vinetur

U.S. Wine Sales Set to Drop for Fifth Straight Year as Table Wines Plunge Up to 11.5%

Premium and sparkling wines outperform lower-priced brands, but overall market faces historic decline amid shifting consumer preferences.

Tuesday, December 16, 2025



The U.S. wine market is facing another difficult year, with sales volumes expected to decline for the fifth year in a row. Data from IRI/Circana and Impact Databank show that, for the year-to-date period ending November 30, 2025, overall wine sales in retail channels have continued to fall. Imports, despite a 3.8% drop in volume, have

performed better than American wines, which saw a 6.2% decrease. This comes even as higher tariffs have made imported wines more expensive.

The market's sluggishness is most apparent in traditional table wines, which continue to lose ground across all major categories. According to the Wine & Spirits Wholesalers of America's SipSource data tracker, white, red, and pink table wines declined by 6.6%, 10%, and 11.5% respectively over the past year. The wholesale sector reports ongoing pressure on these products as consumers shift their preferences.

Growth in the wine sector is now coming from smaller categories such as wine-based cocktails, sake and plum wines, and de-alcoholized brands. These segments remain small but are showing positive momentum compared to the broader market.

Among the top-selling still wine brands in retail channels, only three—Josh Cellars from Deutsch Family Wine & Spirits, Decoy by Duckhorn, and Kim Crawford from Constellation—posted gains in both volume and dollar value. All three are priced above the average table wine price of $8.46 per 750-ml bottle at retail. Josh Cellars is projected to become the largest-selling wine brand in the U.S. by dollar value by the end of this year, surpassing Barefoot.

Sparkling wines have fared better than still wines during this period. Of the 15 largest-selling sparkling wine brands at retail, five saw increases in both volume and dollar terms. These include Veuve Clicquot Champagne, California's Chandon, and three Prosecco brands: La Marca, Mionetto, and Josh. All are priced above the average sparkling wine price of $13.14 per 750-ml bottle at retail. Gallo's La Marca Prosecco stands out as the top-selling imported wine by dollar value in the U.S.

Champagne has shown signs of recovery after previous declines. Over the last 12 months, Champagne gained 2.7% in volume and 1.2% in revenue according to depletion data from WSWA.

Despite these bright spots among imports and sparkling wines, the overall picture remains challenging for the industry. Inflationary pressures, an uncertain economy, and higher tariffs continue to weigh on both producers and consumers. By year-end, total wine volume is expected to fall below that of spirits for the first time in more than four

decades.

The top ten wine brands in the U.S., led by Barefoot and Josh Cellars, collectively saw a 1.8% decline in retail value year-to-date through November 30. Most of these leading brands posted negative growth except for Josh Cellars and La Marca Prosecco.

Industry analysts say that while premium brands and sparkling wines are outperforming lower-priced table wines, it remains unclear when or if overall market growth will return. For now, producers are focusing on innovation within smaller categories and premium offerings as they navigate a changing landscape shaped by shifting consumer tastes and economic headwinds.