

# United States of America

## Country Profile

July 2009

## 1. AREA UNDER VINES

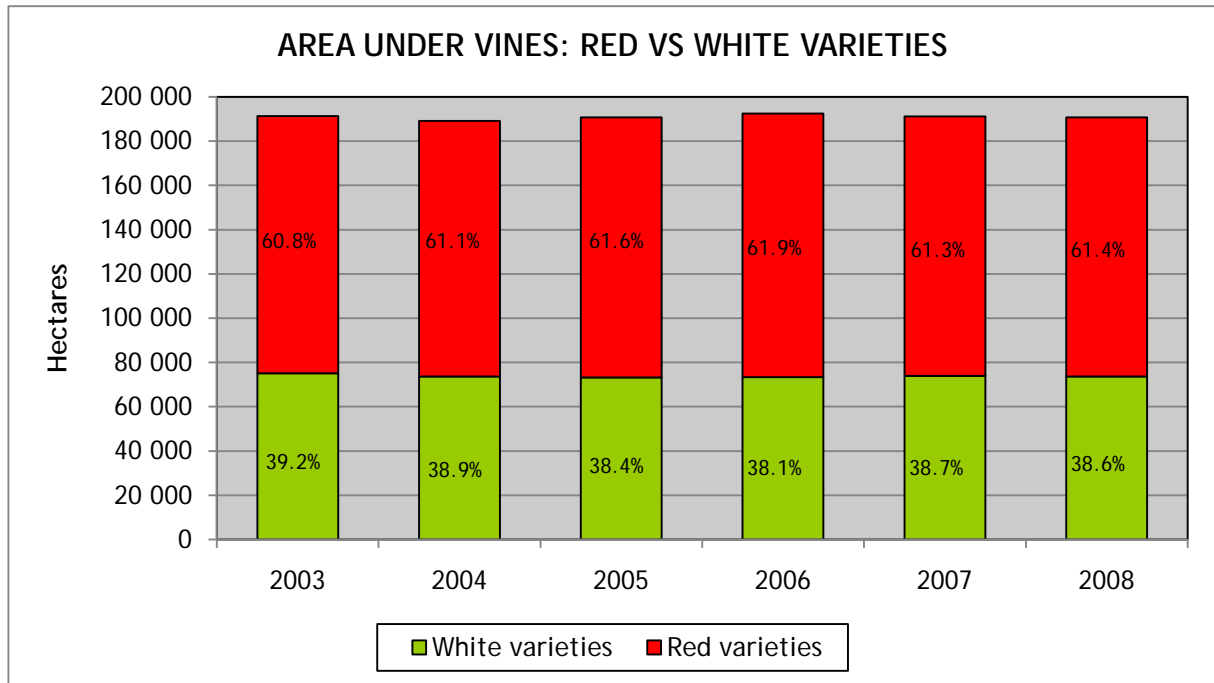
California is the largest wine producing state in the USA, accounting for close to 90% of the total USA wine grape production. Here follows a detailed look at the status of Californian vineyards.

### 1.1 Total area under vines (California)

Year	Area under vines
	Hectares
1996	153 214
1997	164 801
1998	172 915
1999	190 267
2000	185 836
2001	198 279
2002	194 913
2003	191 340
2004	189 109
2005	190 754
2006	192 490
2007	191 114
2008	190 679

