

TABLE OF CONTENTS

1. U.S. WINE CONSUMPTION OVERVIEW

- Wine Consumption by Type
- Table Wine Consumption by Origin
- Sparkling Wine
- Specialty Wine
- Wine-Based Cocktails
- Traditional Dessert Wine
- Vermouth

2. TABLE WINE CONSUMPTION BY COLOR/VARIETAL

- Red, White, Blush/Rose
- Domestic Table Wine by Color
 - California Varietal Trends by Type
- Imported Table Wine by Color
 - Analysis by Type/Origin
- Varietal vs. Generic Trends by Color/Orig/Type

3. PERFORMANCE BY BRAND

- Top 25 Wine Marketers
- Top 100 Wine Brands
- Leading Domestic Table Wines
 - Leading California Table Wine Brands
 - Leading Non-California Domestic Table Wine Brands
- Leading Domestic Sparkling Wine Brands
 - Leading California Sparkling Wine Brands
 - Leading Non-California Domestic Sparkling Wine Brands
- Leading Domestic Specialty Wine Brands
- Leading Wine-Based Cocktails
- Leading Domestic Traditional Dessert Wine Brands
- Leading Domestic Vermouth Brands
- Imported Table Wine Brands
 - Top 25 Imported Table Wine Brands
 - Leading Italian, Australian, New Zealand, French, Chilean, Argentine, Spanish, German and Other Imported Table Wine Brands
- Other Imported Wine Brands
 - Top 10 Imported Sparkling Wine Brands
 - Leading Italian, French and Spanish Sparkling Wine Brands
- Leading Port, Sherry and “Other” Traditional Dessert Wine Brands
- Leading Imported Specialty Wine Brands
- Leading Imported Vermouth Brands
- Fastest-Growing Wine Brands
- Leading New Product Introductions

TABLE OF CONTENTS (continued)

4. RETAIL SALES VALUE

- Top 10 Wine Marketers at Retail
- Top 100 Brands at Retail
- Top 40 Premium-Plus Priced Wine Brands
- Table Wine Sales by Origin/Color – Varietal vs. Generic
- Table Wine Sales by Price Segment –
Economy, Value, Popular, Premium, Super-Premium
- Leading Brands in Circana/NIQ Channels

5. PROJECTIONS

- Alcoholic Beverage Forecasts by Category
 - Wine Projections by Type
 - Wine Projections by Origin
- Table Wine Color Mix Projections by Type – Varietal vs. Generic
- Top 50 Wine Brand Projections
- Covid-19 Effect on Wine Sales

6. ADVERTISING

- Advertising by Medium
 - Broadcast
 - Print & Outdoor
 - Digital
- Advertising by Wine Type
- Advertising by Origin
- Top 10 Wine Media Advertisers
- Top 20 Wine Brand Media Advertisers
- Top 15 Domestic Brand Advertisers
- Top 15 Imported Brand Advertisers
- Advertising by Price Segment
 - Value-Priced Table Wine Brands
 - Popular-Priced Table Wine Brands
 - Premium-Priced Table Wine Brands
 - Super-Premium Priced Table Wine Brands

7. CONSUMPTION TRENDS BY STATE

- Northeast, North Central, South, West
- New England, Middle Atlantic, East North Central, West North Central,
South Atlantic, East South Central, West South Central, Mountain, Pacific

TABLE OF CONTENTS (continued)

8. PRODUCTION

- California Wine Grape Analysis by Color/Type
- California Wine Grape Crush Analysis by District
- California Wine Grape Acreage
- Washington State Wine Grape Analysis
- Oregon Wine Grape Analysis

9. GLOBAL WINE MARKET

- Total Wine Consumption in the Top 15 Markets
- Top 10 Wine Marketers Worldwide
- Top 25 Wine Brands Worldwide
- Champagne—Top 25 Markets by Volume
- Top 10 Champagne Brands Worldwide
- Cava—Top 25 Markets by Volume
- Top Five Sparkling Wine Brands Worldwide
- Port—Top 10 Markets by Volume

