



Texas Wine Marketing Research Institute

College of Human Sciences • Texas Tech University

The Profile of the Texas Wine Industry

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Section I

U.S. Wine Sales and Wine Consumption*

* The data presented in the following section covers (a) total US wine consumption/sales and (b) table US wine consumption/sales. *Total wine* includes table wine, champagne & sparkling, vermouth/aperitif, dessert & fortified, and wine coolers.

Table 1: Total U.S. Wine Consumption 1996-2007

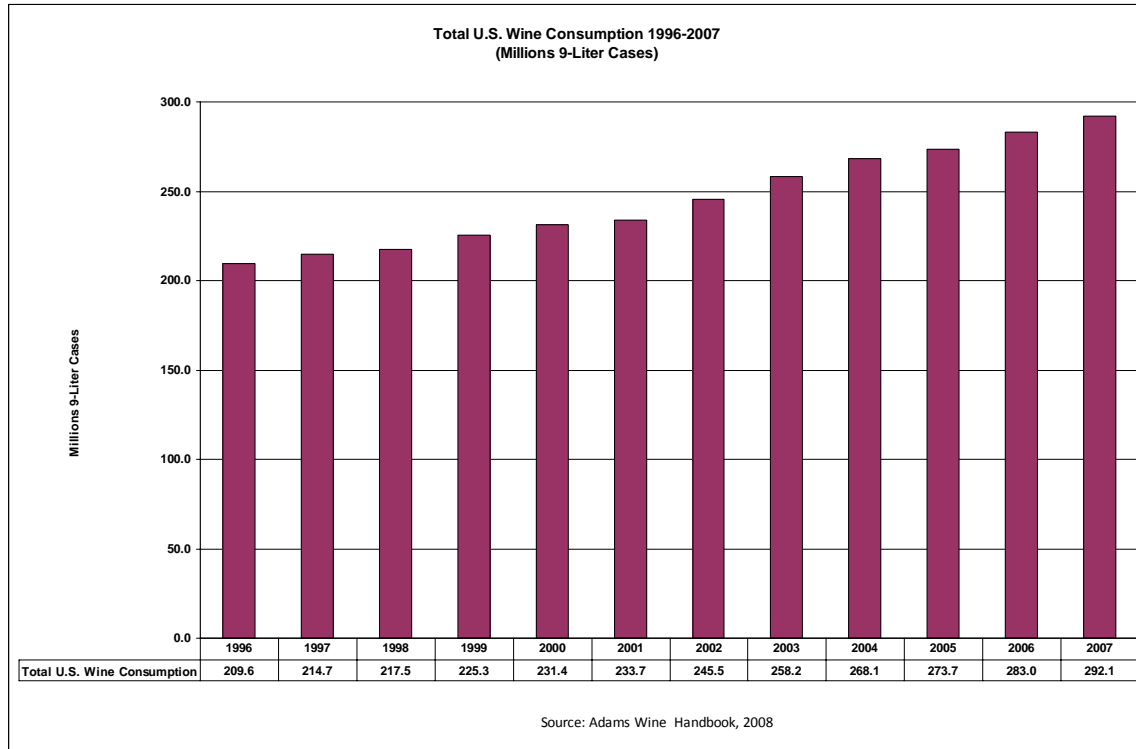


Table 2: Consumption of Total Wine Ranked by State, 2007

Consumption of Total Wine Ranked by State, 2007				
(9-Liter Cases)				
2007 Rank	State	2007 Cases	% Change	
1	California	52,694,630	3.0%	
2	Florida	24,189,390	3.0	
3	New York	23,485,300	3.4	
4	Texas	13,847,390	1.2	
5	New Jersey	12,852,750	4.0	
6	Illinois	12,780,620	4.0	
7	Massachusetts	10,891,320	4.3	
8	Washington	8,597,350	4.8	
9	Pennsylvania	8,067,690	0.3	
10	Michigan	8,001,000	2.6	
11	Virginia	7,914,230	5.6	
12	Ohio	7,796,700	4.7	
13	North Carolina	6,578,200	2.9	
14	Georgia	6,308,670	1.8	
15	Arizona	6,126,860	5.5	
16	Maryland	5,245,730	3.5	
17	Connecticut	5,227,280	2.8	
18	Colorado	5,075,020	0.4	
19	Oregon	4,961,910	2.6	
20	Wisconsin	4,946,690	4.8	
21	Missouri	4,473,000	2.6	
22	Minnesota	4,425,780	3.7	
23	Nevada	4,165,700	2.9	
24	Indiana	3,989,520	3.6	
25	Tennessee	3,274,960	5.4	
26	Louisiana	3,067,940	0.6	
27	South Carolina	2,871,180	3.5	
28	Alabama	2,684,440	4.8	
29	New Hampshire	2,630,110	2.9	
30	Kentucky	1,866,020	2.1	
31	Hawaii	1,802,930	3.6	
32	Oklahoma	1,656,120	5.0	
33	District of Columbia	1,613,740	4.9	
34	Rhode Island	1,543,540	1.8	
35	Maine	1,543,050	1.5	
36	New Mexico	1,392,610	4.8	
37	Delaware	1,367,350	1.8	
38	Iowa	1,354,730	4.7	
39	Idaho	1,309,670	3.0	
40	Arkansas	1,265,460	3.4	
41	Kansas	1,077,050	0.2	
42	Vermont	1,035,820	4.7	
43	Nebraska	955,950	2.9	
44	Utah	948,330	3.0	
45	Mississippi	913,560	0.8	
46	Montana	910,800	2.5	
47	Alaska	788,220	4.2	
48	West Virginia	511,320	0.6	
49	South Dakota	391,200	5.2	
50	North Dakota	348,850	4.6	
51	Wyoming	322,320	2.4	
U.S. Total		292,090,000	3.2%	

Source: Adams Wine Handbook, 2008

Table 3: U.S. Wine Consumption by Category, 2000-2007

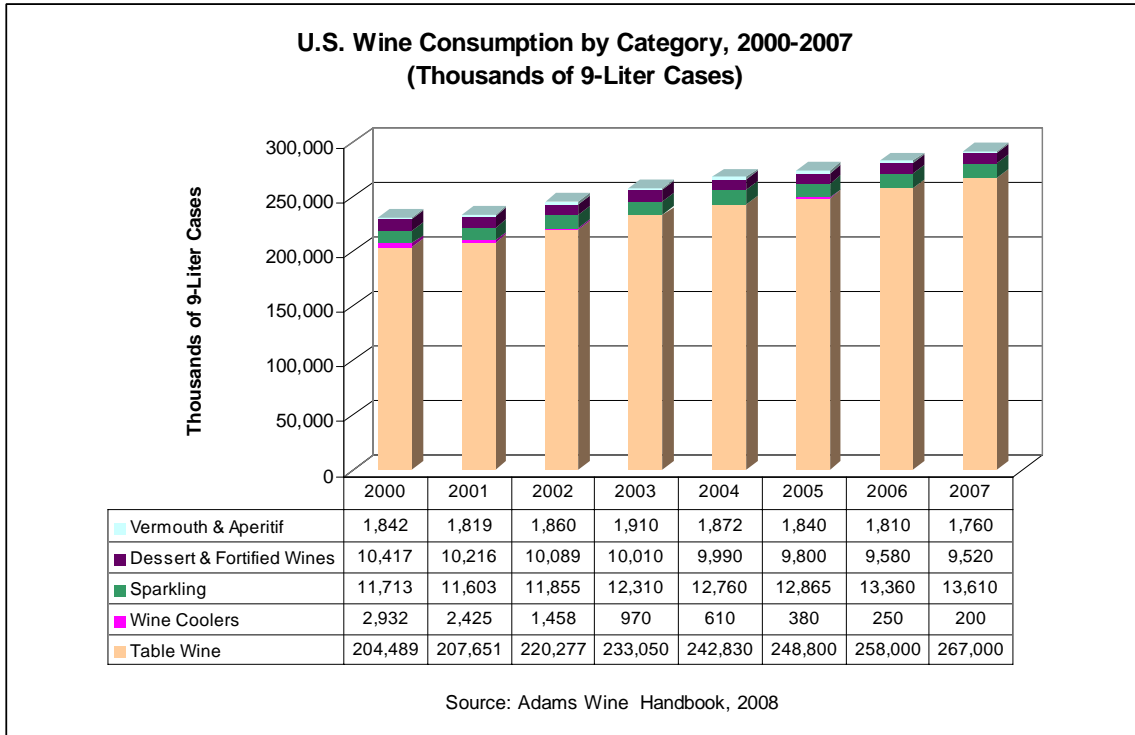


Table 4: Table 4: U.S. Wine Consumption by Category, 2000-2007

U.S. Wine Consumption by Category, 2000-2007						
(Thousands 9-Liter Cases)						
Year	Table Wine	Wine Coolers	Sparkling	Dessert & Fortified Wines	Vermouth & Aperitif	Total Wine
2000	204,489	2,932	11,713	10,417	1,842	231,392
2001	207,651	2,425	11,603	10,216	1,819	233,713
2002	220,277	1,458	11,855	10,089	1,860	245,540
2003	233,050	970	12,310	10,010	1,910	258,250
2004	242,830	610	12,760	9,990	1,872	268,062
2005	248,800	380	12,865	9,800	1,840	273,685
2006	258,000	250	13,360	9,580	1,810	283,000
2007	267,000	200	13,610	9,520	1,760	292,090

