

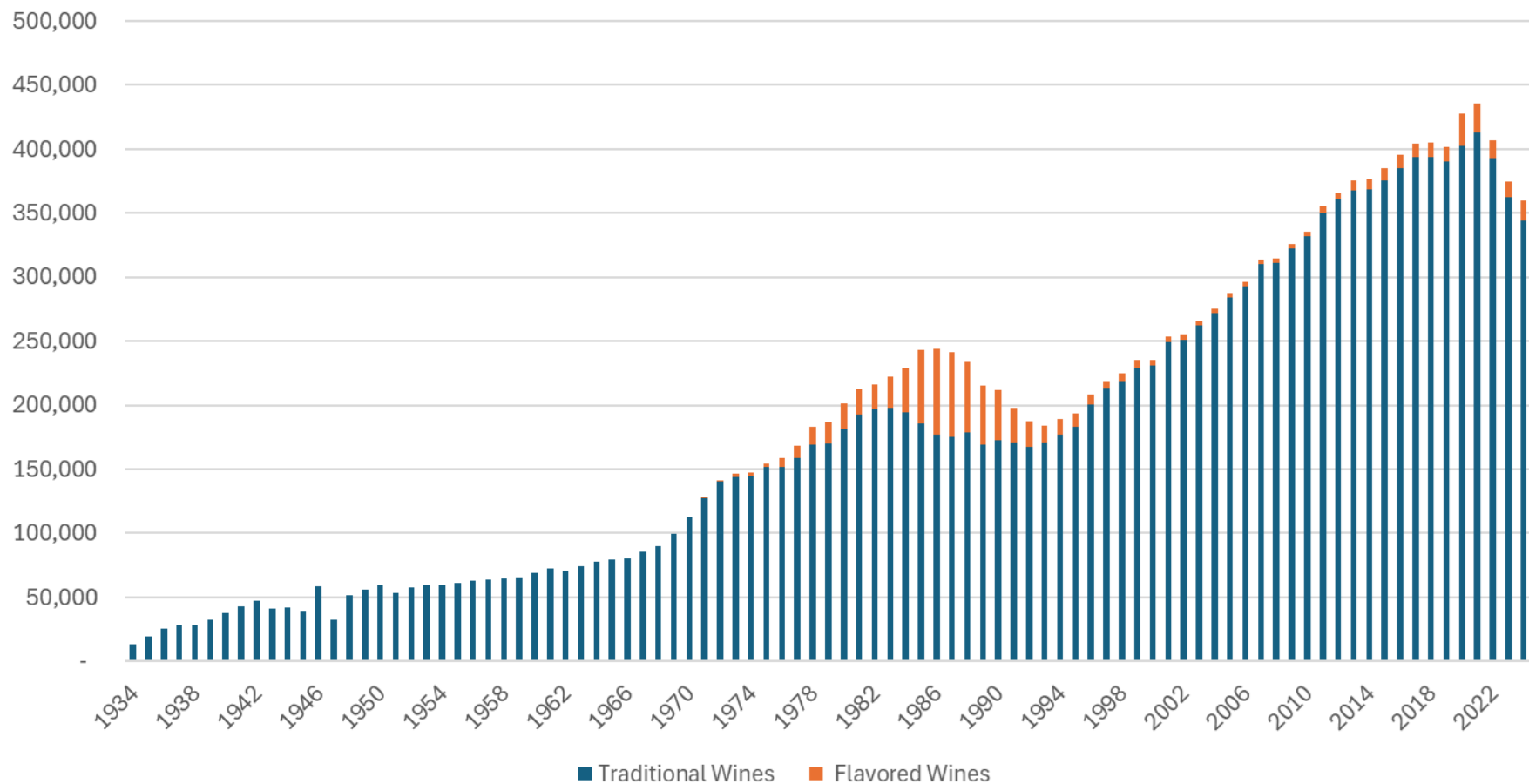
US Wine Market

2025 NAWR SUMMIT

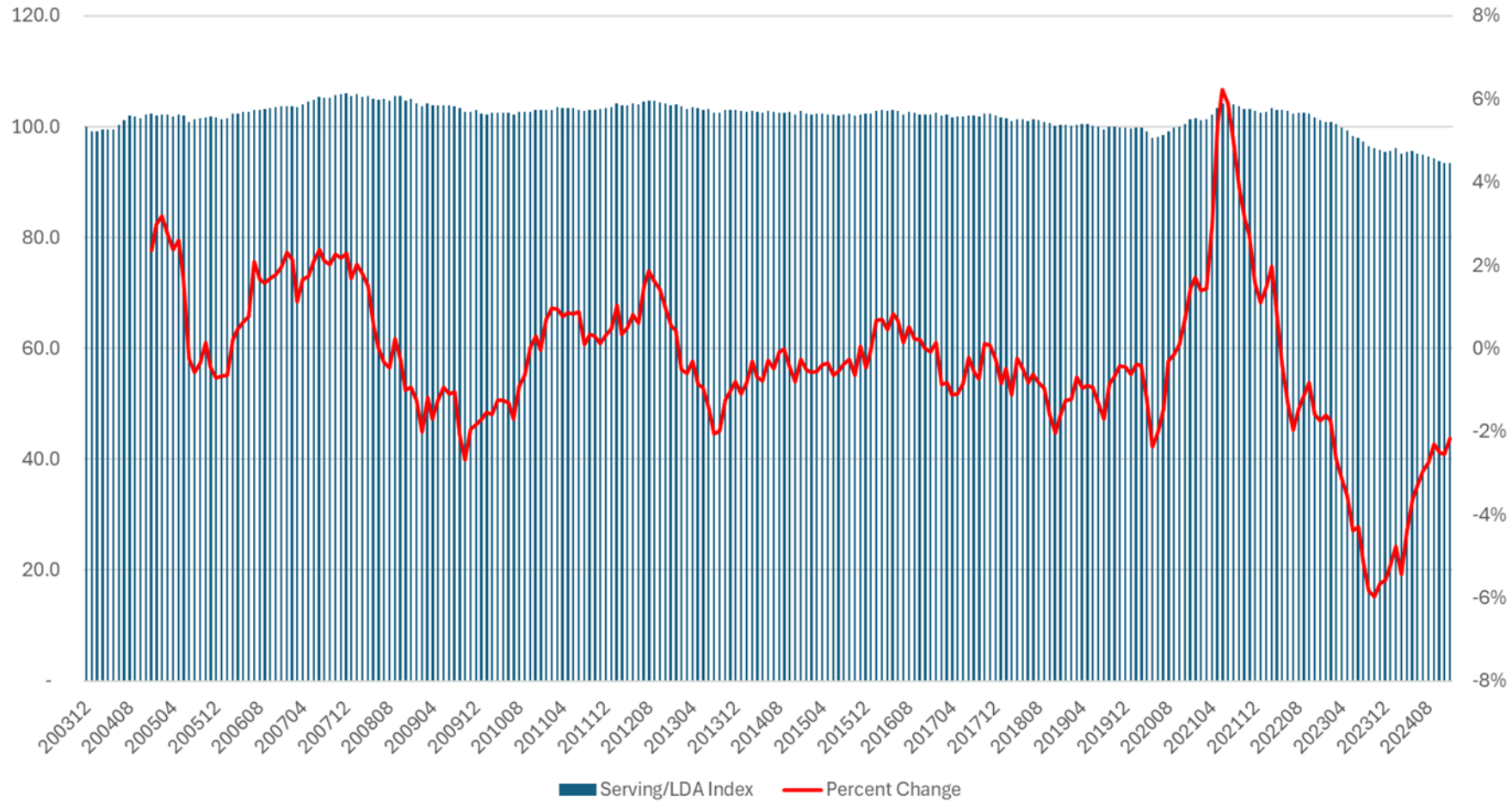
Key Points

- Seeing declines in wine volumes comparable to the mid-80s to early 1990s.
- Generally, a similar trend across most beverage alcohol.
