



wine
intelligence

WINE INTELLIGENCE

MEXICO WINE LANDSCAPES 2021

JUNE 2021

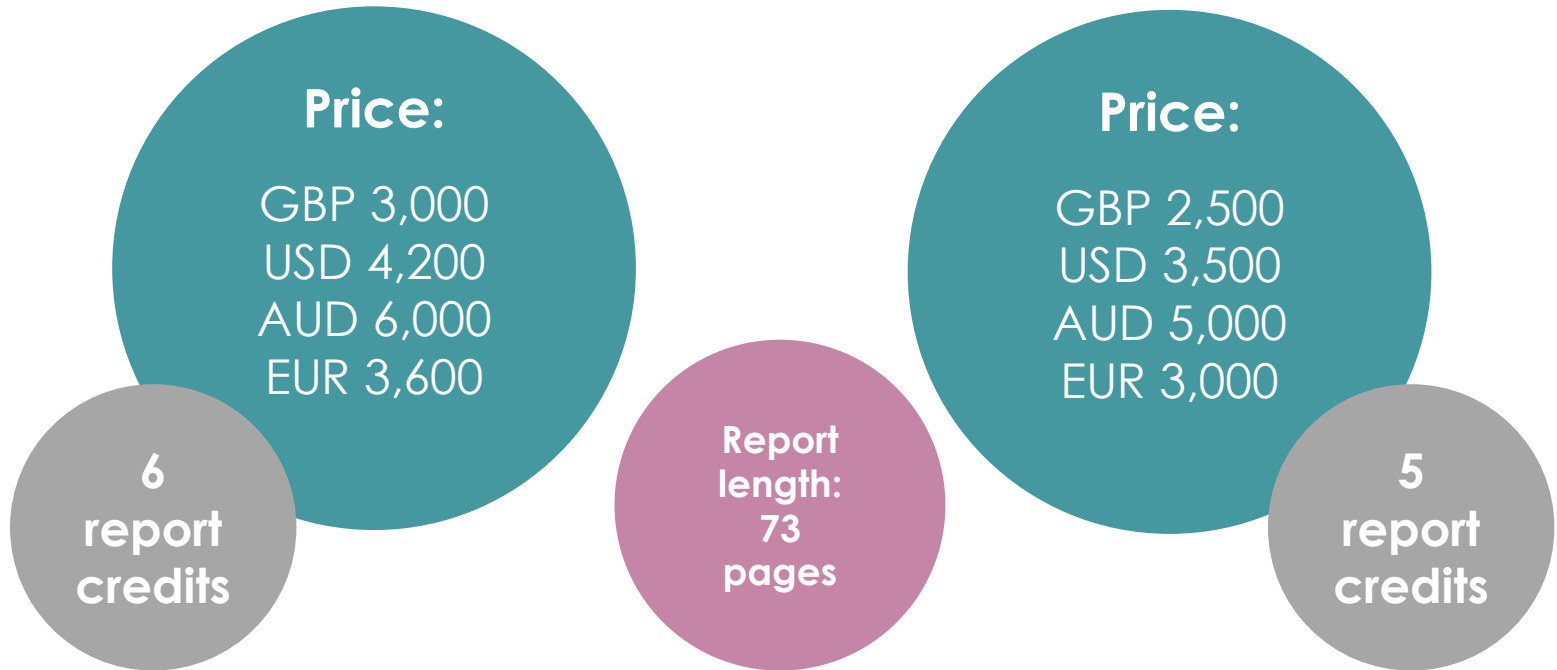
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CONTENTS



05 **Introduction**
Management summary

15 **Overview of the Mexican wine market**
Market Classification
Imported vs. domestic still wine
Imported vs. domestic sparkling and fortified wine
Per capita consumption of still light wine

21 **Overview of Mexican wine consumers**
Demographics
Wine consumption frequency
Attitudes towards wine and involvement
Views on wine closures
Wine confidence and knowledge index

32 **Repertoire**
Alcoholic beverage repertoire
Varietal consumption
Origin awareness and purchase

43 **Wine-buying behaviours**
Wine-buying channel usage
Profile: Online wine users
Wine-buying retailer usage
Wine-buying choice cues

49 **Wine consumption behaviours**
Off-trade: wine consumption frequency by occasion
Off-trade: spend on wine by occasion
Wine purchase in the on-trade
On-trade: wine consumption frequency by occasion
On-trade: spend on wine by occasion

55 **Brand health**
Brand power
Brand awareness, purchase, purchase conversion, consideration, affinity, and recommendation

70 **Research methodology**
Quantitative
Qualitative

INTRODUCTION



Changes are coming to the Mexican wine market. As recently as 2016, the typical Mexican wine consumer was aged around 40; today, the majority of wine consumers are under 35. Connected with this change, the new wine drinker in Mexico has different needs, desires and habits.

This is significant because in most wine markets, the average age of consumers is climbing. This is generally a function of populations ageing as a whole, but it also reflects wine's challenge to be relevant to the rising generation of younger adult drinkers.