Source: Adams Wine Handbook, 2008

Table 5: Share of Total Wine Consumption by Category, 2007

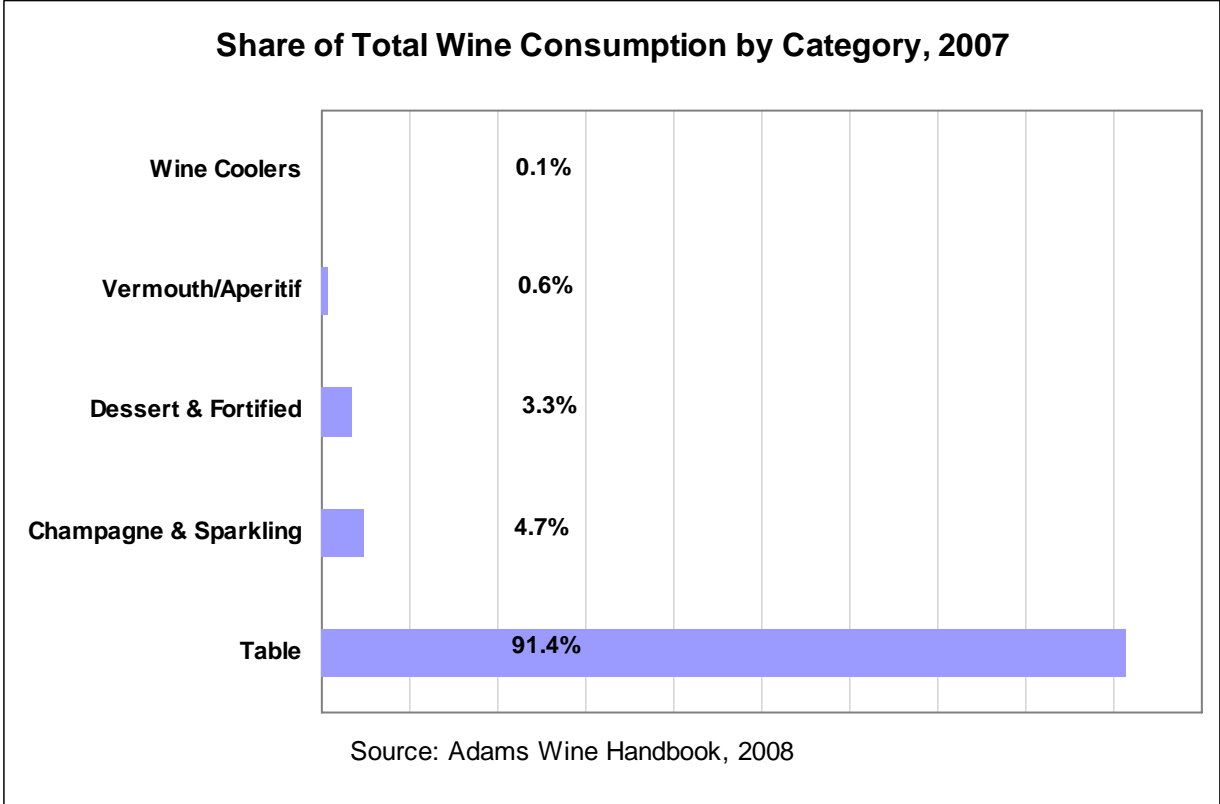


Table 6: Percent Change in U.S. Wine Consumption by Category, 1997 vs. 2007

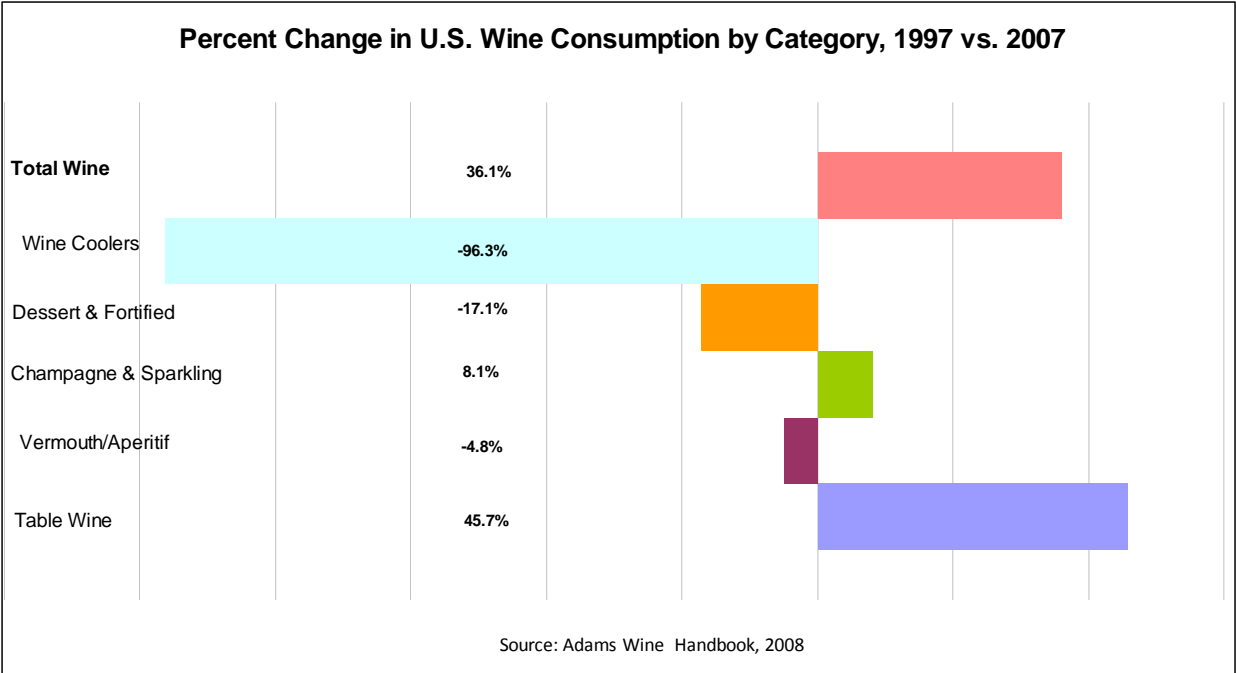


Table 7: Imported vs. Domestic Wine Share by Category, 2007

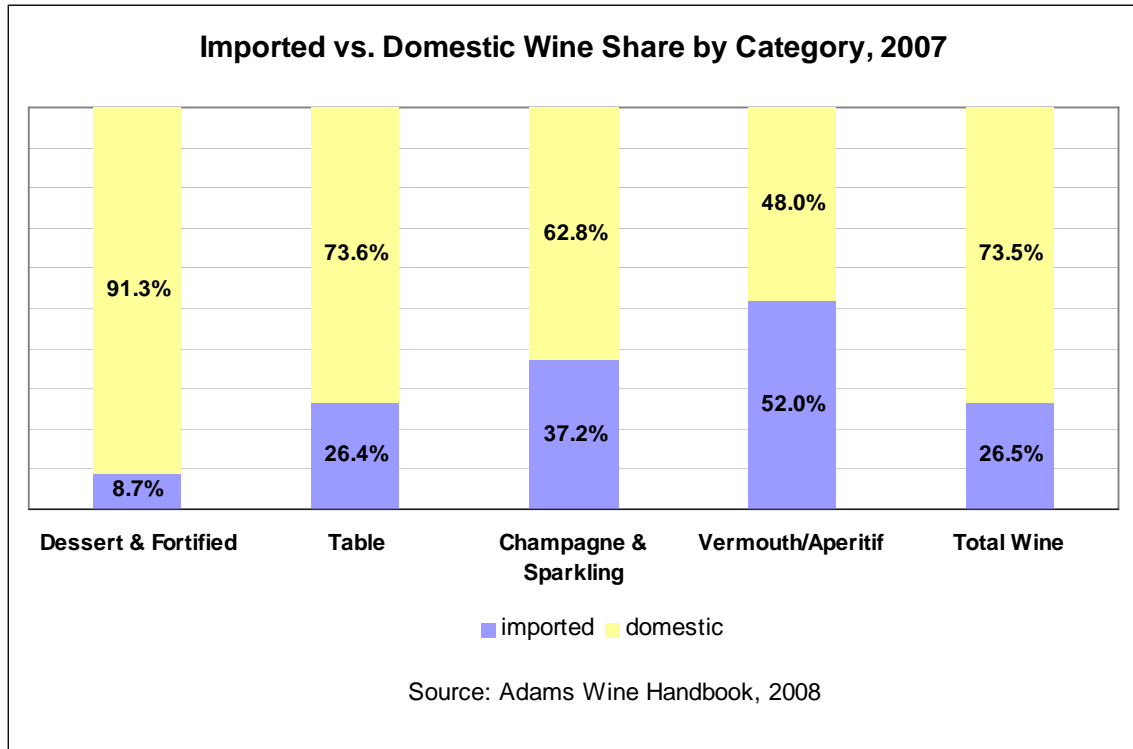


Table 8: 2006-2007 Comparison U.S. National Sales of Wine by Tier

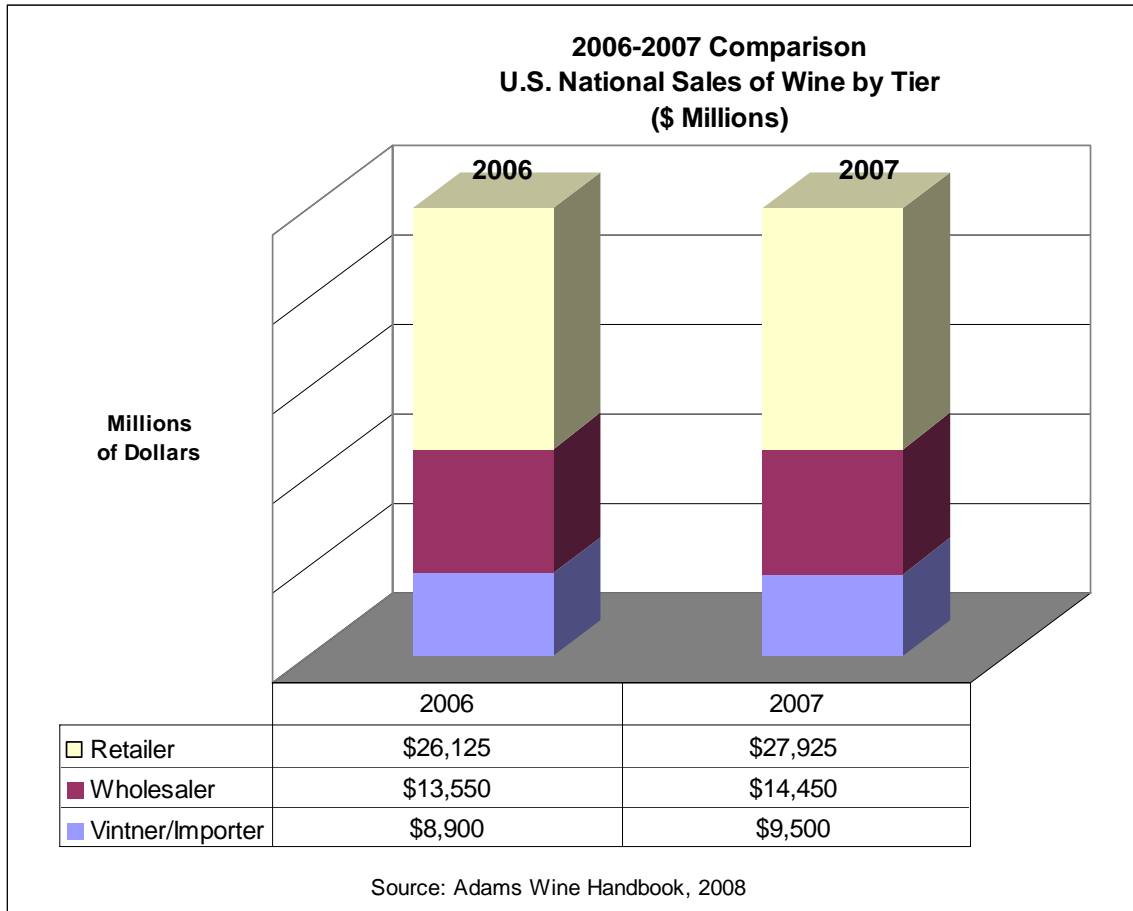


Table 9: U.S. National Sales of Wine by Tier, 2007

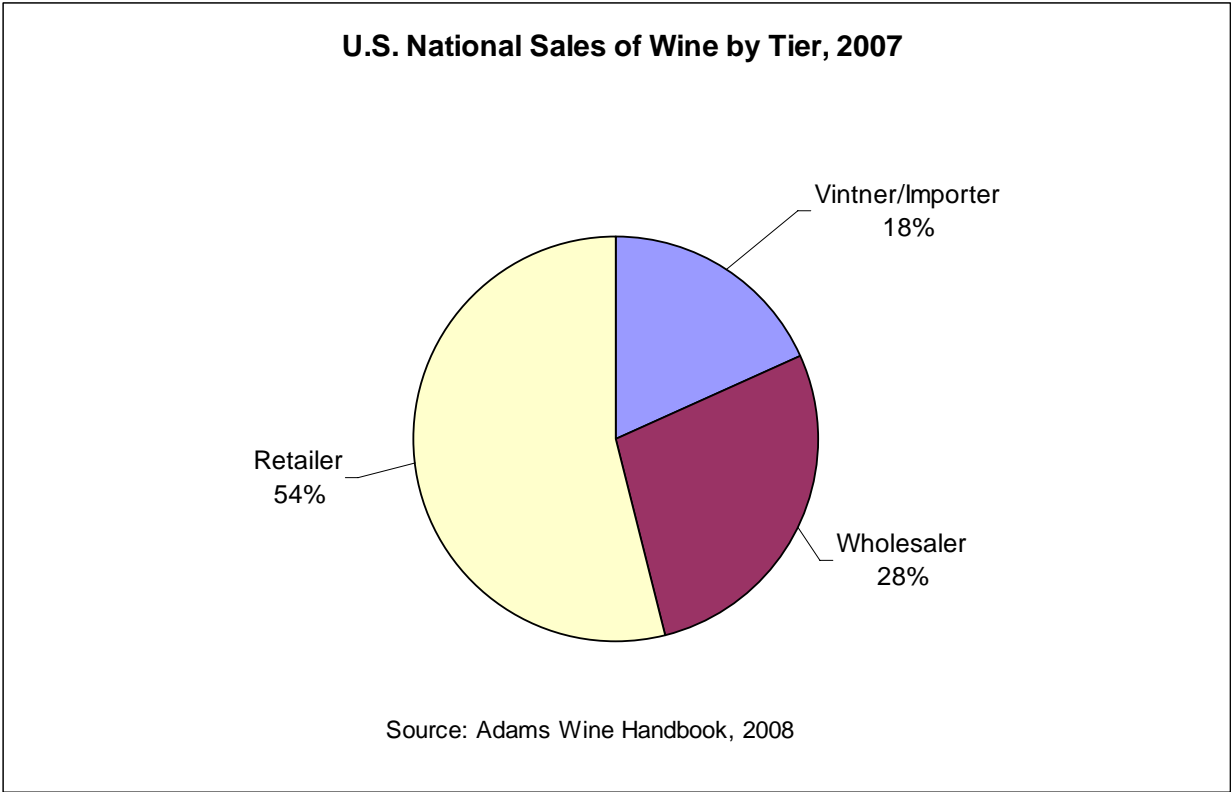


Table 10: U.S. On & Off-Premise Wine Sale in Cases, 2007

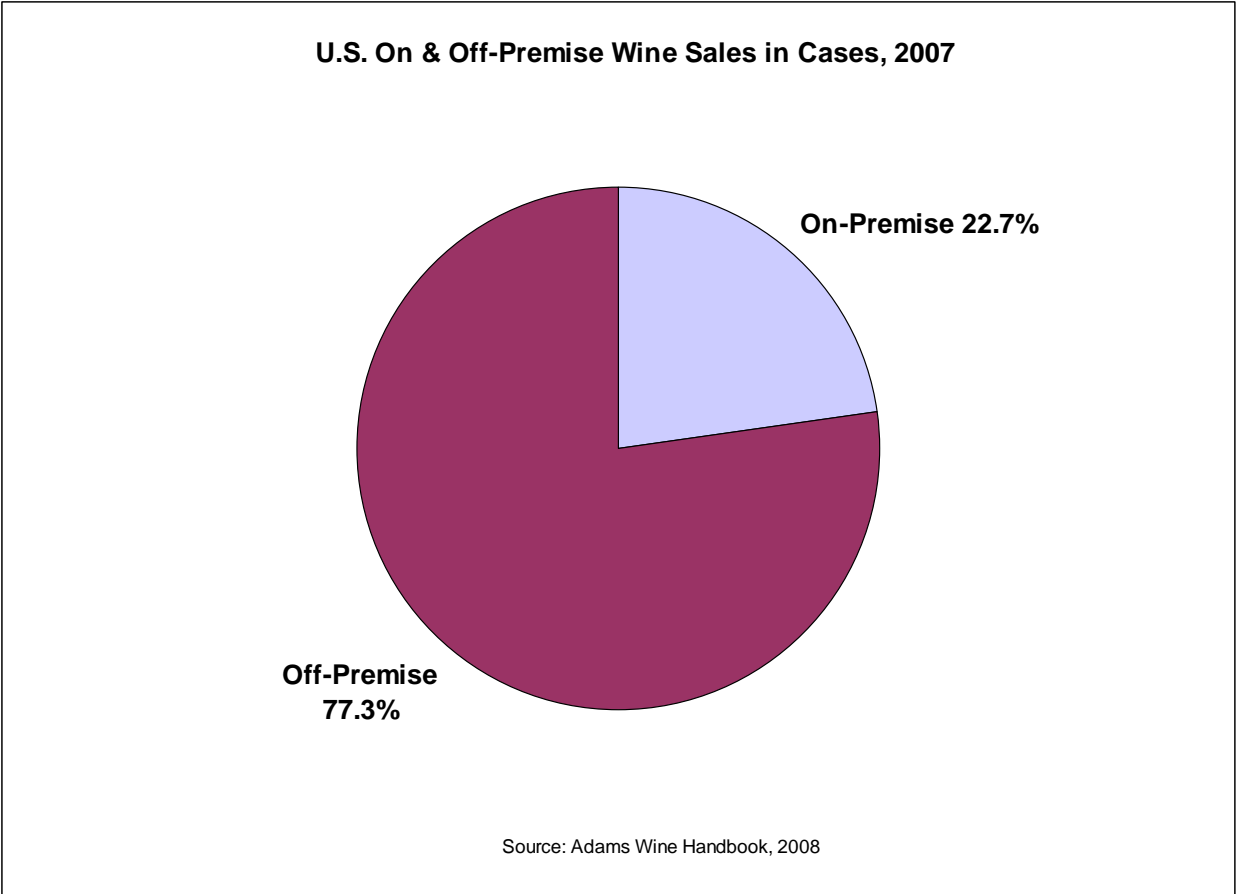


Table 11: U.S. On & Off-Premise Wine Sales in Dollars, 2007

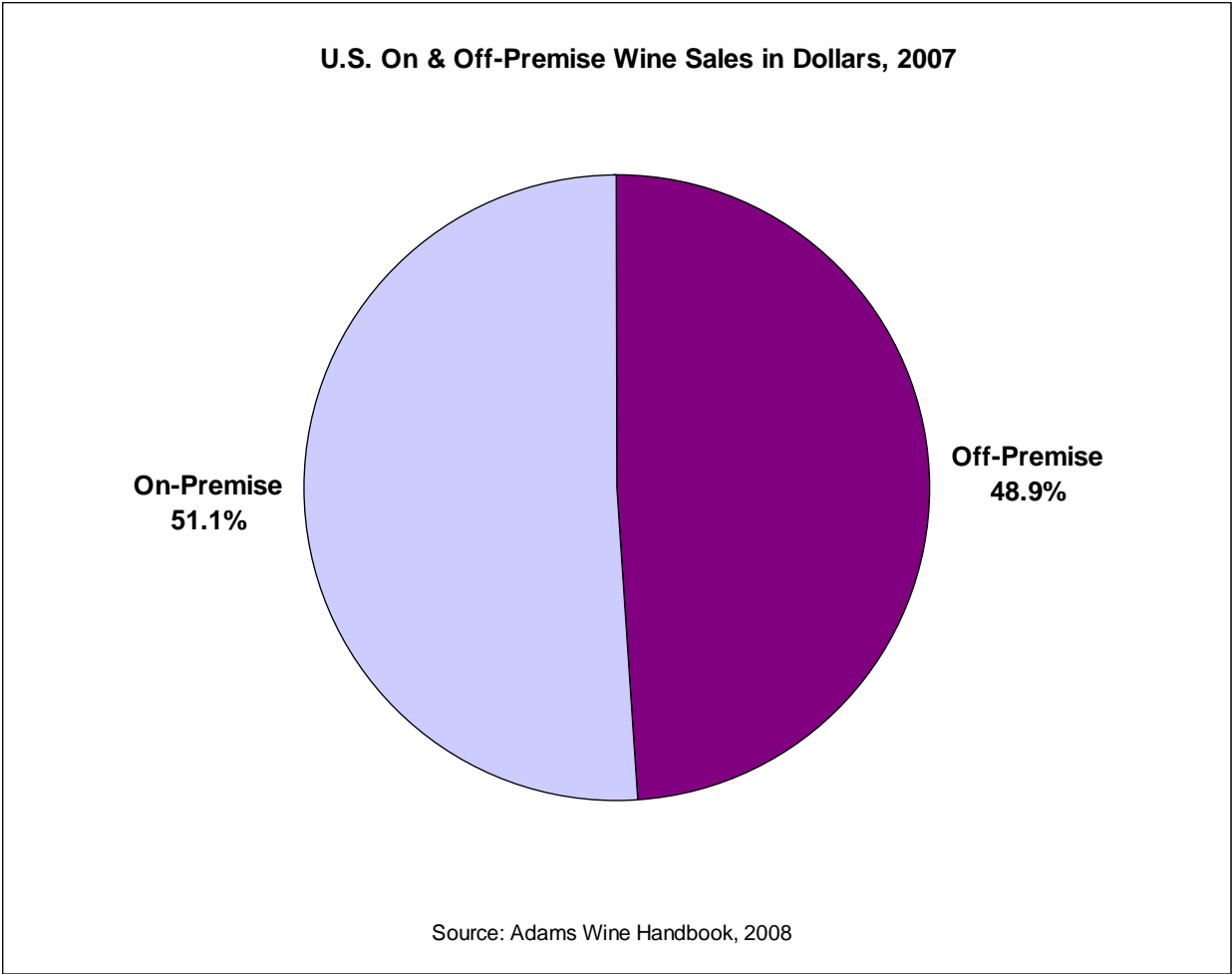


Table 12: Market Share of Wine by Supplier Price Class, 2007

Market Share of Wine by Supplier Price Class, 2007		
Price Class	750 ml. Equivalent	2007
Lowest	Under \$2.75	18.7%
