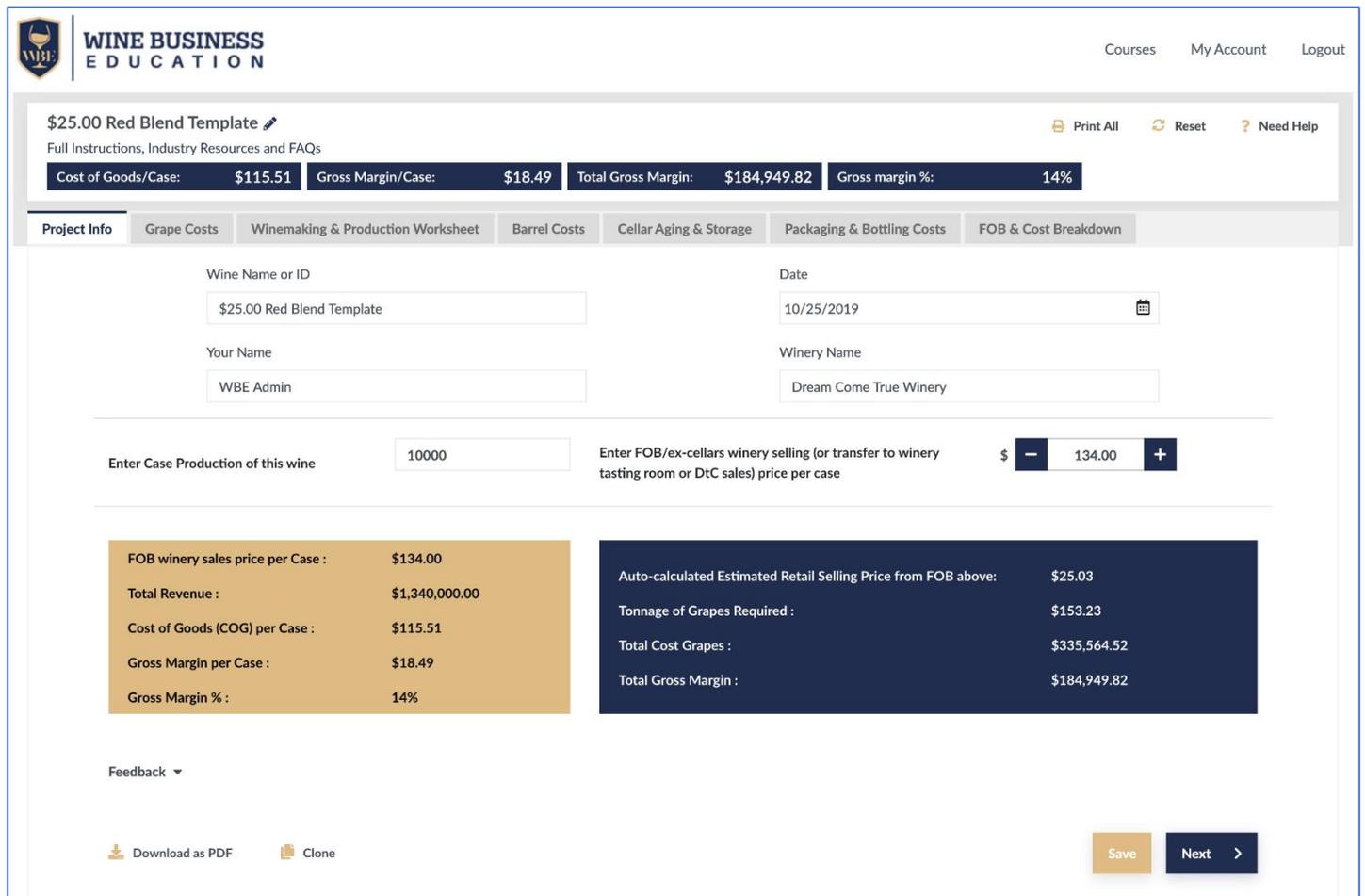


\$25 Red Blend Cost of Goods Workbook Tutorial

The purpose of this workbook is guide users through the wine supply chain and understand the key costs of wine production. Whenever possible use realistic numbers, not just the lowest you can find, when researching the individual line items for input. You can reach out to wineries, winemakers, or custom crush facilities in the area of production for your wine for help in researching the best number for the individual costs. Research costs – and make sure to allocate portions to your team members to come up with the REQUIRED costs. Make sure that key costs and production elements are reflected in your business plan.



