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Imported Wines Outsell U.S. Brands Despite New Tariffs in 2025 Market Shift

NielsenIQ data shows imported wines outperform American counterparts in both sales and price resilience as tariffs fail to boost domestic demand.

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Recent data from NielsenIQ has revealed an unexpected trend in the U.S. wine market for 2025. Despite the introduction of new tariffs on imported wines, these products have performed better than American wines in terms of both consumption and price increases. The findings were discussed by Paolo Battegazzore, CEO of Vinattieri 1385, a direct importer of Marchesi Antinori wines to the U.S., during a recent wine market forum organized by the Chiasso-Cotarella Enological Consulting Society at the Accademia Intrecci in Castiglione in Teverina.

The tariffs, first imposed at 10% in April 2025 and later raised to 15% in August before being declared unconstitutional by the U.S. Supreme Court in February and then reinstated at 10% until July 24, 2026, were expected to give domestic wines a competitive edge. However, Battegazzore explained that the actual impact on European wine prices was minimal, with only a 1% increase observed. This suggests that importers and distributors largely absorbed the cost of tariffs rather than passing them on to consumers.

NielsenIQ’s analysis shows that price increases for imported wines matched those of domestic wines. American wine prices rose by $0.0012 per unit, while European wines increased by $0.0008. Both categories faced similar pressures from rising costs for packaging materials and logistics.

In terms of volume, imported wines outperformed their domestic counterparts. Household consumption of American wine dropped by 5.6%, while imported wine saw a smaller decline of 3.1%. In restaurants and bars, known as the on-premise sector, American wine volumes fell by 5.1%, compared to a 2.5% decrease for imports. Price increases were also similar: American wines rose by $1.45 per bottle on-premise, while imported wines increased by $1.50.

Italy remains one of the strongest performers among wine-exporting countries to the U.S., despite a decline in value and volume in 2025. Italian wine exports closed the year at €1.75 billion, down 9.1% from 2024, with volumes at 339.5 million liters, a decrease of 6.2%. These figures are less severe than those seen by other countries.

The broader context for these trends is a general decline in wine consumption across the United States. Total volumes are down by 7%. White wines, especially Pinot Grigio and Sauvignon Blanc, have shown growth compared to red wines, which fell by 10%, and rosé, which is losing market share to Pinot Bianco. Prosecco continues to grow with a 3% increase, while Champagne also sees modest gains.

NielsenIQ's research also highlights a shift in consumer preferences away from wine toward other beverages such as beer and spirits. Higher-priced wines are performing better than lower-priced options, but overall demand is shrinking.

Another indicator of market contraction is the sharp drop in "Hot Prospects"—wineries selling between 50,000 and 200,000 cases annually with at least 15% growth year-over-year for several years. In 2015 there were 49 such companies (29 American and 20 foreign), but by 2025 this number had fallen to just 28 (17 American and 11 foreign), marking a significant reduction over ten years.

Consumer awareness of tariffs is high: 71% of Americans surveyed know about tariffs on imported goods, not just wine; 81% expect these measures to affect prices; and 43% oppose tariffs altogether.

Battegazzore cautioned that wine consumers are particularly sensitive to price changes and show little brand loyalty, making it easy for them to switch between products if prices rise too much. He warned that every price increase carries consequences unless producers have enough leverage or brand strength to justify higher prices.

The current situation underscores the complexity of using tariffs as an economic tool in the wine industry. While intended to protect domestic producers, they have not delivered clear benefits for American wineries so far and have not significantly hindered imports either. The full effects of tariff changes implemented in late 2025 will become clearer after data from the first quarter of this year is analyzed.