Economy	\$2.76-\$4.25	14.1
Popular	\$4.26-\$5.75	22.0
Premium	\$5.76-\$7.50	18.0
Super-Premium	\$7.51-\$10.00	17.0
Ultra-Premium	\$10.01 & up	10.2
Total		100.0%
Source: Adams Handbook, 2008		

Table 13: Table Wine Consumption, 1996-2007

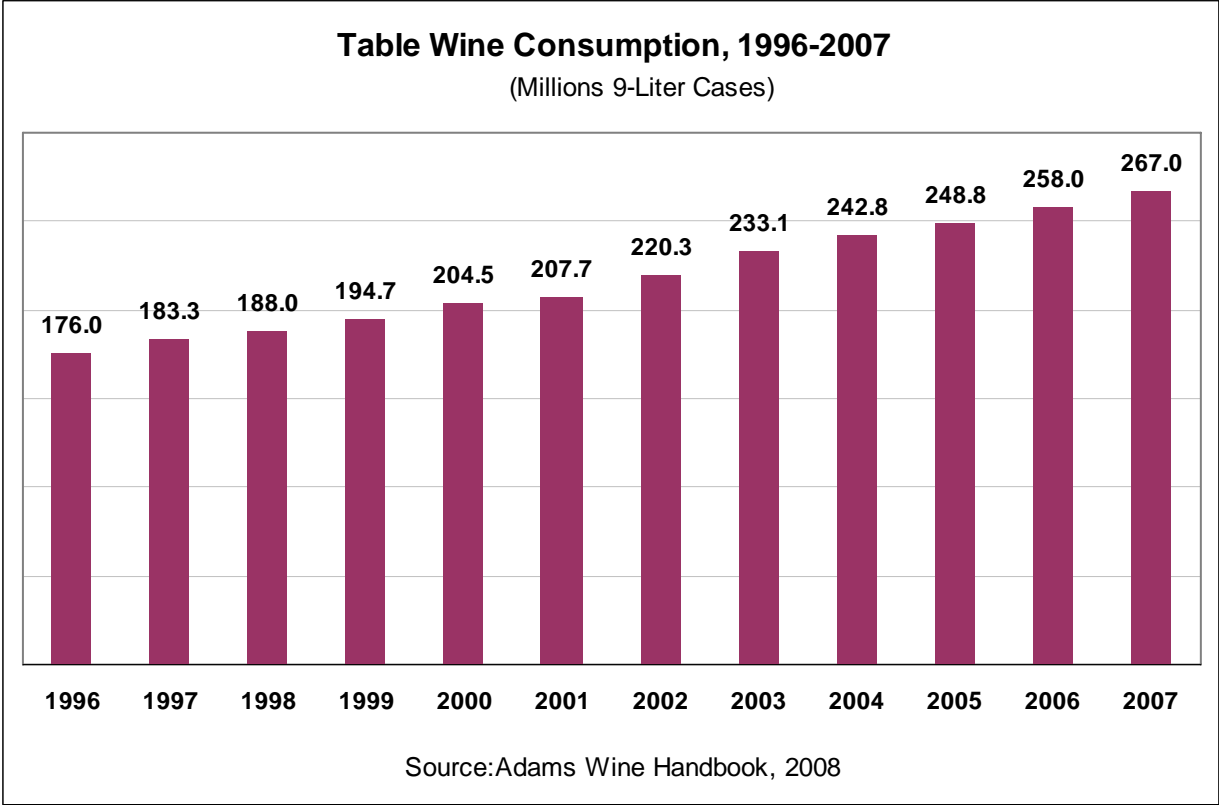


Table 14: Table Wine Share of Total Wine Consumption, 1996-2007

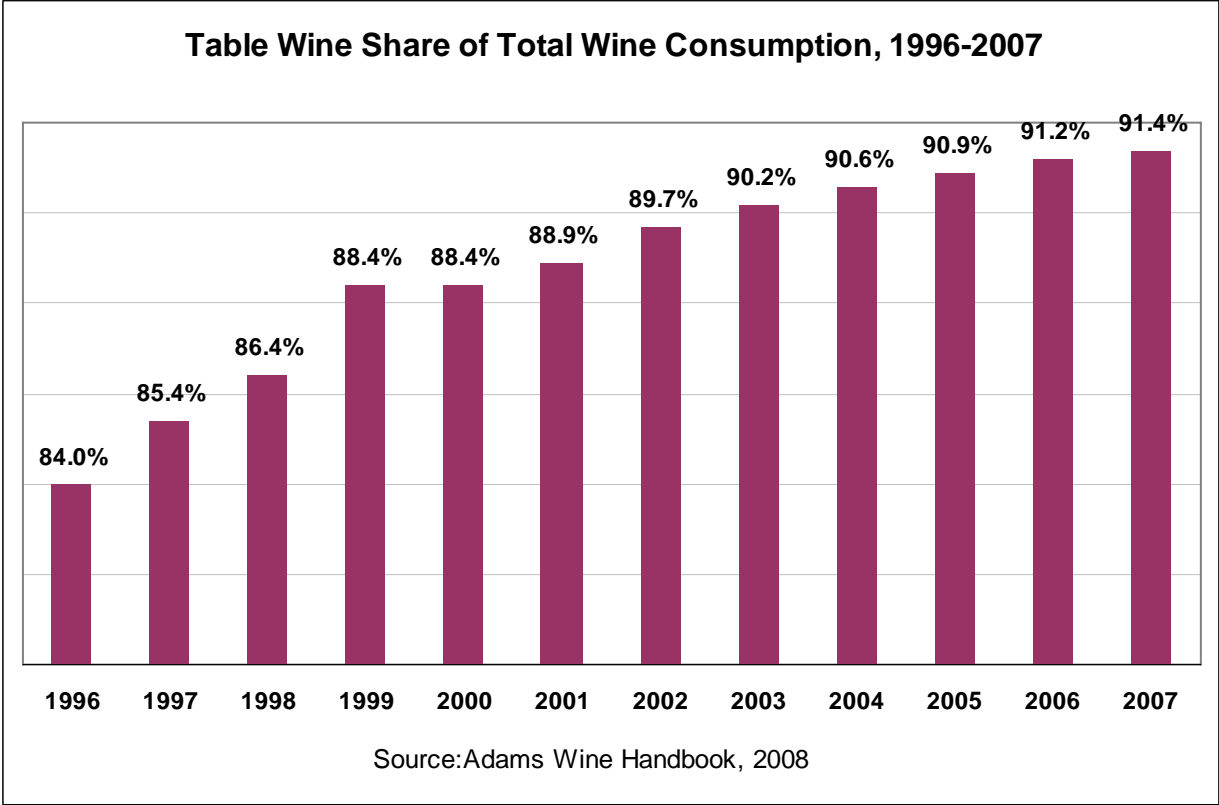


Table 15: Consumption of Table Wine Ranked by State, 2007

Consumption of Table Wine Ranked by State, 2007			
2007 Rank	State	2007 Cases	% Change
1	California	47,550,700	3.3%
2	Florida	22,838,500	3.2
3	New York	21,555,400	3.8
4	Texas	12,525,220	1.2
5	New Jersey	11,976,050	4.3
6	Illinois	10,270,900	4.8
7	Massachusetts	10,170,090	4.7
8	Washington	8,194,100	5.1
9	Virginia	7,697,250	5.7
10	Pennsylvania	7,069,000	0.4
11	Ohio	7,061,050	5.2
12	Michigan	6,925,000	2.9
13	Georgia	5,819,600	1.9
14	North Carolina	5,788,300	3.4
15	Arizona	5,695,600	5.9
16	Maryland	4,883,240	3.8
