THE Gomberg Fredrikson REPORT est.1948
THE EXECUTIVE MARKETING REPORT OF THE WINE INDUSTRY

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Report for the month of
November 2024

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Temporary Changes to the GFA Report

In January 2023, new legislation took effect in CA to allow wineries to opt out of making their winegrower return information public. In September 2023, February, and February, data were released by the BOE, which indicated that few wineries were opting out. The BOE had issues with processing the data, so they did not release data for March through October 2023 until mid-January 2024. When this information was released, roughly half of the wineries opted out of having their information made publicly available. This has made the traditional report difficult to produce. Gomberg & Fredrikson is working with individual wineries to obtain the missing data. In the meantime the report has been modified to add additional information but to not report on individual winery trends. We will keep subscribers updated on our efforts.

Wine Shipments Summary - Eleven Months Ended November

(In Millions of Nine Liter Cases)

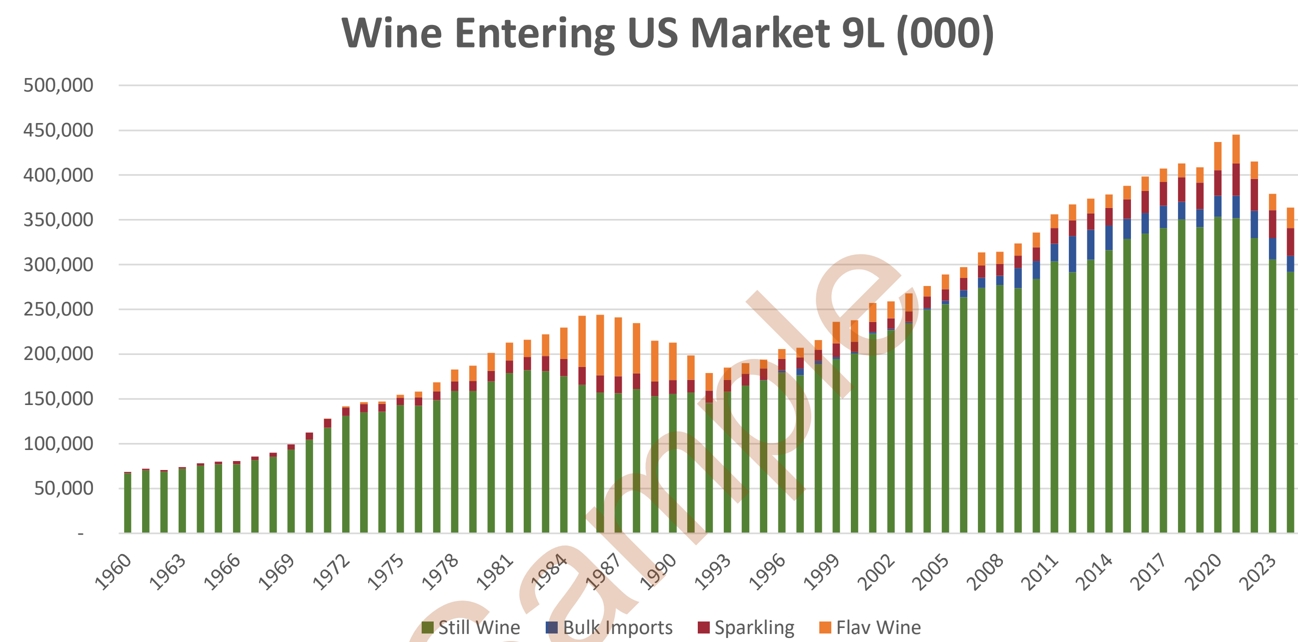
			Change from 2023	
	2023	2024	Cases	%
California Wine Only - Global Shipments				
Wines Not Over 14% Alcohol	169.5	167.9	-1.6	-1%
Wines Over 14% Alcohol	21.3	22.2	+0.9	+4%
Sparkling Wines	9.6	11.5	+1.9	+20%
Total California Wine Shipments	**200.4**	**201.7**	**+1.2**	**+1%**
Bulk Imports Shipped By CA Wineries	21.4	12.6	-8.9	-41%
Total Shipments by California Wineries	221.8	214.2	-7.6	-3%
Total Shipments into US Markets				
CA Still Wines	173.6	169.4	-4.2	-2%
CA Sparkling Wines	9.4	11.2	+1.8	+19%
CA Bulk Imports	21.4	12.6	-8.9	-41%
Total CA	204.4	193.1	-11.3	-6%
Other States Still Wines	36.0	25.4	-10.6	-29%
Other States Sparkling Wines	(0.2)	(2.6)	-2.4	+943%
Other States Bulk Imports	2.8	4.8	+2.0	+70%
Total Other States	38.5	27.5	-11.0	-29%
Import Still Wines	72.3	74.0	+1.7	+2%
Import Sparkling Wines	17.1	18.5	+1.4	+8%
Import Flav Wine Bev	12.9	16.9	+3.9	+30%
Total Imports	102.3	109.3	+7.0	+7%
Total Wine Entering US	**345.2**	**330.0**	**-15.2**	**-4%**

CALIFORNIA WINES (ex import bulk) UP 0.6% YTD THROUGH NOVEMBER 2024

- The US Wine market grew from 1993 to 2016, with a compound annual growth rate of 3.4%. This was compared to Total Beverage Alcohol, including Wine, which showed a growth of 1.2%. The Wine market flattened out in 2017 and has seen market disruption since 2020 due to the Pandemic, supply chain challenges, and demographic changes. (See page 4).
- Prior to the Pandemic, Table Wine in food store volumes were flat, with slow single-digit growth in value in consumer spending. This is compared to the total Still Wine market, which grew by +1 to +2% per year. Food Stores were losing share to Clubs, Mass Merchandisers, and DTC sales. (See pages 5 & 6)
- In 2020, sales in food stores increased dramatically due to the closure of most of the On-Premise. The growth reversed in the second half of 2021. Current Food Store trends are negative -4.6%. The total market was also relatively flat, but shipments into the market increased to +5% in mid-2020. Shipments remained elevated through 2021. This now appears to have been an inventory build in wholesalers, retailers, and consumer pantries. The inventory build has been unwound with market trends for all wines down -5.0%. (see page 7)
- YTD California Wine shipments (ex-imported bulk wines) are up slightly in 2024 vs 2023, but the market seems to be flattening since April 2024. (See page 8).
- YTD domestic volumes are down -15.2% compared to 2020, which is driven by all geographies and tax types. The declines are seen across all sizes of wineries and regions. (see pages 9 to 10)
- Year to Date total of California sourced Sparkling Wine shipments to the US are up +19%, including bulk imports. California accounts for 42% of the total market, and imports account for 63%. (see page 11)
- Although shipments have slowed recently, winery inventories in November 2024 are at levels similar to November 2020 levels. This contrasts with wholesale inventories, which have been at near historical heights. (see pages 12 & 13)
- Major Table Wine brands in food stores have reshuffled with Josh, the largest by value. Table and Sparkling wines account for over 90% of wine sales in food stores by both volume and value. Year-to-date values are down low single digits, and volumes are down in the mid-single digits. Post-2019 sales of wines over $11.00 are up versus pre-pandemic levels. (see pages 14 to 16)
- California bulk wine imports are down YTD to November 2024. The amounts entering the market have been decreasing due to the algorithm used to calculate the bottling cycle of bulk imports and are now negative for the year. Most bulk imports into California come from Australia and Chile. The equivalent value of this bulk is $519 per ton, which includes production processing. (see pages 17 & 18)
- Wine imports have slowed as the overall US Wine Market has slowed. It appeared that imports were beginning to stabilize in the first quarter of 2023 but had weakened significantly since April 2023. YTD 2024 trends have generally stabilized versus the same period in 2023 with some recent increases due to the threat of tariffs. (see pages 19 to 26)
- California is up, but other US exports appear to be down. California's growth through November is due to certain bulk exporters only reporting to the BOE annually. (see pages 27 & 28)
- The United States remains a crucial focus of the international wine trade. Overall, major exporters are down globally compared to 2019 but are up slightly year-to-date through November versus 2023. (see pages 29 & 30)

US Wine Market Calendar 1960 to LTM November 2024

- From 1960 to 2016 the US Wine market has traditionally shown growth other than from 1986 to 1993
- The declines in the 1980's were the slowing of the white wine as a cocktail fad as well as FET tax changes that saw wine coolers convert to Malt.
- In 2016, the wine market saw a slowing of growth as consumers shifted to hard seltzers and spirits.
- The Pandemic distorted the market with unexpected growth and a reversal in 2022. The growth in 2020 and 2021 is now identified as an inventory build in wholesalers and retailers.
- It is likely that it will take through 2024 for the market to stabilize in volume terms.
- The good news is that Consumers continue to increase their spending on wine.
- The data is from the US Bureau of Economic Analysis for total consumer spending on wine in the Off-Premise. The data encompasses all off-premise spending, not just syndicated measured markets such as Nielsen or Circana.
- The green bars are actual spending. The blue line restates all spending in 2017 dollars.
- Consumer spending has consistently increased overtime, whether in real dollars or inflation adjusted dollars.