*Source: California Grape Acreage Report*

## 1.2 Distribution of wine grape varieties (California)



Variety	2003		2004		2005	
	ha	% of total	ha	% of total	ha	% of total
Chardonnay	39 561	20.7%	39 069	20.7%	38 484	20.2%
Colombard	12 905	6.7%	12 064	6.4%	11 929	6.3%
Sauvignon blanc	6 200	3.2%	6 151	3.3%	6 262	3.3%
Pinot Gris	2 393	1.3%	2 874	1.5%	2 934	1.5%
Chenin blanc	5 433	2.8%	4 611	2.4%	4 331	2.3%
Muscat Alexandria	1 529	0.8%	1 368	0.7%	1 361	0.7%
White Riesling	747	0.4%	804	0.4%	943	0.5%
Viognier	846	0.4%	847	0.4%	898	0.5%
Muscat Blanc	393	0.2%	385	0.2%	547	0.3%
Gewurztraminer	550	0.3%	556	0.3%	563	0.3%
Malvasia Bianca	752	0.4%	729	0.4%	693	0.4%
Burger	608	0.3%	606	0.3%	603	0.3%
Semillon	508	0.3%	464	0.2%	439	0.2%
Symphony	248	0.1%	289	0.2%	369	0.2%
Triplett blanc	n/a		n/a		30	0.0%
Other white	2 403	1.3%	2 758	1.5%	2 828	1.5%
<b>Total white</b>	<b>75 076</b>	<b>39.2%</b>	<b>73 574</b>	<b>38.9%</b>	<b>73 214</b>	<b>38.4%</b>
Cabernet Sauvignon	30 435	15.9%	30 320	16.0%	31 097	16.3%
Zinfandel	20 329	10.6%	20 569	10.9%	20 827	10.9%
Merlot	21 049	11.0%	21 682	11.5%	21 975	11.5%
Pinot Noir	9 700	5.1%	9 742	5.2%	9 899	5.2%
Syrah	6 946	3.6%	7 143	3.8%	7 394	3.9%
Rubired	5 049	2.6%	4 507	2.4%	4 496	2.4%
Petite Sirah	2 092	1.1%	2 213	1.2%	2 468	1.3%
Barbera	3 585	1.9%	3 440	1.8%	3 240	1.7%
Grenache	3 511	1.8%	3 144	1.7%	3 069	1.6%
Ruby Cabernet	3 026	1.6%	2 716	1.4%	2 738	1.4%
Carignane	2 078	1.1%	1 825	1.0%	1 614	0.8%
Cabernet Franc	1 437	0.8%	1 406	0.7%	1 436	0.8%
Sangiovese	1 054	0.6%	897	0.5%	915	0.5%
Petit Verdot	443	0.2%	523	0.3%	598	0.3%
Malbec	431	0.2%	446	0.2%	475	0.2%
Other red	5 099	2.7%	4 962	2.6%	5 299	2.8%
<b>Total red</b>	<b>116 264</b>	<b>60.8%</b>	<b>115 535</b>	<b>61.1%</b>	<b>117 540</b>	<b>61.6%</b>
<b>TOTAL</b>	<b>191 340</b>	<b>100.0%</b>	<b>189 109</b>	<b>100.0%</b>	<b>190 754</b>	<b>100.0%</b>

n/a - not available

Variety	2006		2007		2008	
	ha	% of total	ha	% of total	ha	% of total
Chardonnay	38 513	20.0%	38 184	20.0%	38 358	20.1%
Colombard	11 496	6.0%	11 603	6.1%	10 912	5.7%
Sauvignon blanc	6 292	3.3%	6 224	3.3%	6 154	3.2%
Pinot Gris	3 099	1.6%	3 803	2.0%	4 843	2.5%
Chenin blanc	4 202	2.2%	3 887	2.0%	3 337	1.8%
Muscat Alexandria	1 393	0.7%	1 383	0.7%	1 381	0.7%
White Riesling	1 061	0.6%	1 159	0.6%	1 245	0.7%
Viognier	1 051	0.5%	1 123	0.6%	1 204	0.6%
Muscat Blanc	648	0.3%	686	0.4%	701	0.4%
Gewurztraminer	597	0.3%	633	0.3%	644	0.3%
Malvasia Bianca	574	0.3%	580	0.3%	579	0.3%
Burger	631	0.3%	557	0.3%	505	0.3%
Semillon	439	0.2%	416	0.2%	382	0.2%
Symphony	370	0.2%	364	0.2%	370	0.2%
Triplett blanc	123	0.1%	311	0.2%	311	0.2%
Other white	2 905	1.5%	2 994	1.6%	2 761	1.4%
<b>Total white</b>	<b>73 394</b>	<b>38.1%</b>	<b>73 907</b>	<b>38.7%</b>	<b>73 687</b>	<b>38.6%</b>
Cabernet Sauvignon	31 269	16.2%	30 627	16.0%	30 394	15.9%
Zinfandel	21 206	11.0%	20 918	10.9%	20 390	10.7%
Merlot	21 621	11.2%	20 161	10.5%	19 142	10.0%
Pinot Noir	11 145	5.8%	11 822	6.2%	13 491	7.1%
Syrah	7 604	4.0%	7 593	4.0%	7 644	4.0%
Rubired	4 508	2.3%	4 499	2.4%	4 592	2.4%
Petite Sirah	2 642	1.4%	2 771	1.5%	2 965	1.6%
Barbera	3 097	1.6%	3 039	1.6%	2 902	1.5%
Grenache	2 999	1.6%	2 886	1.5%	2 820	1.5%
Ruby Cabernet	2 795	1.5%	2 588	1.4%	2 502	1.3%
Carignane	1 684	0.9%	1 669	0.9%	1 500	0.8%
Cabernet Franc	1 475	0.8%	1 461	0.8%	1 426	0.7%
Sangiovese	864	0.4%	799	0.4%	768	0.4%
Petit Verdot	653	0.3%	706	0.4%	720	0.4%
Malbec	539	0.3%	562	0.3%	595	0.3%
Other red	4 993	2.6%	5 104	2.7%	5 142	2.7%
<b>Total red</b>	<b>119 096</b>	<b>61.9%</b>	<b>117 207</b>	<b>61.3%</b>	<b>116 992</b>	<b>61.4%</b>
<b>TOTAL</b>	<b>192 490</b>	<b>100.0%</b>	<b>191 114</b>	<b>100.0%</b>	<b>190 679</b>	<b>100.0%</b>

