



# SPARKLING WINE IN THE US MARKET

AUGUST 2017



# Sparkling Wine in the US Market 2017

## Report overview



**wine intelligence**

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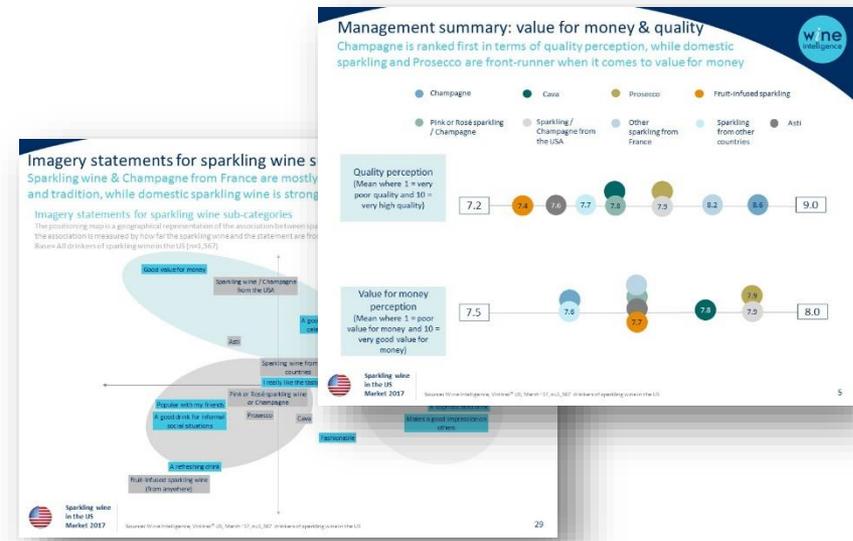
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GBP 1,500  
USD 1,950  
AUD 2,700  
EUR 1,800

The Sparkling wine in the US market 2017 report includes:

- A 71-page PowerPoint report with the latest information regarding the Sparkling wine market in the US, supported by:
  - Wine Intelligence Vinitrac®
  - Wine Intelligence market experience
  - In-depth trade interviews
  - Secondary sources



Sparkling wine in the US Market 2017

\*All prices exclusive of VAT, GST, or relevant local sale taxes at the current rate

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# Sparkling Wine in the US Market 2017

## Excerpts from the report



“Sparkling wine in the US is the success story of the past decade in alcoholic beverages, vying with craft beer and cocktails for era-defining cultural importance. The past ten years has seen volumes grow by 50%, and a whole generation of drinkers (the ones now in their 20s and 30s) introduced to the product not just as a once-in-a-while celebration, but as something to enjoy regularly, either in mini-celebration mode or simply as an alternative to still wine or beer.

However it would still be too soon to talk about sparkling wine as a fully mainstream beverage in the US. Only 18% of US adults say they drink sparkling wine, and just over a third of these, 6% of all adults, drink sparkling wine on a weekly basis. America’s per-capita consumption of less than one litre a year is easily outpaced by the UK (2.5 litres/head) and dwarfed by sparkling wine’s biggest market, Germany (6 litres/head). For most Americans, the sparkling wine experience remains the glass that’s thrust into your hand at a wedding or graduation.

The data suggests the sparkling story still has a lot of growth in it. The younger drinkers, who will define the wine category over the next 30 years, have a very different perspective than their older peers. Sparkling wine – and particularly Prosecco, its most successful product of the past decade – now features in new occasions (brunch, outdoor, “aperitivo”), up-tempo informal social settings, as well as celebrations. Prosecco’s combination of good taste, Italian style and value pricing is a potent mix.

So far, Prosecco’s unprecedented charge has not undermined the market shares of its main rivals: US sparkling, Champagne and Cava. If anything, all have benefited to a certain degree by the excitement that the Italian sparkling revolution has brought to the category. On the other hand, the data shows clearly how much Prosecco “owns” the under-45s category, and how dependent the market leader, California, is on older consumers.

Looking forward, sparkling will become more mainstream, and its offer will diversify. Format innovation is finding its way into the category, and while magnums and cans are unlikely to usurp the incumbency of the 75cl bottle, it’s clear they will play a role in broadening the reach of the category to new consumers and new occasions.”



### Vinitrac®:

- The data for this study was collected in March 2017
- Data was gathered via Wine Intelligence's Vinitrac® online survey of all alcohol drinkers and sparkling wine drinkers in the US:
  - 1,567 drinkers of sparkling wine in the US
- Respondents meet the following requirements:
  - Adult drinking age
  - Permanent resident of the country
  - Drink sparkling wine (for sparkling wine category)
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The survey was quota-based and post-weighted to be representative of the US alcohol drinkers and sparkling wine drinkers in terms of age and gender

Wine Intelligence, Vinitrac® US, March '17, n=1,567 drinkers of sparkling wine in the US

### The IWSR:

- Measures from the IWSR correspond to actual wine consumption figures. This means sales into the trade (on + off trade)
- The IWSR visits each market each year. Discussions are held with key local experts in the market including importers, producers, grey market operators, duty free operators, and supermarket/hypermarket buyers.
- All volume data is given in thousand 9 Litre Cases
- In the breakdown by country of origin, IWSR includes (depending on the market and the size of the category) the following two categories: 'Other' and 'International' They are defined as followed:
  - 'Other': category including wine blends (normally in bulk or bottled without specified country of origin) and wines from other countries with volumes too small to break out separately
  - 'International': Category including wine brands that have wines from various countries



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