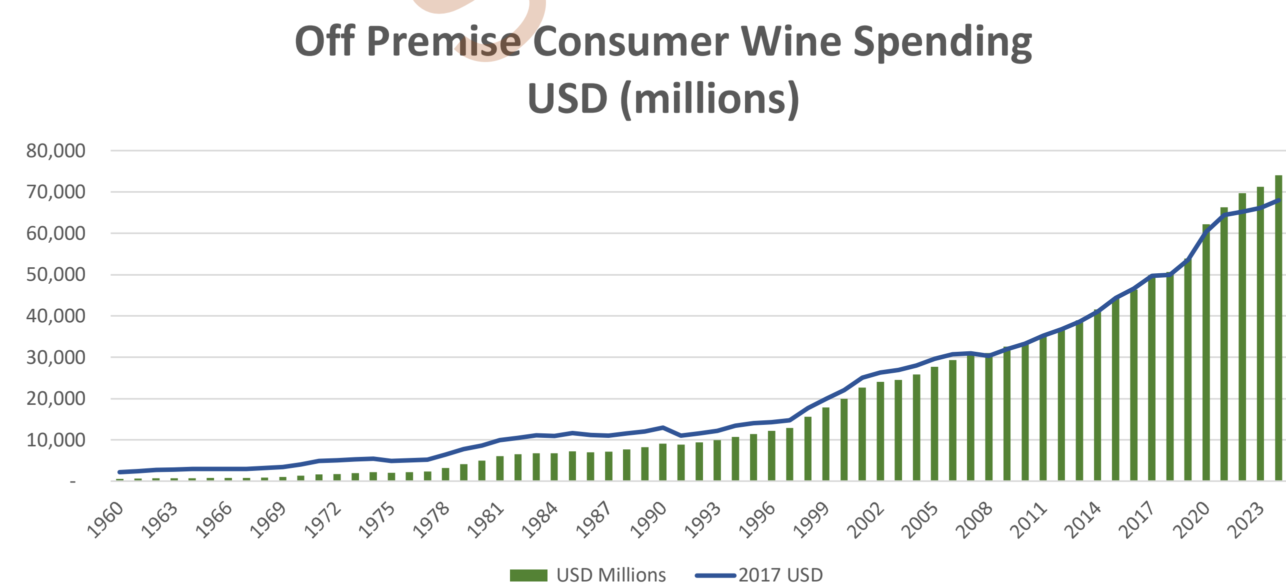


Table Wine in US Food Stores Calendar 2011 to LTM Nov. 2024

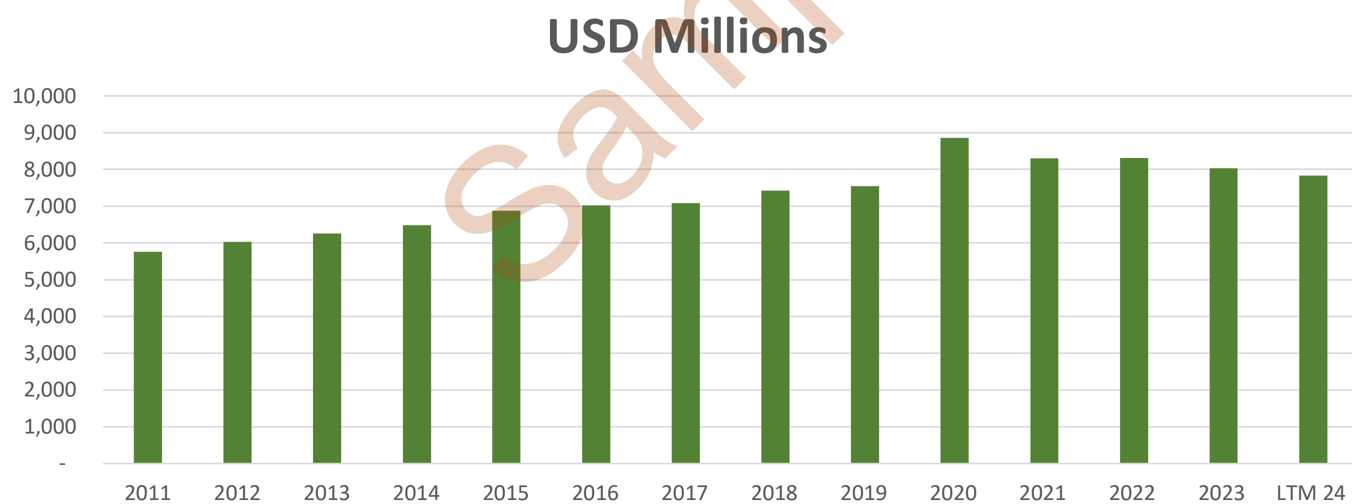
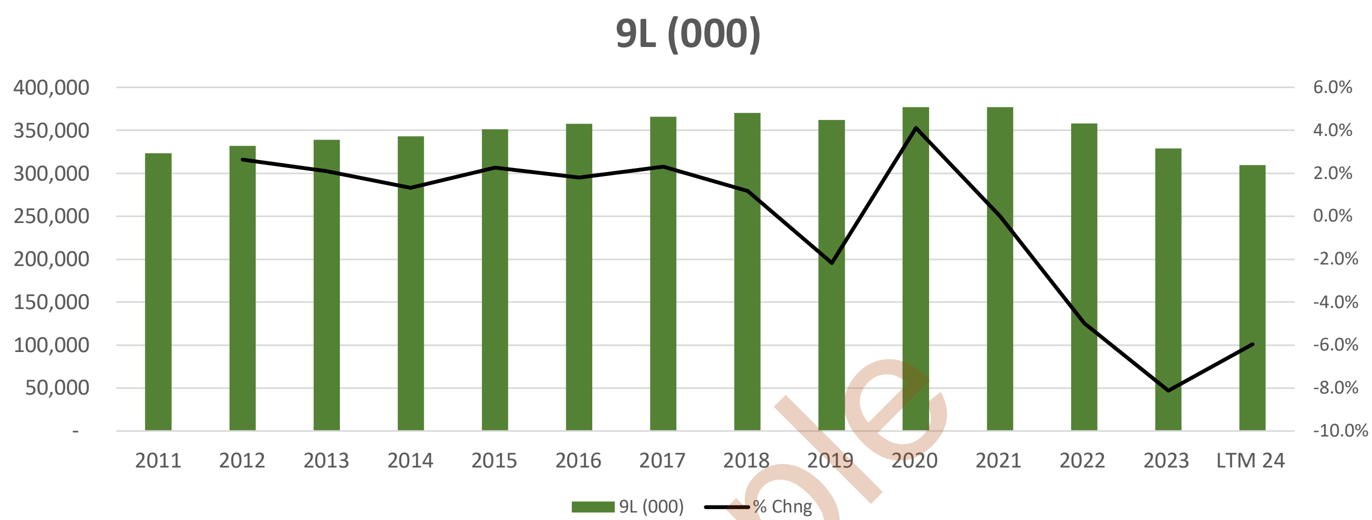
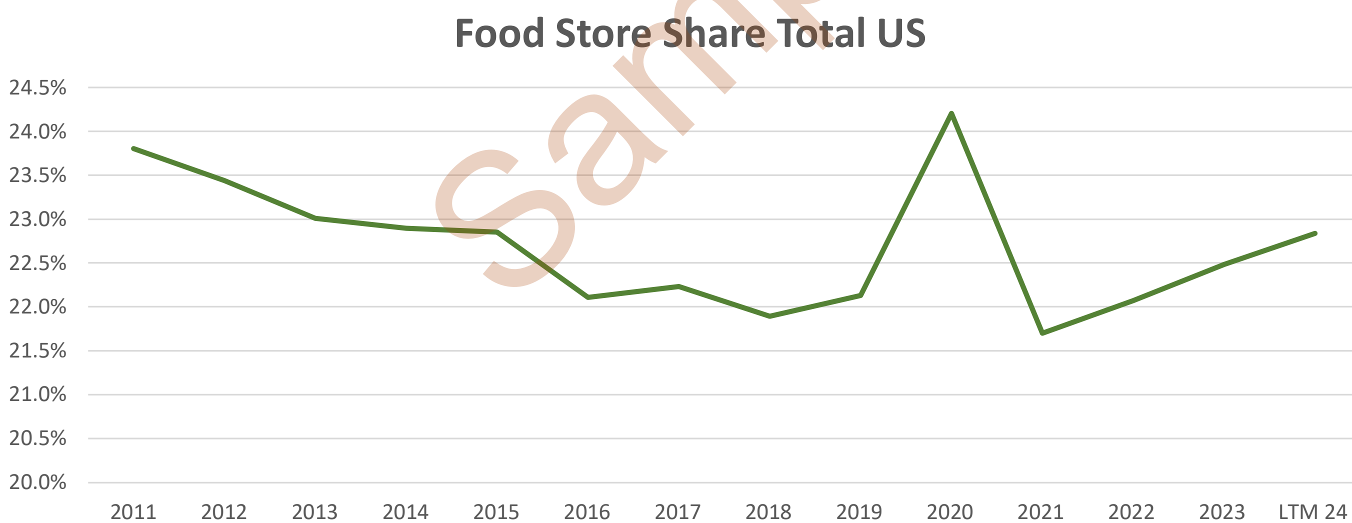


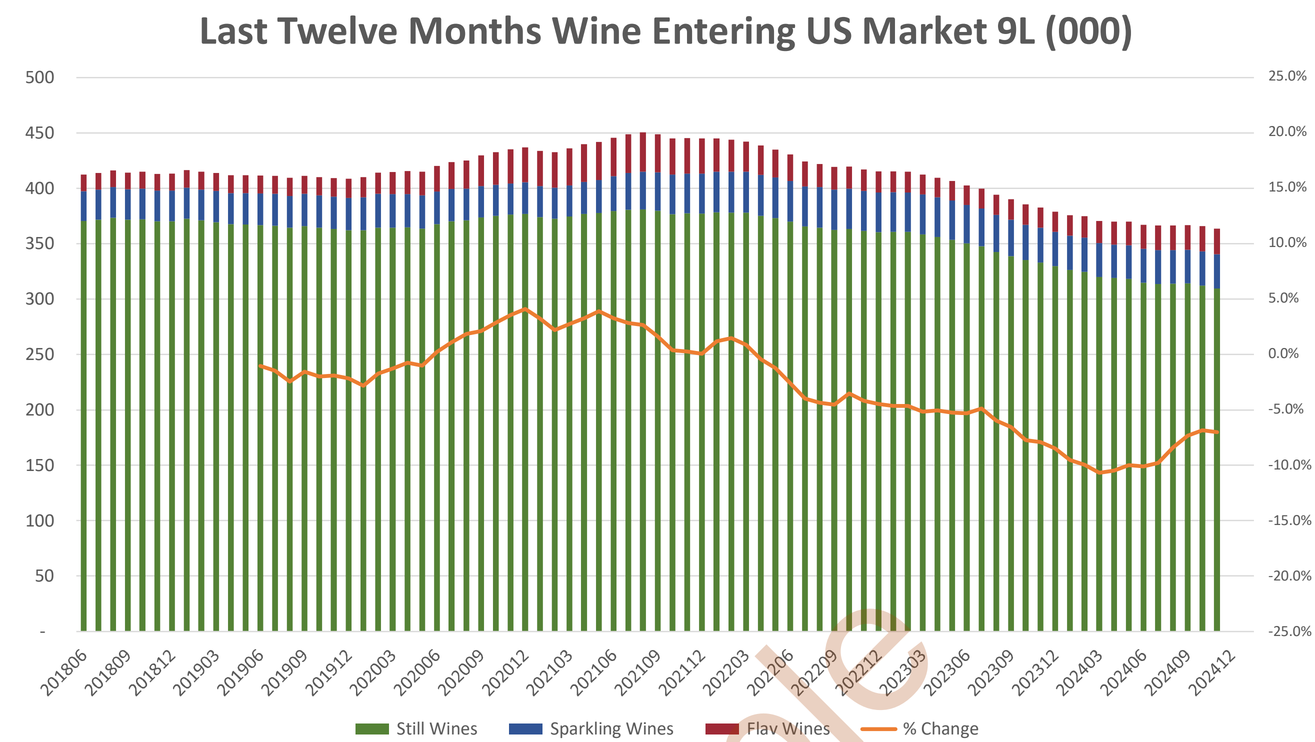
Table wine volumes in food stores plateaued from 2015 to 2019. The pandemic drove 14% growth in 2020 which reverted to volumes slightly lower that 2019 in 2022. Consumer spending continued to grow while volumes plateaued. In 2022 consumer spending was up 10.2% versus 2019 while volumes were marginally down.

Total Still Wines Entering US Market Calendar 2011 to Nov. 2024

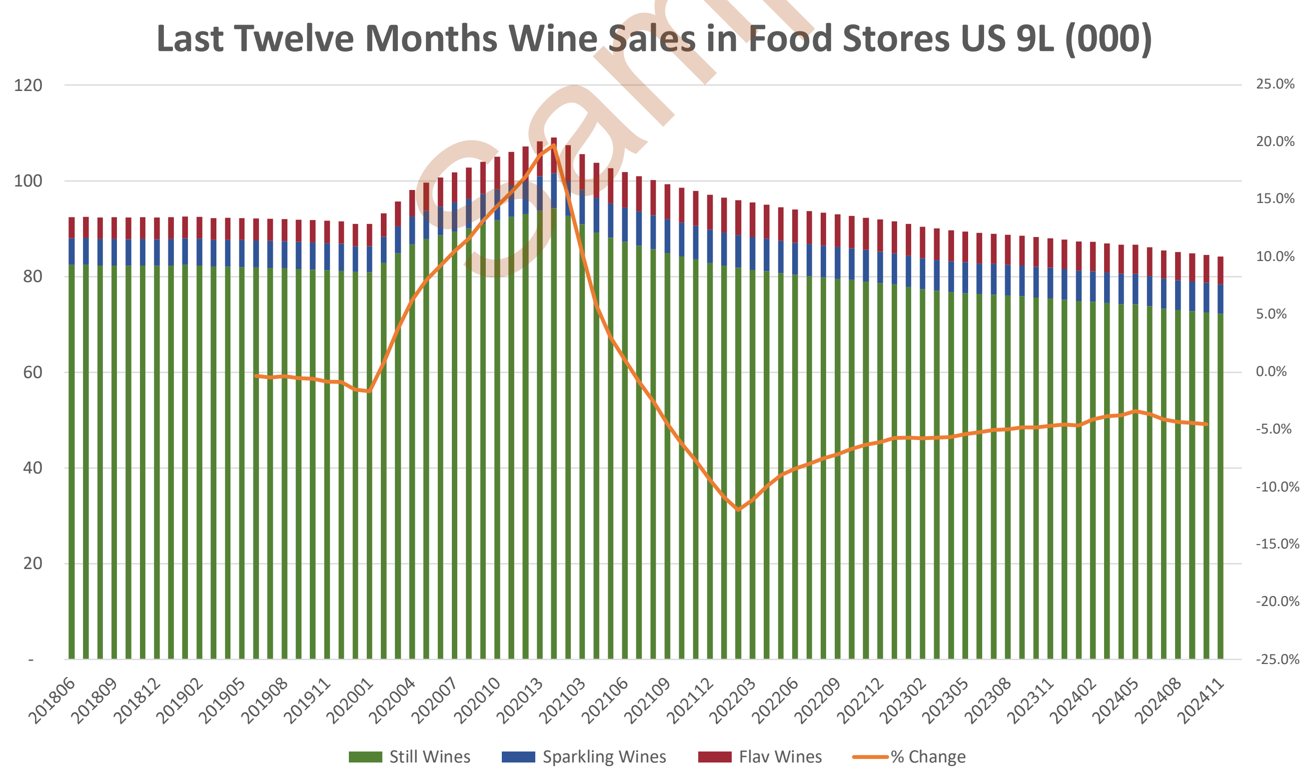




Total still wines entering distribution in the US increased through 2018. 2019 saw a slight decline, primarily driven by tariffs on still wines from some European countries. 2020 and 2021 saw growth in wines entering the market which was partially driven by inventory increase. The inventory was partially reversed in 2022. Food store share of total still wines has been declining over time as sales have shifted to clubs, mass merchandisers and DTC channels.