17	Connecticut	4,858,000	3.0
18	Colorado	4,791,200	0.3
19	Oregon	4,723,880	2.8
20	Wisconsin	4,631,030	5.1
21	Minnesota	4,076,620	4.0
22	Missouri	3,982,820	2.9
23	Nevada	3,804,000	2.9
24	Indiana	3,759,600	3.9
25	Tennessee	3,103,340	5.8
26	South Carolina	2,723,250	3.7
27	Louisiana	2,593,500	0.6
28	Alabama	2,545,000	5.0
29	New Hampshire	2,431,110	3.1
30	Kentucky	1,764,400	2.2
31	Hawaii	1,651,800	3.8
32	Oklahoma	1,474,300	5.7
33	District of Columbia	1,450,100	5.4
34	Rhode Island	1,443,000	1.9
35	Maine	1,413,810	1.5
36	Delaware	1,294,000	1.8
37	New Mexico	1,279,450	5.2
38	Idaho	1,278,900	3.0
39	Iowa	1,232,500	5.1
40	Arkansas	1,155,700	3.9
41	Kansas	982,550	0.3
42	Vermont	973,630	5.0
43	Utah	900,750	3.3
44	Nebraska	876,290	2.9
45	Montana	859,700	2.6
46	Mississippi	757,440	0.8
47	Alaska	737,000	4.4
48	West Virginia	475,400	0.6
49	South Dakota	344,100	6.0
50	North Dakota	310,500	4.7
51	Wyoming	301,330	2.5
	U.S. Total	267,000,000	3.5%

