

Tozai

PREMIUM JAPANESE SAKE

 **KOMÉ COLLECTIVE**
BY VINE CONNECTIONS



BRAND OVERVIEW

- Tozai is a coveted entry-level premium Japanese sake brand imported by Komé Collective. Komé Collective is a division of Vine Connections -- a sake, wine, and spirits importer based in Sausalito, California.
- Komé Collective commands 12% of all sake imports by value, with Tozai representing 6% of all sake imports by value¹.
- The Tozai brand launched in 2006 and currently sells six distinct sake profiles.
- Tozai is the 3rd largest imported sake brand in the US by volume².
- Tozai has seen +37% growth by volume YoY².



Sources:

1. USDA, through 8.31.21.

2. Nielsen, 52 weeks as of 10.9.21.

3. Vine Connections Projected Internal Shipment Data 10.31.21.

WHY TOZAI

- Crafted in Kyoto, the birthplace of sake.
- We partner with a top 10 producing brewery in Japan.
- Home to the local Fushimi Mizu, one of Japan's most prized water sources of soft, pure water.
- Explosive consumer and trade demand in Japanese beverages and flavor profiles.
- No substantial competitor in this price category has this level of quality as well as being authentically and culturally Japanese.





LOWER SUGAR

Sake contains less residual sugar than most other alcohol.



LOW IN TARTARIC ACID

The primary acid in wine that causes acid reflux & enamel erosion.



FREE OF TANNINS & SULFITES

For those looking to avoid wine headaches.



GLUTEN FREE

Premium sake is naturally gluten-free, perfect for those who are sensitive or Celiac.



80% WATER BASED

Arguably more hydrating than other alcoholic beverages.



SAKE BASED COCKTAILS

Perfect for beer & wine licensed accounts and consumers that love creating lower alc cocktails at home.



THE OPPORTUNITY

CONSUMER DEMAND IS BOOMING

+12%

increase in retail sake sales through 2021

Source: Nielsen Data, 10.9.21

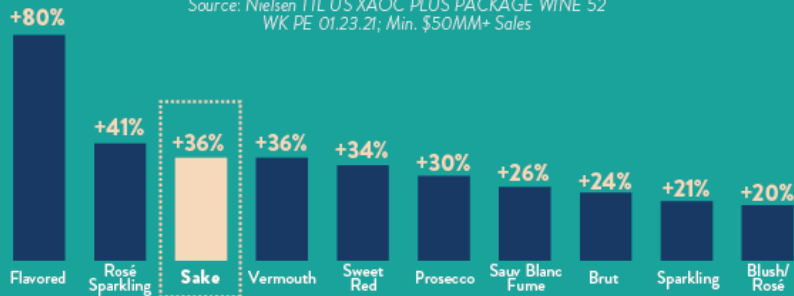
\$63.2M

in sake retail sales in the US in 2021

Source: Nielsen Data, 10.9.21

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



SAKE IS CLAIMING MORE REAL ESTATE ON MENUS
Sake listings on menus increased 50% in 2020.

Source: Mintel Menu Insights PE Q4 2020



SHARE OF SAKE COCKTAIL INGREDIENTS UP +40% IN 2019 PRIOR TO THE PANDEMIC.

Tozai Cocktails are a perfect fit for wine & beer licenses and innovative cocktail accounts.

Source: Mintel Menu Insights PE Q4 2019

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



+24.9%

Expected growth of Japanese Restaurant industry in the US in 2021

Source: www.ibisworld.com

\$27.5 Billion

Size of the Japanese Restaurant Industry in the US in 2021

(Ramen, Yakitori, Soba, Izakaya, Sushi, Shabu Shabu, Soba, etc.)

Source: www.ibisworld.com

THE LINEUP

Snow Maiden

Junmai Nigori



Named after Hanako, or “Flower Maiden”, the most famous Japanese koi fish that lived for 226 years in the snowy, icy waters at the foot of Japan’s Mt. Ontake.

The #1 selling sku in Vine Connections portfolio.

SRP: \$17.50/\$10/\$5

Living Jewel

Junmai



Named after Japan’s colorful koi fish that represent good fortune and luck. This sake represents the combination of vibrant colors, patterns, and shimmering scales that have earned Japanese koi fish the moniker “living jewels.”

SRP: \$17.50/\$10

Blossom of Peace

Plum



Local, all-natural aodani plums are soaked in Tozai sake for over three months resulting in an incredibly balanced sake with tart, juicy acidity on the finish. Plum blossoms are known as “The Flowers of Peace” in Japan and symbolize growth, renewal, and awakening.

SRP: \$18

Well of Wisdom

Ginjo



Draws its water source from the town of Fushimi, which means “hidden water” and is known for its characteristically soft and pure water that is perfect for brewing sake.