In Mexico, wine appears to have caught the eye of Millennials in the past five years. The evidence from this report suggests they are enjoying building their knowledge and experience in wine, and exploring grape varieties and countries of origin. The main beneficiaries of this are producers of sweeter or more fragrant whites made from Moscato, Torrontes and Verdelho; and amongst reds, Tempranillo. Source countries that are benefiting include Italy and California; sparkling wine seems to have been a big beneficiary.

Underlying this is a change in the way wine is being used. Five years ago, the locus of

consumption was a specific occasion, most likely a meal with family and friends. While this remains an important driver of consumption today, the big growth area for wine since 2016 has been the informal, non-food, non-social occasion – the end of day drink when you get home from work.

The recent Covid pandemic has put the brakes on the economy, as well as wine consumption. Mexico's consumption of still wine fell 9% in 2020 compared with the previous year, though sparkling wine volumes – more aligned with a younger audience – rose by 2%. This was led by Prosecco and the growing usage of sparkling wine as a more 'everyday celebration' drink.

How the Mexican economy comes back from the Covid-induced slump, and the extent to which tourism will revive, will largely determine the immediate direction of travel for the wine market in 2021. However the long-run generational shift in consumers, and consumer behaviour, is likely to have ramifications that last far longer.

EXAMPLE SLIDE: MANAGEMENT SUMMARY



GRAPE VARIETIES BECOMING BETTER KNOWN AND MORE IMPORTANT IN DECISION MAKING

Grape variety is the key decision cue, and drinkers are choosing from a wider range

As the wine drinking population is changing, so is the variety of wine being consumed. The average number of both red and white varietals consumed has risen since 2016

For Mexican consumers, grape variety has become the most important factor when deciding on what wine to buy replacing other choice cues such as brand familiarity and food pairings

Average number of wine varieties consumed

Base = Mexican semi-annual imported wine drinkers in selected cities (n≥700)

	n=	2016	2019	2021
		707	700	700
Red varietals consumed		2.9	3.2	3.5
White varietals consumed		2.2	2.5	2.8

Wine-buying choice cues: Tracking

% who indicate each of the following factors is 'important' or 'very important' when buying wine

Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

Rank 2021		n=	2016	2019	2021	Tracking	
			707	700	700	vs. '16	vs. '19
1	Grape variety		77%	83%	85%	↑	→
2	Wine that matches or complements food		82%	81%	84%	→	→
3	A brand I am aware of		84%	84%	83%	→	→
4	Taste or wine style descriptions displayed on the shelves or on wine labels		78%	81%	80%	→	→
5	Wines with long tradition and heritage		74%	78%	78%	→	→

↑ / ↓ : Statistically significantly higher / lower than the 2016 wave at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Mexico, Oct'16, Mar'19 and Jan'21, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

EXAMPLE SLIDE: WINE CONSUMPTION FREQUENCY



Increase in consumption frequency since 2019 with a higher proportion of Mexican consumers drinking wine at least twice a week

Wine consumption frequency: Tracking

% who usually drink wine at the following frequency

Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

	n=	2016	2019	2021	Tracking	
		707	700	700	vs. '16	vs. '19
Most days / every day		2%	2%	3%	→	→
2-5 times a week		18%	15%	21%	→	↑
About once a week		28%	29%	28%	→	→
1-3 times a month		28%	32%	26%	→	↓

Wine consumption frequency by age

% who usually drink wine at the following frequency

Base = All Mexican semi-annual imported wine drinkers in selected cities (n=700)

	n=	All Mexican semi-annual imported wine drinkers	Age groups			
			Gen Z	Millennials	Gen X	Boomers
		700	142	355	145	58
Most days / every day		3%	0%	4%	4%	2%
2-5 times a week		21%	16%	25%	18%	15%
About once a week		28%	26%	30%	28%	23%
1-3 times a month		26%	27%	25%	26%	34%

Red / Blue: Statistically significantly higher / lower than all semi-annual imported wine drinkers at a 95% confidence level

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Mexico, Oct'16, Mar'19 and Jan'21, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