10. DISTRIBUTION

- Impact's Exclusive Ranking of the Top 10 U.S. Wine & Spirit Wholesalers*

LISTING OF TABLES

CHAPTER 1

1-1	Alcoholic Beverage Consumption by Category
1-2	Share of Market—Alcoholic Beverage Consumption by Category
1-3	Adult Per-Capita Alcoholic Beverage Consumption by Category
1-4	Adult Per-Capita Wine Consumption by Type
1-5	Total Wine Consumption by Type
1-6	Share of Market—Total Wine Consumption by Type
1-7	Total Wine Consumption by Origin
1-8	Share of Market—Total Wine Consumption by Origin
1-9	Wine Consumption by Type/Origin
1-10	Imported Wine Consumption by Type
1-11	Adult Per-Capita Imported Wine Consumption by Type
1-12	Wine Imports Entering the U.S. by Country of Origin
1-13	Table Wine Consumption by Origin
1-14	Share of Market—Table Wine Consumption by Origin
1-15	Table Wine Imports by Country of Origin
1-16	Sparkling Wine Consumption by Origin
1-17	Sparkling Wine Imports by Country of Origin
1-18	Specialty Wine Consumption by Origin
1-19	Specialty Wine Imports by Country of Origin
1-20	Traditional Dessert Wine Consumption by Origin
1-21	Fortified Wine Imports by Country of Origin
1-22	Vermouth Consumption by Origin
1-23	Vermouth Imports by Country of Origin
1-24	U.S. Wine Exports by Country of Destination

CHAPTER 2

2-1	Table Wine Consumption by Color
2-2	Share of Table Wine Consumption by Color
2-3	Adult Per-Capita Table Wine Consumption by Color
2-4	Share of Table Wine Consumption by Origin/Color
2-5	Table Wine Consumption by Origin/Color
2-6	Table Wine Consumption by Origin/Color/Type
2-7	Varietal Table Wine Consumption by Color/Type/Origin
2-8	Varietal Table Wine Consumption – Top 10 Types by Origin
2-9	California Table Wine Consumption by Type
2-10	Share of California Table Wine Consumption by Type
2-11	California Varietal Table Wine Consumption by Color/ Type
2-12	California Varietal Table Wine Per-Capita Consumption by Color/Type
2-13	California Varietal Table Wine Consumption by Type
2-14	Share of California Varietal Table Wine Consumption by Type
2-15	California Varietal Table Wine Per-Capita Consumption by Type
2-16	Foreign-Bottled Table Wine Consumption – Leading Types by Origin

- 2-17 Foreign-Bottled Imported Table Wine Consumption – Top 30 Types
- 2-18 French Wine Export Volume to the United States by Origin/Type
- 2-19 French Wine Export Value to the United States by Origin/Type

