WINE INTELLIGENCE

Sparkling Wine in the US Market

September 2021

REPORT BROCHURE

PRICING

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INTRODUCTION

The Millennials have arrived in the US sparkling wine market – and they are changing things up. While the total sparkling wine population appears to be stable, around 4 million more monthly sparkling wine drinkers have appeared in market, and in the main they are drawn from the Millennial generation.

For these newer, younger, and increasingly male drinkers, the relationship with the category appears to be changing. Sparkling wine used to be for special occasions – now it can be for the end of a long day. Sparkling wine drinkers used to be their parents – now the average sparkling wine drinker is under 45 years old. Sparkling wine used to be an occasional drink in a wide portfolio including spirits, beer and still wine; now it is a more frequent choice, while incidence of other drinks categories falls away. Finally, the nexus of sparkling wine drinkers has shifted away from the affluent boomers towards the working young – populations of sparkling drinkers are declining in California and New England, and growing in the southeastern US states and the mountain states, home to new tech hubs such as Austin, Atlanta and Denver.

Last year we reported an uncertain and nervous picture of the US sparkling wine market, in the middle of a nationwide lockdown and with most on-premise establishments shuttered or seriously restricted. A year on, and the mood among sparkling wine drinkers is more buoyant. Having learned to drink sparkling wine at home, consumers are reporting a boost in purchases of mainstream sparkling origins such as Prosecco, French Champagne and Cava.

Aside from the twin effects of Covid and demographic shift, other broader trends in alcohol appear to be affecting sparkling wine. There is continuing evidence of a trend towards moderation in several alcohol categories, including sparkling wine. The shorter-term trend for sparkling indicates a more complex picture: a continued polarization between a core group of consumers, younger and with a male bias, who are opting for sparkling products on at least a monthly basis, and an older, more female-biased group who are cutting back to only occasional sparkling usage.

Some trends are showing consistency compared with 2020. Prosecco's volumes continue to defy gravity, although the rate of growth is starting to slow. On its current pathway, Prosecco will sell more bottles in the US than the entire domestic sparkling wine industry in about 2023. And interest remains high around new formats – cans and smaller bottles – and new styles such as fruit infused and flavored sparkling.