SRP: \$25/\$13

Typhoon

Futsu



A table sake of remarkable quality with rustic banana bread and nut notes. Sturdy enough to handle being warmed or mixed in cocktails.

SRP: \$28/\$14

Night Swim

Futsu

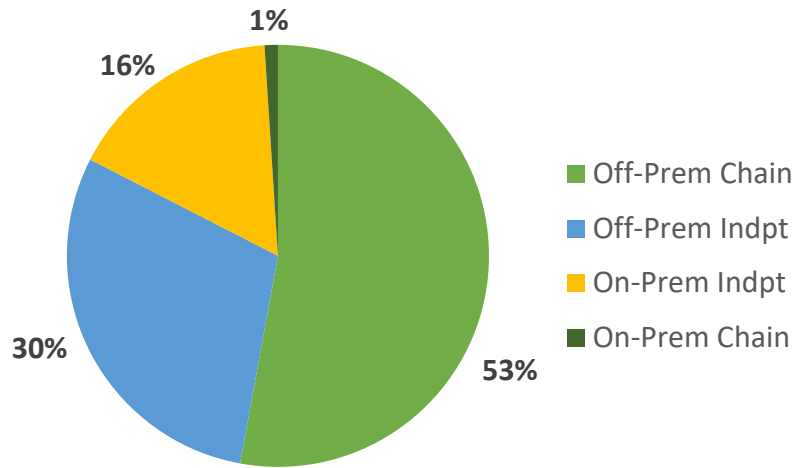


Recently launched and becoming a fan favorite, this canned sake invites all to feel renewed with a night swim.