Project Info Tab

1. Workbook Title. Click on Pencil Icon next to Edit Workbook Name – this will also help you find the project in the “Saved Workbooks” section of “my Accounts”.
2. Full instructions, Industry Resources and FAQs – live link to support page.
3. Click on TABS to preview content and navigate through the workbook.
4. Enter Wine Name, Date, Your Name and Winery Name
5. Enter Case Production for this one wine and expected FOB/ex-cellars price (FOB price will affect retail selling price).
6. You will begin to see values in top information bar as you enter information (Cost of Goods, Gross Margin, etc.).
7. Click Save or Next, or click on Grape Costs tab and continue to Grape Costs worksheet.

*See FOB & COST BREAKDOWN tab LINES 9-12 to see formula for the ESTIMATED RETAIL SELLING PRICE.

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Cost of Goods/Case: \$115.51 Gross Margin/Case: \$18.49 Total Gross Margin: \$184,949.82 Gross margin %: 13.80%

Project Info Grape Costs Winemaking & Production Worksheet Barrel Costs Cellar Aging & Storage Packaging & Bottling Costs FOB & Cost Breakdown

Total cost of grapes/ton:\$2190				Reference: Benchmark Costs (USD per ton) by Region						
Select Varietal from Pulldown	Enter cost per FULL ton:	Variety % of blend (must = 100%):	Allocated grape cost as % of blend:	Ultra Premium Single Vineyard	Ultra Premium AVA	Premium AVA	Premium County	County	State	Grape Source N
Cabernet Sauvignon	2500.0	100%	\$1,250	\$12,000	\$8,000	\$5,000	\$4,000	\$2,000	\$800	
Merlot	1800.0	30	\$540	\$8,000	\$6,000	\$4,000	\$3,000	\$1,500	\$800	
Petit Verdot	2000.0	20	\$400	\$12,000	\$8,000	\$5,000	\$4,000	\$2,000	\$800	

TOTAL COST PER TON \$2190

+ ADD MORE

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Grape Costs Calculator

- Select a Varietal (type of grape; Merlot, Riesling, etc.) from pulldown list in column 1.
 - If you are using a grape variety not listed in the pulldown leave the field SELECT VARIETY and enter the name of the grape variety you are using in the GRAPE SOURCE NOTES to the far right of the row.
 - Enter your full cost per ton, then the percentage of total blend (or 100% if wine is from single variety Chardonnay for example) that grape accounts for.
 - To add additional grape varieties, or if you are using same variety with different costs, select “+Add More” to enter as many additional grape varieties as needed. Make sure that the % column adds up to 100%
- You will see current general benchmark values, provided for reference of typical range of prices, in subsequent fields. Research the actual costs using grape crush reports or by contacting wineries and/or grape growers in the region of production for your wine.
- You may also add notes, such as name of source, or other details about that grape you may want to remember.
- For a blend you can add as many varieties, and their associated cost per ton and percentages, to get an overall Cost Per Ton. Make sure the value in the third column totals 100% (and is displayed in GREEN)
- Click Next or the tab at the top to continue to **Winemaking & Production Worksheet**

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Winemaking & Production Worksheet

- Required fields:
 - Line 2: use the 100% number unless using bulk wine/finished wine. Make sure to enter cost per gallon Line 17 for bulk/finished wine.
 - Line 3: conversion factor is the number of CASES of wine you can expect from a ton of grapes. This number can vary typically from 50-70 cases per ton (or even less than 30 cases/ton for Ice Wine!) depending on the type of grape, style of wine, winemaker discretion and/or efficiency of the press.
 - Line 10: **REQUIRED: Winemaking: fermentation and production per ton (excluding aging and cellaring)***
 - State and Federal Excise Taxes per Gallon
- There are numerous additional OPTIONAL fields to accommodate additional costs, such as equipment or work orders, for any specific wine.
- Click Next or the tab at the top to continue to **Barrel Costs Worksheet**

*Production cost per ton (Line 10) is either provided by custom crush facility or can be determined by taking total production costs from previous years and dividing by number of cases produced.