EXAMPLE SLIDE: TYPICAL SPEND BY THE BOTTLE IN THE OFF-PREMISE

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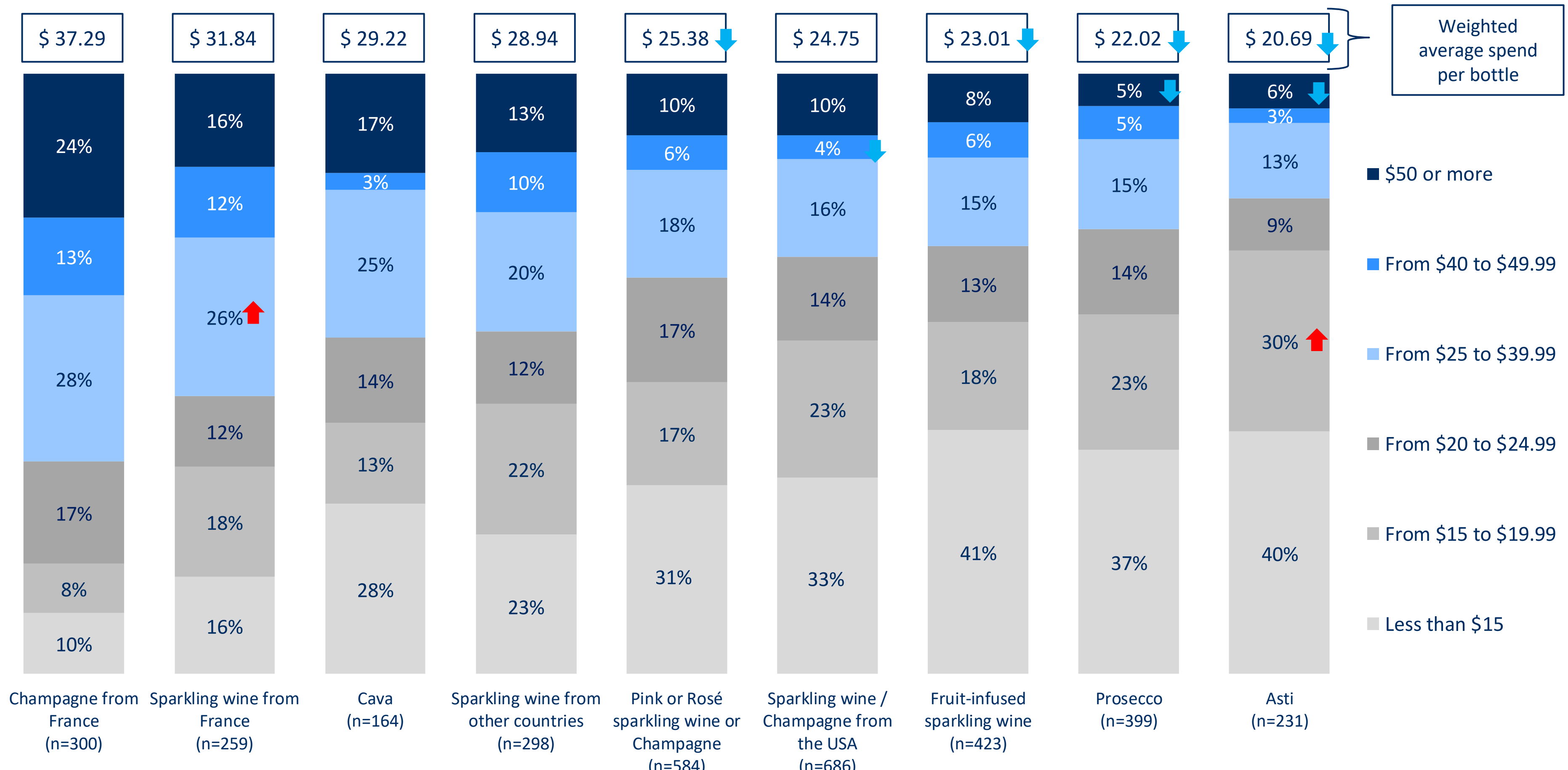
Since 2017, typical spend by the bottle in the off-premise has significantly decreased for pink or rosé sparkling wine, fruit-infused sparkling wine, Asti, and Prosecco

Typical spend in the off-premise by the bottle: 2017 vs 2021

% who spend the following on sparkling wine by the bottle in the off-premise
Base = Those who have purchased the following sparkling wine types in the off-premise



/ : Statistically significantly higher / lower than 2017 at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, Mar'17 and Jun'21 (n≥1,414) US drinkers of sparkling wine who drink sparkling wine at least once a year

vinitrac.