CHAPTER 3

- 3-1 Top 25 Wine Marketers
- 3-2 2023 Top 10 Wine Marketers' Case Volume by Type
- 3-3 2023 Wine Brand Volume Recap
- 3-4 Leading E. & J. Gallo Wine Brand Depletions
- 3-5 Leading Wine Group Brand Depletions
- 3-6 Leading Constellation Brand Depletions
- 3-7 Leading Trinchero Family Estates Brand Depletions
- 3-8 Leading Delicato Family Wines' Brand Depletions
- 3-9 Leading Deutsch Family Wine Brand Depletions
- 3-10 Leading Ste. Michelle Wine Estates' Brand Depletions
- 3-11 Leading Jackson Family Wine Brand Depletions
- 3-12 Leading Palm Bay International Wine Brand Depletions
- 3-13 Leading Treasury Wine Estates Americas Brand Depletions
- 3-14 Leading Vina Concha y Toro USA Brand Depletions
- 3-15 Leading Precept Wine Brand Depletions
- 3-16 Leading Moët-Hennessy USA Wine Brand Depletions
- 3-17 Leading Shaw-Ross International Brand Depletions
- 3-18 Leading Pernod Ricard USA Wine Brand Depletions
- 3-19 2020-2023 Wine Brand Analysis
- 3-20 Top 100 Wine Brands
- 3-21 Top 25 Wine Brands' Momentum Analysis, 1980-2023
- 3-22 Top 25 Table Wine Brands
- 3-23 Top 25 California Table Wine Brands
- 3-24 Leading California Table Wine Brands
- 3-25 Leading Non-California Domestic Table Wine Brands
- 3-26 Top 10 Domestic Sparkling Wine Brands
- 3-27 Leading California Sparkling Wine Brands by Type
- 3-28 Leading Non-California Domestic Sparkling Wine Brands
- 3-29 Leading Domestic Traditional Dessert Wine Brands
- 3-30 Leading Domestic Specialty Brands
- 3-31 Top 10 Wine-Based Cocktails
- 3-32 Leading Domestic Vermouth/Aperitif Brands
- 3-33 Top 25 Imported Table Wine Brands
- 3-34 Leading Italian Table Wine Brands
- 3-35 Leading Australian Table Wine Brands
- 3-36 Leading New Zealand Table Wine Brands
- 3-37 Leading French Table Wine Brands
- 3-38 Leading Chilean Table Wine Brands
- 3-39 Leading Argentine Table Wine Brands
- 3-40 Leading Spanish Table Wine Brands
- 3-41 Leading German Table Wine Brands
- 3-42 Leading "Other" Country Table Wine Brands

3-43	Top 10 Imported Sparkling Wine Brands
3-44	Leading Italian Sparkling Wine Brands
3-45	Top 20 Champagne Brands
3-46	Leading Spanish Sparkling Wine Brands
3-47	Leading Port Wine Brands
3-48	Leading Sherry Brands
3-49	“Other” Imported Traditional Dessert Wine Brands
3-50	Leading Imported Specialty Wine Brands
3-51	Leading Imported Vermouth/Aperitif Brands
3-52	Fastest-Growing Wine Brands
3-53	Leading Wine Brand Introductions, 2022-2023

CHAPTER 4

4-1	Alcoholic Beverage Consumer Purchases by Category
4-2	2023 U.S. Alcoholic Beverage Market – Estimated Retail Sales
4-3	2023 U.S. Wine Market – Estimated Retail Sales
4-4	2023 Top 10 Wine Marketers’ Ranked by Retail Sales
4-5	Recap – Top Three Wine Marketers’ Leading Table Wine Brands by Price Segment
4-6	Top Three Wine Marketers’ Leading Table Wine Brands by Price Segment
4-7	2023 Top 100 Wine Brands’ Consumer Expenditures at Retail
4-8	2023 Top 40 Premium-Plus Priced Wine Brands’ Retail Expenditures
4-9	2023 Table Wine Retail Sales by Origin/Color/Type
4-10	Table Wine Depletions by Origin/Price Segment
4-11	Economy-Priced (under \$3.00) Brand Table Wine Depletions by Origin
4-12	Value-Priced (\$3.00-\$6.99) Brand Table Wine Depletions by Type/Origin
4-13	Popular-Priced (\$7.00-\$9.99) Brand Table Wine Depletions by Origin
4-14	Premium-Priced (\$10.00-\$13.99) Brand Table Wine Depletions by Origin
4-15	Super-Premium Priced (\$14.00 and over) Brand Table Wine Depletions by Origin
4-16	2023 Top 15 Sparkling Wine Brands’ Consumer Expenditures at Retail
4-17	Wine Sales in NIQ Channels by Origin
4-18	Wine Sales in NIQ Channels by Type
4-19	Leading Wine Companies in Circana Channels
4-20	Table Wine Sales in Circana Channels by Origin
4-21	Table Wine Sales in NIQ Channels by Container and Size
4-22	Table Wine Sales in NIQ Channels by Color
4-23	Wine Sales in Circana Channels by Price Segment
4-24	Leading Table Wine Brands in Circana Channels
4-25	Table Wine Sales in Circana Channels by Type
4-26	Leading Cabernet Sauvignon Brands in Circana Channels
4-27	Leading Chardonnay Brands in Circana Channels
4-28	Leading Pinot Grigio/Gris Brands in Circana Channels
4-29	Leading Sauvignon Blanc Brands in Circana Channels
4-30	Leading Pinot Noir Brands in Circana Channels
4-31	Leading Merlot Brands in Circana Channels
4-32	Leading Moscato Brands in Circana Channels

