



## Wine Consumer Trends in 2026

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# About Wine Market Council

## Non-Profit Organization since 1996

- 501(c)(6) Non-profit status
- Member-funded, sliding scale dues
- >80% of funds pay directly for research

## Members

- International
- Wineries & Vineyards
- Regional Organizations
- Wholesalers, Importers, Retailers
- Supplier Industries
- Academic, Financial, Advisory

## Biannual US Consumer Benchmark Survey

- Run since 2000, identical methodology since 2015
- 4700-7200 consumers
- Balanced to US Census for age, gender, ethnicity, income & education
- Fundamental facts & Trends

## Custom Research

- 3-5 studies per year on key industry-wide topics
- Annual in-person ½ day conference
- Complimentary to members
- Reports, data, webinars

# Sources Today

## WMC Sources

- Benchmark Segmentation Surveys 2000-2025 (WMC, N=4835 LDA adults balanced to US census demographics)
- Reducing Barriers study of marginal and non-consumers 2025 (WMC & Vista Grande, video shop along N=60, shopping simulation survey N=1500 marginal and infrequent wine consumers)
- Young Multicultural Wine Consumers study 2024 (WMC & Ethnifacts, interviews, N=1816 consumers aged 21-39, oversamples of Hispanic, Black & Asian Americans)
- Category Shifting study 2023 (WMC & NielsenIQ, 3 year household panel purchases & survey of 1500 consumers)
- Wine & Wellness Study 2025 (WMC, survey of 1200 wine consumers)
- Wine Communications & Information study 2019 (WMC, survey of 982 marginal and core wine consumers)



## Other Sources

- NIQ, SipSource, Sovos, Community Benchmark sales data
- SVB, BMO annual industry reports



## The Current Market: A Longer View

# What caused the U.S. Wine Boom



US food culture



expanded distribution



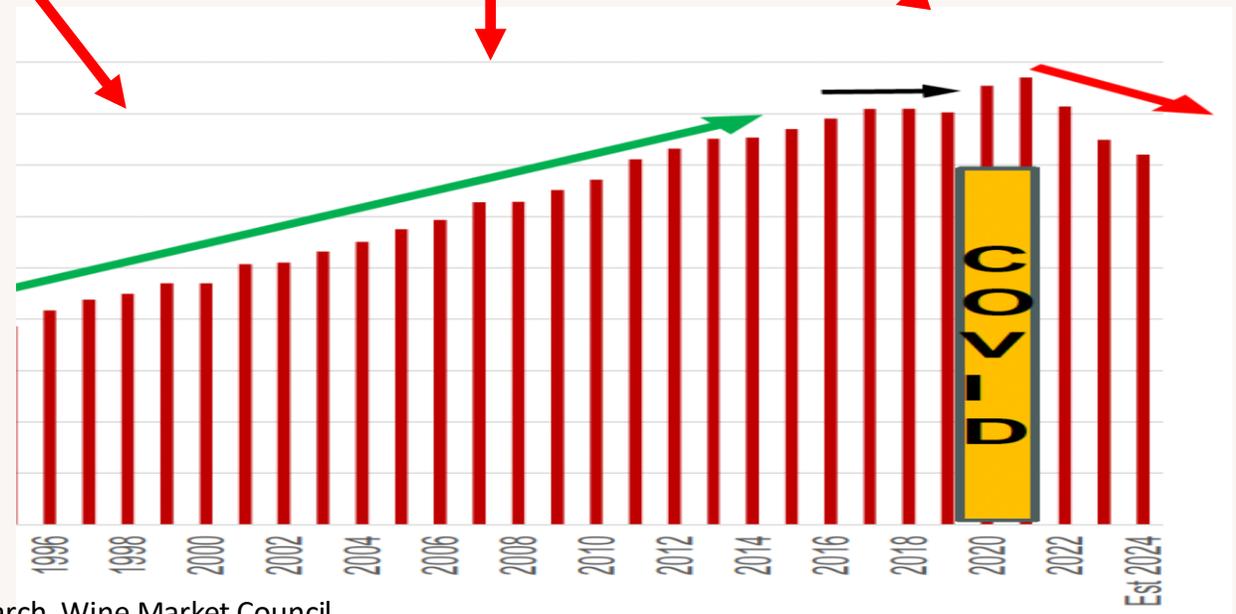
high income/education consumer base



boomer life stage 40s-50s



health news



**X** = No Longer applies or no longer a competitive advantage

Sources: bw166, Gomberg-Fredrikson Report, Full Glass Research, Wine Market Council

# The #1 Reason People Are Drinking Less Wine Is They Are Drinking Less Alcohol

## Alcohol

- Reducing alcohol across categories is the strongest predictor of reducing wine consumption, over demographic, drink type preference, purchase channels, social trends, cannabis usage, financial well-being, etc. Supported by 3-year analysis of household purchasing data and multiple surveys. (WMC Category Shifting study 2023; Benchmark Segmentation surveys 2023 & 2025; NIQ HH panel 2021-2023)
- Two main drivers from 2021-2023 data: Health/Wellness & Home Economics
- 2025 Benchmark Survey: 53% of those reducing wine say it's due to reducing alcohol generally