Source: California Grape Acreage Report

## 2. PRODUCTION

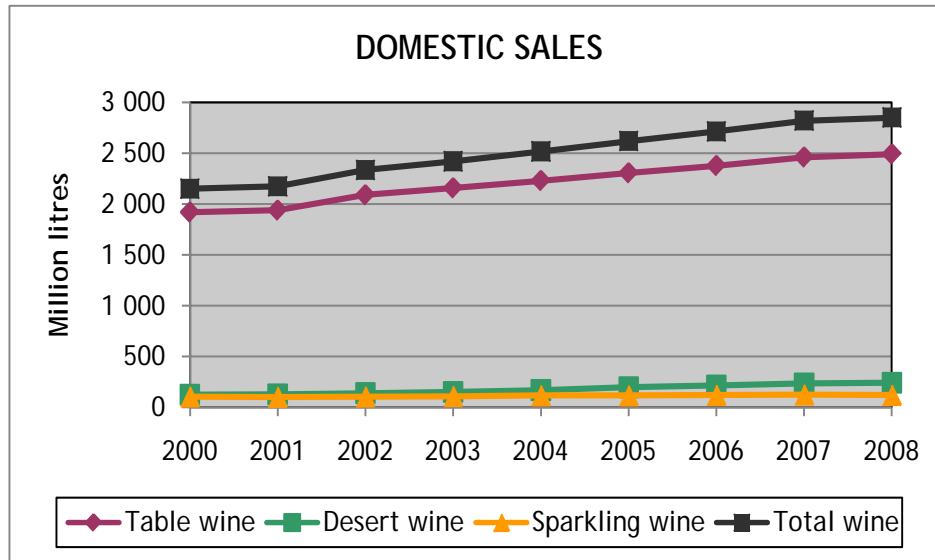
According to the U.S. Treasury's Alcohol and Tobacco Tax and Trade Division, 4 867 wine producers produced a total of 2,4 billion litres of wine in 2006. This is a breakdown of the 2006 wine production: California with 2,1 billion litres (89.3%), New York with 106,8 million litres (4.4%), Washington with 75,9 million litres (3.1%), Oregon with 15.6 million litres (0.6%), Florida with 6,6 million litres (0.3%), New Jersey with 6,3 million litres (0.3%), Kentucky with 4,7 million litres (0.2%), Ohio with 4,2 million litres (0.2%), Virginia with 3,7 million litres (0.2%), and North Carolina with 3,5 million litres (0.1%).

Year	Grapes for winemaking	Wine production	
	California	USA	California
	(tons)	'000 Litres	
1996	2 170 000	1 741 407	1 583 553
1997	2 890 000	2 022 125	1 830 256
1998	2 530 000	1 870 157	1 679 397
1999	2 620 000	1 902 549	1 701 225
2000	3 320 000	2 333 070	2 137 522
2001	3 010 000	2 218 410	1 988 415
2002	3 100 000	2 088 178	1 859 770
2003	2 860 000	2 225 119	1 983 367
2004	2 770 000	2 304 566	2 070 499
2005	3 760 000	2 709 843	2 453 376
2006	3 136 317	2 359 034	2 108 736
2007	3 247 477	2 413 588	2 142 127
2008	3 061 421	2 345 507	2 066 063

Source: [www.wineinstitute.org](http://www.wineinstitute.org)

### 3. DOMESTIC SALES

The U.S. Department of Commerce estimates that 61% of all wines sold in the USA in 2007 were produced in California; 26% were imported wines and 13% were produced in other USA states. According to 2007 supermarket data from AC Nielsen, red wines accounted for 43% of retail wine sales, white wines for 42%, and rosé for 15%.