- 4-33 Leading White Zinfandel Brands in Circana Channels
- 4-34 Leading Riesling Brands in Circana Channels
- 4-35 Leading Malbec Brands in Circana Channels
- 4-36 Leading Zinfandel Brands in Circana Channels
- 4-37 Leading Italian Chianti Brands in Circana Channels
- 4-38 Leading Shiraz/Syrah Brands in Circana Channels
- 4-39 Sparkling Wine Sales in NIQ Channels by Origin/Type
- 4-40 Sparkling Wine Sales in Circana Channels by Size
- 4-41 Sparkling Wine Sales in Circana Channels by Price Segment
- 4-42 Leading Sparkling Wine Brands in Circana Channels
- 4-43 Leading Sangria Brands in Circana Channels
- 4-44 Leading Fortified/Dessert Wine Brands in Circana Channels
- 4-45 Leading Kosher Wine Brands in Circana Channels
- 4-46 Leading Sake/Plum Wine Brands in Circana Channels
- 4-47 Leading Vermouth Wine Brands in Circana Channels
- 4-48 Leading Wine Seltzer Brands in Circana Channels
- 4-49 Leading De-Alcoholized Brands in Circana Channels

CHAPTER 5

- 5-1 Alcoholic Beverage Consumption Trends by Category, 1975-2030P
- 5-2 Alcoholic Beverage Consumption Trends by Category, 1950-2030P – Volume vs. Number of Servings
- 5-3 Apparent Wine Consumption by Type, 1975-2030
- 5-4 Wine Consumption Average Annual Compound Growth Rates by Type, 1975-2030
- 5-5 Adult Per-Capita Wine Consumption by Type, 1975-2030
- 5-6 Adult Per-Capita Wine Consumption Average Annual Compound Growth Rates by Type, 1975-2030
- 5-7 Apparent Wine Consumption by Origin, 1975-2030
- 5-8 Share of Market—Apparent Wine Consumption by Origin, 1975-2030
- 5-9 Wine Consumption Average Annual Compound Growth Rates by Origin, 1975-2030
- 5-10 Adult Per-Capita Wine Consumption by Origin, 1975-2030
- 5-11 Adult Per-Capita Wine Consumption Growth Rates by Origin, 1975-2030
- 5-12 Apparent Table Wine Consumption by Origin/Color/Type, 2010-2030
- 5-13 Adult Per-Capita Table Wine Consumption by Origin/Color/Type, 2010-2030
- 5-14 Top 50 Wine Brand Projections, 2024P
- 5-15 Covid-19 Effect on Wine Sales in NIQ Channels by Quarter
- 5-16 Covid-19 Effect on Wine Sales in Circana Channels by Quarter
- 5-17 Covid-19 Effect on Wine Sales in NIQ Channels by Month
- 5-18 Covid-19 Effect on Wine Sales in Circana Channels by Month

CHAPTER 6

- 6-1 Alcoholic Beverage Media Advertising Expenditures by Category
- 6-2 Share of Alcoholic Beverage Media Advertising Expenditures by Category
- 6-3 2023 Wine Media Recap - Dollar Change vs. 2022
- 6-4 Wine Advertising Expenditures by Medium