## 2025 WMC Wellness Study

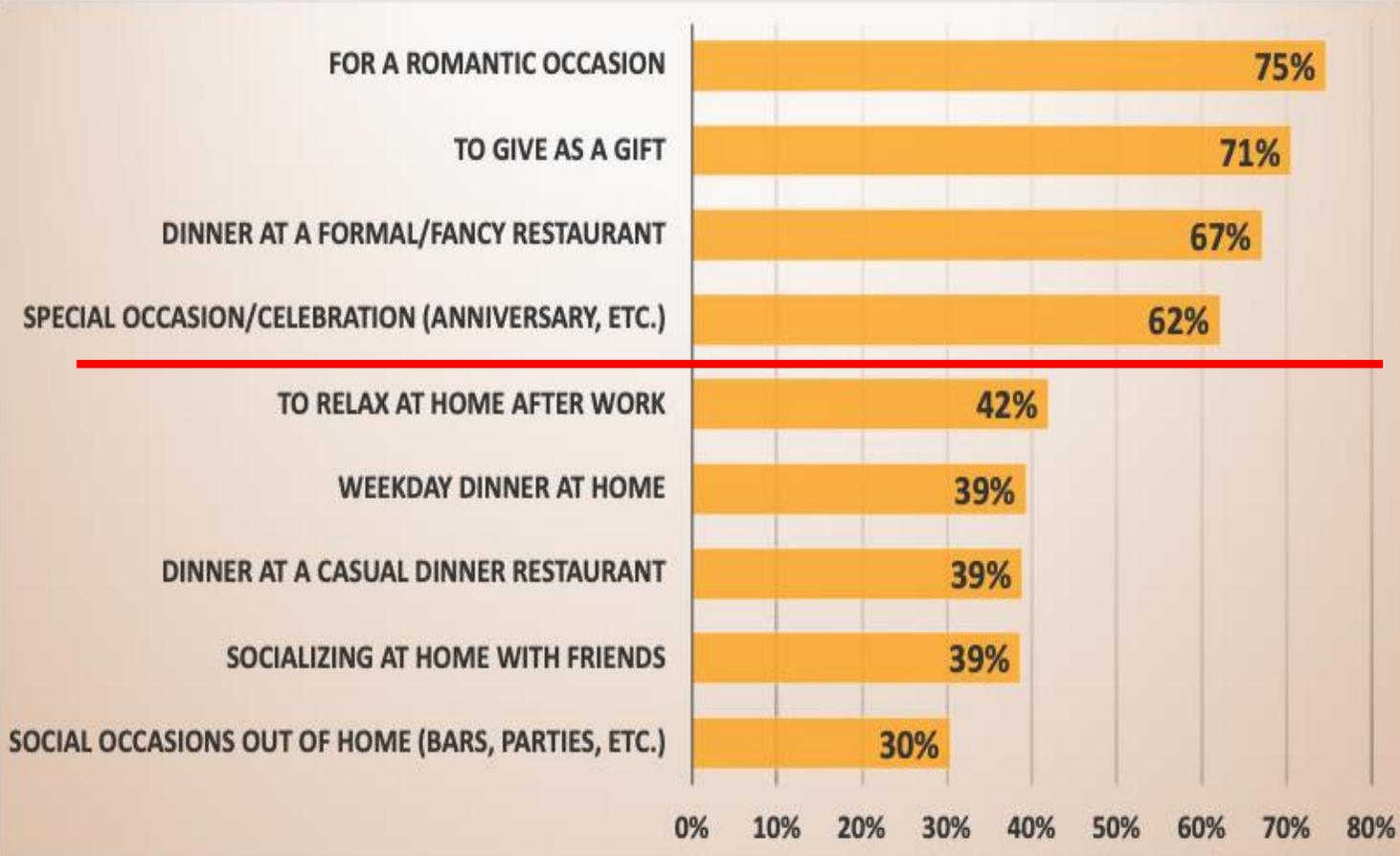
Reasons for Drinking LESS ALCOHOL (top 7)	%
Reduced drinking occasions	37%
Bad for my health	32%
Doesn't fit with my current diet or the way I eat	24%
It is too expensive or not worth the money	23%
It makes me physically or mentally feel bad	22%
Due to a medical condition	15%

Reducing calories (46%)  
 Reducing sugar (39%)  
 Bad for heart (35%)  
 Mental health (28%)  
 Reducing carbs (27%)  
 Cancer risk (21%)  
 Avoiding additives (17%)\*

LESS THAN 5% OF THOSE REDUCING WINE BUT NOT OTHER TYPES OF ALCOHOL SAID IT WAS FOR HEALTH/DIET REASONS

# Meanwhile Other Factors Affect Wine Specifically

**Occasions** (“less wine occasions” ranked 2<sup>nd</sup> among reasons decreasing wine, in 2025 WMC Benchmark survey)



## Practical Barriers

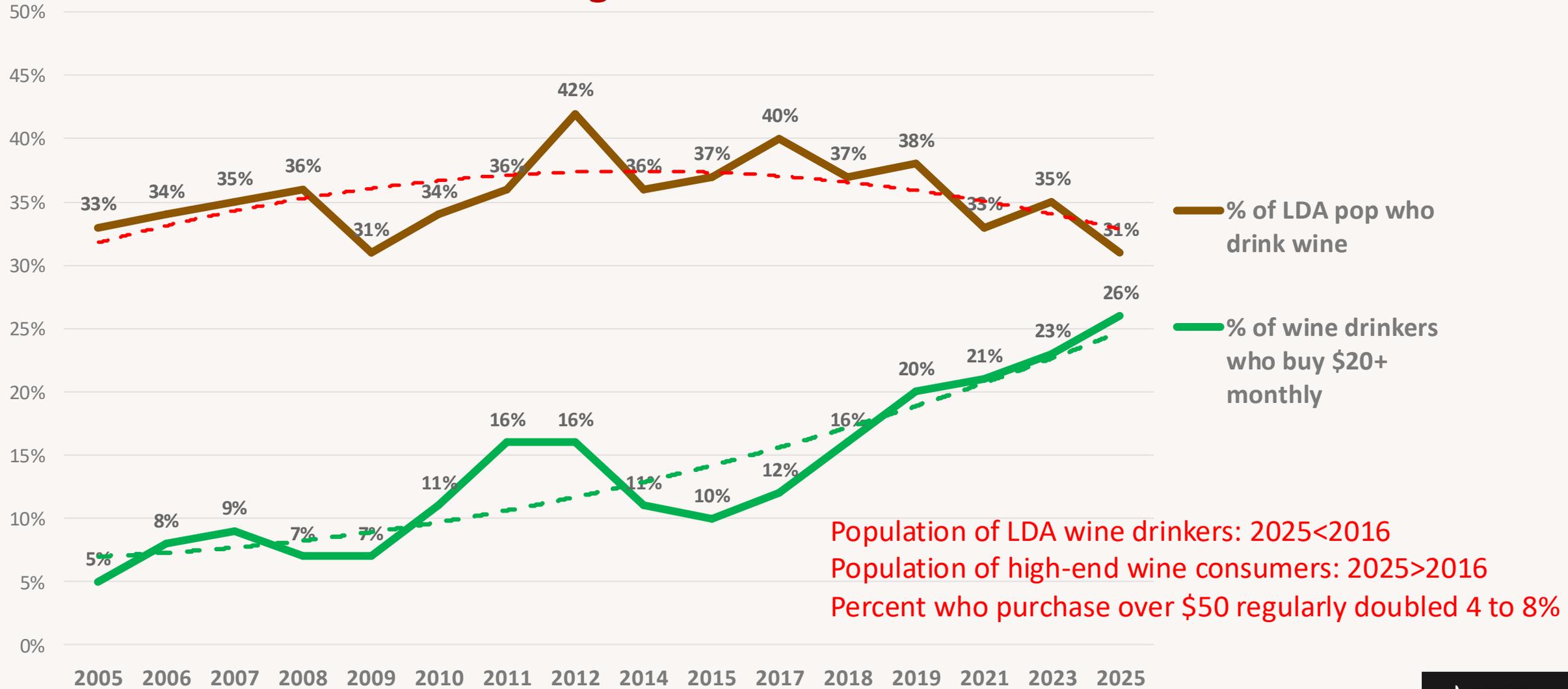
- Cost (ranked 5th)
- Unexciting
- Hard to choose
- Occasion “vibe”