Year	Table wine <sup>1</sup>	Dessert wine <sup>2</sup>	Sparkling wine	Total wine	Retail value
	Million litres				USA\$ billion
1996	1 662	117	110	1 893	14.3
1997	1 745	110	110	1 964	16.1
1998	1 764	117	110	1 991	17.0
1999	1 798	117	140	2 055	18.1
2000	1 919	125	106	2 150	19.2
2001	1 938	129	102	2 173	20.3
2002	2 089	140	106	2 335	21.8
2003	2 157	151	110	2 419	22.3
2004	2 229	170	117	2 517	24.0
2005	2 305	197	117	2 619	25.8
2006	2 377	216	121	2 714	27.8
2007	2 460	235	125	2 820	30.0
2008	2 491	242	121	2 850	30.0

<sup>1</sup> Includes all still wines not over 14 per cent alcohol; excludes Canadian coolers.

<sup>2</sup> Includes all still wines over 14 per cent alcohol and sake

Source: <http://www.wineinstitute.org>

## 4. CONSUMPTION

In the USA, wine consumption tends to be concentrated in its strongholds of California and New York State, with the remainder of the country inclined to regard wine as a drink for special occasions.

### 4.1 Per capita consumption

USA per capita consumption of wine is among the lowest of all the beverage groups. In 2004, wine consumption per person was approximately 9.80 litres, a 3% increase from 2003.

Year	Wine	Beer	Spirits	Total alcohol
	Litres		LAA	
1993	6.60	85.5	2.00	6.7
1994	6.70	85.2	1.95	6.7
1995	6.70	83.7	1.87	6.5
1996	7.15	83.5	1.89	6.6
1997	7.34	83.3	1.87	6.6
1998	7.50	83.7	1.86	6.6
1999	8.60	84.4	1.90	6.8
2000	8.60	84.1	1.95	6.8
2001	8.80	83.2	1.92	6.8
2002	8.80	82.0	1.92	6.7
2003	9.50	81.6	1.94	6.8
2004	9.80	81.2	1.90	6.3

Source: *World Drink Trends 2005*  
*The Global Wine Statistical Compendium 1961-2004*

**Please Note:** Due to the Copyright and Licence Agreement between SAWIS and Euromonitor, access to the following Euromonitor statistics will only be available by emailing Lizelle Arendse, Information Officer at SAWIS ([lizelle@sawis.co.za](mailto:lizelle@sawis.co.za)). Only South African Wine Industry role-players will gain access to these statistics. These statistics will be available in electronic - and hard copy.

## **5. CONSUMER EXPENDITURE ON ALCOHOLIC DRINKS**

### **6. ALCOHOLIC DRINKS**

#### **6.1 Sales of alcoholic drinks by sector - Total volume**

#### **6.2 Sales of alcoholic drinks by sector - Total value**

#### **6.3 Forecast sales of alcoholic drinks by sector - Total volume**

#### **6.4 Forecast sales of alcoholic drinks by sector - Total value**

### **7. SALES OF WINE BY SUBSECTOR**

#### **7.1 Total volume**

#### **7.2 Total value**

### **8. FORECASTS OF WINE BY SUBSECTOR**

#### **8.1 Total volume**

#### **8.2 Total value**

### **9. SALES OF WINE BY PRICE SEGMENT**

#### **9.1 Red wine**

#### **9.2 White wine**

#### **9.3 Rosé wine**

### **10. SALES OF WINE BY GRAPE/VARIETAL TYPE**

#### **10.1 Red wine**

#### **10.2 White wine**

## **11. DISTRIBUTION**

**11.1 On-trade vs Off-trade sales of wine - Total value**

**11.2 On-trade vs Off-trade sales of wine - Total value**

**11.3 Off-trade sales of wine by distribution format: % analysis**

## 12. INTERNATIONAL TRADE

### 12.1 Total wine exports

The European Union has been a major export market for the USA, but in 2007 it accounted for only 47% (in value terms) of total USA wine exports, compared to 70% in 2002. On the other hand, exports to Australia, Argentina, Canada, Chile, New Zealand and South Africa accounted for 24% (in value terms), compared to 16% in 2002.

Year	Volume	Value
	Million litres	USA\$ million
1997	227.3	425
1998	272.0	537
1999	290.6	560
2000	294.2	547
2001	303.9	541
2002	282.1	549
2003	349.2	621
2004	461.3	809
2005	388.2	674
2006	404.5	876
2007	453.2	951
2008	490.9	1 008