- One positive point is that consumers continue to increase spending on Wine and Beverage Alcohol.
- Challenges
 - Alcohol and Health
 - Aging of Baby Boomers
 - Changing alcohol use by Gen-Z
 - Economy and discretionary spending. Wine is considered expensive compared to Beer and Spirits
 - Changing life patterns
 - The #1 Reason People Are Drinking Less Wine Is They Are Drinking Less Alcohol.

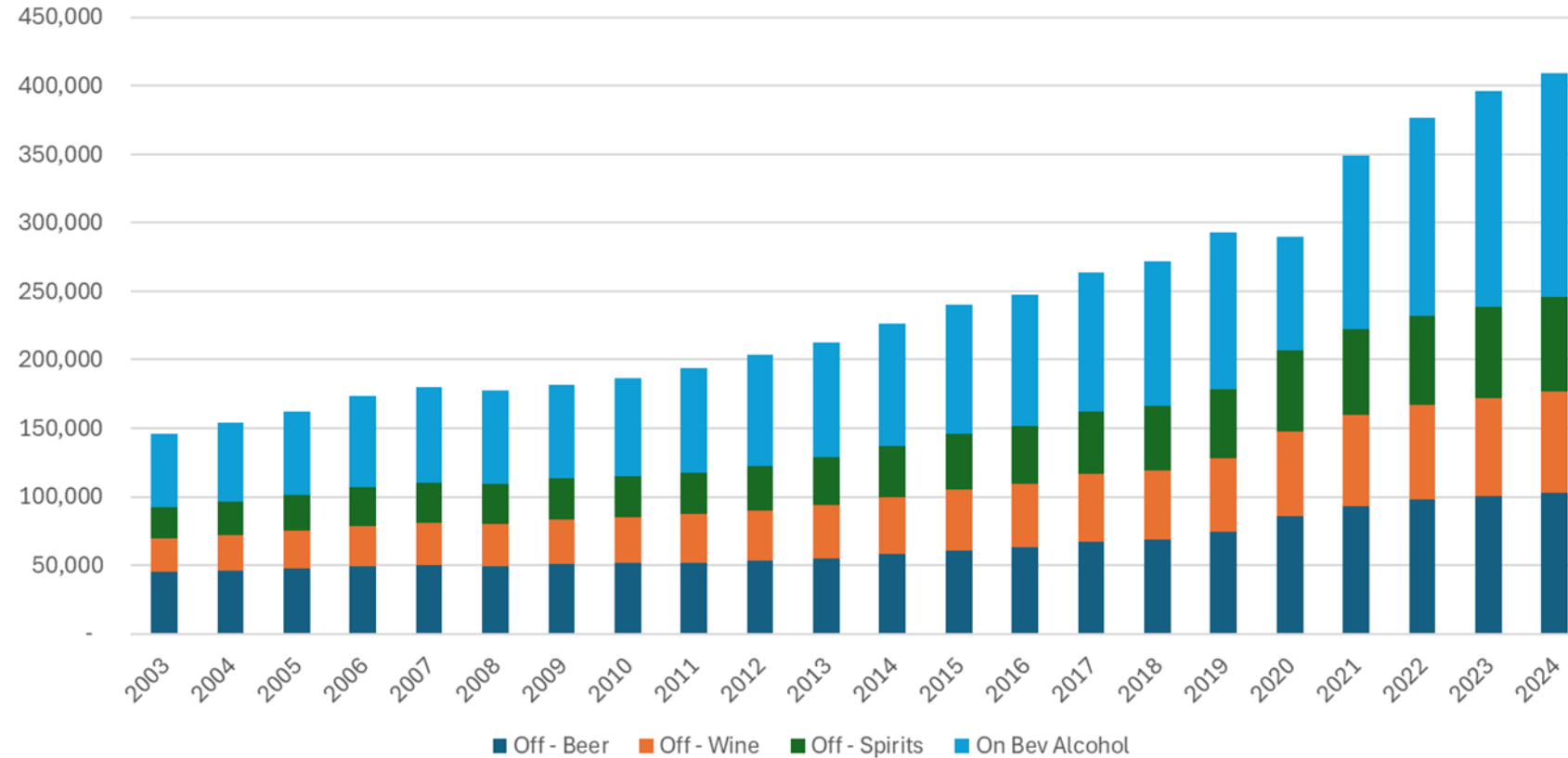
US Wine Market 9L (000)