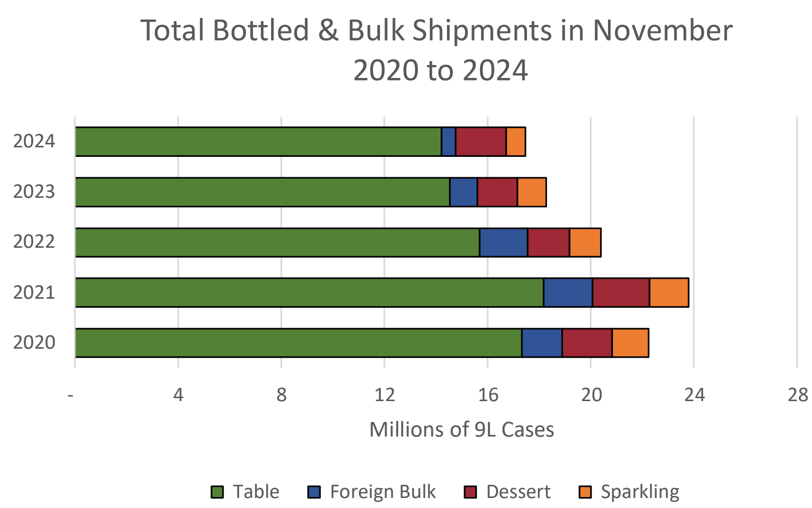


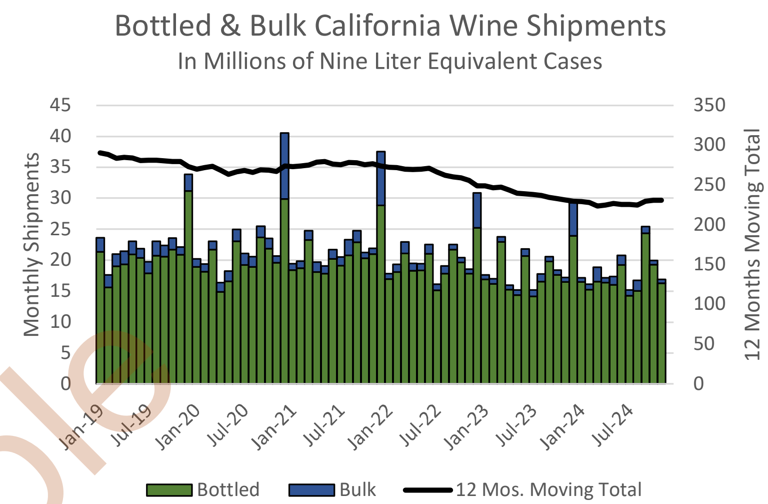
Last Twelve Months Wine Entering US Market 9L (000)
500
450
400
350
300
250
200
150
100
50
-
25.0%
20.0%
15.0%
10.0%
5.0%
0.0%
-5.0%
-10.0%
-15.0%
-20.0%
-25.0%
201806
201809
201812
201903
201906
201909
201912
202003
202006
202009
202012
202103
202106
202109
202112
202203
202206
202209
202212
202303
202306
202309
202312
202403
202406
202409
202412
Still Wines
Sparkling Wines
Flav Wines
% Change



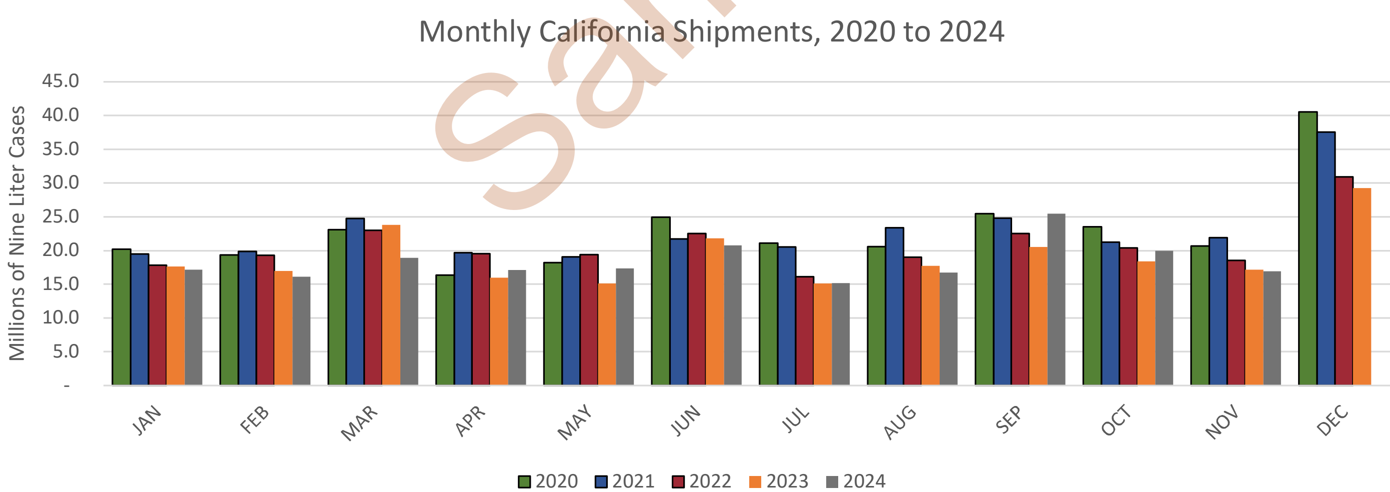
Last Twelve Months Wine Sales in Food Stores US 9L (000)
120
100
80
60
40
20
-
25.0%
20.0%
15.0%
10.0%
5.0%
0.0%
-5.0%
-10.0%
-15.0%
-20.0%
-25.0%
201806
201809
201812
201902
201905
201908
201911
202001
202004
202007
202010
202013
202103
202106
202109
202112
202203
202206
202209
202212
202302
202305
202308
202311
202402
202405
202408
202411
Still Wines
Sparkling Wines
Flav Wines
% Change

History of California Wine Shipments

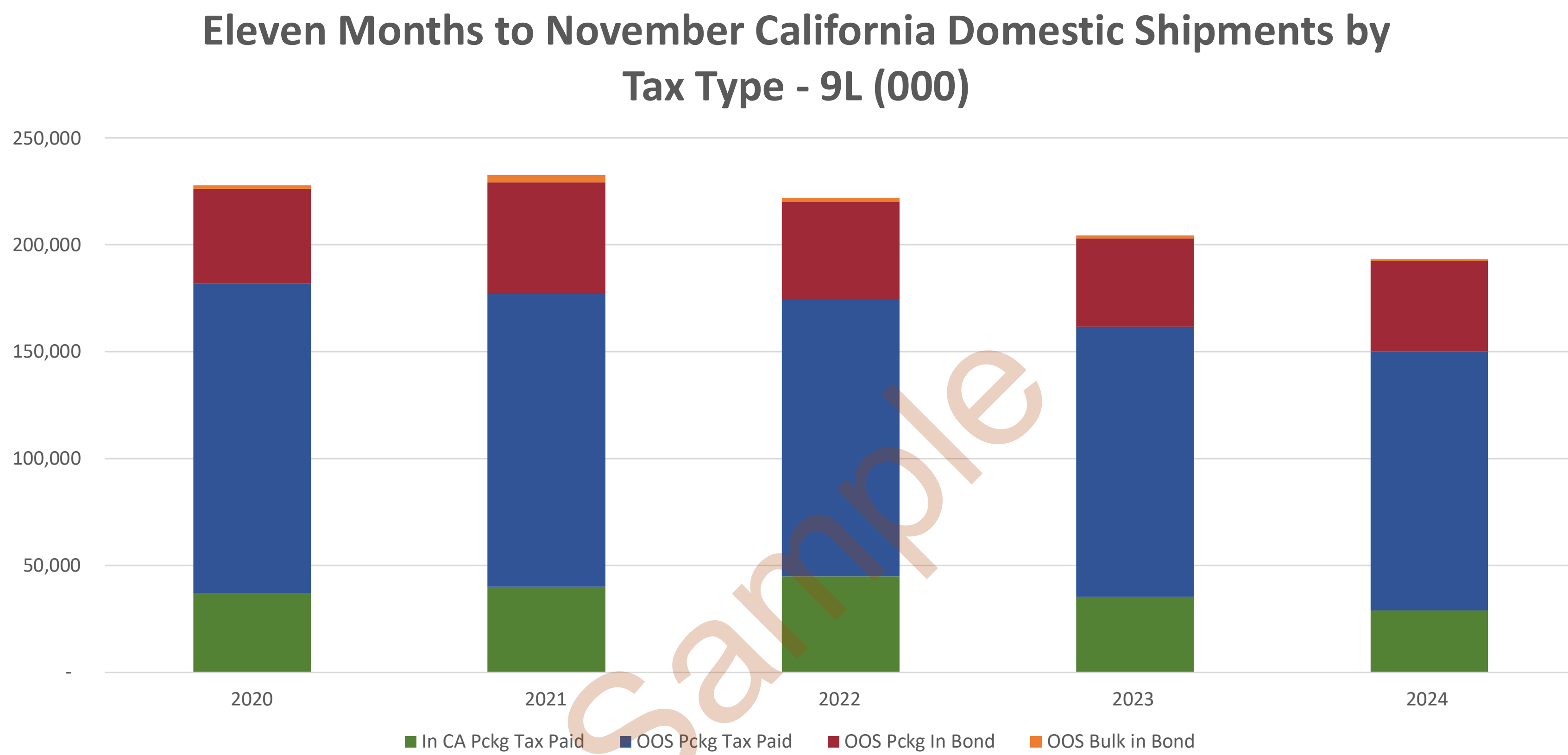




Source: CA BOE. Bulk gallonage converted to nine liter equiv. cases. Excludes foreign bulk



Includes Bottled and Bulk Shipments to all markets, excludes foreign bulk wines



Trends 2024 versus 2020	Share of Ships	Chng 24 vs 20
Packaged wines shipped in CA Tax Paid	15.0%	-21.7%
Packaged Wines shipped out of state tax paid	62.7%	-16.3%
Packaged Wines shipped out of state in bond	21.8%	-5.0%
Bulk Wine shipped out of state in bond	0.5%	-48.7%
Total Domestic Shipments		-15.2%

The Majority of wines are shipped from CA tax paid.
A few major wineries ship wine in bond to distribution centers in other states.

SHIPMENTS OF CALIFORNIA WINE, BY TYPE OF WINE

November, 2024

(In Thousands of Gallons and Nine Liter Cases)

	Bottled & Bulk Wine			Bottled & Bulk Wine				Bottled Wine Only			
	This Month Gallons		%	Year-to-Date Gallons			%	**Year-to-Date Cases**			%
	2023	**2024**	Change	2022	2023	**2024**	Change	2022	2023	**2024**	Change
California Wine To All Markets											
Total Not Over 14% Alcohol	34,567	33,789	*-2.2%*	432,835	402,898	399,169	-0.9%	170,107	160,233	156,269	-2.5%
Over 14% Alcohol	3,672	4,671	*27.2%*	60,006	50,718	52,890	4.3%	24,809	21,057	21,334	1.3%
Sparkling	2,652	1,776	*-33.0%*	25,911	22,882	27,396	19.7%	10,898	9,624	11,523	19.7%
TOTAL CALIFORNIA WINE	**40,891**	**40,236**	**-1.6%**	**518,752**	**476,497**	**479,454**	**0.6%**	**205,814**	**190,914**	**189,126**	**-0.9%**
*All Imported Wines Reported**	2,900	1,669	*-42.5%*	62,400	50,956	29,842	*-41.4%*	26,246	21,432	12,552	*-41.4%*
Gross Winery Shipments	*43,792*	*41,905*	*-4.3%*	*581,152*	*527,453*	*509,297*	*-3.4%*	*232,059*	*212,347*	*201,678*	*-5.0%*
California Wine to Total U.S.**											
Total Not Over 14% Alcohol	31,187	30,557	-2.0%	383,308	364,580	353,516	-3.0%	159,613	152,067	148,015	-2.7%
Over 14% Alcohol	3,389	4,470	31.9%	56,909	48,138	49,153	2.1%	23,704	20,044	20,459	2.1%
Sparkling	2,558	1,720	-32.8%	25,108	22,321	26,671	19.5%	10,561	9,389	11,218	19.5%
TOTAL	**37,135**	**36,747**	**-1.0%**	**465,325**	**435,039**	**429,341**	**-1.3%**	**193,878**	**181,499**	**179,692**	**-1.0%**
*Imported Bulk Table Wine**	2,396	1,276	*-46.8%*	53,708	42,226	26,246	*-37.8%*	22,590	17,760	11,039	*-37.8%*
Gross Winery Shipments to US	*39,531*	*38,023*	*-3.8%*	*519,033*	*477,265*	*455,587*	*-4.5%*	*216,468*	*199,260*	*190,731*	*-4.3%*
% Foreign Bulk of Not Over 14%	*6.1%*	*3.4%*		*10.3%*	*8.8%*	*5.8%*		*10.4%*	*8.9%*	*5.8%*	
California Wine to Other Countries**											
Total Not Over 14% Alcohol	3,380	3,232	-4.4%	49,527	38,318	45,652	19.1%	10,494	8,166	8,254	1.1%
Over 14% Alcohol	283	200	-29.2%	3,097	2,580	3,737	44.8%	1,105	1,013	875	-13.6%
Sparkling	94	56	-40.5%	802	560	725	29.4%	337	236	305	29.4%
TOTAL	**3,757**	**3,488**	**-7.1%**	**53,427**	**41,458**	**50,113**	**20.9%**	**11,936**	**9,415**	**9,434**	**0.2%**

Sources: Prepared for the Wine Institute by Gomberg, Fredrikson & Associates from reports of California Board of Equalization and industry sources.

*Estimated shipments of imported bulk and bottled wines shipped by California wineries.

**Adjusted for estimated amount of California exports that were shipped in bond to warehouses in other states and then exported.

