

Wine - US - October 2013

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“Young category participants are more likely than average to turn to recommendations from friends, store employees, and advertisements in their wine purchase decision. This group also turns to indicators such as label design at a higher-than-average rate and latches onto familiar characteristics such as an interest in natural products.”
– Beth Bloom, Food and Drink Analyst

This report looks at the following areas:

- What drives consumer purchase decision?
- How can the category attract the attention of Millennials?
- How can wine compete with other alcoholic beverage options?

Mintel estimates that total US sales of wine will grow 2.6% in 2013 to reach \$41.5 billion. While such performance represents another year of growth, it's a slowdown from the gains seen in the four years prior. Consumers report slightly lower wine consumption than in years past, and volume sales of products in the category increased by only 1.3% in 2013, the smallest year-over-year gain since 2009.

As of 2012, the US became home to 100 million wine drinkers, according to a Wine Market Council study. While Baby Boomers and Generation Xers make up the majority of today's wine consumers, the large Millennial generation will shape wine's future. Some 54% of consumers over age 21 drink wine. Young drinkers appear as strong targets for use, with 54% of 21-24-year-olds and 65% of 25-34-year-olds drinking products in the category.

Household income is a strong determinant of category participation, with lower income earners significantly less likely than their higher-earning counterparts to drink wine. Among wine drinkers, familiarity trumps price in wine purchase decisions. Some 62% of consumers who purchase wine look for a brand they've tried before. This, combined with the interest in familiar wine type and region and a clear description of taste, points to the important role of comfort and recognition in wine purchase decisions.

Volume sales of imported wine posted annual declines throughout the 2008-13 period, while domestic wine continues to grow. A combination of familiarity and value perception comes into play here, with 55% of consumers believing imported wine is more expensive than domestic offerings. Champagne and sparkling wine experienced the largest percentage growth among wine segments from 2008-13. The expansion of bubbly offerings and a general casualization of the segment make room for expanded drinking occasions.

E. & J. Gallo grew volume sales by 2.7% from 2011-12, maintaining a 26% share of the market. The second leading company [The Wine Group](#), experienced the largest declines among the top manufacturers, allowing third place Constellation to edge closer to the number two spot. While [The Wine Group](#) saw strong growth in its Cupcake brands, through which it targets Millennials, large declines in sales of boxed Franzia and Almaden offerings may be driven by the expansion of similar offerings among other providers.

Mintel forecasts continued growth in the category through 2018, due largely to robust innovation in formats and flavors; continued consumer interest; and a strong perception of health that benefits this otherwise indulgent category.

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This report is part of a series of reports, produced to provide you with a more holistic view of this market

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