Servings per LDA Index



Consumer Spending Beverage Alcohol - USD (millions)



2024 Trends

- Beer – Off: +2.7%
- Wine – Off: +3.5%
- Spirits – Off: +3.3%
- On Premise: +3.6%

Source: Bureau of
Economic Analysis

Table Wine in Food Stores Under \$11.00 9L (000)

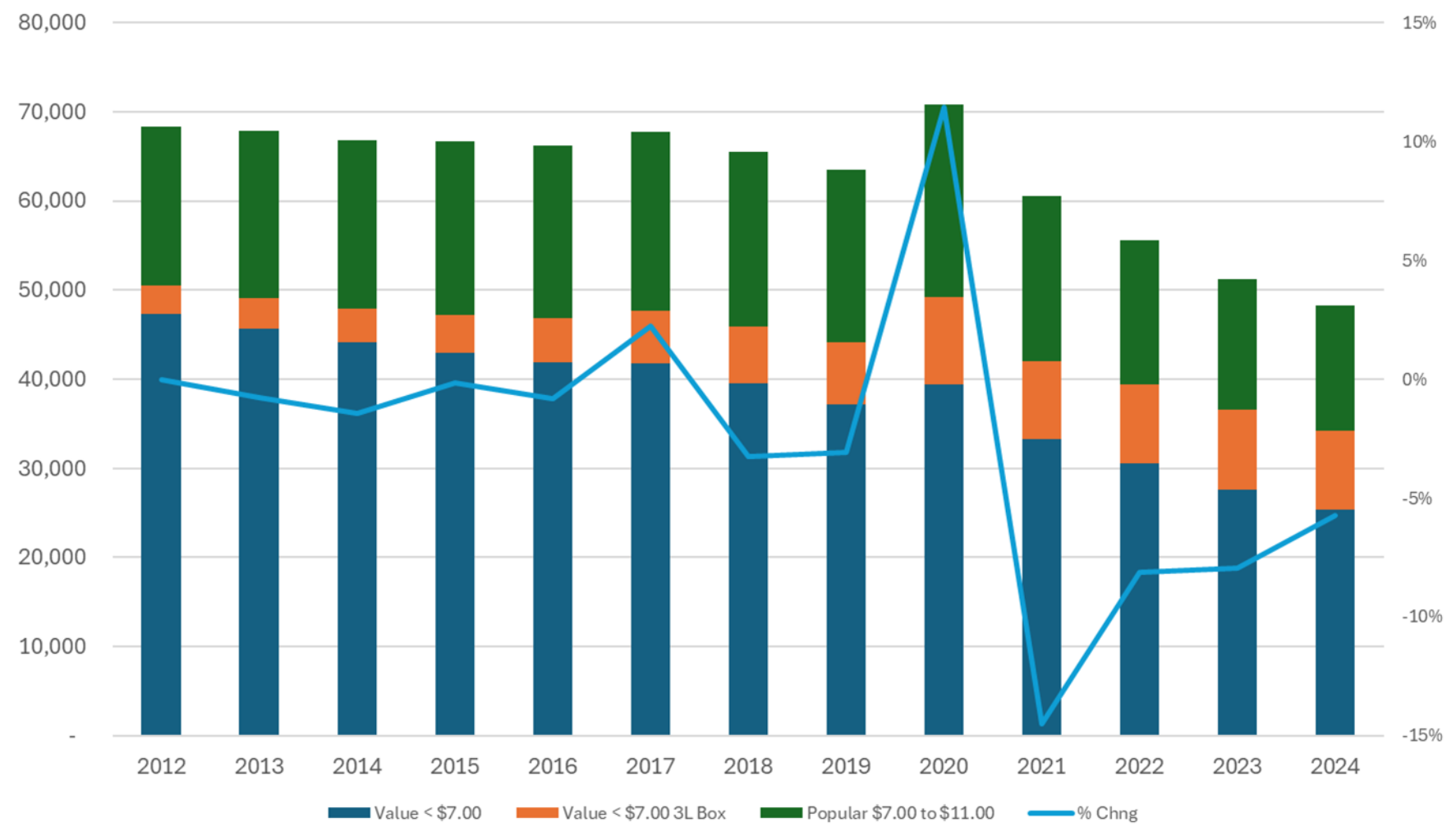
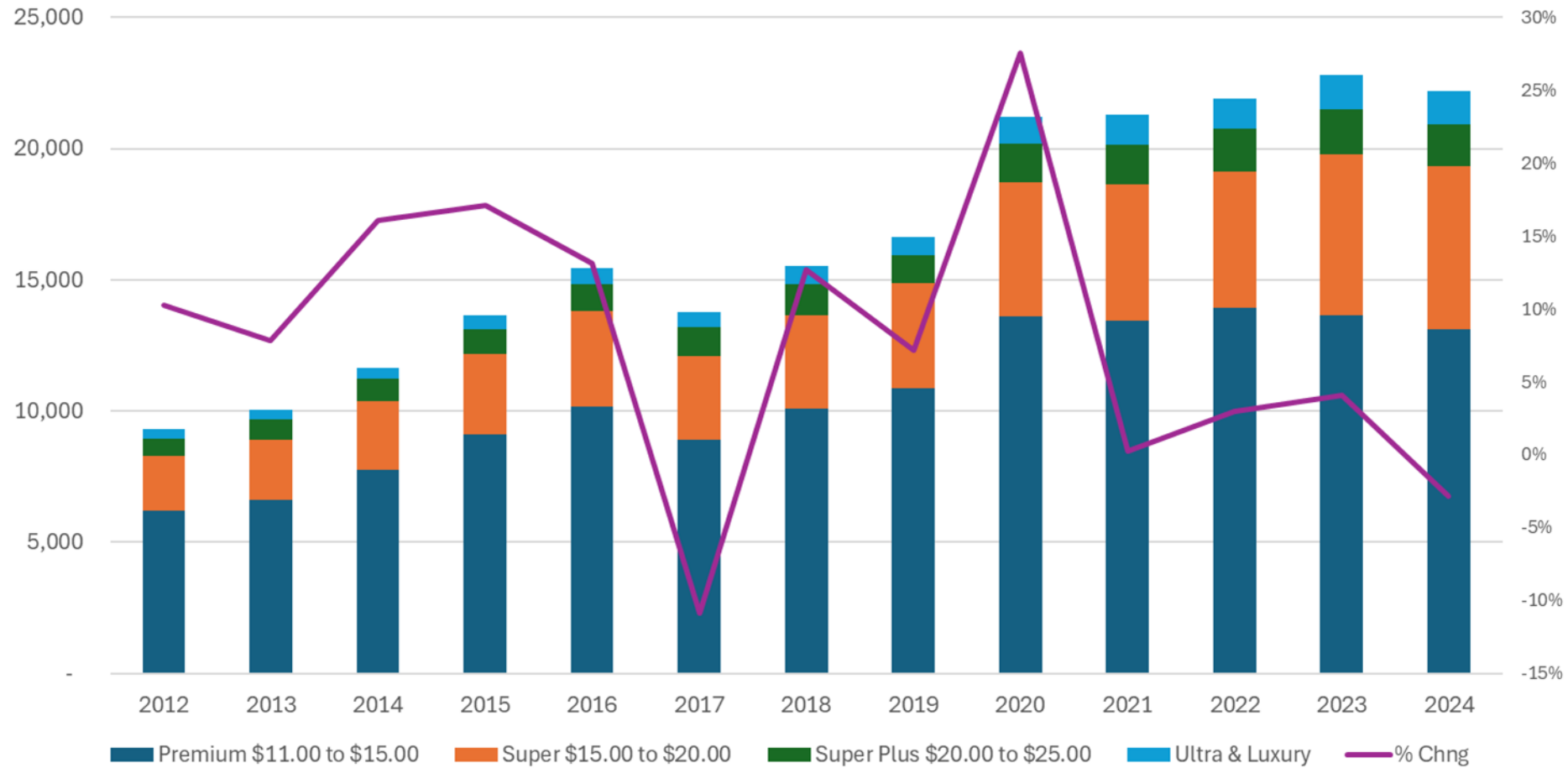