SRP: \$5

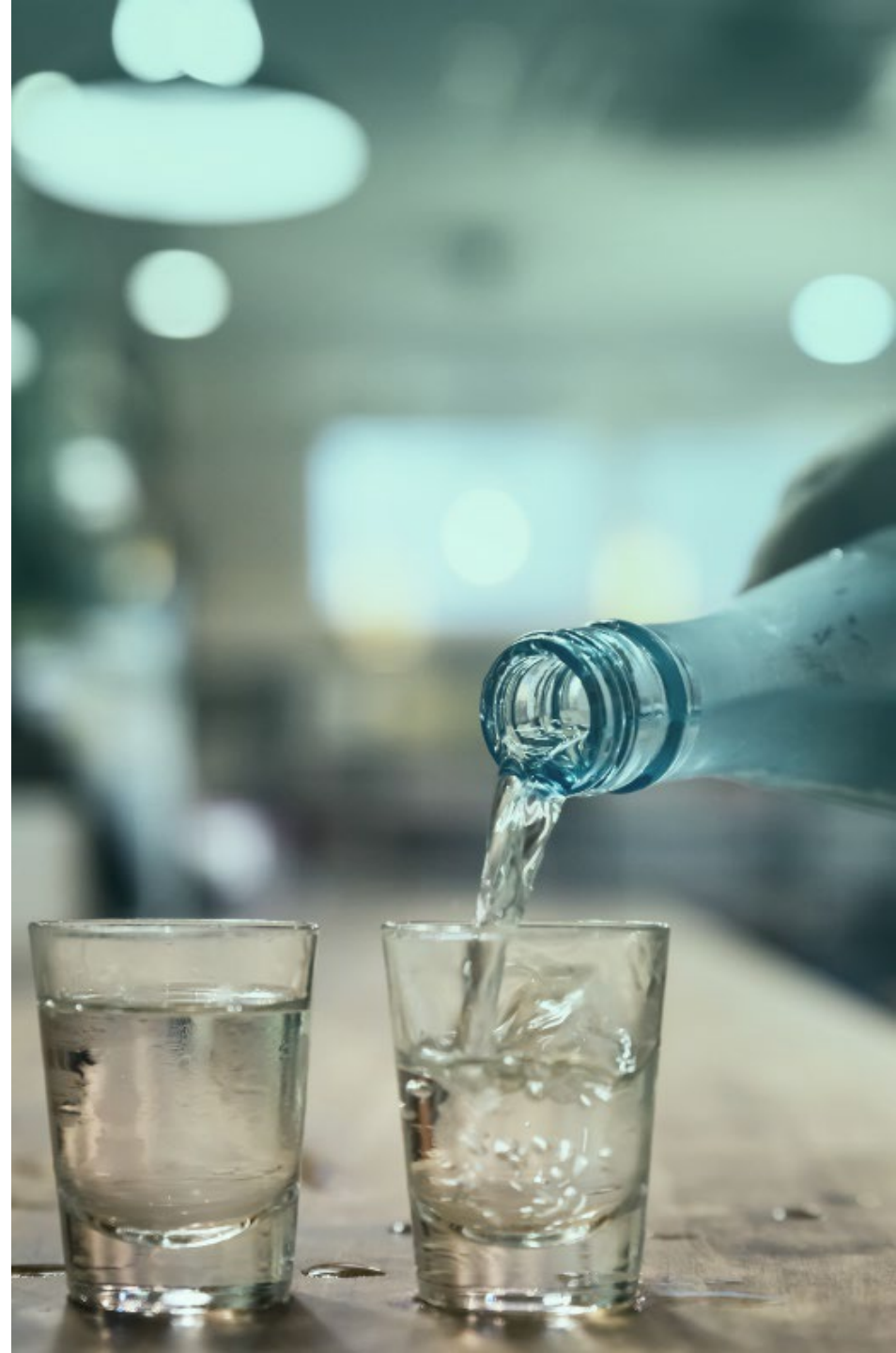
THE DISTRIBUTION

Tozai has a healthy channel mix in Retail, Restaurant, Hotel, and Grocery



+14% 3-Year Accounts Sold CAGR

+18% 3-Year POD CAGR



THE BRAND OPPORTUNITY

+60%

Growth in Sake Imports to US YoY

USDA, 1.20.22

+10%

3-year CAGR by Volume

USDA, 8.31.21

5.3%

Tozai represents of total sake import volume

USDA, 8.31.21

6.3%

Tozai represents of total sake import value

USDA, 8.31.21

+43%

Tozai 3-year CAGR by Depletions

VC Internal Data, 10.31.21

+31%

in sales velocity per POD (since 2017)

VC Internal Data, 10.31.21



NON-NIELSEN RETAILERS GROWING STRONG PAST 2 YEARS

Entry level consumers are seeking Tozai



+210%

Tozai Sales

853 cases R12, 2021
275 cases R12, 2020



+32%

Tozai Sales

10,059 cases R12, 2021
7,633 cases R12, 2020



+90%

Tozai Sales

1,646 cases R12, 2021
864 cases R12, 2020

THE TOZAI CONSUMER IS AN EVERYDAY CONSUMER



*Outdoor / Active
Social / Single*



*Design / Cultured
Hip Dad / Married*



*Cultured / Trendy
Fashionista / Traveler*



*Tech / Attracted to Good Design /
Cultural Influencer*

Meet Shawn

- 27 years old, Black
- Single
- Austin, TX
- \$65,000 HHI
- Biz Dev / Sales
- Always on the go
- Taste Maker
- Hub of Social Circle

Food & Fun

- Eats out 5+ nights week
- Asian, BBQ, Mexican cuisine
- Enjoys outdoors
- Nightlife/Breweries
- Concerts once a week
- Instagram Stories his life
- Follows accounts that inspire to explore, brands he enjoys

Why Tozai

- Loves that it is Innovative/unexpected
- Seeks premium beverages
- Pairs well with the food he craves
- Enjoys a cleaner way to drink alcohol

Meet Luther

- 35 years old, White
- Married
- Chicago, IL
- \$110,000 HHI
- Art Director
- Kids don't slow him down
- Circle of Creative Friends

Food & Fun

- Eats out 3+ nights week
- French, American, Ethnic Cuisine
- Asian once every two weeks
- Modern Museums
- Backyard Movies
- Instagram active but not obsessive
- Follows accounts that are design focused, cultured brands, friends

Why Tozai

- Gravitates toward the interesting packaging
- Seeks cultured, craft beverages
- Drinks premium beverages

Meet Brit

- 33 years old, White
- New York
- Married
- No kids
- \$140,000 HHI
- Licensing Lawyer
- Explores Trendy New Hotspots

Food & Fun

- Home Cook via Meal Kits, Eats out 3+
- Sushi, Asian Fusion, Brunch
- Open to new styles of food
- Part of the new cocktails at home trend
- Finds new vacation spots before hot
- Likes to shop in store and online
- Orders Alcohol on her mobile
- Instagram as a window to friends/fam

Why Tozai

- Drinks premium beverages
- Engages digitally with a brand like Tozai
- Answers the wanderlust of traveling to Japan

Meet Christina

- 28 years old, Asian American
- San Francisco
- \$100,000 HHI
- Tech Marketing Manager
- Engaged – lots of friends getting married
- Cultural influencer - Validates sake to other cultures and backgrounds

Food & Fun

- Orders food delivery 3x/ week
- Eats Asian Cuisines Regularly
- Sports lover
- Food Halls + Truck Parks
- Art Walks + Craft Fairs
- Game nights with friends in the apt
- 80% shop online for clothing, food and alcohol

Why Tozai

- Enjoys premium sake
- Familiar but finds the brand unique
- A chance to share culture w/ friends

