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Study finds Brunello draws more young adult buyers than wine overall in the United States and Italy

In the United States, 53% of Brunello consumers are 25 to 44, compared with 38% for red wine overall; in Italy, 35% are 29 to 44, against 21% for wine consumers overall

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Young adult consumers account for a larger share of Brunello di Montalcino buyers in the United States and Italy than they do of wine consumers overall, according to a consumer analysis presented during the Benvenuto Brunello event in Montalcino.

The study was prepared by the Unione italiana vini observatory for the Consorzio del vino Brunello di Montalcino. It examined Brunello's two main markets, the United States and Italy, which together account for 60% of global spending on the Tuscan red. The report said Brunello represents only 0.25% of Italian wine production by volume, but carries much greater weight in reputation and value, especially in the ultra-premium and luxury segments.

That makes the findings relevant beyond a single denomination. For the broader drinks business, they suggest premium red wine may still have room to attract younger adult buyers in two markets that are central to high-end wine spending, even as producers across the sector look for ways to bring new consumers into the category.

According to the analysis, the United States has about 7.8 million Brunello consumers and Italy has about 4.1 million. In both countries, the audience is younger than the general wine-drinking public and younger than the broader market for red wine.

In the United States, 53% of Brunello consumers are between 25 and 44 years old, compared with 38% of the overall audience for red wines, the report said. In Italy, consumers between 29 and 44 years old account for 35% of Brunello buyers, equal to about 1.4 million people. That compares with 21% for wine consumers overall.

The report also found a different gender profile in the two countries. In the United States, men make up 62% of Brunello's audience. In Italy, women show higher levels of awareness and stronger conversion to purchase. Among Italian women under 34 who know Brunello, 47% go on to buy it, more than double the 22% recorded for men in the same age group.

Awareness and purchasing patterns also differ sharply between the two markets. In the United States, about 17.3 million people know Brunello, equal to 20% of wine consumers, according to the study. That level of awareness remains well below Bordeaux and Burgundy, which the report said are known by nearly 50% of U.S. wine

consumers. But Brunello converts awareness into purchase in 46% of cases, compared with roughly 20% for those two French competitors.

In Italy, awareness is much broader. About two-thirds of respondents said they know Brunello. But only one in five people familiar with the wine actually buys it, the report said, pointing to what it described as substantial room to turn recognition into consumption.

Giacomo Bartolommei, president of the Brunello consortium, said the data point to two different priorities for the denomination: expanding awareness in the United States and encouraging purchase in Italy, while using Brunello's appeal among young adults in both countries. He said the consortium's 2027 promotion plans include a Benvenuto Brunello stop in New York in February and additional promotion at U.S. trade fairs. In Italy, he said, the group will increase activity in cities it considers strategic.

The analysis cited multiple sources, including IWSR, NielsenIQ, SipSource-WSTA and the U.S. Census.

Benvenuto Brunello, held in Montalcino from November 19 to Monday, November 23, brought together 116 producers for tastings of Brunello 2022, Brunello Riserva 2021 and Rosso di Montalcino 2025. The opening sessions on November 19 and 20 were reserved for Italian and international media and selected trade operators. In the following days, the tasting tables also opened with producers present and with access for wine enthusiasts. On November 25, the event will move to London for its U.K. edition for media and trade professionals.