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Vino Nobile di Montepulciano U.S. Sales Surge 4.8% as Italian Wine Imports Drop 6.2%

Younger consumers and premium buyers drive growth, with organic bottles now making up over half of international sales.

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The Vino Nobile di Montepulciano is showing strong growth in the United States, standing out from other Italian wine denominations that are experiencing declines. According to the latest data from the Unione Italiana Vini (UIV) Observatory, presented

on October 21 in Montepulciano, the U.S. now accounts for 35% of the wine's total exports, making it the second most important market for this Tuscan red.

Between January and August 2025, Vino Nobile di Montepulciano recorded a 4.8% increase in volume and a 4.2% rise in value in the U.S. market. This is in sharp contrast to the overall performance of Italian wine in the U.S., which saw a 6.2% drop in volume and a 5% decrease in value over the same period. The off-premise channel, which includes retail and grocery sales, was particularly strong for Vino Nobile di Montepulciano, with volumes up 15.9% and value up 16.8%. While on-premise sales (restaurants and bars) saw a slight decline, there was growth in higher price segments, indicating continued interest from premium consumers.

The UIV Observatory's analysis, based on Sipsource data tracking wine shipments from American distributors, also highlights a shift in consumer demographics. The 21-39 age group now represents 44% of Vino Nobile di Montepulciano's U.S. sales volume, a 12% increase from the previous year. Households with annual incomes between $75,000 and $124,999 make up the largest segment of buyers, accounting for 57% of volume and showing a 4.5% increase.

Sales channels are also evolving. The wine's presence in grocery stores and liquor shops has grown, strengthening its position in both mainstream and specialized retail. Direct sales at wineries in Italy have also increased, now surpassing 35% of total sales in 2024. In the domestic Italian market, most sales are concentrated in central Italy (62%), especially Tuscany (42%), with northern Italy accounting for 33% and the south for just over 5%.

Internationally, Vino Nobile di Montepulciano's export market is split almost evenly between Europe (excluding Italy) at 29.2% and the Americas at 35%. The U.S. remains the largest non-European market, with exports to the country rising compared to 2023.

Organic Vino Nobile di Montepulciano is another area of growth. In Italy, organic-labeled bottles account for nearly 45% of sales, while internationally, they represent more than half of all sales. This reflects a broader trend among consumers seeking sustainable and certified products.

The Consorzio del Vino Nobile di Montepulciano has invested heavily in promoting the wine in the U.S., using funds from the European Union’s OCM program to support marketing campaigns and events. These efforts have helped the wine reach new audiences, including younger and more cosmopolitan consumers.

Andrea Rossi, president of the Consorzio, said that these results confirm the strength and quality of Vino Nobile di Montepulciano and its ability to appeal to both younger drinkers and those with higher spending power. He emphasized that continued investment in promotion and new market strategies is essential to meet global challenges and ensure long-term growth.

Lamberto Frescobaldi, president of Unione Italiana Vini, noted that despite increasing competition and market difficulties, Vino Nobile di Montepulciano has improved its communication and market positioning over the years. He said that the positive results in the U.S. show that there is still room for success with Italian red wines in key markets.

Looking ahead, there are concerns about potential tariffs that could impact future sales in the U.S., but for now, Vino Nobile di Montepulciano is bucking the trend and reinforcing its reputation as one of Italy’s leading wine exports. The data from the UIV Observatory suggest that targeted investments and a focus on quality and innovation are paying off for this historic Tuscan denomination.