**Competition** (“prefer other drinks” ranked 4th)

- WAY more choices now
- RTDs
- Craft beer
- Cocktails

# Long Term Trends in Wine Consumer Population

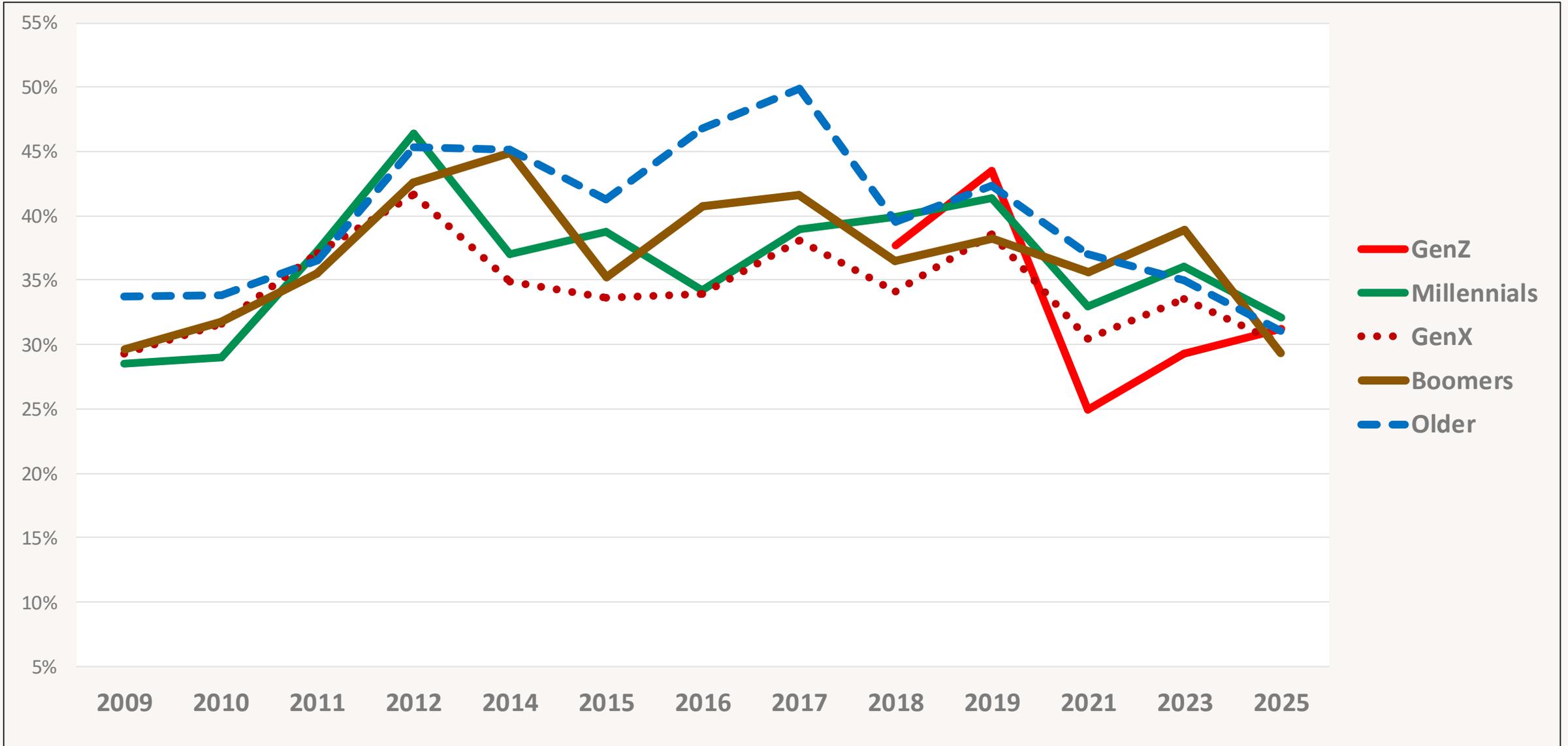
## Total Wine Consumers vs. High End Wine Consumers