Source: <http://www.wineinstitute.org>

## 12.2 Wine exports by destination

Countries	2004	2005	2006	2007
	'000 Litres			
Australia	3 833	2 279	1 507	2 998
Belgium	11 809	8 904	5 520	3 667
Canada	67 352	74 076	74 187	80 482
China	2 396	2 419	3 474	5 694
Denmark	9 579	10 408	8 019	6 845
France	13 058	6 221	5 260	6 546
Finland	2 355	2 345	2 082	2 202
Germany	27 693	24 736	23 741	35 140
Hong Kong	1 611	2 171	3 162	3 867
Italy	14 433	52 232	54 195	53 134
Ireland	7 663	3 455	2 810	2 163
Japan	72 039	40 868	28 279	29 156
Mexico	9 155	9 814	9 692	13 334
Netherlands	33 328	17 654	15 875	9 048
Norway	1 226	480	645	644
Russia	788	718	881	1 952
Singapore	3 884	1 483	2 765	3 375
Switzerland	7 617	6 509	5 467	8 546
South Korea	3 595	4 476	4 883	6 792
Sweden	1 950	8 593	5 924	3 298
Taiwan	2 600	4 343	3 489	2 893
Thailand	461	567	657	1 237
UK	143 257	82 576	121 139	134 935

Source: <http://www.wineinstitute.org>

### 12.3 Total wine imports

In 2007, wine imports from the top five countries accounted for almost 87% of the total value of wines imported into the USA: France supplied 31%, Italy supplied 28%, Australia supplied 17%, Spain supplied 5.8%, and Chile 4.5%.

Year	Quantity (litres)
1997	421 200 000
1998	415 300 000
1999	428 600 000
2000	440 166 000
2001	468 800 000
2002	546 000 000
2003	608 200 000
2004	641 500 000
2005	705 200 000
2006	816 878 000
2007	876 503 000

Source: OIV

<http://www.wineinstitute.org>

## 12.4 Wine imports by country of origin

Countries	2004	2005	2006	2007
	'000 Litres			
Australia	182 386	202 187	216 009	204 132
Argentina	22 156	28 094	39 554	65 750
Chile	54 193	57 017	54 066	61 040
France	97 033	100 939	125 497	129 867
Germany	19 140	24 531	27 791	30 961
Italy	204 387	222 534	237 977	258 021
New Zealand	8 524	14 586	14 773	19 656
Portugal	9 494	10 309	10 535	11 507
South Africa	7 169	9 226	10 330	10 790
Spain	35 829	41 862	45 670	50 487

Source: <http://www.wineinstitute.org>

### 13. PRICES OF SELECTED GRAPE VARIETIES IN CALIFORNIA

	Grape prices						
	2002	2003	2004	2005	2006	2007	2008
<b>Red varieties</b>	<b>Average \$/ton</b>						
Barbera	203	205	258	257	247	239	269
Cabernet Franc	1 696	1 459	1 169	1 180	1 272	1 362	1 421
Cabernet Sauvignon	1 026	1 013	978	937	955	989	1 112
Carignane	179	204	293	329	313	299	377
Grenache	152	195	232	251	232	245	291
Merlot	859	796	799	729	664	592	649
Mission	162	168	179	180	180	181	183
Petit Verdot	1 468	1 331	1 173	1 187	1 193	1 215	1 319
Petit Sirah	975	917	934	901	964	882	939
Pinot Noir	1 779	1 615	1 620	1 751	2 028	2 094	1 961
Rubired	170	157	210	221	205	218	253
Ruby Cabernet	236	236	248	256	236	234	259
Shiraz	674	601	667	670	679	660	704
Tempranillo	290	389	528	528	562	497	411
Zinfandel	476	427	473	473	510	467	463
<b>White varieties</b>							
Burger	153	172	178	175	177	176	179
Chardonnay	683	664	694	714	753	718	817
Colombard	115	131	201	220	190	185	233
Chenin Blanc	158	168	234	249	221	224	268
Gewurztraminer	986	906	878	859	953	862	880
Malvasia Bianca	237	264	330	336	323	301	416
Muscat blanc	332	432	627	649	589	612	597
Muscat of Alexandria	146	183	319	277	266	241	297
Pinot Gris	770	663	596	568	600	588	577
Sauvignon Blanc	816	754	692	705	722	688	774
Semillon	591	584	574	556	546	503	632
Symphony	246	277	345	345	338	318	359
Triplett blanc	n/a	n/a	n/a	200	175	174	230
Viognier	867	751	699	768	841	762	834
White Riesling	879	808	927	965	1 014	971	960

*n/a - not available*

*Source: California Grape Crush Report*

## **14. TAXATION**

### **14.1 State excise taxes**

For a complete list of excise tax rates by state visit:

[http://www.taxadmin.org/fta/rate/tax\\_stru.html](http://www.taxadmin.org/fta/rate/tax_stru.html)

### **14.2 Other taxation**

A sales tax is applicable on alcoholic beverages in every state over and above federal, state and/or local excise tax.