Source: Adams Wine Handbook, 2008

Table 16: Per Capita U.S. Consumption of Table Wine Ranked by State, 2007

Per Capita U.S. Consumption of Table Wine Ranked by State, 2007 (9-liter Cases per 1,000 Adults)*	Rank	
District of Columbia	2944.4	1
New Hampshire	2547.0	2
Delaware	2234.5	3
Nevada	2196.2	4
Vermont	2020.3	5
Massachusetts	2009.0	6
New Jersey	1852.4	7
Connecticut	1820.8	8
California	1807.7	9
Rhode Island	1757.1	10
Florida	1752.5	11
Hawaii	1729.3	12
Washington	1711.1	13
Oregon	1690.4	14
Alaska	1653.5	15
New York	1486.3	16
Maine	1407.9	17
Colorado	1406.0	18
Virginia	1395.1	19
Arizona	1390.2	20
Idaho	1290.2	21
Montana	1240.5	22
Maryland	1210.3	23
Wisconsin	1149.0	24
Illinois	1133.8	25
Minnesota	1113.1	26
New Mexico	970.8	27
North Carolina	939.5	28
Missouri	938.1	29
Michigan	934.1	30
Georgia	903.8	31
South Carolina	856.3	32
Ohio	845.4	33
Louisiana	830.7	34
Indiana	830.3	35
Texas	814.3	36
Wyoming	793.9	37
Pennsylvania	774.6	38
Alabama	744.2	39
Tennessee	705.0	40
Nebraska	673.6	41
North Dakota	638.1	42
South Dakota	609.1	43
Kentucky	565.9	44
Arkansas	564.8	45
Utah	550.4	46
Iowa	549.6	47
Oklahoma	537.6	48
Kansas	505.9	49
Mississippi	365.2	50
West Virginia	332.4	51