6-5	Wine Broadcast Advertising Analysis
6-6	Wine Media Advertising Expenditures by Type
6-7	Imported Wine Media Advertising Expenditures by Country of Origin
6-8	Wine Media Advertising Expenditures by Origin
6-9	Share of Wine Media Advertising Expenditures by Origin
6-10	Top 10 Wine Media Advertisers
6-11	Top Five Wine Television Advertisers
6-12	Top 10 Wine Magazine Advertisers
6-13	Number of Wine Brands Advertised by Origin
6-14	Top 20 Wine Brand Media Advertisers
6-15	Top 15 Domestic Wine Brand Media Advertisers
6-16	Top 15 Domestic Wine Brand Advertisers by Medium
6-17	Top 15 Imported Wine Brand Media Advertisers
6-18	Top 15 Imported Wine Brand Advertisers by Medium
6-19	Top 15 Domestic Table Wine Brand Media Advertisers
6-20	Top 10 Imported Table Wine Brand Media Advertisers
6-21	Table Wine Brand Media Advertising Expenditures by Price Segment
6-22	Leading Value-Priced Table Wine Brands' Media Advertising Expenditures by Origin
6-23	Leading Popular-Priced Table Wine Brands' Media Advertising Expenditures by Origin
6-24	Leading Premium-Priced Table Wine Brands' Media Advertising Expenditures by Origin
6-25	Leading Super-Premium Table Wine Brands' Media Advertising Expenditures by Origin
6-26	Top Two Domestic Sparkling Wine Brand Media Advertisers
6-27	Top Seven Imported Sparkling Wine Brand Media Advertisers

CHAPTER 7

7-1	Wine Entering Distribution Channels by Region/Division
7-2	Share of Wine Entering Distribution Channels by Region/Division
7-3	Wine Entering Distribution Channels by Division/State
7-4	Share of Wine Entering Distribution Channels by Division/State
7-5	Per-Capita Wine Consumption by Division/State
7-6	Wine Entering Distribution Channels Ranked by State Volume
7-7	Pennsylvania – Top 15 Wine Brands
7-8	New Hampshire – Top 15 Wine Brands
7-9	Utah – Top 15 Wine Brands
7-10	Mississippi – Top 15 Wine Brands
7-11	Montgomery County, Maryland – Top 15 Wine Brands
7-12	Wyoming – Top 15 Wine Brands

CHAPTER 8

8-1	California Wine Grape Crush Analysis by Color
8-2	Leading California White Wine Grape Crush Analysis by Type
8-3	Leading California Red Wine Grape Crush Analysis by Type
8-4	2023 California Wine Grape Crush by District/Color/Type
8-5	California Wine Grape Crush by District/Type
8-6	Leading California Wine Grape Bearing Acreage by Color/Type

- 8-7 Leading California Wine Grape Yield per Bearing Acre
- 8-8 Leading California Wine Grape Non-Bearing Acreage by Color/Type
- 8-9 Washington State Wine Grape Crush by Color
- 8-10 Leading Washington State White Wine Grape Crush by Type
- 8-11 Leading Washington State Red Wine Grape Crush by Type
- 8-12 Leading Oregon Wine Grape Crush Analysis

CHAPTER 9

- 9-1 Total Wine Consumption in the Top 15 Markets
- 9-2 World's Top 10 Wine Marketers
- 9-3 World's Top 25 Wine Brands
- 9-4 Champagne—Top 25 Markets by Volume
- 9-5 Top 10 Champagne Brands Worldwide
- 9-6 Cava—Top 25 Markets by Volume
- 9-7 Top Five Sparkling Wine Brands Worldwide
- 9-8 Port—Top 10 Markets by Volume

CHAPTER 10

- 10-1 Top 10 U.S. Wine and Spirits Wholesalers
- 10-2 Southern Glazer's Wine & Spirits
- 10-3 Republic National Distributing Co.
- 10-4 Breakthru Beverage Group
- 10-5 Johnson Bros. Liquor Co.
- 10-6 Empire Merchants
- 10-7 Martignetti Companies
- 10-8 Empire Distributors
- 10-9 Allied Beverage Group
- 10-10 Fedway Associates
- 10-11 Horizon Beverage Co.