PARTNER ACCOUNTS



SAFEWAY  **BevMo!**



FEATURED IN

Forbes

Sunset

THE MANUAL

The Essential Guide for Men

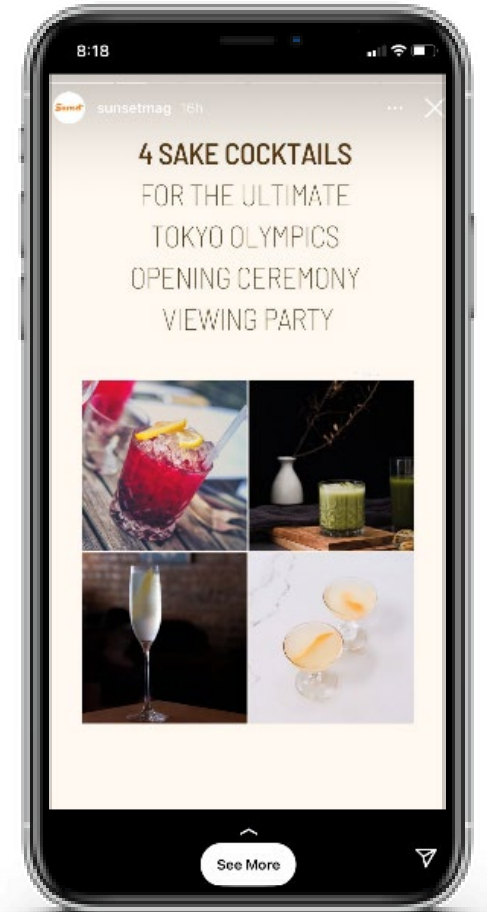
SHAPE

BuzzFeed

Chowhound

PastE

OVER SERVED



DEDICATED MARKETING

Digital

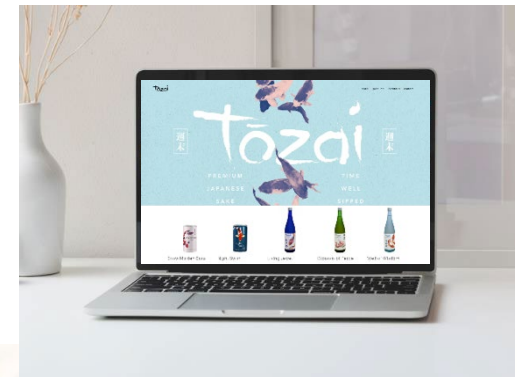
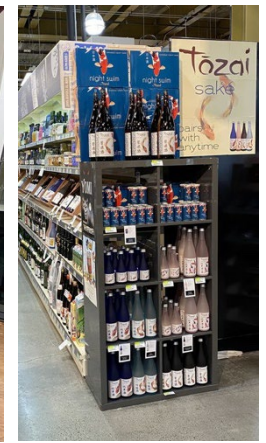
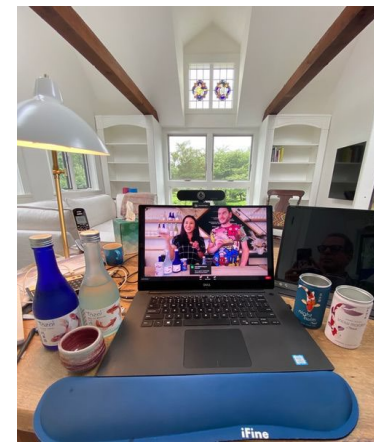
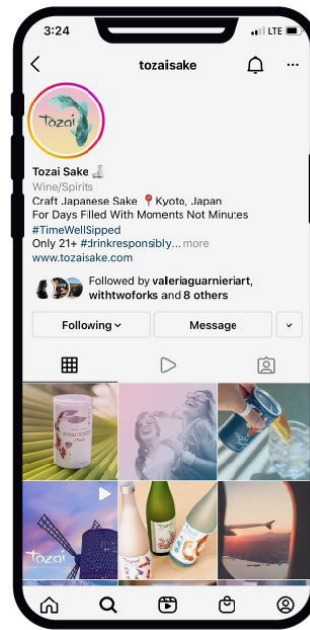
- Tozai Sales Presentation
- Tozai One-Sheet
- Tozai Cocktail Recipes
- Instagram Content for Accounts
- Virtual Tasting Events
- Instacart Paid National Campaign
- E-commerce Updated Content: Drizly, Saucey, Tippsy, Tozaisake.com

POS

- Cold Box Can and 300ml Holder
- Retail Case Stack display
- Tozai Account Poster
- On-premise Coasters
- On-premise Ice Buckets

Swag

- Branded Trucker Hat
- Branded Topo Backpack
- Branded Yoga Mat
- Custom Can Koozies
- Shopping Tote Bag
- Tozai Sake Sake Sake Stickers
- Chopsticks
- Handcrafted Cherry Blossom Candle
- Japanese Incense
- Japanese Bento Box
- Onsen Spa Robe



Tozai

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有り難う

Thank you

@ Tozai Sake

www.TozaiSake.com