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Cost of Goods/Case: **\$115.51** Gross Margin/Case: **\$18.49** Total Gross Margin: **\$184,949.82** Gross margin %: **13.80%**

Project Info Grape Costs Winemaking & Production Worksheet Barrel Costs Cellar Aging & Storage Packaging & Bottling Costs FOB & Cost Breakdown

Enter Values	Totals	
1	\$ 2,190.00	Grape cost per ton (from page previous page)
2	95 %	Percentage of full production wine (100% = NO bulk wine used)
3	5 %	Percentage bulk/finished wine if used (up to 99%, enter bulk wine cost per gallon line 17) <small>NOTE: for 'bulk wine only' project you can also use the BLENDING CALCULATOR.</small>
4	62	Calculation of grape needs and costs based on average cost/ton, % of production and press conversion: Enter wine press conversion factor (1 ton of fruit = xx cases of wine)
5	153.23	Grape Tons needed (case production divided by press yield)
6	\$335,564.52	Total Cost of Grapes
7	\$33.56	Reference Cost of Grapes per case (2.38 gallons) of finished wine
8	\$ 0.00	Processing and production costs (per ton basis) not including labor or overhead OPTIONAL: Additional prefermentation handling, treatments of the grapes and/or must per ton
9	\$ 0.00	OPTIONAL: Additional one-time fixed prefermentation costs: supplies or equipment
10	\$ 800.0	REQUIRED: Winemaking: fermentation and production per ton (excluding aging and cellaring)
11	\$ 0.00	OPTIONAL: Exceptional production costs not included above: equipment, supplies, treatments
12	\$ 0.00	OPTIONAL: Lab work and analysis (pre-, during & post-ferm) total production OR use /ton basis next line
13	\$ 0.00	OPTIONAL: Lab work and analysis (pre-, during & post-ferm) per ton processed estimate
14	\$800.00	Total production cost per ton
15	\$116,451.61	Total cost of full production wine (as % of full production vs. bulk)
16	\$11.65	Total per-case cost production
17	\$ 25.0	Bulk/Fermented wine cost per gallon (enter \$/gallon cost of material)
18	1,190.00	Bulk/Fermented wine required - gallons in blend (2.38 gallons per case)
19	\$29,750.00	Bulk/Fermented wine total cost
20	\$0.15	Total per-case cost of Bulk/Fermented wine
21	\$25,466.00	State and Federal Excise Taxes per gallon (displays times 2.38 gallons/case) CLICK FOR TTB TAX DETAILS
22	\$507,232.13	Total cost including grapes, production, Bulk/Fermented wine and taxes
23	\$47.90	Total cost of wine per case of Fermented 12/750 ml bottles

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Cost of Goods/Case: **\$115.51** Gross Margin/Case: **\$18.49** Total Gross Margin: **\$184,949.82** Gross margin %: **13.8%**

Project Info Grape Costs Winemaking & Production Worksheet **Barrel Costs** Cellar Aging & Storage Packaging & Bottling Costs FOB & Cost Breakdown

\$47.9 Total Cost of Finished Wine per case of finished per case of 12/750 ml bottles (from previous page).

NOTE: *Percentage of wine in each barrel program (line 1) and *Duration of Barrel Aging (line 3) must be populated for the subsequent calculations in each column to be activated.

	Program 1	Program 2	Program 3	Program 4	TOTALS
1 Barrel program description (i.e. new French, used, etc.)	French	New	Old	Neutral	May be less than 100% if portion not aged in barrel
2 Percentage of wine in each barrel program (TOTAL = 100%)	10	50	0	0%	60
3 Duration of barrel aging (months)	6	12	0		
4 Gallons	2,380	11,900	0	0	14,280
5 Equivalent number of cases	1,000	5,000	0	0	6,000
6 Laid in cost of barrel (incl. shipping and preparation)	\$ 1400.00	\$ 900.00	\$	\$	
7 Used barrel resale (or transfer to used program) value	\$ 900.00	\$ 100.00	\$	\$	
8 Barrel capacity (gallons)	60.00	60.00			
9 Net cost/barrel for life of use	\$500	\$800	\$0	\$0	
10 Number of years used	1	6			
11 Cost per barrel per month of use	\$41.67	\$11.11	\$0	\$0	
12 Number barrels required	39.67	198.33	0	0	238
13 Net cost of barrels	\$9,916.67	\$26,444.44	\$0	\$0	\$36,361.11
14 Net cost of barrels per bottle	\$0.83	\$0.44	\$0	\$0	\$1.27
15 Annual evaporative loss rate (3-5 % per year typically)	3.0	4.0			
16 Topping wine cost per gallon (bulk and/or finished wine)	\$ 25.00	\$ 25.00	\$	\$	
17 Evaporation loss per month (gallons)	5.95	39.67	0	0	45.62
18 Topping wine cost/bottle	\$0.07	\$0.2	\$0	\$0	
19 Evaporation loss: total cost of topping wine	\$892.5	\$11,900	\$0	\$0	\$12,792.5
20 Cost of barrels + evaporation loss per bottle	\$0.9	\$0.64	\$0	\$0	
21 Cost of barrels + evaporation loss cost per 12 bottle case	\$10.81	\$7.67	\$0	\$0	\$18.48
22 Cost of wine including barrel aging per case					\$66.38
23 Total Cost of Fermented Wine per case / 750ml bottles					\$398,250.11