Source: Wine Market Council Benchmark Segmentation Surveys

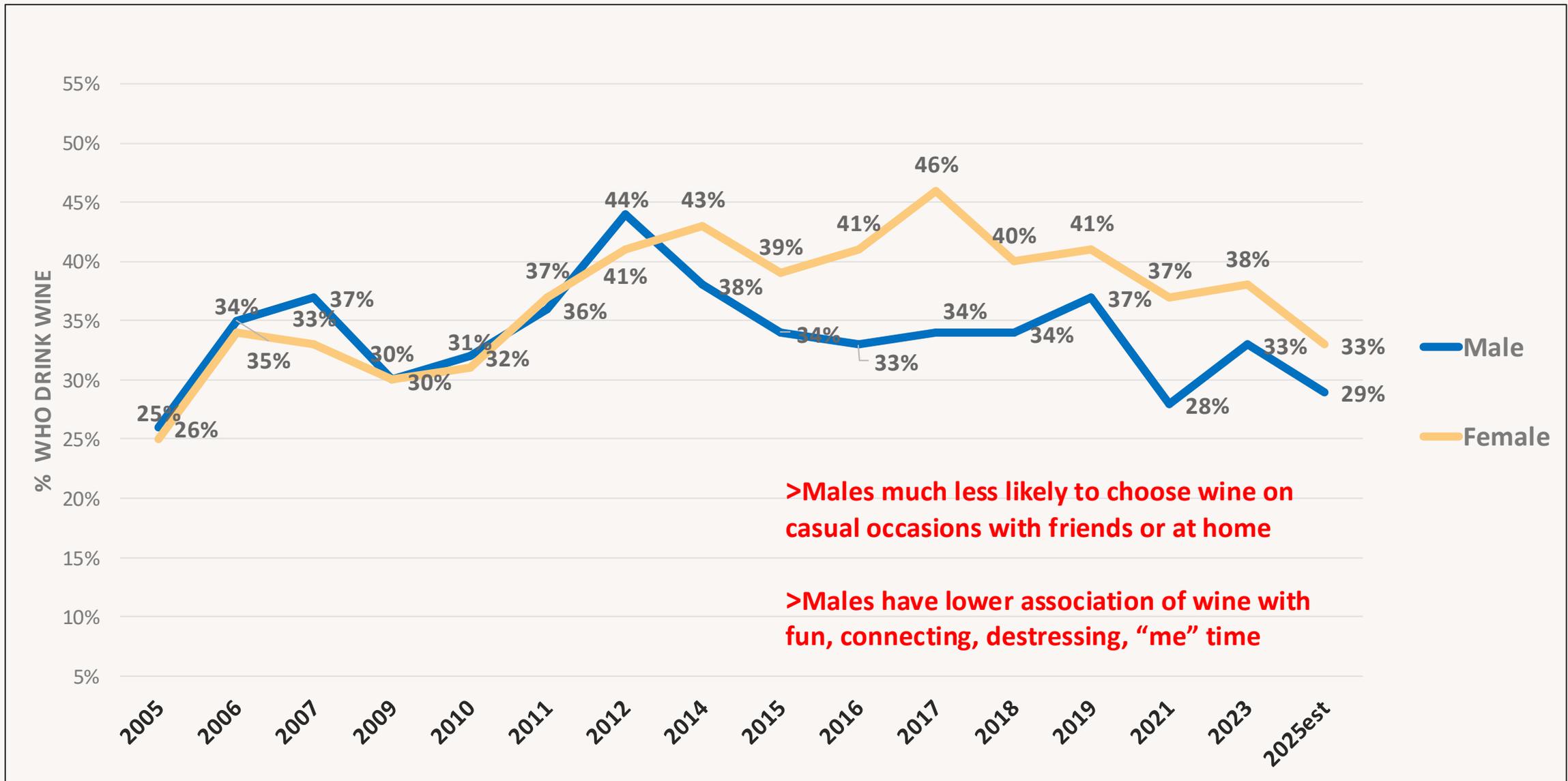


# % OF EACH GENERATION THAT DRINKS WINE 2009-2025



Source: Wine Market Council Benchmark Segmentation Surveys

# Who is not drinking wine? Men!



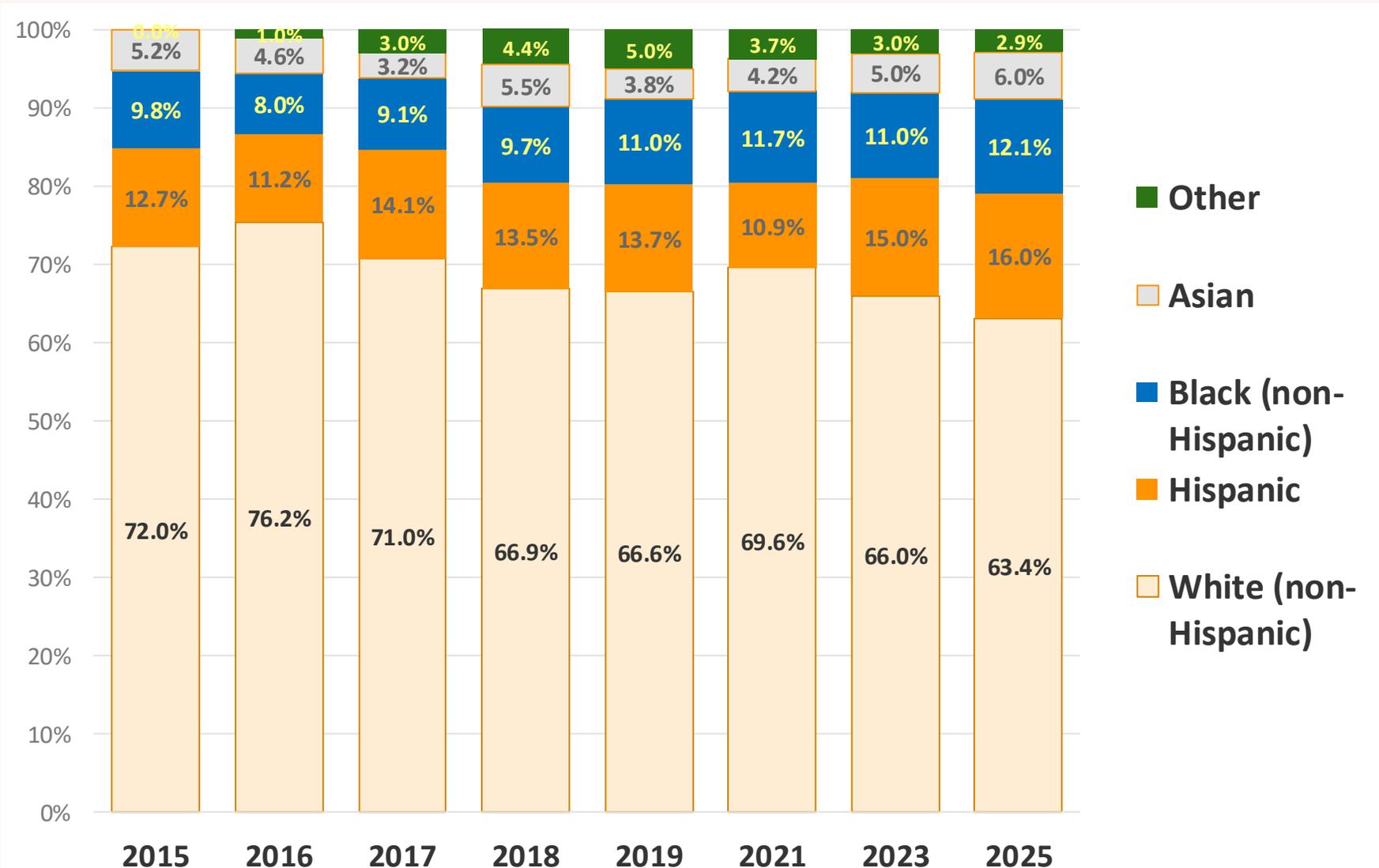
>Males much less likely to choose wine on casual occasions with friends or at home

>Males have lower association of wine with fun, connecting, destressing, “me” time

Source: Wine Market Council Benchmark Segmentation Surveys

Sources: Wine Market Council Benchmark Segmentation Survey

# SHARE OF WINE DRINKERS BY ETHNICITY 2015-2025



- Other
- Asian
- Black (non-Hispanic)
- Hispanic
- White (non-Hispanic)