Estimated Shipments to the U.S. of Sparkling Wine

Eleven Months Ended November 2024

Domestic Sparkling Wine Shipments

(In Thousands of Nine Liter Cases)	2023	2024	% Chg.
California Sourced Sparkling Wines	9,388.5	11,218.0	19%
Bulk Imports Bottled In California	2,045.7	1,204.4	-41%
Total California Producers	11,434.2	12,422.3	9%
Other States	1,795.7	-1,402.3	-178%
Total Domestic Sparkling Wine to U.S. Market	13,229.9	11,020.0	-17%
California share of Domestic Sparkling Wines	86.4%	112.7%	

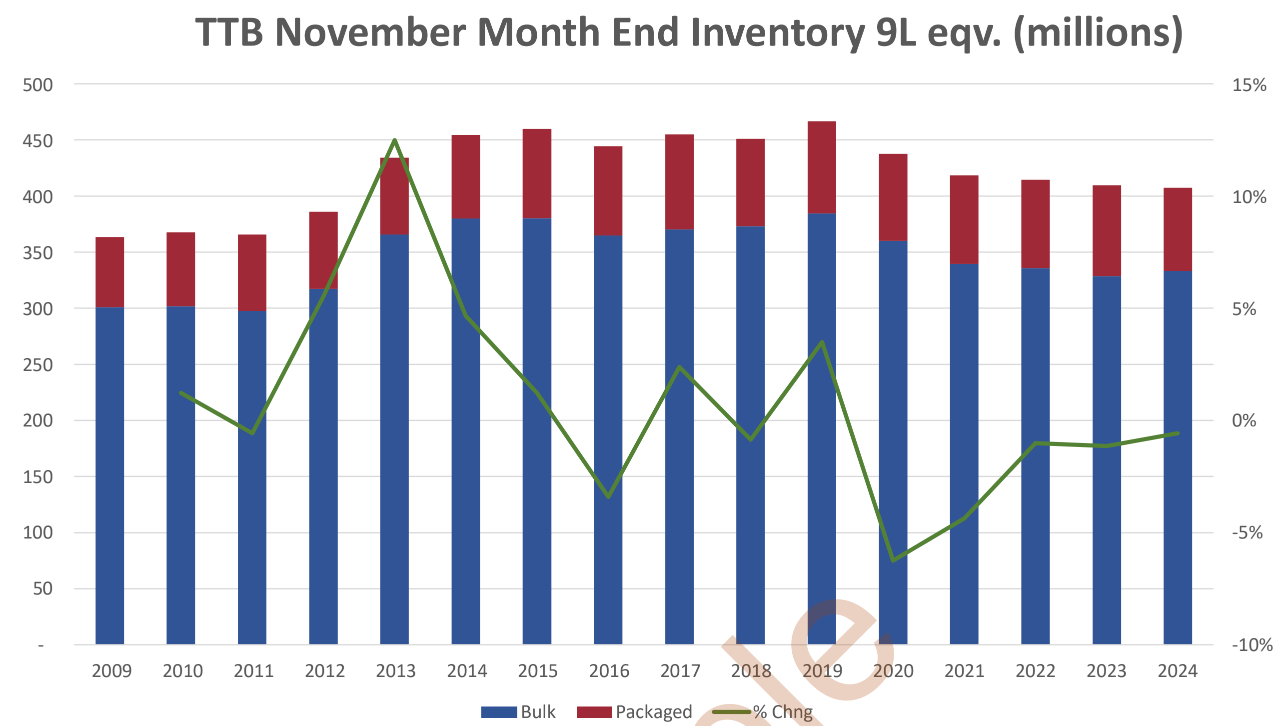
Note: Other states is a simple calculation. Est of Bulk Imports and CA Shipments to other states in bond distorts the calculation

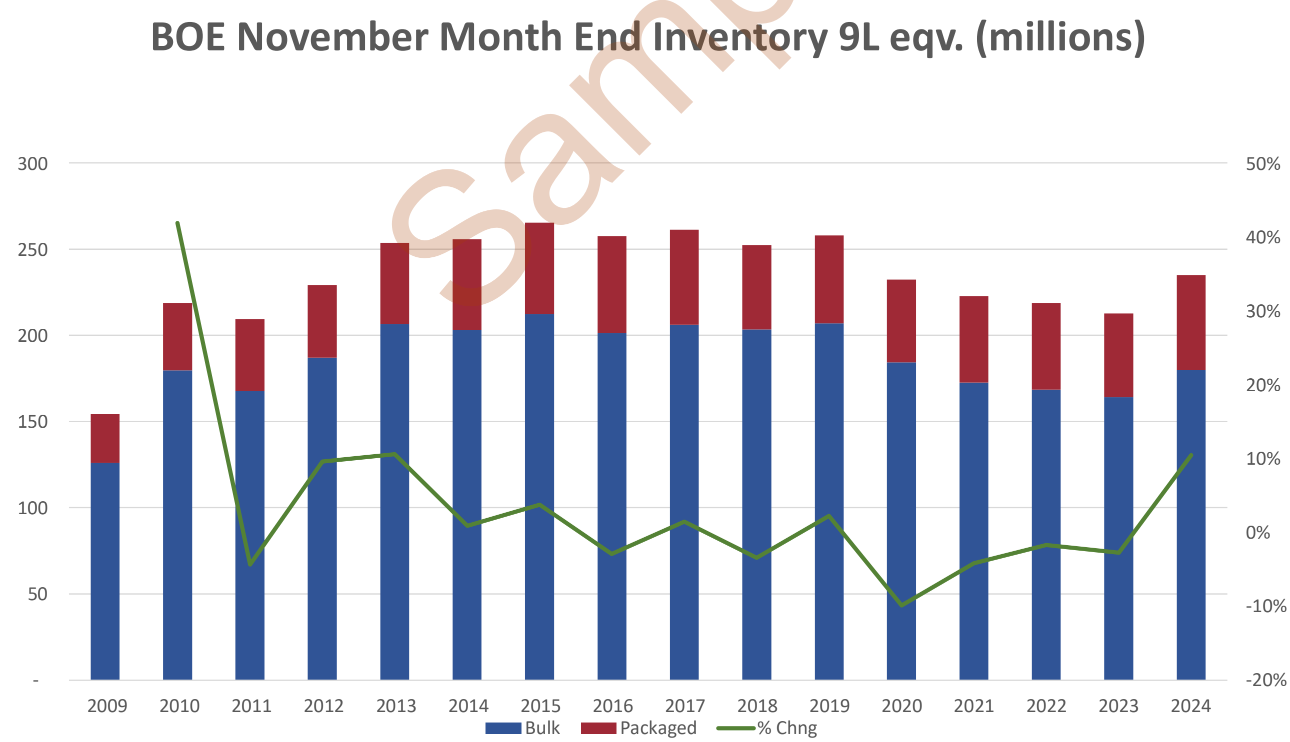
Imported Sparkling Wine Shipments

(In Thousands of Nine Liter Cases)	2023	2024	% Chg.
Italy	10,911.7	12,202.9	12%
France	3,630.1	3,560.0	-2%
Spain	2,107.2	2,302.6	9%
Germany	100.1	107.2	7%
Argentina	56.6	52.6	-7%
South Africa	27.2	33.8	24%
Australia	32.8	23.1	-30%
Other	208.5	175.2	-16%
Total Imported Sparkling Wine to U.S. Market	17,074.2	18,457.3	8%

Total Sparkling Wine Shipments to US

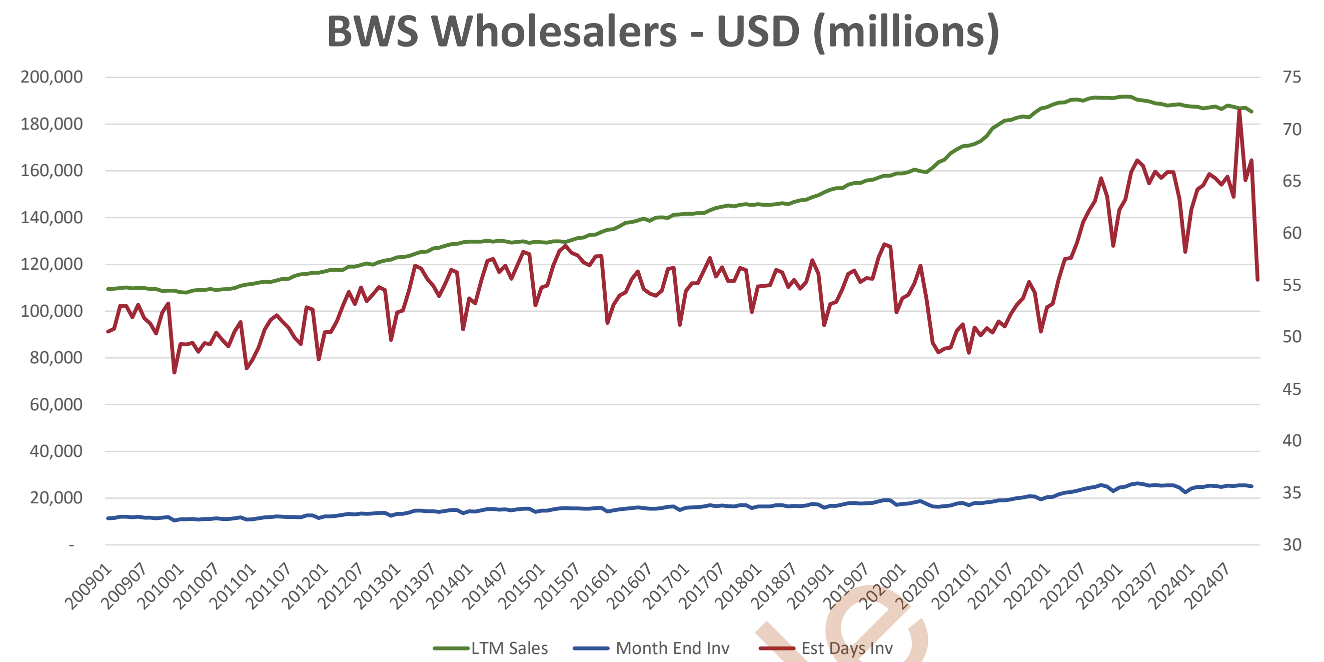
(In Thousands of Nine Liter Cases)	2023	2024	% Chg.
Total Domestic and imports	30,304.1	29,477.3	-3%
California Share of Total Sparkling	37.7%	42.1%	
Domestic Share of Total Sparkling	43.7%	37.4%	
Italy Share of Total Sparkling	36.0%	41.4%	
France Share of Total Sparkling	12.0%	12.1%	
Spain Share of Total Sparkling	7.0%	7.8%	
Import Share of Total Sparkling	56.3%	62.6%	

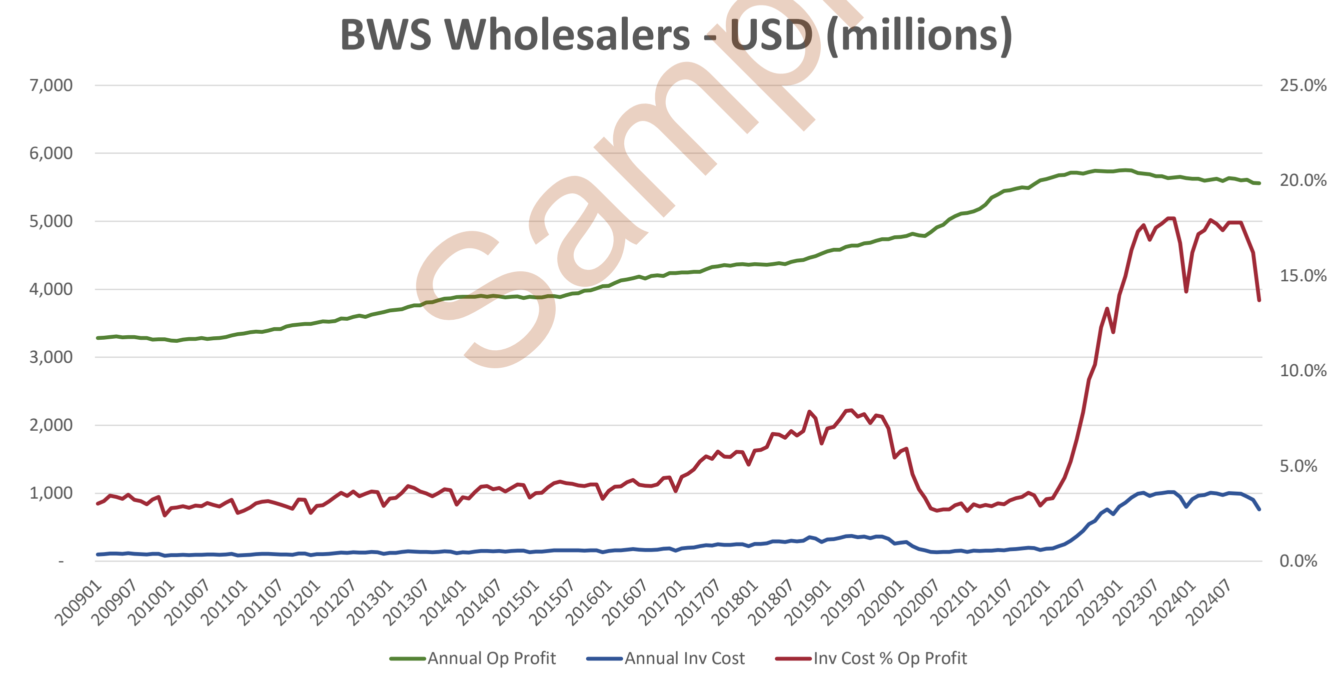




The BOE frequency of reporting is based on the state taxes due from each facility each month. There are some major facilities that hold significant inventory but do not ship wines tax paid. These facilities only show inventories at year end. Most of these facilities report on a monthly basis to the TTB. California historically accounted for 90%+ of winey inventories at December each year.