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Barrel Costs

- This worksheet will introduce you to the many variables and costs associated with barrel aging a wine
- If wine is NOT barrel aged leave this page blank.
 - Alternatives like oak chips, adjuncts/additives, etc. can be found on the next page.
 - You are not required to use all four PROGRAMS
 - LINE 1 - PROGRAM names can be: new or used, French, American or other source of barrels for each PROGRAM (up to four) NOTE: headings for Programs 1&2 on this template are reversed!
 - Program 1 typical for New French
 - Program 2 Used French barrels
 - If only a portion of the wine goes into barrel the TOTAL on LINE 2 should reflect the % (100% is all the wine is barrel aged)
- LINE 3: number of months the wine will spend in barrels
- LINE 4: capacity of barrels
- LINE 6: research the cost of the type of barrels you plan to use
- LINE 7: What is the salvage value (if any) when done using the barrels for this wine? This can be an internal transfer or actual reselling of barrels.
- LINE 8: what is the capacity of the barrels?
- LINE 10: how many years will the barrel be used (only 1 year for new oak, up to 5 or more years for used barrels)
- LINE 15: evaporation expected during barrel aging process. Barrel storage conditions are important!
- LINE 16: refer to previous tab (Winemaking & Production Worksheet) Line 23: Total cost of wine per case of Fermented 12/750 ml bottles, then divide by 2.38 to get a cost per gallon for your topping wine.
- Click Next or the tab at the top to continue to **Cellar Aging & Storage Worksheet**

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Cost of Goods/Case: \$115.51
Gross Margin/Case: \$18.49
Total Gross Margin: \$184,949.82
Gross margin %: 13.80%

Project Info
Grape Costs
Winemaking & Production Worksheet
Barrel Costs
Cellar Aging & Storage
Packaging & Bottling Costs
FOB & Cost Breakdown

Includes costs of barrels, topping wine, evaporation loss and depreciation adjustments. Does not include costs of labor, facilities, or overhead.

\$66.38 Cost of finished wine including barrel aging

Line	Cost per case	Number of Months	total/case	Description	
1	\$ 0.25	- 12 +	\$3.00	Storage/aging per month, large uprights, eggs, stainless, etc.	
2			\$0.50	Oak alternative costs (chips, blocks, additives, etc.)	\$ 5000.0
3			\$0.00	Add any additional aging-related costs	\$ 50
4			\$3.50	Total Storage and Oak Alternatives Per Case	
Additional cellar treatments not included in total winemaking costs					
5			\$0.00	Stabilization and clarification	\$ 50
6			\$0.00	Specialized filtration, additions or treatments	\$ 50
7			\$0.00	Additional cost of cellar treatments or supplies:	\$ 50
8			\$0.00	Total Additional Cellaring, Storage and Aging Options	
Monthly storage of bulk and/or finished wines					
9	\$ 0.25	- 6 +	\$1.50	Case goods storage BEFORE release (in bond)	
10			\$0.00	In and out fees (total cost)	\$ 50
11	\$ 0.00	- 0 +	\$0.00	In and out fees (per case charge times # of times)	
12	\$ 0.25	- 6 +	\$1.50	Case goods storage AFTER release, taxes paid (average # months until depleted)	
13			\$3.00	TOTAL storage and fees	
14			\$6.50	Aging and cellar costs per case	
15			\$65,000.00	Total cost of aging and cellaring	
16			\$72.88	Total cost of Wine per case, including cellaring and aging	
17			\$728,750.18	Total Production Cost Of Finished Wine	

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Cellar Aging & Storage Costs