(*) Population 21 years and older

Source: Adams Wine Handbook, 2008

Table 17: Sources of U.S. Table Wine Share by Volume, 2007

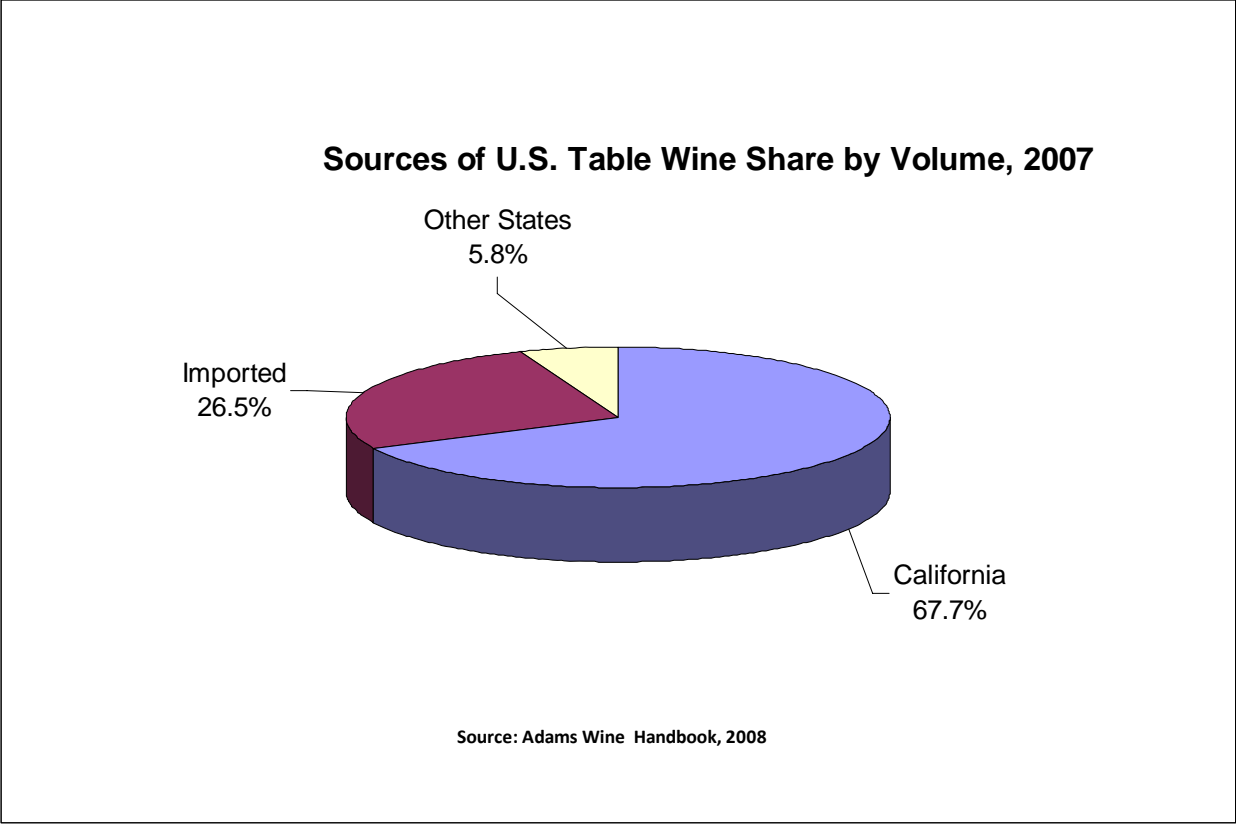


Table 18: Imported Table Wine Market, 2007

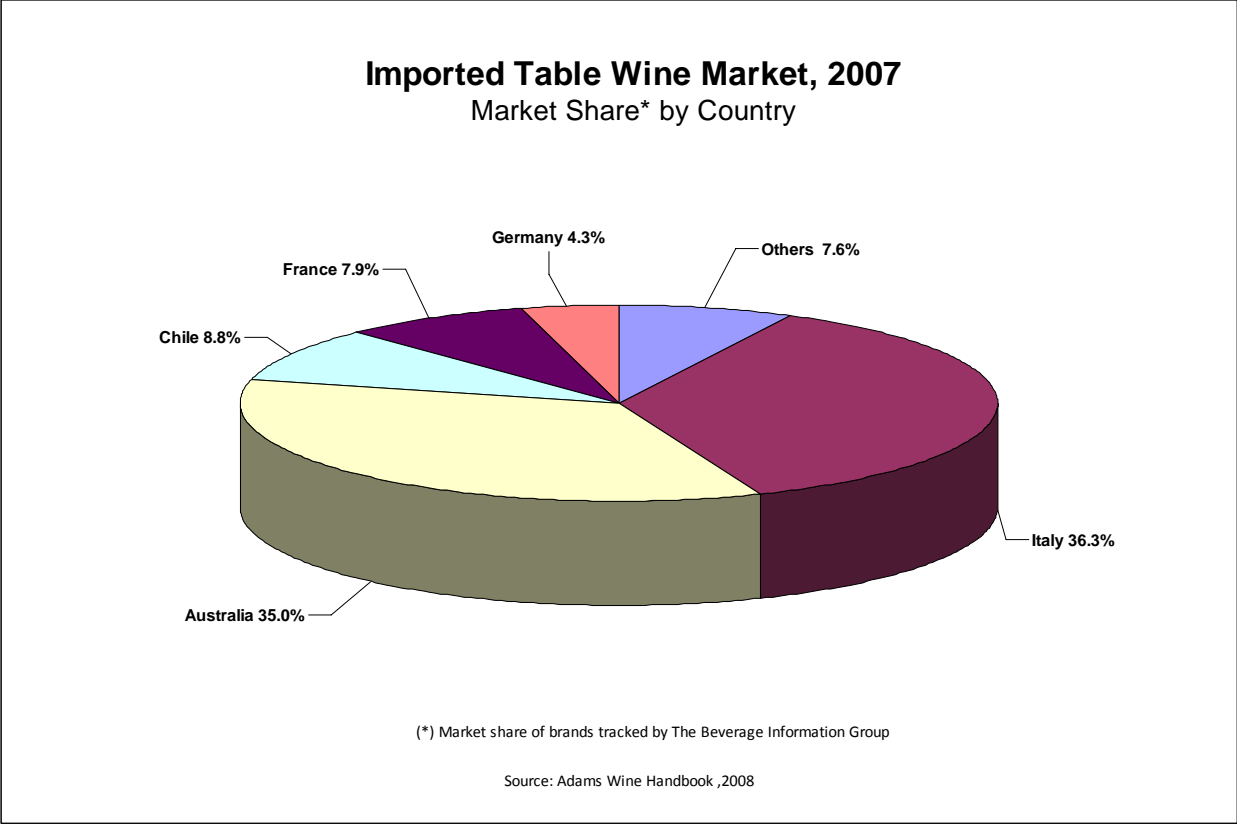


Table 19: Table Wine Share by Retail Trade Channel, 2007