LTM BWS Wholesaler Sales and Inventory Data





Source: US Census Bureau monthly survey of business
Days inventory based on last twelve month sales
Operating gross margin assumed to be 25%
Operating Profit estimated to be 3%
Cost of capital based on Federal Funds rate + 2%

Recent Food Store Sales Trends

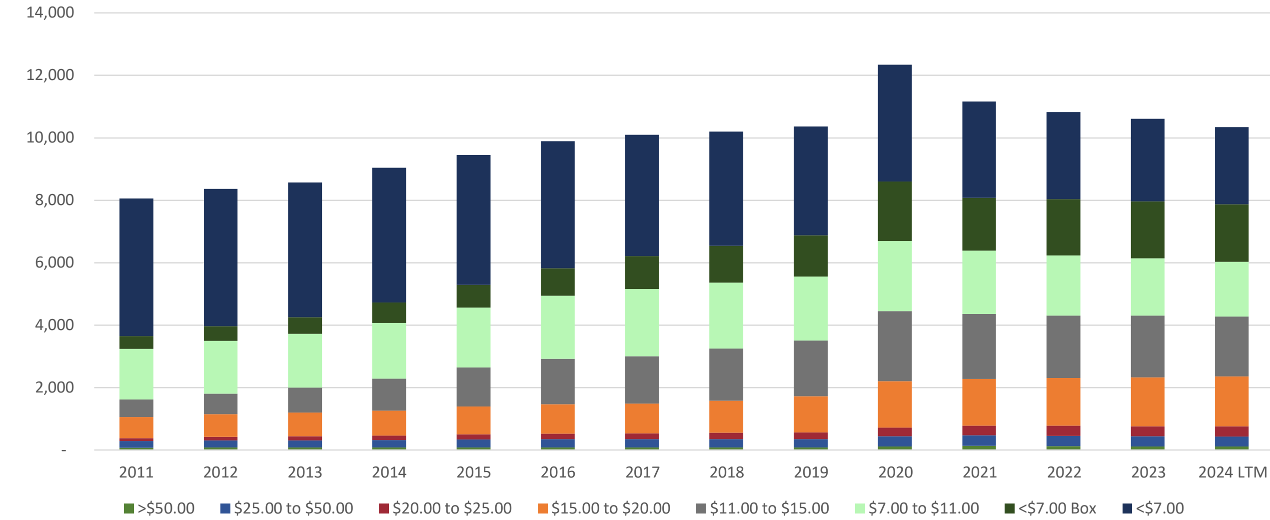
Eleven Months to Novemberber 2024 Food Store Table Wine Sales - $7.1 Billion (-2.8%)

Source: The Nielsen Co. Food Markets, Includes domestic and imported table wines.

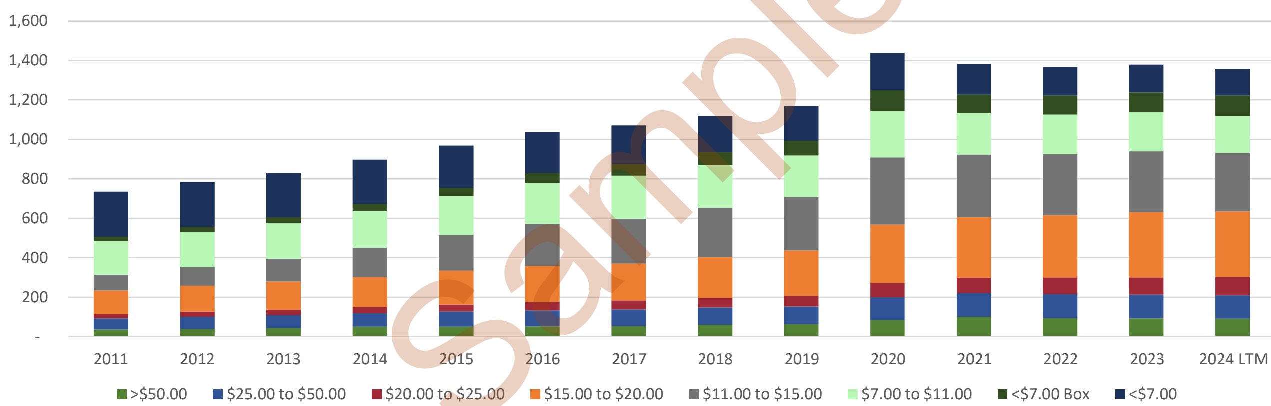
U.S. Food Store Mix, Eleven Months to November 2024

Wine Type	USD Share	YTD % Change	Volume Share	YTD % Change
Table Wine	82.4%	-2.8%	84.4%	-4.6%
Sparkling Wine	10.6%	-2.1%	6.9%	-3.8%
Flav Wines	5.0%	-2.2%	6.0%	-4.7%
Dessert Wines	0.7%	-9.2%	1.6%	-10.6%
Sake	0.5%	34.6%	0.5%	28.9%
Non Alc	0.5%	8.4%	0.4%	4.6%
Vermouth	0.3%	0.2%	0.2%	-5.7%
Total		-2.6%		-4.5%

Calendar 2011 to LTM 2024 CA Cab Sauv in Food Stores 9L (000)



Calendar 2011 to LTM 2024 CA Cab Sauv in Food Stores USD (millions)



LTM 2024 Post-Pandemic change vs. 2019 Pre-Pandemic

	Over $50.00	$25.00 to $50.00	$20.00 to $25.00	$15.00 to $20.00	$11.00 to $15.00	$7.00 to $11.00	Less Than $7.00 Box	Less than $7.00	Total
9L Volume	23.6%	22.1%	58.3%	37.6%	6.8%	-14.3%	40.1%	-29.0%	-0.2%
USD Value	45.0%	33.9%	64.5%	44.1%	13.2%	-6.3%	39.1%	-20.5%	17.9%

California Cabernet Sauvignon Trends in US Food Stores from 2011 to LTM 2024 by price bands
Generally seeing weakness in wines under $11.00 per 750 ml. Significant weakness below $7.00 except for 3L premium box
Likely reason is reduced promotions by retailers that prefer a higher ring for items promoted on the floor
Given the Pandemic disruptions, the above table compares LTM 2024 volumes and values versus 2019.
The trends are similar for other varieties such as Chardonnay, Pinot Noir, and Sauvignon Blanc.

2011 to LTM 2024 Table Wine in Food Store Trends

All Table Wines

	Over $50.00	$25.00 to $50.00	$20.00 to $25.00	$15.00 to $20.00	$11.00 to $15.00	$7.00 to $11.00	Less Than $7.00 Box	Less than $7.00	Total
2011 9L Share	0.2%	1.0%	1.1%	3.4%	8.3%	22.1%	3.4%	60.5%	100.0%
2109 9L Share	0.2%	1.1%	1.4%	6.2%	15.6%	23.9%	8.7%	42.9%	100.0%
2023 9L Share	0.2%	1.6%	2.0%	8.5%	18.3%	21.2%	12.0%	36.2%	100.0%
LTM 2024 9L Share	0.2%	1.6%	2.1%	8.9%	18.8%	20.6%	12.5%	35.2%	100.0%
2011 USD Share	1.0%	3.0%	2.7%	7.7%	14.9%	29.2%	2.1%	39.5%	100.0%
LTM 2024 USD Share	1.6%	5.7%	5.2%	16.6%	26.0%	20.6%	6.3%	17.9%	100.0%
CAGR 2011 to 2019	-4.0%	2.0%	3.8%	8.4%	8.8%	1.5%	13.2%	-3.7%	0.5%
CAGR 2019 to LTM24	4.9%	6.0%	7.8%	5.7%	1.5%	-6.5%	6.1%	-7.6%	-3.0%
LTM 2024 vs 2023	-2.0%	-0.3%	2.0%	-0.3%	-2.3%	-7.0%	-0.3%	-7.3%	-4.6%

White Table Wines

	Over $50.00	$25.00 to $50.00	$20.00 to $25.00	$15.00 to $20.00	$11.00 to $15.00	$7.00 to $11.00	Less Than $7.00 Box	Less than $7.00	Total
2011 9L Share	0.0%	0.4%	0.5%	1.3%	3.9%	10.6%	1.6%	32.7%	50.9%
2109 9L Share	0.0%	0.3%	0.4%	2.0%	6.9%	10.4%	3.9%	23.4%	47.3%
2023 9L Share	0.0%	0.5%	0.6%	2.9%	9.0%	9.5%	5.9%	20.7%	48.9%
LTM 2024 9L Share	0.0%	0.5%	0.6%	3.1%	9.6%	9.4%	6.2%	20.3%	49.7%
2011 USD Share	0.1%	1.0%	1.1%	2.8%	6.9%	13.5%	1.0%	21.7%	48.1%
LTM 2024 USD Share	0.1%	1.8%	1.5%	5.5%	13.2%	9.3%	3.1%	10.6%	45.1%
CAGR 2011 to 2019	-14.1%	-1.0%	-0.1%	6.4%	7.9%	0.3%	12.2%	-3.6%	-0.4%
CAGR 2019 to LTM24	0.7%	6.0%	5.4%	7.2%	5.3%	-5.4%	9.1%	-6.3%	-1.8%
LTM 2024 vs 2023	-7.4%	1.6%	2.2%	2.0%	1.8%	-5.2%	1.7%	-6.6%	-3.1%

Red Table Wines

	Over $50.00	$25.00 to $50.00	$20.00 to $25.00	$15.00 to $20.00	$11.00 to $15.00	$7.00 to $11.00	Less Than $7.00 Box	Less than $7.00	Total
2011 9L Share	0.2%	0.6%	0.6%	2.1%	4.4%	11.3%	1.6%	24.3%	45.1%
2109 9L Share	0.2%	0.8%	0.8%	3.8%	7.9%	12.0%	4.5%	16.3%	46.4%
2023 9L Share	0.2%	1.1%	1.2%	5.1%	8.5%	10.4%	5.7%	13.1%	45.3%
LTM 2024 9L Share	0.2%	1.1%	1.3%	5.2%	8.3%	10.0%	5.8%	12.6%	44.7%
2011 USD Share	0.9%	2.0%	1.5%	4.9%	7.9%	15.3%	1.1%	16.4%	50.0%
LTM 2024 USD Share	1.6%	3.9%	3.2%	10.0%	11.6%	10.2%	3.0%	6.3%	49.7%
CAGR 2011 to 2019	-3.0%	3.6%	4.2%	8.4%	8.3%	1.3%	14.2%	-4.3%	0.9%
CAGR 2019 to LTM24	5.1%	6.1%	9.2%	4.6%	-1.8%	-7.3%	3.5%	-9.0%	-3.9%
LTM 2024 vs 2023	-1.7%	-0.6%	1.5%	-1.2%	-6.0%	-8.3%	-1.8%	-7.9%	-5.7%

Rose Table Wines

	Over $50.00	$25.00 to $50.00	$20.00 to $25.00	$15.00 to $20.00	$11.00 to $15.00	$7.00 to $11.00	Less Than $7.00 Box	Less than $7.00	Total
2011 9L Share	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%	0.1%	3.6%	4.0%
2109 9L Share	0.0%	0.0%	0.1%	0.3%	0.8%	1.5%	0.3%	3.2%	6.4%
2023 9L Share	0.0%	0.0%	0.2%	0.6%	0.9%	1.3%	0.5%	2.4%	5.8%
LTM 2024 9L Share	0.0%	0.0%	0.2%	0.6%	0.9%	1.2%	0.4%	2.3%	5.6%
2011 USD Share	0.0%	0.0%	0.0%	0.0%	0.1%	0.3%	0.1%	1.4%	1.9%
LTM 2024 USD Share	0.0%	0.0%	0.5%	1.0%	1.2%	1.2%	0.2%	1.0%	5.2%
CAGR 2011 to 2019	+++	12.1%	47.0%	58.5%	41.5%	26.7%	13.1%	-0.9%	6.5%
CAGR 2019 to LTM24	+++	-2.2%	6.5%	9.2%	-1.6%	-8.3%	3.2%	-10.4%	-5.9%
LTM 2024 vs 2023	+++	-7.2%	7.2%	-2.2%	-7.3%	-7.6%	-7.5%	-10.2%	-7.6%

Includes all table wines, domestic and imported.
The above shows the evolving share by price point and growth trends over time.

Eleven Months to November California Bulk Wine Imports - 9L (000)

Eleven Months to November Imported Bulk Wine Packaged in CA Entering the US Market - 9L (000)

Bulk Imports became an important source of supply for California wineries in the mid - 2000's

Once Bulk Imports are received they are not immediately packaged so there are variances between the timing of bulk imports and packaged bulk entering the market.