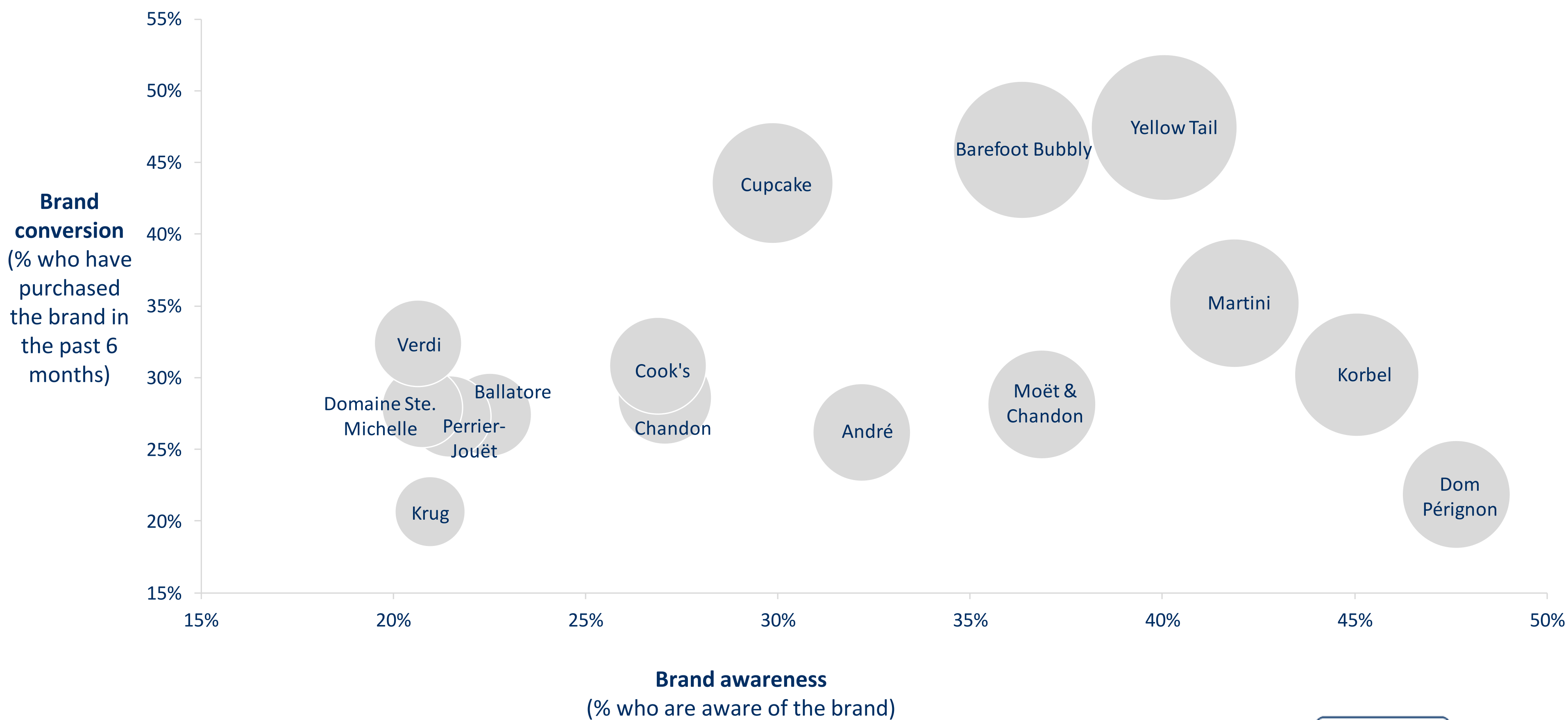
EXAMPLE SLIDE: SPARKLING WINE BRAND POWER

Australian brand Yellow Tail and domestic brand Barefoot Bubbly perform well in the US market, ranking highly for awareness and purchase

Brand power top 15 sparkling wine brands

Base = All US drinkers of sparkling wine who drink sparkling wine at least once a year (n=1,414)

Size of bubble = **Brand purchase** (% who have purchased the brand in the past 6 months)



