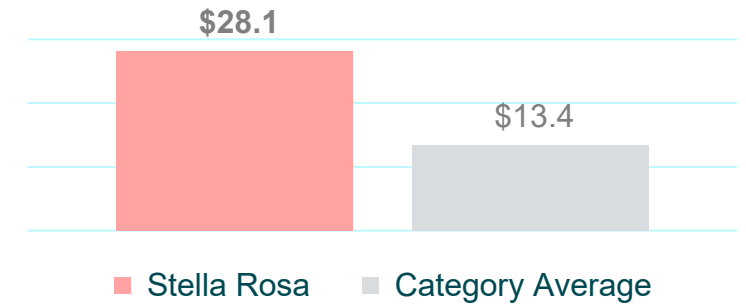
Stella Rosa generates nearly
2x the category-average
velocity in Flavored Wine.

\$ / item / store / week: **Moscato**



Stella Rosa dramatically
outperforms the Moscato
category, generating over
3x the average velocity.

\$ / item / store / week: **Other Red**



Stella Rosa is a top productivity
driver within Other Red Blend,
delivering more than **2x**
the category average.



Data source: NIQ; Total US xAOC + Liquor Open State + Conv; Latest 52 weeks ending 6-20-26