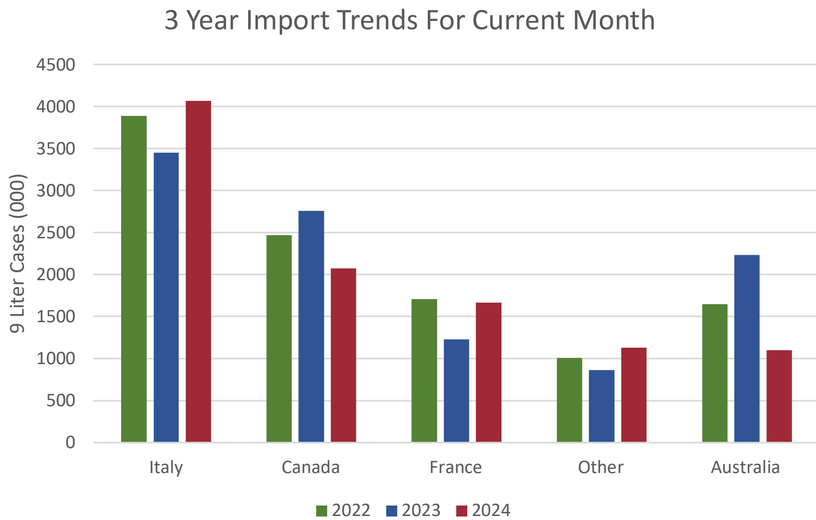
Eleven Months to November California Bulk Wine Imports

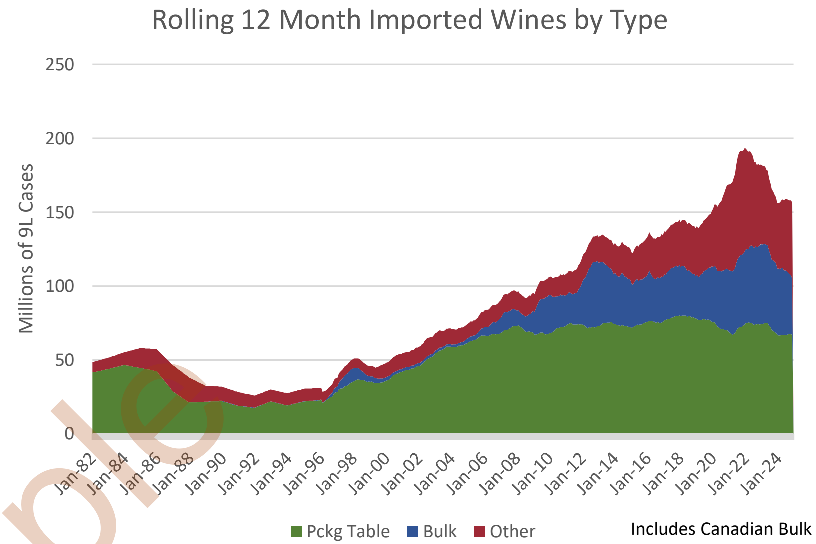
	2019	2020	2021	2022	2023	2024
Chile						
9L (000)	8,105	9,376	10,691	9,921	3,966	3,681
Eqv USD / Ton	$606	$517	$516	$577	$589	$505
Australia						
9L (000)	5,357	5,286	3,184	6,795	8,540	4,807
Eqv USD / Ton	$569	$620	$773	$672	$559	$530
Chile & Australia Sub-Total						
9L (000)	13,462	14,662	13,875	16,717	12,506	8,489
Eqv USD / Ton	$591	$554	$575	$615	$568	$519
New Zealand						
9L (000)	2,464	2,222	2,384	2,812	3,352	3,011
Eqv USD / Ton	$1,783	$1,954	$2,071	$1,843	$1,906	$2,128
Argentina						
9L (000)	1,286	450	1,047	2,067	314	280
Eqv USD / Ton	$483	$909	$759	$750	$990	$798
All Others						
9L (000)	1,093	1,877	3,858	4,652	1,716	1,303
Eqv USD / Ton	$1,177	$1,461	$1,728	$1,196	$1,225	$1,230
Total CA Bulk Imports						
9L (000)	18,304	19,210	21,164	26,248	17,888	13,083
Eqv USD / Ton	$779	$813	$963	$860	$889	$966

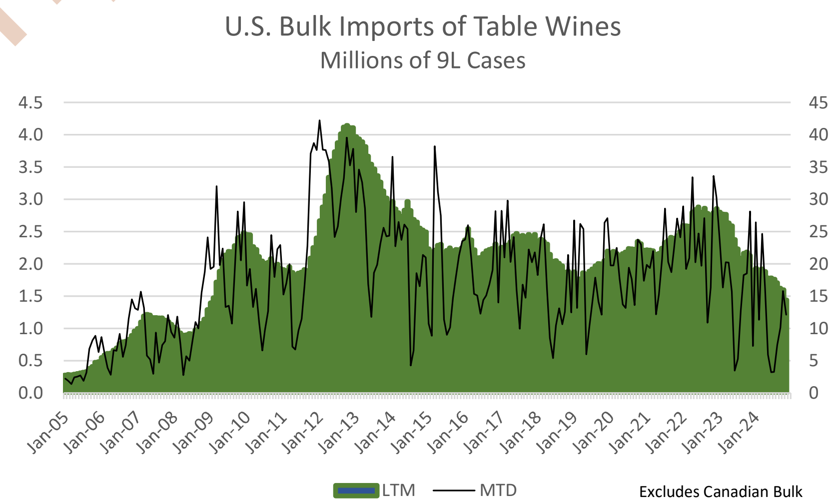
Eqv USD / Ton: Assumes 65 cases per ton
Based on total landed value which includeds customs value, freight, taxes, insurance, and duty. Does not include FET
Includes production cost to convert from grapes to bulk wine.

Source: U.S. Department of Commerce

History Of Imported Wine Shipments November 2024







Imported Table Wine Shipments

% Change by Color YTD

	Red	White	Total*	% Red
Italy	3%	-1%	1%	39%
France	6%	9%	4%	36%
Australia	-6%	3%	-1%	41%
New Zealand	4%	-16%	-16%	2%
Chile	12%	13%	12%	68%
Argentina	5%	-5%	4%	91%

Packaged Table Wines Only (excludes bulk)

** Includes wines unclassified by color*

Source: U.S. Department of Commerce

Eleven Months to November Imports to the U.S.

Imported Wines, by Country of Origin

Expressed in Thousands of Dollars and Nine Liter Cases (ranked on value)

Value in Dollars				Shipments in Cases			$ / 9L	
2023	2024	% Chg		2023	2024	% Chg	2023	2024
			Bottled Table Wines					
1,273,514	1,340,870	5%	France	12,138.8	12,679.1	4%	104.91	105.75
1,186,936	1,230,199	4%	Italy	20,952.4	21,115.3	1%	56.65	58.26
467,711	379,585	-19%	New Zealand	7,176.7	6,021.8	-16%	65.17	63.04
170,209	171,748	1%	Australia	6,215.8	6,131.0	-1%	27.38	28.01
155,534	162,109	4%	Spain	3,010.0	3,228.0	7%	51.67	50.22
150,264	159,448	6%	Argentina	3,450.9	3,577.8	4%	43.54	44.57
106,160	103,525	-2%	Chile	3,610.2	4,030.7	12%	29.41	25.68
69,857	65,636	-6%	Germany	1,536.2	1,357.1	-12%	45.47	48.36
61,840	63,578	3%	Portugal	1,940.0	2,001.1	3%	31.88	31.77
33,483	29,890	-11%	South Africa	697.8	605.3	-13%	47.99	49.38
19,377	25,071	29%	Israel	224.4	283.2	26%	86.35	88.54
21,510	19,691	-8%	Austria	359.4	332.1	-8%	59.85	59.30
15,514	16,225	5%	Greece	232.6	233.4	0%	66.70	69.52
4,445	6,502	46%	Georgia	77.5	123.9	60%	57.37	52.48
3,446	6,143	78%	Switzerland	44.8	94.8	112%	76.93	64.83
4,459	5,110	15%	Mexico	41.9	46.0	10%	106.31	111.13
5,321	3,855	-28%	Canada	85.7	42.0	-51%	62.09	91.79
3,769	3,639	-3%	Slovenia	83.7	81.0	-3%	45.04	44.94
3,922	3,179	++	Hungary	73.7	54.9	++	53.22	57.88
1,411	2,556	++	Moldova	56.4	90.8	61%	2503%	2815%
25,410	21,185	-17%	Others	526.3	516.1	-2%	48.28	41.05
3,784,093	3,819,745	1%	Total	62,535.2	62,645.1	0%	60.51	60.97

Eleven Months to November Imports to the U.S.

Imported Wines, by Country of Origin

Expressed in Thousands of Dollars and Nine Liter Cases (ranked on value)

Value in Dollars				Shipments in Cases			$ / 9L	
2023	2024	% Chg		2023	2024	% Chg	2023	2024
			Bulk Still Wines					
91,480	93,611	2%	New Zealand	3,395.9	3,065.2	-10%	26.94	30.54
58,948	52,788	-10%	Canada	23,080.5	20,954.0	-9%	2.55	2.52
61,946	33,576	-46%	Australia	8,586.0	4,834.0	-44%	7.21	6.95
35,881	27,893	-22%	Chile	4,260.9	3,872.5	-9%	8.42	7.20
18,490	16,492	-11%	Italy	1,043.6	902.3	-14%	17.72	18.28
6,681	9,061	36%	France	320.7	300.4	-6%	20.84	30.16
5,001	3,476	-31%	Argentina	374.5	335.3	-10%	13.35	10.37
7,707	3,033	-61%	South Africa	691.9	465.1	-33%	11.14	6.52
2,296	2,600	13%	Spain	188.6	199.1	6%	12.17	13.05
1,990	1,455	-27%	Others	86.0	77.0	-10%	23.14	18.88
290,421	243,984	-16%	Total	42,028.6	35,005.1	-17%	6.91	6.97
			Sparkling Wines					
855,789	766,527	-10%	France	3,630.1	3,560.0	-2%	235.75	215.32
556,649	614,782	10%	Italy	10,911.7	12,202.9	12%	51.01	50.38
88,702	102,493	16%	Spain	2,107.2	2,302.6	9%	42.09	44.51
3,303	4,276	29%	Germany	100.1	107.2	7%	32.99	39.90
2,011	2,786	39%	South Africa	27.2	33.8	24%	73.85	82.33
2,058	1,834	-11%	Argentina	56.6	52.6	-7%	36.39	34.90
1,744	1,298	-26%	Australia	32.8	23.1	-30%	53.18	56.26
1,649	1,165	-29%	Austria	23.5	16.5	-30%	70.05	70.53
9,852	8,906	-10%	Others	185.0	158.7	-14%	53.27	56.13
1,521,756	1,504,069	-1%	Total	17,074.2	18,457.3	8%	89.13	81.49

Eleven Months to November Imports to the U.S.

Imported Wines, by Country of Origin

Expressed in Thousands of Dollars and Nine Liter Cases (ranked on value)

Value in Dollars				Shipments in Cases			$ / 9L	
2023	2024	% Chg		2023	2024	% Chg	2023	2024
			Still Wines Over 14%					
168,087	190,870	14%	Italy	996.4	1,106.9	11%	168.70	172.44
171,905	131,630	-23%	France	1,022.9	916.2	-10%	168.06	143.68
85,711	85,758	0%	Spain	1,080.9	971.1	-10%	79.29	88.31
46,194	43,913	-5%	Portugal	394.2	356.4	-10%	117.20	123.21
2,002	33,359	++	Moldova	84.9	1,567.9	++	23.56	21.28
27,206	24,231	-11%	Argentina	387.9	369.8	-5%	70.14	65.53
22,015	18,207	-17%	Australia	304.9	217.4	-29%	72.21	83.76
11,157	10,875	-3%	Israel	50.6	47.4	-6%	220.70	229.59
9,447	8,331	-12%	Chile	60.9	67.0	10%	155.12	124.28
17,277	14,279	-17%	Others	238.3	225.5	-5%	72.51	63.32
561,001	561,452	0%	Total	4,621.8	5,845.5	26%	121.38	96.05
			Sangria / Coolers					
118,672	132,510	12%	Canada	5,398.3	6,443.9	19%	21.98	20.56
45,716	76,578	68%	Mexico	4,160.8	6,460.8	55%	10.99	11.85
15,955	21,852	37%	Italy	508.2	667.2	31%	31.39	32.75
14,976	17,301	16%	Spain	955.7	1,032.9	8%	15.67	16.75
8,875	9,800	10%	Netherlands	597.0	610.5	2%	14.87	16.05
23,787	33,691	42%	Others	1,307.1	1,642.5	26%	18.20	20.51
227,981	291,732	28%	Total	12,927.1	16,857.8	30%	17.64	17.31

Eleven Months to November Imports to the U.S.