## 2025 vs. 2016 Index vs. Share of LDA Population

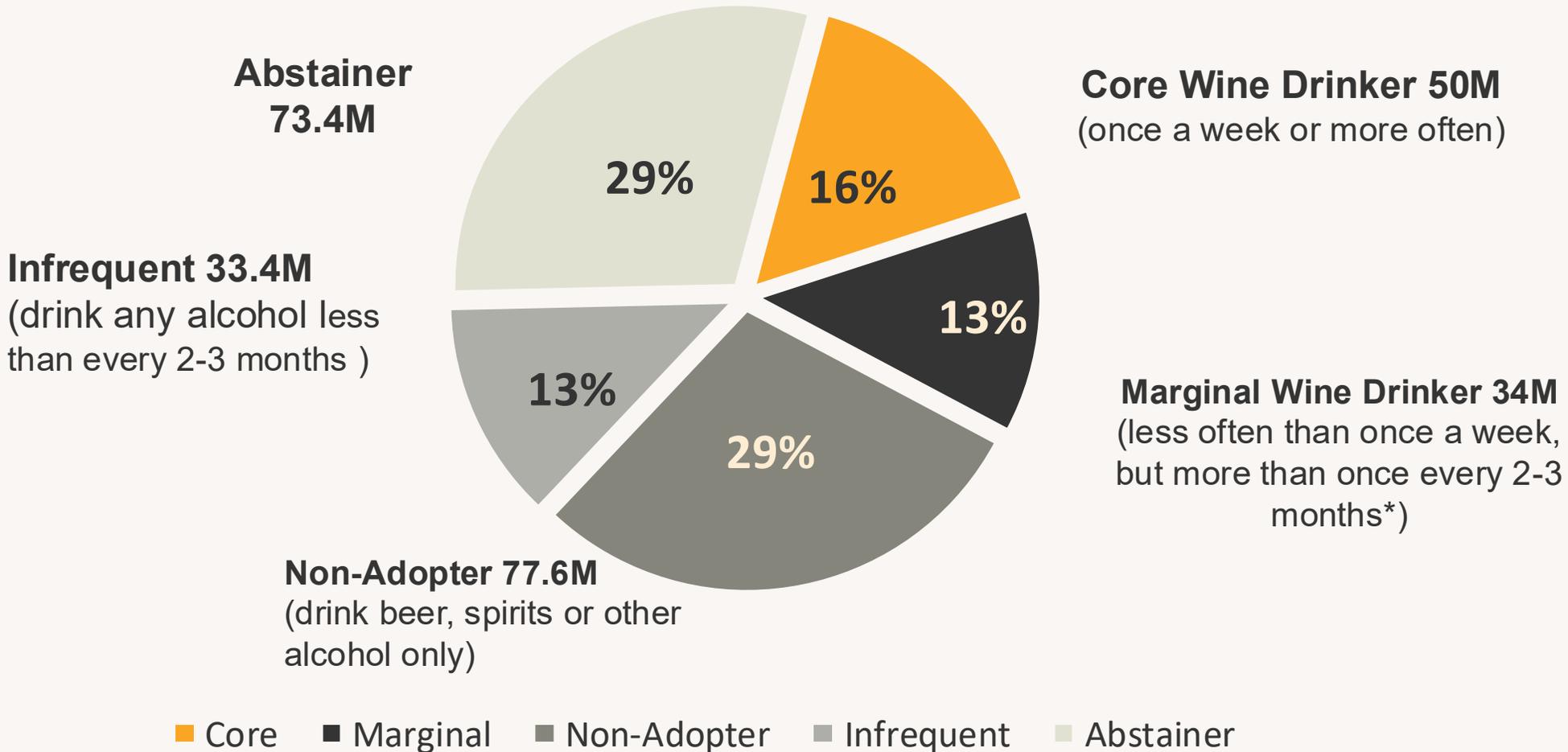
- Over-indexing for non-Hispanic Whites has shrunk
- Under-indexing for non-Hispanic Black and Asian Americans is near zero
- Under-indexing for Hispanic-Americans has shrunk
- Wine-based drinks (sangria, spritzers, flavored) are only 51% NH white, with all other ethnicities over-indexing

