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Impact Databank Exclusive: Top Italian Labels Driving Imported Sparklers In U.S.

April 19, 2012

Impact Databank's exclusive analysis of the top 10 imported sparkling wines in the U.S. market finds that Italian wines continue to be the biggest volume drivers in this rising segment. Total imported sparkling wine shipments to the U.S. increased 19.7% to 7.65 million cases in 2011.

Of the 10 largest imported sparkling wines in the market by volume, half are sourced from Italy. Four of those five—Verdi, Sparkletini, Mionetto and Lunetta—grew by double-digits in 2011, the lone exception being Martini & Rossi, whose U.S. depletions have now slipped by 25% since 2007. Verdi and Sparkletini, imported by Carriage House Imports, continue to thrive on accessible pricing and flavored extensions like Green Apple, Peach and Raspberry. Combined volume for the two Carriage House labels has nearly doubled since 2007, eclipsing 1.5 million cases last year.

Selling for a few dollars more per bottle, Proseccos like Mionetto and Lunetta continue to surge in the U.S. market. Lunetta, making good on marketer Palm Bay Imports' prediction to Shanken News Daily last summer, grew nearly 50% to 150,000 cases in 2011. Rival Mionetto more than kept pace, adding 5,000 more cases than Lunetta for the year on 21% growth.

While Italy's top sparklers keep charging ahead, the leading Cava brands in the U.S. have seen a tougher road. Freixenet has now declined for three straight years and is off by 19% since 2008. Slightly lower-priced portfoliomate Segura Viudas added at least 20,000 cases a year from 2005-2010, but last year it slowed markedly. Competitor Jaume Serra Cristalino's path has been similar. From 2006-2010 it grew by 70%, but an 8.5% decline in 2011 ended its upswing.

Meanwhile, Champagne shipments to the U.S. have been robust the past two years (up 14% by volume last year, according to the CIVC), but depletions for the Champagne segment's top two brands, Moët & Chandon and Veuve Clicquot, were relatively flat last year.

USA - Top 10 Imported Sparkling Wine Brands
(thousands of nine-liter case depletions)

Rank	Brand	Importer	Origin	2010	2011	Percent Change
1	Verdi	Carriage House Imports, Ltd.	Italy	1,065	1,185	11.3%
2	Martini & Rossi	Bacardi USA, Inc.	Italy	650	600	-7.7%
3	Freixenet	Freixenet USA, Inc.	Spain	545	535	-1.8%
4	Moët & Chandon*	Moët-Hennessy USA (LVMH)	France	405	410	1.2%
5	Jaume Serra Cristalino	CIV USA Inc.	Spain	410	375	-8.5%
5	Sparkletini	Carriage House Imports, Ltd.	Italy	325	370	13.8%
6	Veuve Clicquot	Moët-Hennessy USA (LVMH)	France	365	365	-
8	Mionetto	Mionetto USA	Italy	265	320	20.8%
9	Segura Viudas	Freixenet USA, Inc.	Spain	215	220	2.3%
10	Lunetta	Palm Bay International	Italy	105	155	47.6%
Total Top 10				4,350	4,535	4.3%

* excludes Dom Perignon
Source: IMPACT DATABANK

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