Imported Wines, by Country of Origin

Expressed in Thousands of Dollars and Nine Liter Cases (ranked on value)

Value in Dollars				Shipments in Cases			$ / 9L	
2022	2023	% Chg		2022	2023	% Chg	2022	2023
			Cider					
4,943	5,135	4%	United Kingdom	324.7	400.9	23%	15.22	12.81
5,724	4,585	-20%	France	608.8	1,031.0	69%	9.40	4.45
643	1,847	187%	Ireland	103.7	125.5	21%	6.21	14.72
1,080	705	-35%	Sweden	67.4	46.2	-31%	16.03	15.28
1,896	1,248	-34%	Others	104.8	64.9	-38%	18.10	19.21
14,286	13,519	-5%	Total	1,209.2	1,668.4	38%	11.81	8.10
			Vermouth					
122,873	127,467	4%	Italy	3,590.7	3,835.4	7%	34.22	33.23
11,325	14,883	31%	France	249.1	312.7	26%	45.46	47.60
2,038	1,586	-22%	Spain	57.6	35.2	-39%	35.39	45.00
3,895	3,418	-12%	Others	123.3	94.4	-23%	31.59	36.20
140,132	147,354	5%	Total	4,020.7	4,277.8	6%	34.85	34.45
			Sake					
69,251	79,621	15%	Japan	758.9	928.2	22%	91.25	85.78
3,751	3,505	-7%	Korea, South	280.6	300.9	7%	13.37	11.65
188	568	++	France	1.6	1.2	-29%	114.22	484.75
1,027	701	-32%	Others	35.6	32.0	-10%	28.84	21.89
74,216	84,395	14%	Total	1,076.8	1,262.3	17%	68.93	66.86
6,613,886	6,666,249	1%	Total Imported Wines	145,493.6	146,019.3	0%	45.46	45.65
6,323,465	6,422,265	2%	Total Packaged Wines	103,464.9	111,014.2	7%	61.12	57.85
231,472	191,196	-17%	Bulk Imports ex Canada	18,948.2	14,051.1	-26%	12.22	13.61
58,948	52,788	-10%	Bulk Imports from Canada	23,080.5	20,954.0	-9%	2.55	2.52

Imported Wine Shipments by Country of Origin
Year to Date Ended November

In Thousands of Dollars and Nine Liter Cases

		Volume This Month			Imported Value Year-to-Date			Case Volume Year-to-Date			
		2023	2024	% Chg	2023	2024	% Chg	2022	2023	2024	% Chg
Italy	Bottled Table Wines	1,788.2	2,008.6	12%	$ 1,186,936	$ 1,230,199	4%	23,895.9	20,952.4	21,115.3	1%
	Bulk Still Wines	19.5	21.2	8%	18,490	16,492	-11%	1,199.7	1,043.6	902.3	-14%
	Still Wines Over 14%	81.3	112.3	38%	168,087	190,870	14%	1,274.2	996.4	1,106.9	11%
	Vermouth	352.7	421.1	19%	122,873	127,467	4%	4,208.8	3,590.7	3,835.4	7%
	Sparkling Wine	1,178.1	1,460.6	24%	556,649	614,782	10%	12,950.2	10,911.7	12,202.9	12%
	Sangria / Coolers	31.2	38.9	25%	15,955	21,852	37%	742.9	508.2	667.2	31%
	Total	3,451.1	4,062.8	18%	$ 2,068,989	$ 2,201,662	6%	44,271.7	38,002.9	39,830.0	5%
Australia	Bottled Table Wines	661.0	717.5	9%	$ 170,209	$ 171,748	1%	6,459.2	6,215.8	6,131.0	-1%
	Bulk Still Wines	1,541.2	361.5	-77%	61,946	33,576	-46%	6,853.8	8,586.0	4,834.0	-44%
	Still Wines Over 14%	18.2	16.5	-9%	22,015	18,207	-17%	422.7	304.9	217.4	-29%
	Sparkling Wine	2.8	0.9	-68%	1,744	1,298	-26%	38.2	32.8	23.1	-30%
	Sangria / Coolers	5.6	1.9	-65%	813	763	-6%	105.0	33.3	28.8	-14%
	Total	2,228.8	1,098.3	-51%	$ 256,727	$ 225,592	-12%	13,878.8	15,172.7	11,234.2	-26%
France	Bottled Table Wines	765.4	1,094.8	43%	$ 1,273,514	$ 1,340,870	5%	12,881.3	12,138.8	12,679.1	4%
	Bulk Still Wines	6.0	12.0	100%	6,681	9,061	36%	676.3	320.7	300.4	-6%
	Still Wines Over 14%	79.1	72.1	-9%	171,905	131,630	-23%	1,658.4	1,022.9	916.2	-10%
	Vermouth	18.6	37.8	103%	11,325	14,883	31%	309.1	249.1	312.7	26%
	Sparkling Wine	346.9	408.5	18%	855,789	766,527	-10%	5,192.5	3,630.1	3,560.0	-2%
	Sangria / Coolers	0.1	14.2	28228%	1,705	1,226	-28%	71.4	61.4	68.6	12%
	Total	1,216.0	1,639.4	35%	$ 2,320,919	$ 2,264,198	-2%	20,789.1	17,423.0	17,836.9	2%
Spain	Bottled Table Wines	233.2	209.8	-10%	$ 155,534	$ 162,109	4%	3,325.5	3,010.0	3,228.0	7%
	Bulk Still Wines	22.0	11.4	-48%	2,296	2,600	13%	286.5	188.6	199.1	6%
	Still Wines Over 14%	80.0	66.6	-17%	85,711	85,758	0%	1,482.6	1,080.9	971.1	-10%
	Vermouth	9.6	3.6	-63%	2,038	1,586	-22%	59.6	57.6	35.2	-39%
	Sparkling Wine	228.3	294.8	29%	88,702	102,493	16%	2,536.1	2,107.2	2,302.6	9%
	Sangria / Coolers	57.4	74.8	30%	14,976	17,301	16%	1,268.5	955.7	1,032.9	8%
	Cider	16.3	7.3	-55%	584	540	-8%	56.9	40.7	35.0	-14%
	Total	646.9	668.3	3%	$ 349,841	$ 372,386	6%	9,015.7	7,440.8	7,804.0	5%
Chile	Bottled Table Wines	369.0	260.3	-29%	$ 106,160	$ 103,525	-2%	3,846.9	3,610.2	4,030.7	12%
	Bulk Still Wines	622.0	547.1	-12%	35,881	27,893	-22%	10,479.9	4,260.9	3,872.5	-9%
	Still Wines Over 14%	3.6	6.1	69%	9,447	8,331	-12%	116.1	60.9	67.0	10%
	Total	994.5	813.4	-18%	$ 151,488	$ 139,749	-8%	14,443.0	7,932.1	7,970.3	0%

Continued on next page

Imported Wine Shipments by Country of Origin
Year to Date Ended November

In Thousands of Dollars and Nine Liter Cases

		Volume This Month			Imported Value Year-to-Date			Case Volume Year-to-Date			
		2023	2024	% Chg	2023	2024	% Chg	2022	2023	2024	% Chg
Germany	Bottled Table Wines	139.3	139.7	0%	$ 69,857	$ 65,636	-6%	1,678.5	1,536.2	1,357.1	-12%
	Sparkling Wine	9.7	13.0	34%	3,303	4,276	29%	101.5	100.1	107.2	7%
	Sangria / Coolers	31.5	15.8	-50%	6,863	8,148	19%	516.0	407.7	442.0	8%
	Total	180.5	168.5	-7%	$ 80,023	$ 78,060	-2%	2,296.1	2,044.0	1,906.3	-7%
New Zealand	Bottled Table Wines	754.4	461.3	-39%	$ 467,711	$ 379,585	-19%	6,551.1	7,176.7	6,021.8	-16%
	Bulk Still Wines	494.8	236.0	-52%	91,480	93,611	2%	2,871.3	3,395.9	3,065.2	-10%
	Total	1,249.3	697.3	-44%	$ 559,191	$ 473,197	-15%	9,422.4	10,572.5	9,087.0	-14%
Argentina	Bottled Table Wines	403.5	310.6	-23%	$ 150,264	$ 159,448	6%	4,728.6	3,450.9	3,577.8	4%
	Bulk Still Wines	129.1	29.2	-77%	5,001	3,476	-31%	2,156.6	374.5	335.3	-10%
	Still Wines Over 14%	29.3	24.9	-15%	27,206	24,231	-11%	597.6	387.9	369.8	-5%
	Sangria	-	-	++	-	-	++	-	-	-	++
	Total	561.9	364.7	-35%	$ 182,472	$ 187,154	3%	7,482.8	4,213.3	4,282.9	2%
Portugal	Bottled Table Wines	176.4	219.2	24%	$ 61,840	$ 63,578	3%	2,067.2	1,940.0	2,001.1	3%
	Still Wines Over 14%	41.8	32.4	-22%	46,194	43,913	-5%	497.9	394.2	356.4	-10%
	Total	218.2	251.6	15%	$ 108,034	$ 107,490	-1%	2,565.1	2,334.2	2,357.5	1%
South Africa	Bottled Table Wines	47.2	65.3	38%	$ 33,483	$ 29,890	-11%	868.5	697.8	605.3	-13%
	Bulk Still Wines	12.1	24.0	99%	7,707	3,033	-61%	2,948.7	691.9	465.1	-33%
	Still Wines Over 14%	3.2	2.7	-15%	3,981	3,514	-12%	44.5	33.7	26.5	-22%
	Sparkling Wine	3.1	4.0	28%	2,011	2,786	39%	37.6	27.2	33.8	24%
	Total	65.6	96.1	46%	$ 47,181	$ 39,224	-17%	3,899.3	1,450.7	1,130.7	-22%
Canada	Bulk Still Wines	2,251.5	1,443.1	-36%	$ 58,948	$ 52,788	-10%	21,483.7	23,080.5	20,954.0	-9%
	Sangria / Coolers	501.7	626.7	25%	118,672	132,510	12%	5,215.3	5,398.3	6,443.9	19%
	Total	2,753.2	2,069.8	-25%	$ 177,620	$ 185,298	4%	26,698.9	28,478.8	27,397.9	-4%
Other	Bottled Table Wines	127.3	134.6	6%	$ 103,264	$ 109,302	6%	2,035.7	1,720.7	1,856.1	8%
	Still Wines Over 14%	43.4	189.6	337%	25,136	53,852	114%	344.1	331.3	1,807.2	445%
	Sangria / Coolers	580.1	659.1	14%	68,584	108,473	58%	6,986.9	5,550.3	8,136.8	47%
	Cider	6.2	28.7	360%	6,891	7,986	16%	623.4	509.0	587.5	15%
	Sake	88.7	100.6	13%	74,029	83,824	13%	1,470.3	1,075.1	1,261.1	17%
	Total	845.7	1,112.6	32%	$ 277,904	$ 363,436	31%	11,460.4	9,186.5	13,648.7	49%

Imported Wine Shipments by Country of Origin
Year to Date Ended November

In Thousands of Dollars and Nine Liter Cases

		Volume This Month			Imported Value Year-to-Date			Case Volume Year-to-Date			
		2023	2024	% Chg	2023	2024	% Chg	2022	2023	2024	% Chg
World Total	Bottled Table Wines	5,470.9	5,625.8	3%	$ 3,784,093	$ 3,819,745	1%	68,410.5	62,535.2	62,645.1	0%
	Bulk Still Wines	5,102.9	2,685.8	-47%	290,421	243,984	-16%	49,112.2	42,028.6	35,005.1	-17%
	Still Wines Over 14%	381.3	523.8	37%	561,001	561,452	0%	6,451.0	4,621.8	5,845.5	26%
	Total Still Wines	10,955.1	8,835.4	-19%	4,635,515	4,625,181	0%	123,973.7	109,185.6	103,495.8	-5%
	Vermouth	390.3	476.9	22%	140,132	147,354	5%	4,785.1	4,020.7	4,277.8	6%
	Sparkling Wine	1,794.5	2,203.9	23%	1,521,756	1,504,069	-1%	21,191.3	17,074.2	18,457.3	8%
	Sangria / Coolers	1,207.7	1,438.2	19%	227,981	291,732	28%	14,918.6	12,927.1	16,857.8	30%
	Cider	34.9	64.5	85%	14,286	13,519	-5%	1,340.6	1,209.2	1,668.4	38%
	Sake	88.7	101.0	14%	74,216	84,395	14%	1,470.5	1,076.8	1,262.3	17%
	Total All Wines	14,471.3	13,119.9	-9%	$ 6,613,886	$ 6,666,249	1%	167,679.9	145,493.6	146,019.3	0%
	Bottled Wine Only*	9,333.5	10,369.6	11%	$ 6,309,179	$ 6,408,746	2%	117,227.1	102,255.7	109,345.8	7%
	Bulk Wines ex Canada	2,851.5	1,242.7	-56%	$ 231,472	$ 191,196	-17%	27,628.5	18,948.2	14,051.1	-26%

Source: US Dept. of Commerce *Excludes Cider

US Reported Exports to Foreign Markets - 9L (000)

Eleven Months Ended November

As Reported by The CA BOE

Year	Pckg Exp	% Chng	Bulk Exp	% Chng	Total Exp	% Chng
2020	10,122		15,287		25,409	
2021	11,728	15.9%	12,119	-20.7%	23,846	-6.2%
2022	11,936	1.8%	10,535	-13.1%	22,472	-5.8%
2023	9,415	-21.1%	8,023	-23.8%	17,437	-22.4%
2024	9,434	0.2%	11,644	45.1%	21,078	20.9%

As Reported by The US TTB

Year	Pckg Exp	% Chng	Bulk Exp	% Chng	Total Exp	% Chng
2020	13,290		24,491		37,782	
2021	13,868	4.3%	20,681	-15.6%	34,549	-8.6%
2022	14,100	1.7%	16,187	-21.7%	30,287	-12.3%
2023	11,385	-19.3%	12,278	-24.1%	23,663	-21.9%
2024	9,822	-13.7%	14,427	17.5%	24,249	2.5%

As Reported by US Customs

Year	Pckg Exp	% Chng	Bulk Exp	% Chng	Total Exp	% Chng
2020	14,964		24,008		38,971	
2021	17,779	18.8%	17,659	-26.4%	35,438	-9.1%
2022	17,756	-0.1%	12,636	-28.4%	30,391	-14.2%
2023	14,909	-16.0%	7,171	-43.2%	22,080	-27.3%
2024	12,795	-14.2%	10,526	46.8%	23,321	5.6%

Notes:

CA BOE - These are exports as reported on CA Winegrower Returns.
Certain wineries only report quarterly or annually so trends can vary.