Source: Wine Market Council Benchmark Segmentation Surveys



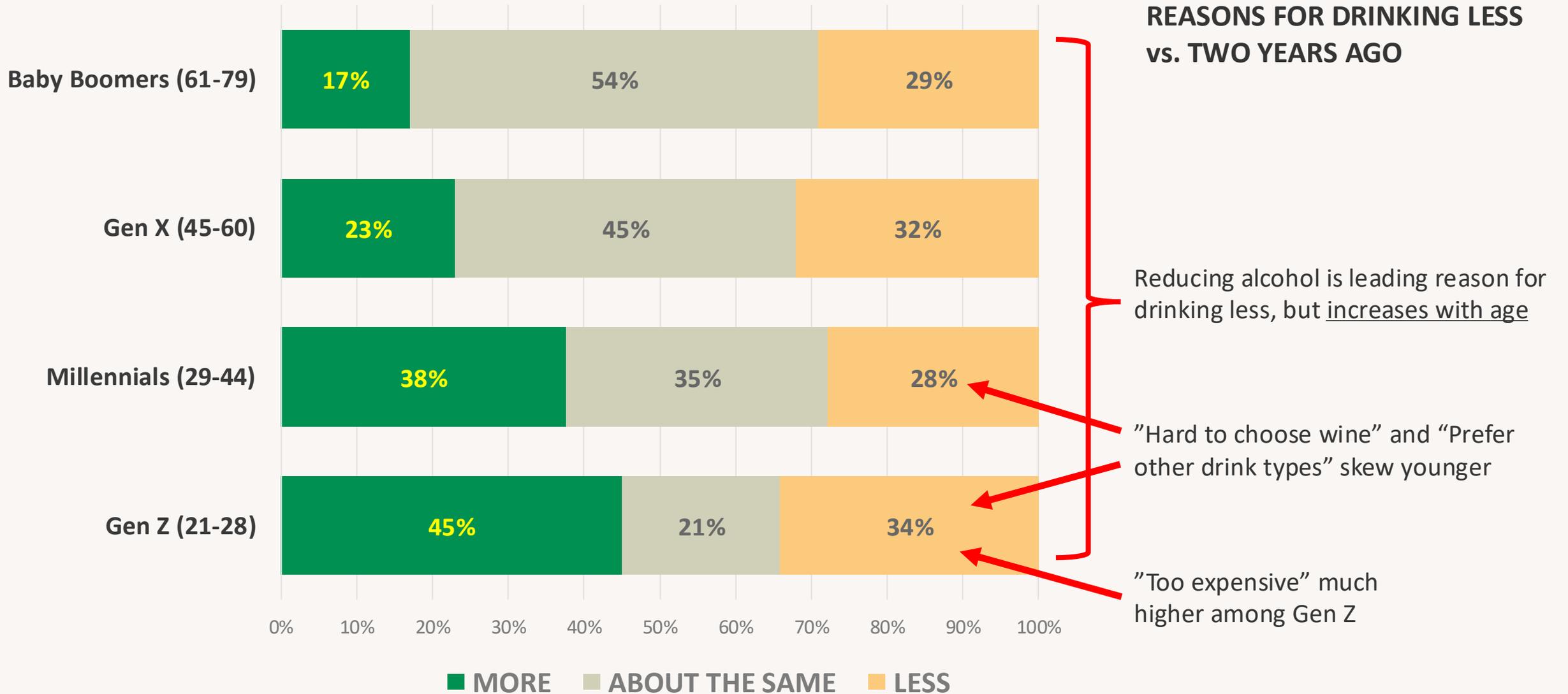
# Where are we Now? The Current Market

# BEVERAGE ALCOHOL CONSUMPTION AMONG U.S. ADULTS 21+ (N = 4835)



Source: Wine Market Council Benchmark Segmentation Survey 2025

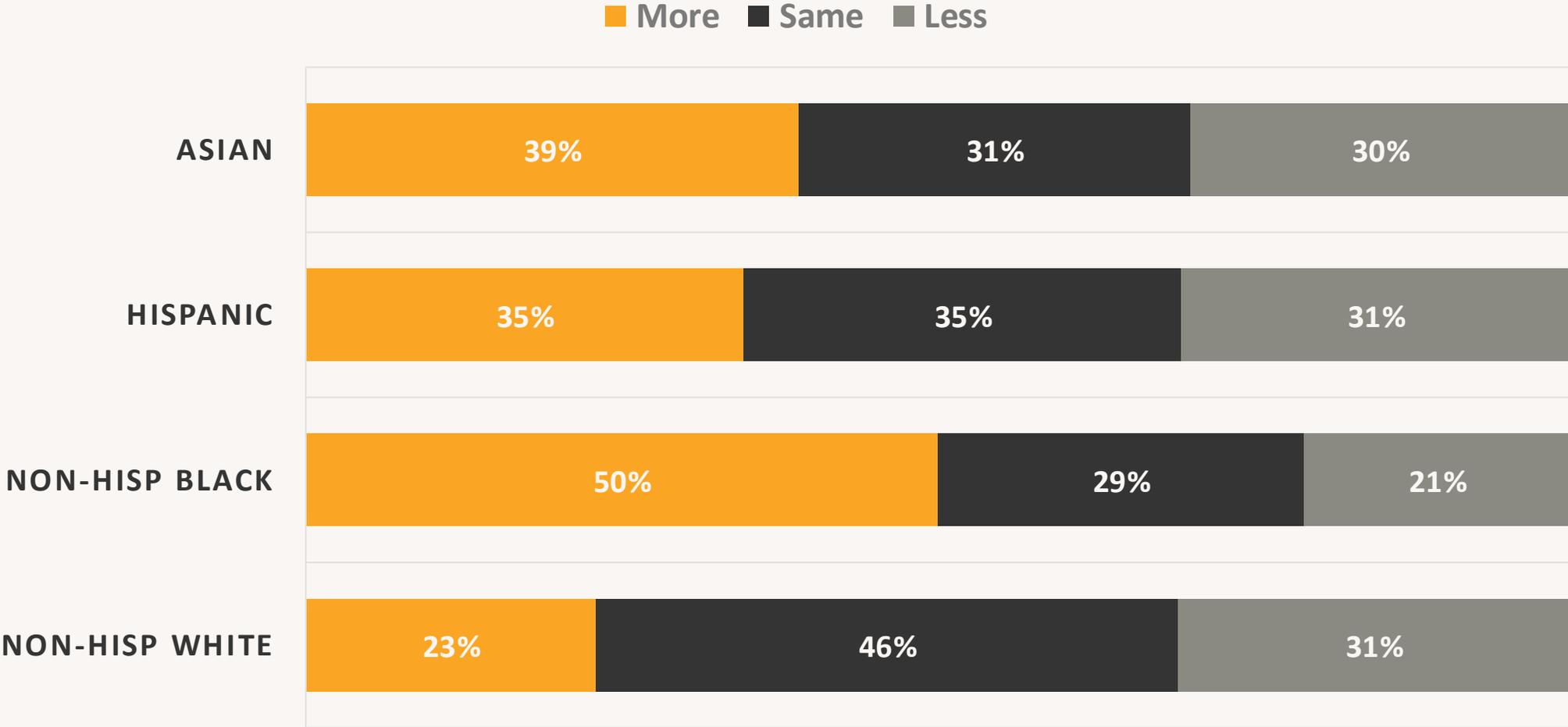
# 2025 Wine Drinkers: Drinking More vs. Less Wine



Source: Wine Market Council Benchmark Segmentation Survey 2025

# Change in Wine Consumption vs. “a couple of years ago” by Ethnicity

W4. In general, would you say you are drinking more, less, or about the same amount of the beverages listed below, as you did a couple of years ago?



Source: Wine Market Council Benchmark Segmentation Survey 2025

# Wine Tourism: a Demographic Shift

- **Older wine consumers FAR less likely to intend to visit every wine region in next 1-2 years than younger**
  - Boomers & older 5-12% depending on region
  - Gen Z/Millennials 20-34% depending on region
- **Non-Hispanic whites less likely to intend to visit than Black, Hispanic or Asian Americans**
  - Non-Hispanic whites 13-20%, depending on region
  - Other ethnicities 16-39%, depending on region
- **But UNLIKE wine consumption generally, only a modest income skew when it comes to interest in visiting wineries.**
  - Opportunity to engage marginal and more casual wine consumers?



*Photo Credit: GAAR Blog*

Source: Wine Market Council Benchmark Segmentation Survey 2025

# Key Demand Issues

## **Decline in # wine consumers and consumption frequency**

- ❖ Infrequent wine consumers becoming more marginal
- ❖ Core wine drinkers split between engaged loyalists and those decreasing consumption
- ❖ Higher priced wines more insulated; fewer total consumers but more \$20+/\$50+ consumers

## **Gen Z & Millennials: drink but consumption spread over more categories**

## **Boomer wine drinkers reducing or dropping out faster than anticipated**

**Hispanic and especially African & Asian Americans catching up**, skew younger – wine consumers starting to look more like American demographically speaking

## **Consumers choosing wine less for casual social occasions, esp. males**

## **Primary driver of wine decline is alcohol reduction, but other factors effect wine in particular**

- ❖ Competition within and without category
- ❖ Structural: promotion, distribution and cost

## **Wellness trends are both positive and negative for wine**

# Sales Channels

## Retail

- Wine losing on-premise (cost, cocktails, weak for fun/casual occasions, dull offerings, disconnect with certain foods/types)
- Chain SKUs & space being cut back, private label share increasing
- Mixed results in long tail of wine/liquor stores, wine bars increasing

## Wholesale

- Consolidation among big/medium sized + growth in smaller specialists
- Bigs reducing SKUs, focusing on faster turning, higher margin products
- Small distributors face tariff/cost pressures, narrowing market
- All have inventory cost pressure

## DtC

- Growth in number of TRs + fewer/longer visits intersects with flat or down visitation
- “Maturity” of Wine Club programs and members
- Wineries lost their pandemic casual or ad hoc consumers

# Under \$10 Wine Hit from All Sides

Core (especially high end) consumers are increasingly consuming \$10-25 wines on casual occasions, reducing or dropping out of under-\$10 segment.



Younger consumers (presumably many of new consumers) are not necessarily entering the category at low prices, and splurge more often.

Older, Brand or Type-loyal High Frequency Consumers who drove under \$10 “fighting varietals”, 1.5L & Jug wines are reducing consumption or aging out of category.



# Challenges & Opportunities

# Some of the Wine Boom's Drivers Have Expired – But Not All

## EXPIRED

boomer life stage 40s-50s



health news



expanded distribution



## NO LONGER A USP

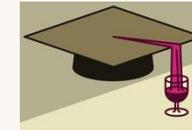


US food/drink culture



## STILL STRONG!

high income/education consumer base



Associations with Romance & Friendship

pure, natural, real



## POTENTIAL LEVERS

Ethnic Diversification



Wellness



# Wine Specific Barriers

**Low on Energy, Fun, Excitement:** low key vibe, put on a pedestal, dull descriptions/presentation, same old visuals online, many tasting rooms similar...

**Hard to Choose or Find Your Style/Flavor:**, repetitive look and types, flavors not clear from labels or listings, takes time to find what you want...