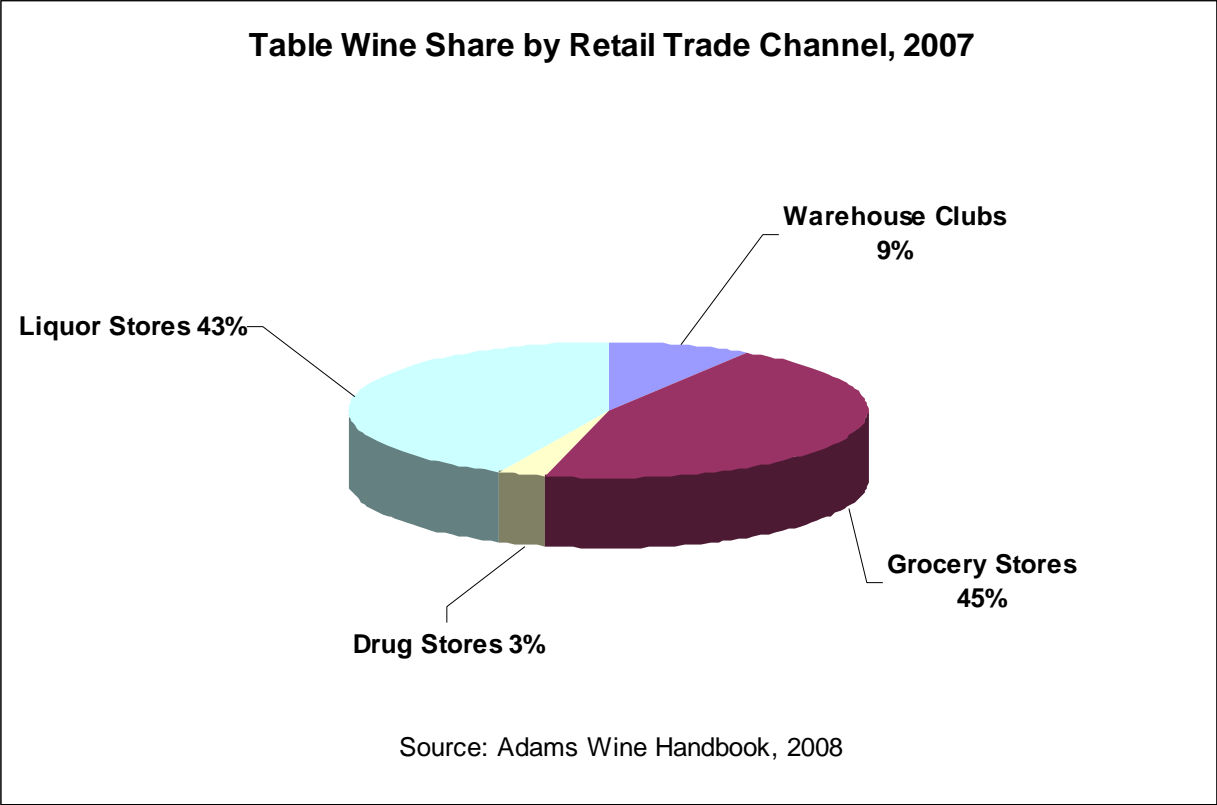


Table 20: Table Wine Share by Retail Price Segment, 2007

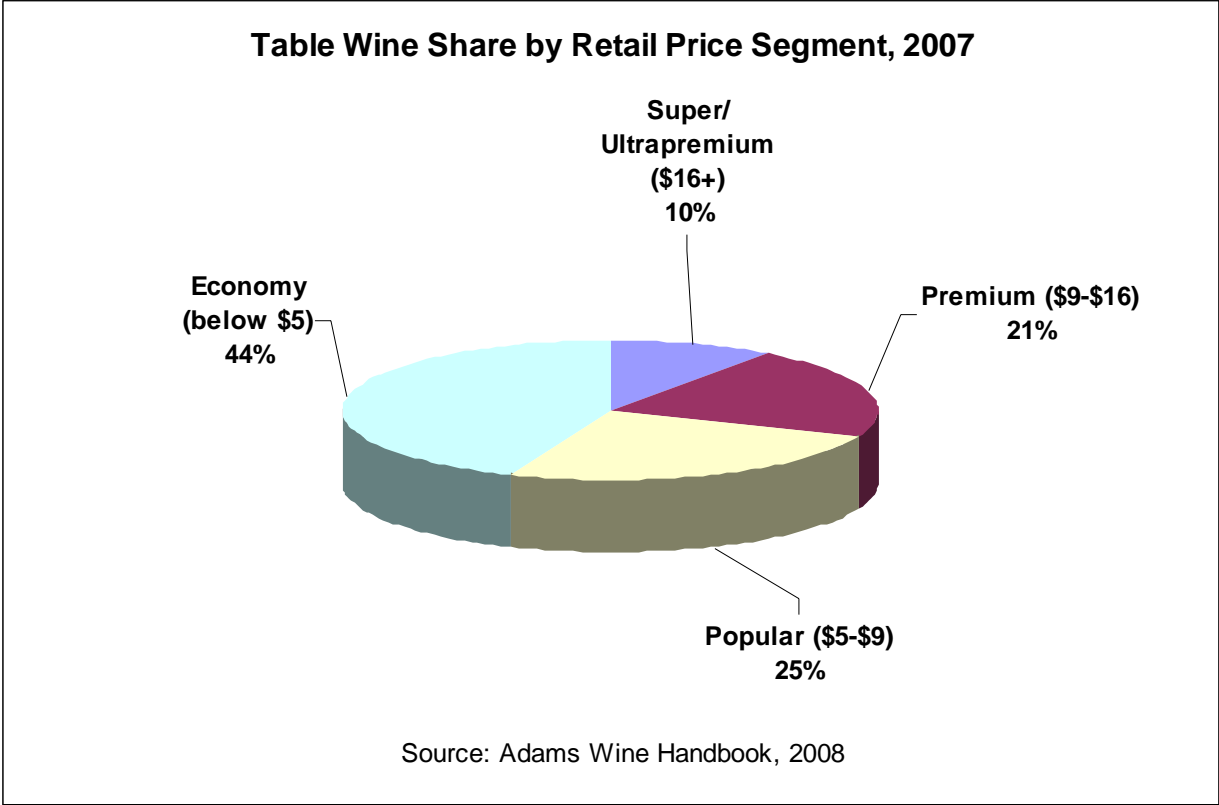


Table 21: U.S. Table Wine Share by Varietal, 2007

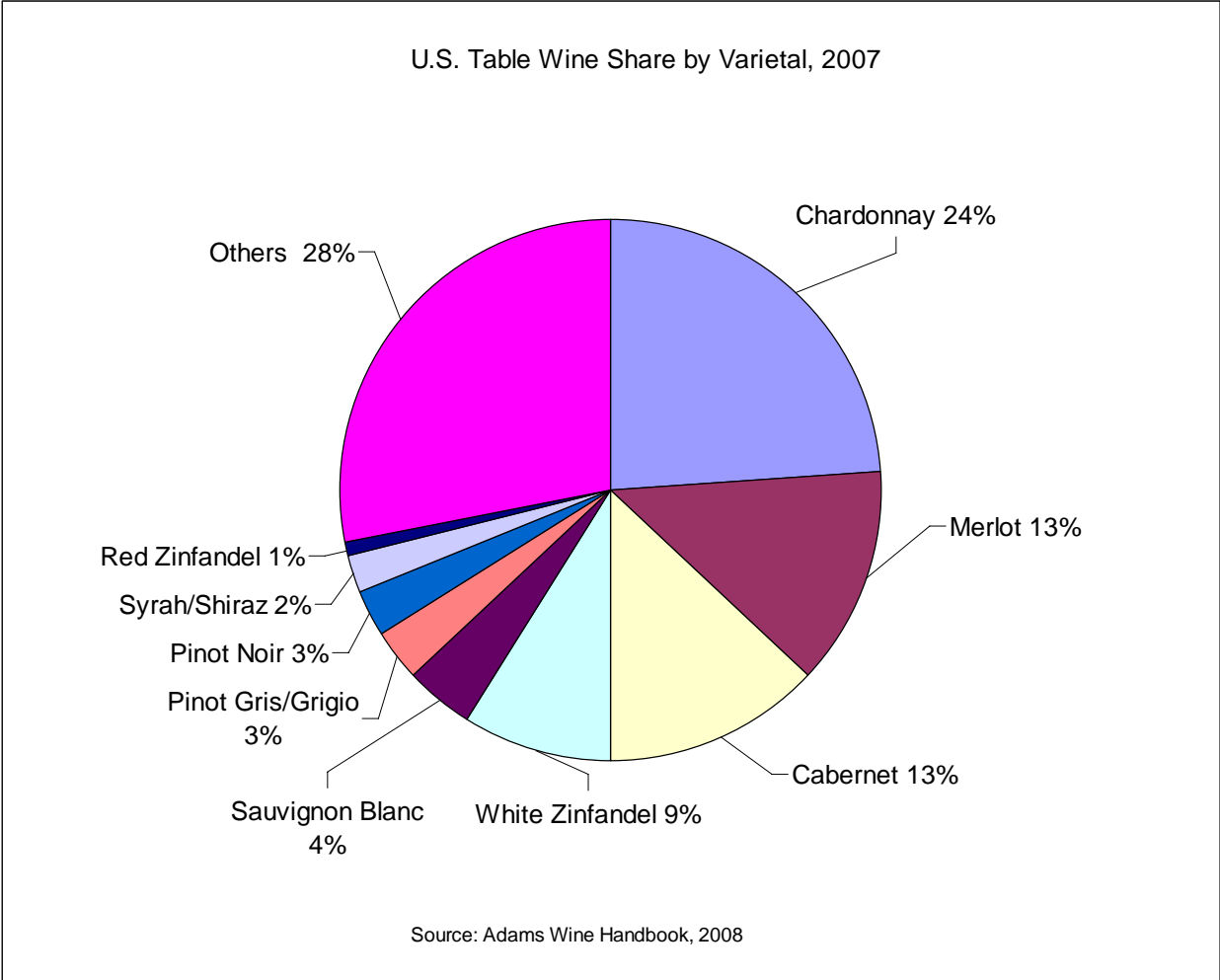
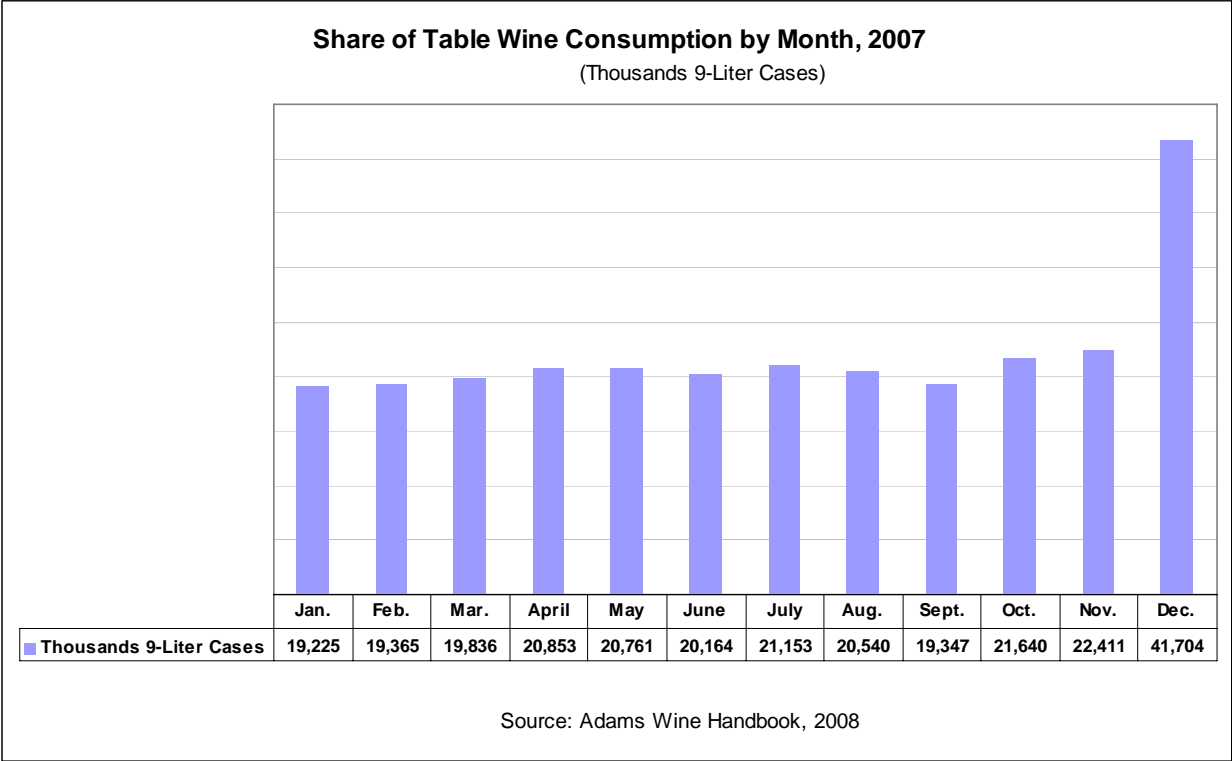