US TTB - These are exports as reported on Reports of Wine Premise Operations.
Generally these will track closer to when wines leave the winery.

US Customs - These are exports as reported on customs forms.
These are tracked when the ship leaves the port.
The packaged versus bulk is based on customs codes.

Annually - Variances due to timing generally balance out over 12 months.
There are some variances between packaged and bulk based on BOE definitions, TTB definitions, and Customs codes.

American Wine Exports per U.S. Dept of Commerce Summary by Wine Category Eleven Months Ended November 2024 and 2023 In Thousands of Nine Liter Equivalent Cases and Dollars						
Category	Eq. Cases 2024	Change Cases	% Chg Cases	Value 2024	Change Value	% Chg Value
Bottled Table Wines	8,666	-74	-1%	599,920	17,797	3%
Bottled Dessert Wine	3,105	-22	-1%	297,166	-3,151	-1%
Sparkling Wine	360	-556	-61%	35,097	-34,682	-50%
Cider	171	-164	-49%	3,573	-1,934	-35%
Vermouth	156	-38	-20%	10,157	-5,978	-37%
Sangria / Coolers	1,814	217	14%	36,847	3,000	9%
Subtotal Bottled	14,272	-637	-4%	982,761	-24,947	-2%
Bulk Still Wines	11,218	4,324	63%	153,096	64,016	72%
Bulk Dessert Wines	361	85	31%	8,172	-546	-6%
Subtotal Bulk	11,579	4,408	61%	161,268	63,470	65%
Total	25,852	3,772	17%	1,144,029	38,523	3%

Note: Excludes re-exports of imported wines. Source: U.S. Dept. of Commerce

Bottled American Wine Exports Summary of Bottled Wine Exports for Top 12 Countries of Destination Eleven Months Ended November 2024 and 2023 In Thousands of Nine Liter Equivalent Cases and Dollars						
Category	Eq. Cases 2024	Change Cases	% Chg Cases	Value 2024	Change Value	% Chg Value
EEC	1,788	-42	-2%	112,268	-5,545	-5%
Canada	5,714	-155	-3%	396,655	-6,105	-2%
China	796	252	46%	81,126	47,276	140%
Japan	748	-4	-1%	70,461	-9,460	-12%
Korea, South	591	-52	-8%	46,476	-12,416	-21%
Dominican Republic	782	62	9%	25,834	3,007	13%
Hong Kong	324	-14	-4%	23,864	-10,251	-30%
Mexico	357	0	0%	19,744	392	2%
Singapore	151	-34	-18%	12,457	-1,651	-12%
Norway	141	28	25%	12,441	1,491	14%
Philippines	277	41	17%	9,420	41	0%
Nigeria	162	78	92%	7,401	3,600	95%
Other Countries	2,439	-796	-25%	164,612	-35,326	-18%
Total	14,272	-637	-4%	982,761	-24,947	-2%

Bulk American Wine Exports Summary of Bulk Wine Exports for Top 7 Countries of Destination Eleven Months Ended November 2024 and 2023 In Thousands of Nine Liter Equivalent Cases and Dollars						
Category	Eq. Cases 2024	Change Cases	% Chg Cases	Value 2024	Change Value	% Chg Value
United Kingdom	6,627	2,195	50%	97,229	40,735	72%
Germany	1,237	869	237%	12,621	8,959	245%
Canada	705	466	195%	9,993	6,456	183%
Denmark	776	465	150%	9,427	4,331	85%
France	727	383	111%	8,590	4,512	111%
Belgium	453	-5	-1%	4,493	947	27%
Netherlands	267	47	21%	2,692	572	27%
Other Countries	787	-13	-2%	16,223	-3,041	-16%
Total	11,579	4,408	61%	161,268	63,470	65%

Source: US Customs Data

World Wine Trade - Major Exporting Countries* - Top 15 Trade Partners

Eleven Months Ending - November 2024

Exporting Country

Trade Partner	Argentina	Australia	Chile	France	Germany	Italy	New Zealand	Portugal	South Africa	Spain	United States	Total
9L Cases (000)												
United States	4,038	6,585	4,439	13,639	1,571	23,855	5,454	2,386	666	4,343	-	66,975
United Kingdom	1,797	3,090	4,113	12,454	1,719	15,138	2,224	2,347	2,651	9,228	571	55,333
Germany	167	187	691	10,533	-	25,346	120	1,577	656	8,709	95	48,079
Netherlands	578	526	2,050	10,156	7,093	5,908	193	1,445	1,278	4,518	303	34,048
Canada	1,018	2,098	1,883	5,335	286	5,954	1,268	1,207	518	2,014	4,795	26,376
Belgium	108	434	386	10,066	1,407	2,914	92	1,071	497	2,057	88	19,120
Japan	118	836	4,231	3,929	281	3,542	116	198	185	2,784	724	16,944
China	155	3,361	3,540	4,185	478	1,310	315	165	348	1,249	791	15,897
Brazil	2,729	38	7,515	472	14	964	6	2,958	77	696	24	15,493
France	104	27	178	-	781	3,061	144	3,213	53	5,271	243	13,074
Sweden	45	299	731	3,706	1,356	3,099	61	880	756	1,415	251	12,600
Poland	87	7	463	1,416	2,684	2,222	51	1,689	65	1,793	11	10,488
Russia	113	-	1,131	194	1,202	4,079	-	1,689	107	1,175	-	9,689
Switzerland	201	18	139	1,945	582	4,263	1	867	25	1,367	121	9,529
Denmark	52	197	425	1,959	806	2,622	111	463	115	1,695	312	8,757
Sub-Total	11,307	17,704	31,913	79,990	20,259	104,276	10,155	22,157	7,996	48,314	8,330	362,401
All Others	3,530	7,228	13,551	17,762	7,483	23,407	3,132	7,257	7,526	23,671	3,489	118,034
Total	14,837	24,931	45,465	97,751	27,742	127,683	13,287	29,413	15,522	71,985	11,819	480,435

USD / 9L	Argentina	Australia	Chile	France	Germany	Italy	New Zealand	Portugal	South Africa	Spain	United States	Total
United States	42.16	28.04	26.36	103.21	51.80	56.09	54.92	42.36	44.33	56.94	-	59.37
United Kingdom	34.89	32.66	26.43	75.71	32.87	27.89	47.97	36.32	29.39	28.01	90.51	41.10
Germany	38.98	26.02	30.16	40.52	-	34.49	44.85	28.23	35.06	21.01	71.32	33.19
Netherlands	33.53	27.66	29.09	33.26	21.52	37.92	53.68	35.80	29.65	27.49	73.84	30.97
Canada	44.08	29.50	32.95	70.76	45.21	62.92	65.61	41.68	41.78	49.51	78.20	59.28
Belgium	41.45	14.64	28.63	42.90	20.91	42.33	48.87	37.40	35.67	24.44	84.56	37.99
Japan	39.65	29.45	24.33	92.60	55.96	40.47	76.70	36.32	35.81	19.32	94.84	47.23
China	53.79	133.87	33.75	76.85	51.76	57.07	75.30	37.76	35.40	36.36	102.21	73.44
Brazil	32.19	31.81	24.71	61.69	59.07	37.70	64.75	29.04	28.87	25.21	63.69	28.96
France	106.04	93.74	210.72	-	29.69	49.82	117.38	30.99	67.01	13.10	73.69	33.17
Sweden	52.89	39.23	18.71	42.86	22.95	42.40	57.40	25.07	24.16	31.12	58.84	35.86
Poland	27.86	42.71	25.23	30.26	25.04	30.97	46.03	23.03	22.96	16.74	78.84	25.45
Russia	24.35	-	18.51	29.38	25.36	27.88	-	20.11	23.12	16.87	-	23.72
Switzerland	48.10	56.52	38.51	162.38	72.82	72.78	93.86	35.48	110.05	92.00	64.01	89.38
Denmark	43.20	44.32	34.59	71.72	31.76	47.48	46.48	50.37	49.81	25.92	71.30	47.58
Sub-Total	38.86	49.33	27.93	66.29	29.32	43.27	56.19	32.53	32.90	29.23	81.38	44.86
All Others	36.45	49.08	26.61	101.67	33.69	38.51	59.77	24.64	22.01	20.57	66.37	42.81
Total	38.29	49.26	27.54	72.72	30.50	42.40	57.03	30.59	27.62	26.38	76.95	44.36

** Packaged Still Wines. Excludes Sparkling Wine, Vermouth, Sake, Flavored Wine Beverages, Bulk Wines*

Eleven Months to November Exports of Major Wine Producing Countries

Major Wine Exporters	2019	2020	2021	2022	2023	2024
9L Cases (000)						
Argentina	18,316	19,696	20,436	19,375	14,519	14,931
Australia	39,357	37,975	26,965	25,769	21,831	24,974
Chile	51,181	52,469	51,157	51,754	41,169	45,812
France	109,440	102,938	110,360	107,420	98,277	100,159
Germany	34,767	33,664	33,084	29,742	28,982	30,283
Italy	126,845	127,818	134,382	131,197	125,177	138,934
New Zealand	17,339	17,013	16,751	17,134	15,811	13,287
Portugal	27,271	29,654	30,551	29,356	28,233	29,589
South Africa	20,326	19,006	22,911	18,665	16,503	16,452
Spain	76,366	79,622	84,507	77,463	72,616	77,818
United States	15,146	12,662	15,528	15,159	11,992	11,975
Total	536,353	532,517	546,630	523,035	475,109	504,215
USD / 9L						
Argentina	$34.70	$31.32	$33.72	$34.62	$38.04	$38.20
Australia	$37.64	$39.28	$39.51	$37.31	$37.80	$49.23
Chile	$27.98	$26.96	$29.09	$28.55	$28.44	$27.54
France	$58.49	$57.20	$68.82	$67.15	$73.33	$72.23
Germany	$26.81	$25.54	$28.50	$28.08	$30.78	$29.35
Italy	$36.58	$36.89	$40.86	$39.65	$41.68	$40.88
New Zealand	$50.19	$50.00	$56.40	$54.15	$54.76	$57.04
Portugal	$29.40	$29.13	$31.98	$29.14	$30.81	$30.58
South Africa	$22.71	$22.34	$21.96	$24.56	$25.92	$26.96
Spain	$22.65	$23.16	$24.76	$24.10	$25.72	$25.38
United States	$60.98	$65.65	$69.10	$73.91	$75.27	$76.79
Total	$37.86	$37.18	$41.82	$41.28	$43.78	$43.37

Eleven Months to November Key Importers of Above Exporting Countries

Major Importing Country	2019	2020	2021	2022	2023	2024
9L Cases (000)						
United States	72,602	71,451	77,889	72,843	66,082	62,454
United Kingdom	68,685	71,930	64,408	58,483	55,212	50,345
Germany	54,981	56,156	60,217	54,554	51,423	40,818
Netherlands	32,401	37,776	36,611	35,870	34,461	30,486
Canada	30,726	31,673	31,113	30,755	26,549	24,430
China	42,570	29,731	26,920	19,993	14,260	14,923
Belgium	19,573	20,223	21,884	21,549	20,377	17,162
Japan	18,843	17,908	17,156	18,526	15,747	16,134
Brazil	11,650	15,192	15,542	14,625	13,873	15,137
France	14,916	13,903	13,850	13,960	13,705	11,678
Sweden	12,872	13,880	13,476	13,472	12,608	11,191
Switzerland	10,206	10,908	11,593	10,569	10,039	8,496
All Others	146,327	141,788	155,970	157,835	140,774	200,962
Total	536,353	532,517	546,630	523,035	475,109	504,215
USD / 9L						
United States	$49.87	$45.68	$52.17	$53.99	$58.01	$59.10
United Kingdom	$33.69	$33.42	$41.65	$40.76	$43.53	$41.02
Germany	$29.96	$29.75	$30.72	$30.64	$32.82	$32.84
Netherlands	$27.00	$27.28	$30.06	$27.92	$30.68	$30.42
Canada	$48.15	$48.25	$55.53	$54.80	$55.65	$59.39
China	$40.49	$48.23	$44.17	$47.96	$55.12	$72.14
Belgium	$34.22	$34.44	$38.33	$35.67	$38.20	$37.23
Japan	$45.20	$43.79	$48.42	$48.06	$50.87	$46.45
Brazil	$27.49	$24.89	$26.79	$27.26	$28.64	$28.85
France	$27.00	$27.15	$32.62	$32.25	$33.46	$32.95
Sweden	$33.96	$34.12	$37.77	$36.36	$36.12	$35.39
Switzerland	$77.71	$74.88	$85.51	$84.35	$89.53	$88.80
All Others	$35.36	$34.87	$39.82	$38.43	$40.95	$39.58
Total	$37.86	$37.18	$41.82	$41.28	$43.78	$43.37

** Packaged Still Wines. Excludes Sparkling Wine, Vermouth, Sake, Flavored Wine Beverages, Bulk Wines / Source Global Trade Database*