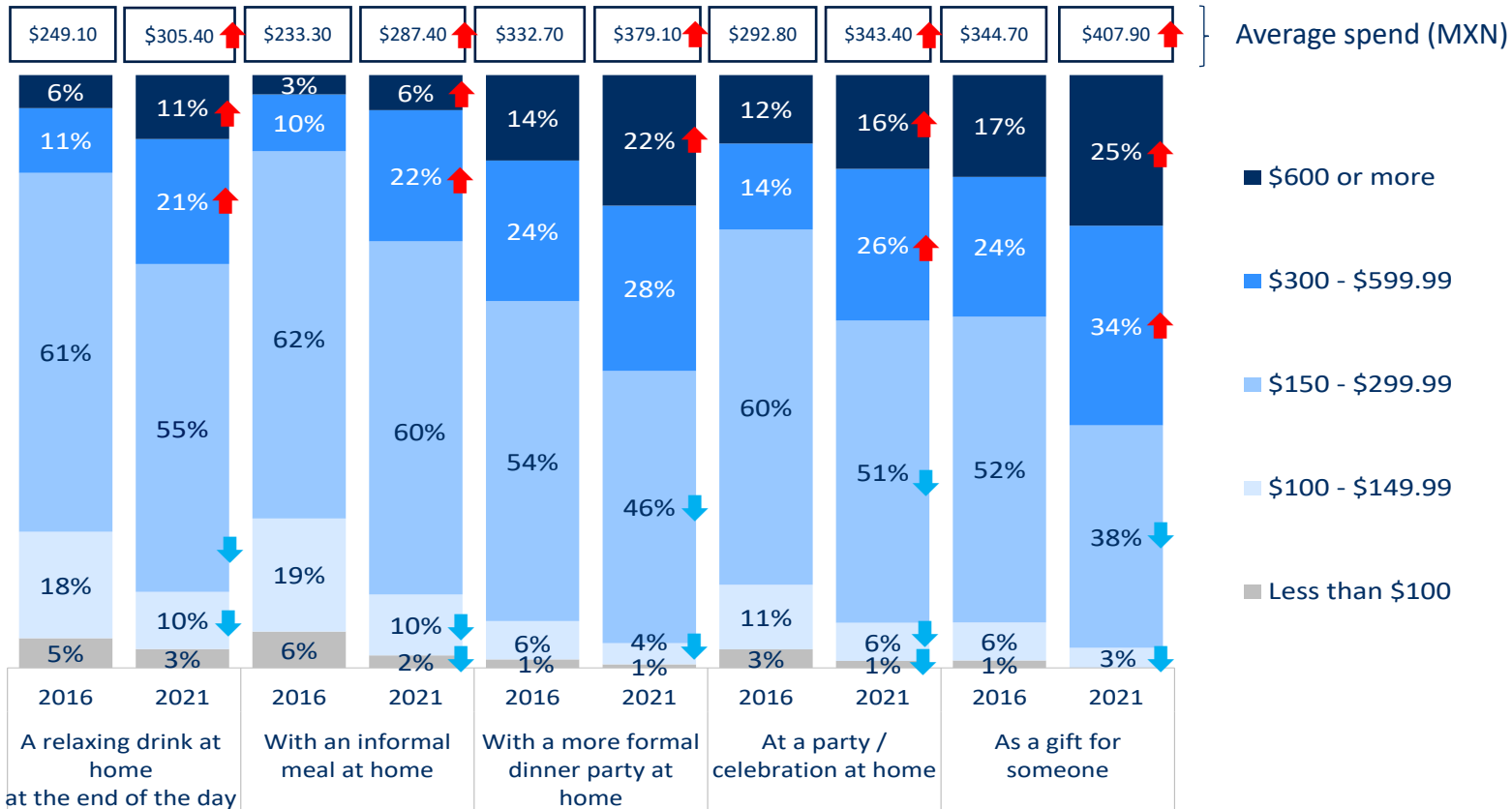
EXAMPLE SLIDE: OFF TRADE: SPEND ON WINE BY OCCASION



Despite relative stability in terms of off-premise consumption frequency, spend has increased significantly for all off-premise occasions

Off-trade: Spend on wine by occasion

% who typically spend the following amount on a bottle of wine on each occasion
Base = Those who drink wine on each occasion



IWSR
 ↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
 Source: Wine Intelligence, Vinitrac® Mexico, Oct'16 and Jan'21, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

RESEARCH METHODOLOGY: QUANTITATIVE



The data was collected in Mexico in October 2016, March 2019 and January 2021

Data was gathered via Wine Intelligence's Vinitrac® online survey

Respondents were screened to ensure that they were 18-59 years old; drank imported red, white or rosé wine at least twice a year; and have bought wine in the off-trade or in the on-trade

Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

The data is representative of Mexican semi-annual imported wine drinkers in selected cities in terms of age, gender and region

The distribution of the sample is shown in the table:

		<i>Oct-16</i>	<i>Mar-19</i>	<i>Jan-21</i>
		<i>n= 707</i>	<i>700</i>	<i>700</i>
Gender	Male	55%	54%	53%
	Female	46%	46%	47%
	Total	100%	100%	100%
Age	18-24	22%	22%	20%
	25-34	26%	25%	39%
	35-44	23%	23%	17%
	45-54	20%	20%	16%
	55-59	10%	10%	8%
	Total	100%	100%	100%
Region	Mexico DF	64%	66%	65%
	Guadalajara	17%	18%	22%
	Monterrey	19%	16%	12%
	Total	100%	100%	100%

Source: Wine Intelligence, Vinitrac® Mexico, October 2016 (n=707), March 2019 (n=700) and January 2021 (n=700) Mexican semi-annual imported wine drinkers in selected cities

RESEARCH METHODOLOGY: QUALITATIVE



MARKET EXPERT INTERVIEWEES

Trade Interviews were conducted with four experienced industry professionals in the Mexican wine trade in 2021

Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing

The four interviewees were members of the wine trade working in different roles:

2 x Wine Importer and Distributor

1 x Wine Educator

1 x Sommelier

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