1. In addition to aging in barrels there are several points that you need to store wine before and after bottling.
2. **REQUIRED FIELDS**
 - a. **LINE 1:** How many months, and cost per case equivalent, of storing the wine after fermentation (or before/after barrel aging) but **BEFORE** bottling. May range from 2-3 months up to even a year depending on wine type and style. Cost can range from \$0.10 to \$0.50 depending on storage vessel.
 - b. **LINE 9:** can vary from 1 month for fresh whites/rose (cash flow!) to 12 months or more for reserve style reds, cost varies from \$0.15 to \$.50 per month.
 - c. **LINE 10:** cost varies from \$0.15 to \$.50 per month. If wine is planned to be completely sold within a year from release, divide your production by 12 for **NUMBER OF MONTHS**
3. **OPTIONAL**
 - a. Research cost of oak alternatives if using instead of, or in addition to, barrel aging
 - b. Any specialized treatments (most of these may be covered in line 10 your **REQUIRED: Winemaking: fermentation and production per ton (excluding aging and cellaring) of the Winemaking & Production Worksheet**
 - c. If calculations are not being completed or not displaying properly, click **SAVE** to fix it
4. Click **Next** or the tab at the top to continue to **Packaging & Bottle Costs Worksheet**

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Project Info Grape Costs Winemaking & Production Worksheet Barrel Costs Cellar Aging & Storage **Packaging & Bottling Costs** FOB & Cost Breakdown

\$72.88 Finished wine cost per case from previous page

1 \$ Total per case packaging cost (bottles, case, closure, labels)

Enter EITHER cost per case of packaging OR individual costs

2 \$ Bottles or other containers, per bottle

3 \$ Corks, screwcaps or other closures, per bottle

4 \$ Capsules, per bottle

5 \$ Labels, per bottle

6 \$ Boxes and/or box graphics (boxes may be included with cost of bottles), per case

7 \$ Additional packaging costs (wooden boxes, tissue wrap, etc.), per case

8 **Packaging cost per case**

9 Total Cost of COLA, design and additional packaging expenses \$

10 \$ Bottling/filling cost per case including additions or treatments

11 Total Cost of Additional bottling line setup or changeover fee \$

12 Total Cost of Additional packaging and/or bottling costs \$

13 Total case cost of packaging materials, bottling and treatments

14 Total bottle cost of packaging materials, bottling and treatments

15 Total cost of materials and bottling

16 **\$ 1,155,050.18** Total cost including wine, packaging and bottling

17 **\$ 115.51** Finished Cost of Goods (COG) per case

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Packaging & Bottling Costs

1. Use Line 1 to enter total packaging cost PER CASE or Lines 2-8 individual packaging components.
2. REQUIRED FIELDS
 - i. LINE 9: research COLA and then add estimate of cost to create label design and artwork
 - ii. LINE 10: You may want to contact an individual bottling company, winery or mobile bottling service to get costs and provide them with the volume of production for your project
3. Additional fields are available for one-time or exceptional costs as needed.

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Cost of Goods/Case:	\$115.51	Gross Margin/Case:	\$18.49	Total Gross Margin:	\$184,949.82	Gross margin %:	13.80%
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- Project Info
- Grape Costs
- Winemaking & Production Worksheet
- Barrel Costs
- Cellar Aging & Storage
- Packaging & Bottling Costs
- FOB & Cost Breakdown

\$115.51 Unallocated Cost of Finished Goods (use this number to enter into Sales & Distribution Calculator)

Cost of Finished Goods Breakdown	% of total	\$ per Case	Total Costs/Margin
1 Grapes	29.05%	\$33.56	\$335,564.52
2 Production (including taxes)	12.29%	\$14.19	\$141,917.61
3 Bulk wine	0.13%	\$0.15	\$1,487.50
4 Barrel aging	16.00%	\$18.48	\$184,780.56
5 Cellar and storage	5.63%	\$6.50	\$65,000.00
6 Packaging	36.91%	\$42.63	\$426,300.00
7 Cost of finished goods	100.00%	\$115.51	\$1,155,050.18
8 GROSS MARGIN (FOB selling price less cost of goods)	13.80%	\$18.49	\$184,949.82

Preliminary retail pricing calculation pricing forecaster*

9 Winery FOB/ex-cellar price	\$134.00
10 Total winery revenue for this wine (FOB times case production)	\$1,340,000.00
11 Distributor selling price (freight, landed cost X 1.5 markup to licenced resellers: on-premise and off-premise)	\$20.91
12 Estimated retail shelf selling price after 33% retail markup (25% margin)	\$25.03

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FOB & Costs Breakdown

This page displays the summary of all your costs and determines your FOB price and Gross Profit Margin for the inputs you have provided.

The “Preliminary retail pricing calculation forecaster*” LINES 9-12 provides the formula used to generate the ESTIMATED retail selling price given you FOB Selling Price from the Wine info page. You can use the Wine Pricing Calculator to work up detailed pricing through the 3-tier distribution system.

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