**Misinformation on sugar, additives, calories**

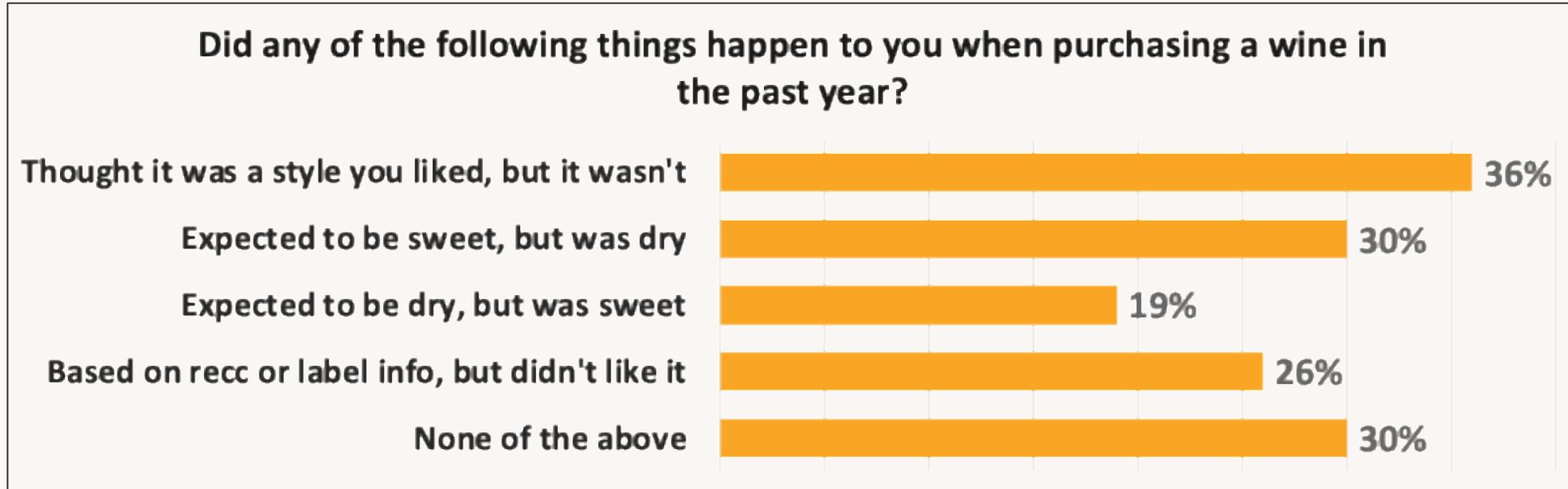
**Wine people don't look or talk like me & my friends**

**It's expensive:** cost per serving, cost of 750ml bottle, tasting room/wine country is expensive...

# Barriers & Challenges: Flavor

Many consumers who mostly or entirely drink other categories think they dislike wine's taste

Many consumers interested in, but not knowledgeable about wine, can't find the flavor/styles they like



Source: Wine Market Council Communications study 2019

## SOLUTIONS

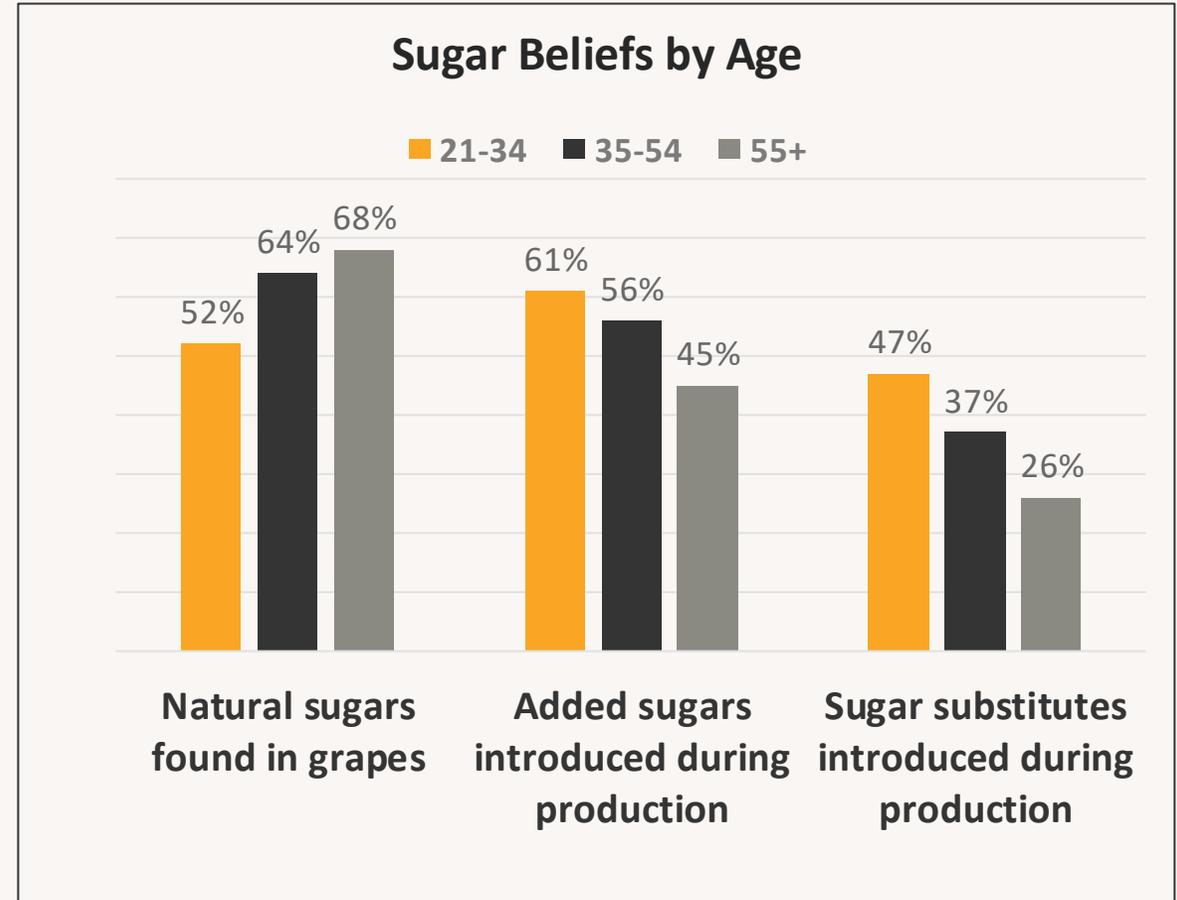
- Make the flavors clear (especially sweetness and body/intensity)
- Showcase, promote & explain wine's diversity of flavor
- Introduce new wine-adjacent products (fruit wines, cider, cocktails, sparkling...)