Table 22: Share of Table Wine Consumption by Month, 2007



Section II

Texas Wine Consumption

Table 23: Consumption of Wine by Category in Texas, 2007

**Consumption of Wine by Category in Texas, 2007
(9-Liter Cases)**

Category	Texas	%
Table Wine	12,525,220	90.45
Champagne & Sparkling	791,400	5.72
Dessert & Fortified	457,880	3.30
Vermouth/Aperitif	65,900	0.48
Wine Coolers	6,990	0.05
Total	13,847,390	100%

Source: Adams Wine Handbook, 2008

Table 24: Consumption of Wine by Category in Texas, 2007

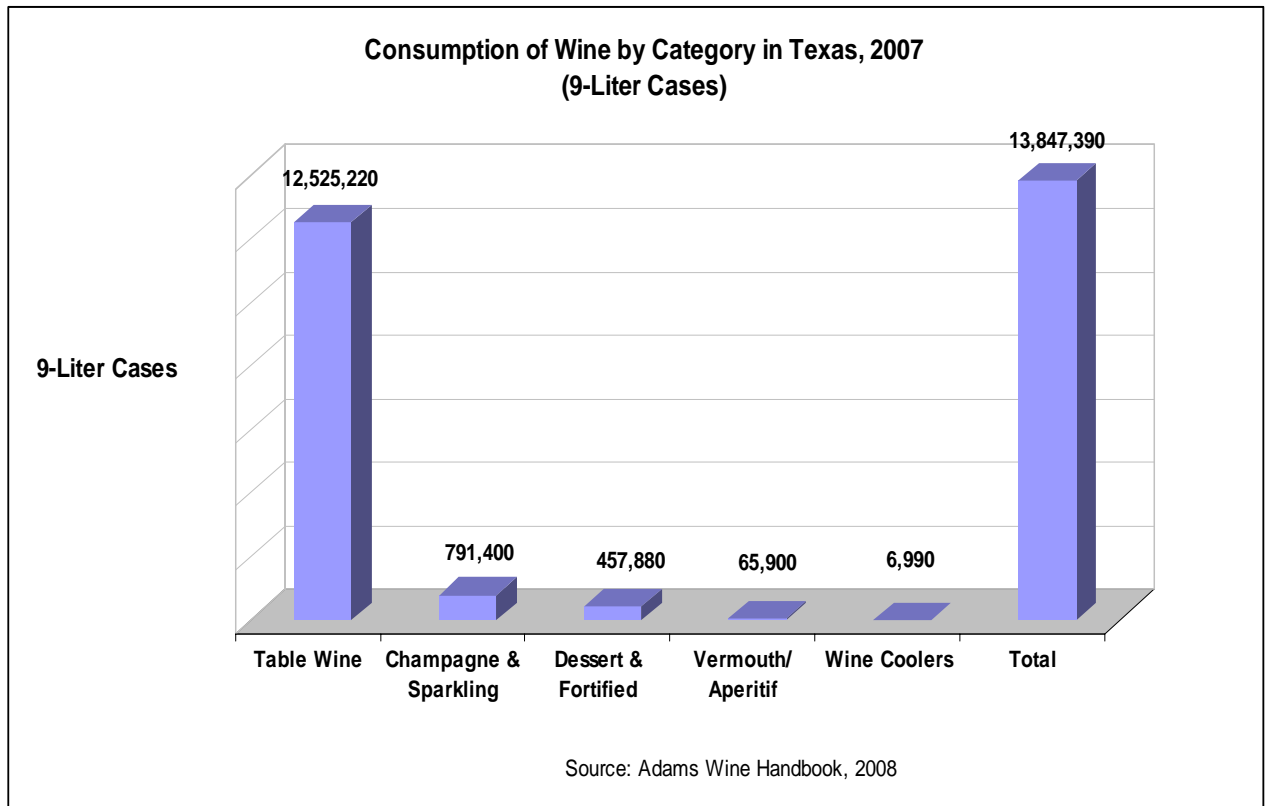


Table 25: Consumption of Domestic and Imported Wine in Texas, 2007

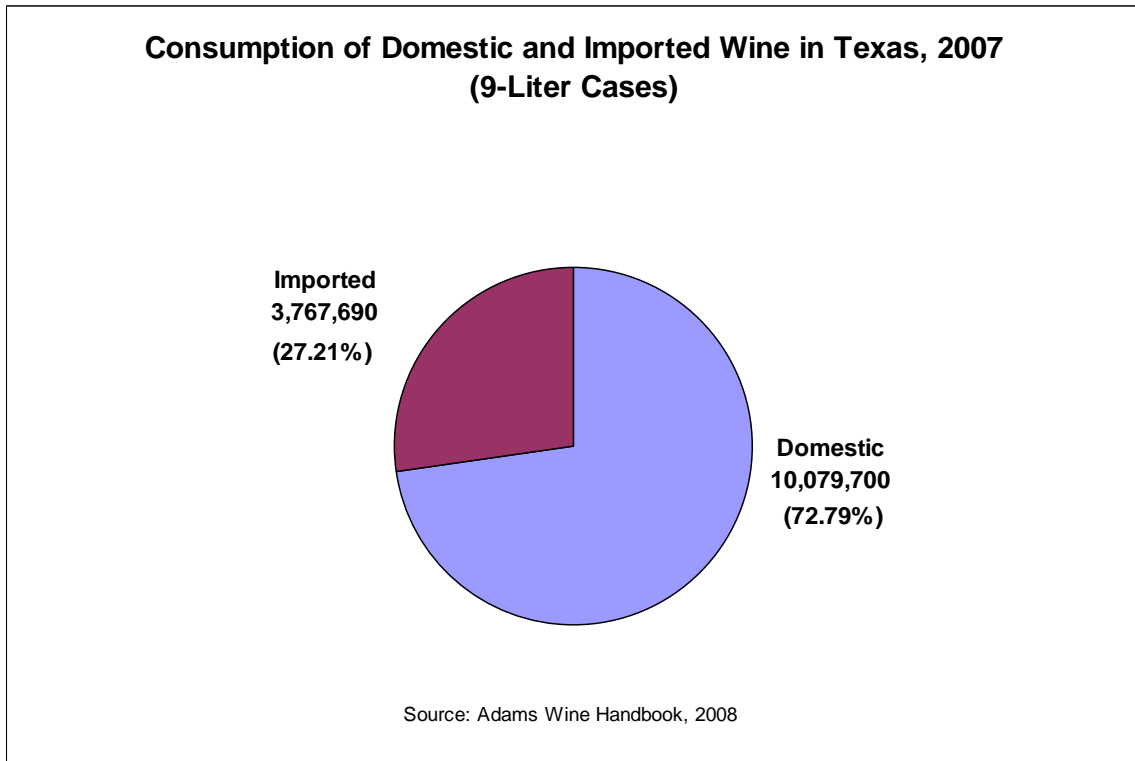


Table 26: Percent Change in Wine Consumption by Category in Texas, 2006 vs. 2007

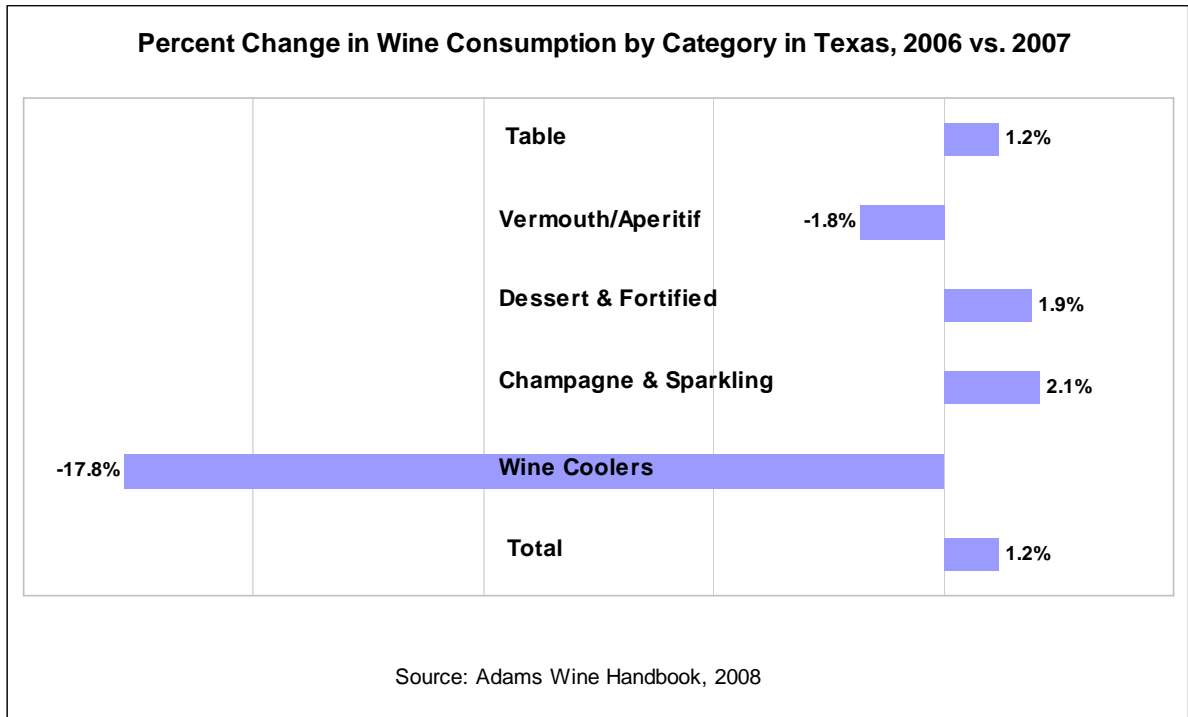


Table 27: Per Capita Consumption of Wine by Category in Texas, 2007

**Per Capita Consumption of Wine by Category in Texas, 2007
(9-Liter Cases per 1,000 Adults)***

Category	9-Liter Cases per 1,000 Adults
Table	814.3
Wine Coolers	0.5
Champagne & Sparkling	51.5
Dessert & Fortified	29.8
Vermouth/Aperitif	4.3
Total	900.3

(*) Population 21 years and older.
Source: Adams Wine Handbook, 2008

Table 28: Per Capita Consumption of Wine by Category in Texas, 2007

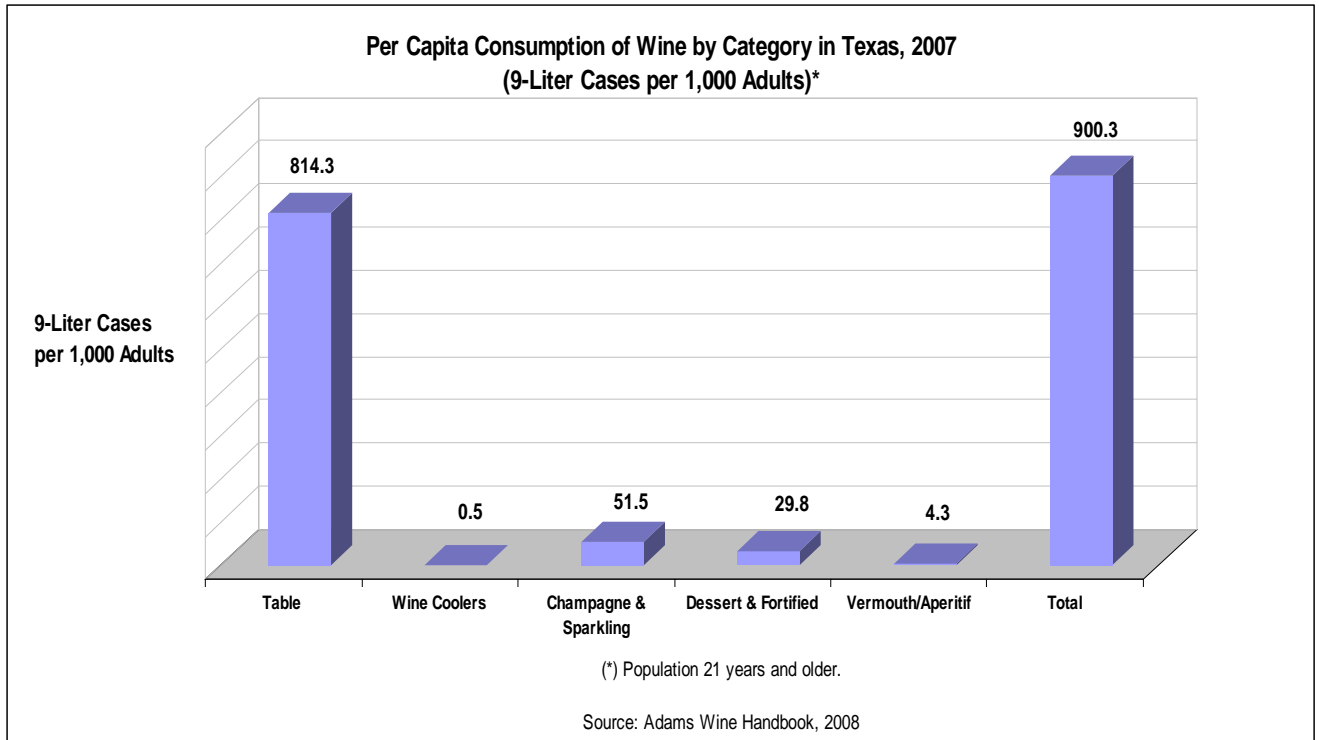


Table 29: Consumption of Total Wine in Texas, 1998-2007

**Consumption of Total Wine in Texas, 1998-2007
(9-Liter Cases)**

year	9-Liter Cases
1998	10,041,700
1999	10,677,500
2000	11,630,800
2001	11,528,000
2002	12,047,300
2003	12,791,300
2004	13,414,400
2005	13,331,100
2006	13,676,740
2007	13,847,390

Source: Adams Wine Handbook, 2008

Table 30: Consumption of Total Wine in Texas, 1998-2007

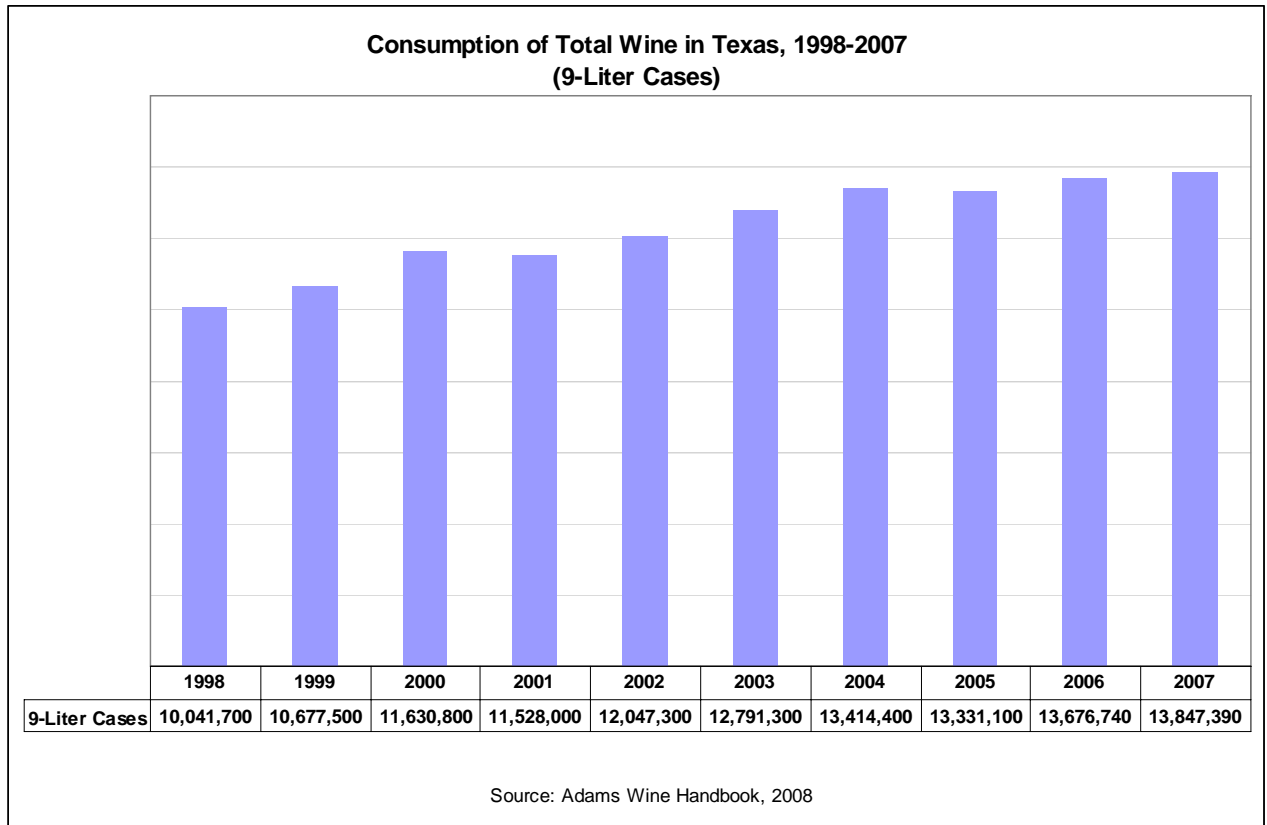


Table 31: Percent Change in Total Wine Consumption in Texas, 2003-2007