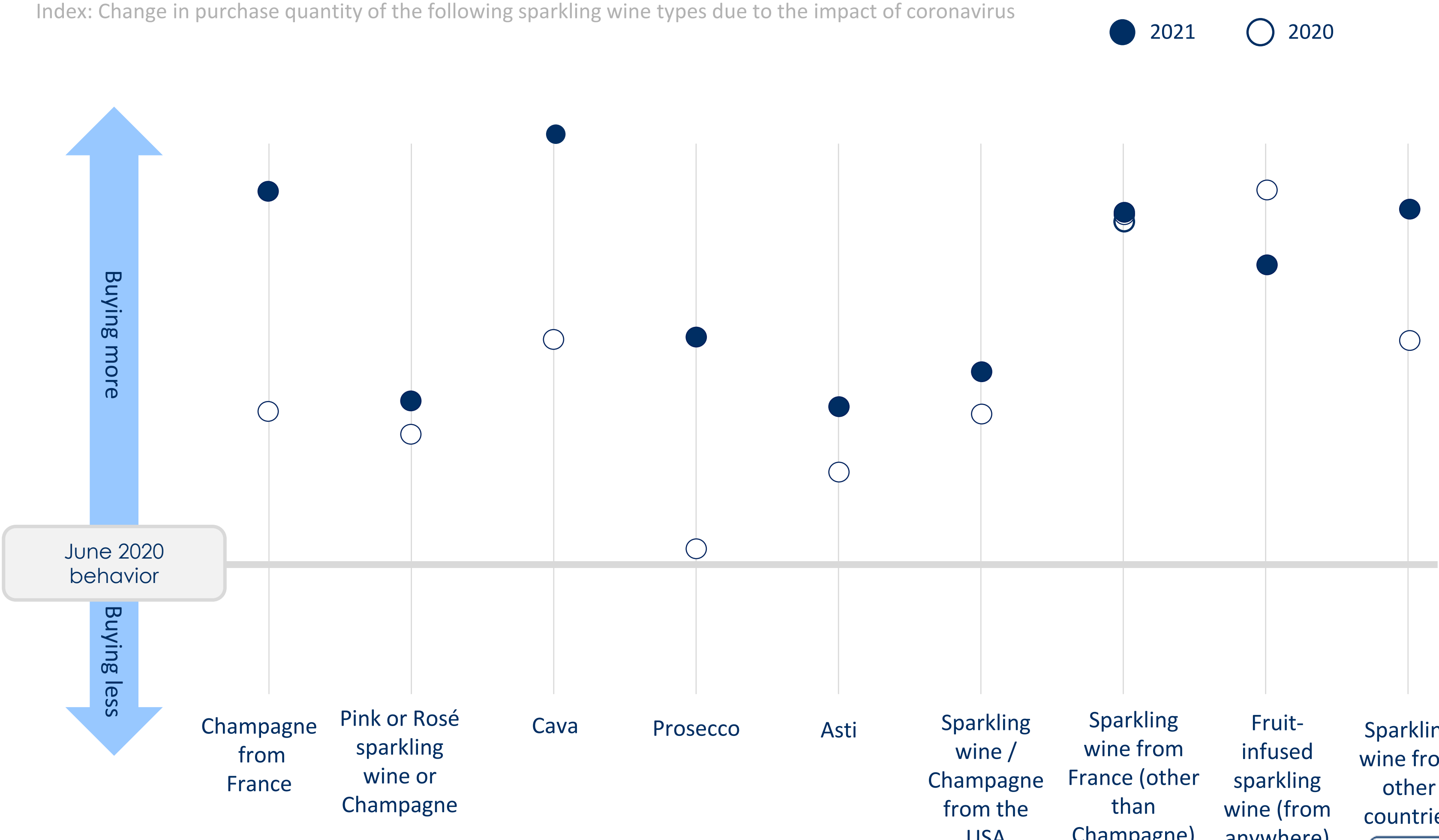
Source: Wine Intelligence, Vinitrac® US, Jun'21 (n=1,414) US drinkers of sparkling wine who drink sparkling wine at least once a year

EXAMPLE SLIDE: HOT TOPIC: COVID-19 CONSUMPTION BEHAVIOR

Compared with last year, consumption of most sparkling wine has increased, particularly for Old World sparkling wine types Champagne, Cava and Prosecco

Change in sparkling wine consumption behavior: **June 2020 vs July 2021**

Index: Change in purchase quantity of the following sparkling wine types due to the impact of coronavirus



Source: Wine Intelligence, Vinitrac® US, Jun'21 (n=1,414) US drinkers of sparkling wine who drink sparkling wine at least once a year

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