Table Wine in Food Stores Over \$11.00 9L (000)



National Institute of Health

- SAMHSA – Substance Abuse and Mental Health Services Administration
- Annual: National Survey on Drug Use and Health (NSDUH)
 - Initial Survey in 1979
 - Conducted Annually since 1990
 - Initial Respondent base in 1979 – 7,224.
 - Respondent base increased to 50,000 plus annually in 1999.
- Questions and Methodology have evolved through the years.
- Note: Most comparable research is based on samples of 1,200 to 1,500 respondents.

Reported Alcohol Consumption

Age Band	Percent Consuming			Servings per Week		
	2004 to 2008	2019 to 2023	% Change	2004 to 2008	2019 to 2023	% Change
21 to 23	83.1%	78.9%	-5.1%	7.63	5.03	-34.1%
24 to 25	81.5%	78.6%	-3.6%	6.91	5.10	-26.3%
26 to 29	79.3%	77.9%	-1.8%	5.70	5.05	-11.5%
30 to 34	77.3%	75.8%	-1.9%	5.16	5.45	5.7%
35 to 49	74.3%	72.3%	-2.6%	5.17	5.24	1.3%
50 to 64	66.1%	66.8%	1.0%	5.08	5.61	10.3%
65 Plus	50.5%	56.4%	11.6%	3.94	4.53	15.0%
Chng vs 50 to 64	-15.6%	-10.4%		(1.15)	(1.08)	
Underage						
12 to 13	11.0%	5.8%	-47.2%	1.37	0.67	-50.9%
14 to 15	33.8%	17.1%	-49.5%	2.03	1.54	-24.4%
16 to 17	54.1%	33.5%	-38.1%	3.91	2.03	-48.1%
18 to 20	71.3%	53.2%	-25.4%	6.80	3.46	-49.1%

San Francisco Chronicle Top 100 Restaurants 2025

Alcohol License Type

Price Band	Beer	Beer & Wine	Beer/Wine/Spirits	None	Total
\$	2	13	3	15	33
\$\$		15	12	6	33
\$\$\$		11	11		22
\$\$\$\$		7	5		12
Total	2	46	31	21	100

Est Cost - 2 People w/o Drinks or Dessert

\$	up to \$50
\$\$	\$51 to \$100
\$\$\$	\$100 to 250
\$\$\$\$	Over \$250

Alcohol License Type

Genre	Beer	Beer & Wine	Beer/Wine/Spirits	None	Total
Asian		14	6	11	31
American/California		4	9	2	15
Fine Dining		6	4		10
Italian/Pizza		7	3		10
Mexican	1	3	1	3	8
Mid East/Africa		3	2	3	8
French		4	1		5
Indian	1		3	1	5
Southern		2		1	3
South American		1	2		3
Wine Bar		2			2
Total	2	46	31	21	100