# Ingredient Concerns: the Case of Sugar

**47% of consumers believe that wine is high in sugar**  
(WMC Ingredients/Nutrition study 2022)

**Q19: You told us you were concerned about the sugar content of wine. Where do you believe that sugar comes from?**

Natural sugars found in grapes	63%
Added sugars introduced during production	53%
Added sugar substitutes introduced during production	36%
I do not know	8%



# Under 40 Consumers: Image of “Typical” Wine Drinker

*“The typical wine drinker’s (age) is ... compared to me”*

% Agreement	Race/Ethnicity					AGE	
	Total	Hispanic	Black	Asian	NH White	21-29	30-39
Older than me	<b>54%</b>	<b>58%</b>	<b>57%</b>	<b>56%</b>	45%	<b>69%</b>	41%
Amount the same age as me	<b>38%</b>	31%	40%	34%	47%	23%	<b>51%</b>
Younger than me	<b>8%</b>	11%	4%	10%	8%	9%	8%

Males (58%) think that the typical wine drinker is older than them, where females (42%) think that the typical wine drinker is about the same age as me.

*“The typical wine drinker’s (culture/ethnicity) is ... compared to me”*

% Agreement	Race/Ethnicity					AGE	
	Total	Hispanic	Black	Asian	NH White	21-29	30-39
Could be any culture/ethnicity	<b>48%</b>	40%	54%	48%	53%	46%	51%
A different culture/ethnicity than me	<b>27%</b>	<b>35%</b>	27%	<b>34%</b>	13%	30%	24%
The same culture/ethnicity as me	<b>25%</b>	25%	19%	18%	<b>34%</b>	25%	25%

Source: Wine Market Council Young Multicultural Consumer study 2024

# Shopping & Occasions: Opportunities & Solutions

- ❖ Make wine more casual & fun
- ❖ Make wine easier to choose or enticing on-premise; diversify cuisine/ambiance



- ❖ Diversify products



- ❖ Make it easier to figure out which wine you want



- ❖ Remind the trade that the wine consumer is valuable

## BASKET VALUE PER SHOPPING TRIP

<b>Non Wine Buyer</b>	<b>\$43.49</b>
<b>Wine Buyer</b>	<b>\$77.34</b>
• Wine	\$18.68
• Other products	\$58.66



Source NIQ Omni panel 52 wks end 11/30/2024

# Features Favored by Young, Multicultural Consumers

Entertaining non-wine things to do at the vineyard  
(e.g. bocce ball, art exhibits, hikes)

Vineyard tours



By age: Under 40 25%, 40-59 21%, 60+ 19%



By age: Under 40 16%, vs. 60+ 6%

Beautiful winery or tasting room design



More important for those under 40 (39%), less for 60+ (28%)

More important for Black members (44%)

A casual wine lounge setting for hanging out

Kid and/or pet friendly



More important for Hispanic (11%), Asian American (16%)

More important for Black members (35%)

Source: Wine Market Council Member DtC Survey 2023

# A Few Tested Examples of Solving Barriers

Solution:	Wine Cocktails	Seasonal, Ltd Edition wines	Flavored Wine	Clearer Taste Descriptions / Sweetness Scale	Single Servings, Trial Packs
Large \$8-12 brand	New wine-forward cocktails developed & offered with training in casual national chains	Holiday-themed wines such as pumpkin spiced cooler, mulled wine; fresh May Wine.	Currently fashionable or original flavors but don't try to compete with classic cocktails;	Sweetness scale; intensity/body indicators	Wider variety of types; mixed variety packs; intro or single serving sizes of flavored, cocktails
Medium Sized \$15-25 brand	Extend depletions of wine BtG in independent restaurants via recipes; diversify TR offerings	Limited lots to match the weather: hearty for winter, light, low alc for summer; bring back Nouveau!	Natural, high quality, organic ingredients tied to craft/ag (sangria)	Sweetness scale; intensity/body indicators	Need wider variety of sub-750ml sizes from established brands with quality image; promotion, cold box
Small \$25-50 brand	Upscale craft or sparkling wine-based cocktails offered in tasting room and as aperitifs at events	Single barrel, limited lots, themed releases; tied to seasons; targeted retailers plus club, online offers	High end crafted vermouths, digestifs or dessert wines	Sweetness scale; intensity/body; do NOT describe before TR customer tastes; forgo elaborate descriptions	50ml samplers for club members or to entice mailing list; small "picnic" packages for wine tourists

Source: Wine Market Council/Vista Grande Reducing Barriers Study 2025

# Individual Wineries: Three Vectors for Growing Sales

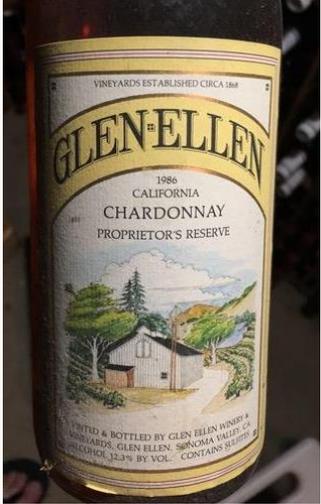
- I. **Selling to a consumer niche that has been less saturated, promoted to, or communicated with than most.**
  
- II. **Offering and distinctive or unique wine or wine-based product that appeals to a consumer type, and then effectively targeting distribution and communication to that consumer.**
  
- III. **Wineries that are most effective and efficient tactically in distribution and/or consumer communications and/or hospitality/customer relations. They will take share from less effective wineries.**

# What's a grower to do?

- ❖ **Don't sweat the big stuff.** You can't impact social or cultural trends like Ozempic affecting alcohol consumption or social media's impact on Gen Z drinking occasions. Focus on who your customers are or should be, what they need.
- ❖ **Know where your grapes are going:** which wines or products are they are going into? Is it a hot or cold segment? Is the winery investing or tapping into some of the potential growth consumer segments or stuck selling to aging consumers at the low or high end? If mostly DtC, are they dynamic in adopting technology for analytics and customer relations? If in the 3-tier, do they actively manage or work with their distributors and retailers? Those are the customers you want.
- ❖ **Rank or target your buyers:** best is buyer(s) with a hot product or market segment; next best is having multiple diverse buyers to spread your risk. Worst is just one or a few big buyers who are facing margin squeezes or plunging sales.
- ❖ **Watch for the impact of acreage pulls and mothballing on supply** (big numbers will be good news for remaining acreage in the future).
- ❖ **Lean into or start green practices now**, and work with wineries to ID and promote the wines. Prepare for serious climate risk down the road. Many impact indicators are coming in on the high range of estimates, current administration policy is likely to accelerate them.
- ❖ **Keep up with HARD consumer purchase data** – scanned retail, wholesale depletions, large quantitative surveys from reputable sources. Ignore hot takes, social media memes, sweeping statements not backed by serious data. Know which data source is most relevant for your products (bulk wine, chain retail, high end consumers..?)

# Going forward

Booker Whatley's "farming the troughs"



These wines all debuted during a period of oversupply and lagging demand (1980s). Yet they turned out to be foundational products of the 1990s wine boom. We don't yet know what the equivalent products will be in the 2020s or 2030s, but let's try to stick around to find out.