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Wine in the US on-premise sector

Market report

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WineMarkets.co

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Introduction

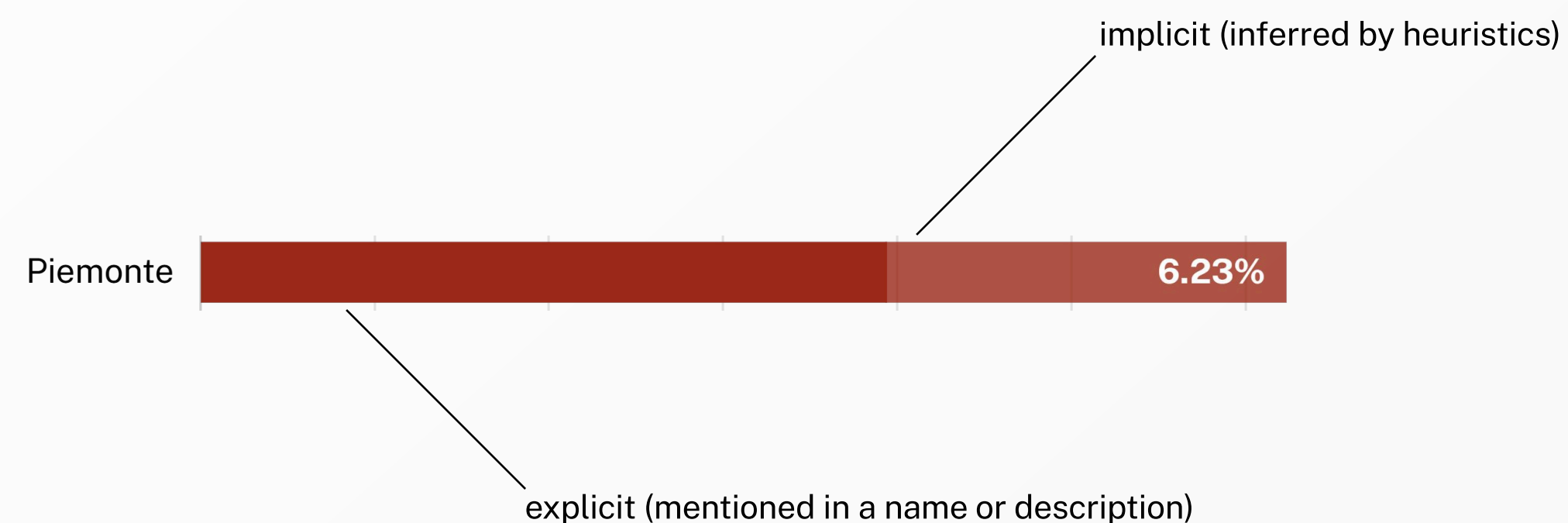
How do Americans drink wine when they are eating out? What varieties, appellations and brands do they prefer? How different are they from the British, the French, the Germans, the Italians? The structure of the US on-premise wine market has been obscure, with only limited and mostly anecdotal data. On the other hand, the hospitality and fine dining sector has always been indicative of the broader industry. Restaurants and wine bars both set trends and reflect consumers' tastes, and sommeliers form professional communities with cavistes and wine merchants.

This report is based on a database of more than 1.4 million wine placements from 28,000 restaurants across the United States. This is a much larger dataset than those that are usually used in consumer surveys. The information contained in wine lists was the primary source of data; sometimes they were incomplete, and sometimes the sum of mutually exclusive categories that should together form the whole subset is slightly less than 100%. The exact methodology of data collection and processing is published at [WineMarkets.co](https://winemarkets.co); the resulting data has proven to be remarkably accurate.

Today, [WineMarkets.co](https://winemarkets.co) tracks more than 37,000 wine brands, about 2,100 regions and appellations down to the village level, and more than 800 grape varieties. All these properties, or tags, are divided into *explicit* and *implicit*. *Explicit* are the properties that were stated directly in wine lists. *Implicit* tags are assigned algorithmically through the set of rules. On the report's bar charts, implicit tags are shown with semi-transparent fill.

The US wine market is going through challenging times. With declining consumption, domestic overproduction, tariffs on foreign wines and increased competitive pressure, it is crucial to have reliable market intelligence. WineMarkets.co offers many capabilities, from full-text search and showing placements on the map to advanced analytics, including the calculation of ideal restaurant profiles for a selected wine brand and the subsequent creation of target account lists using multidimensional feature vectors.

The following report shows the overall picture of the market at the end of 2025.



Ilya Zabolotnov DipWSET

General overview

In the US, around 20% of wine by volume is sold through the on-premise sector. Wine in American restaurants is expensive: the usual markup for low-priced mass-produced wines is around 300%, going down to 200% for mid-priced wines and further down to 100% for super-premium wines. (The median on-premise price per bottle in the US for *Barefoot* is more than 3.5 times higher than the usual off-premise price; for *Banfi Brunello di Montalcino* it is 2.3 times higher; for *Tignanello* it is 1.7 times higher – see Appendix 1.) This is significantly higher than in the UK, where the markup for least expensive wines is usually around 200%, going down to 50% for most expensive wines, with a variance across different restaurants larger than in the US. It is worth mentioning that all wholesale prices for European wines in the US in 2026 include 15% tariff while all wine prices in the UK contain around £3 excise duty.

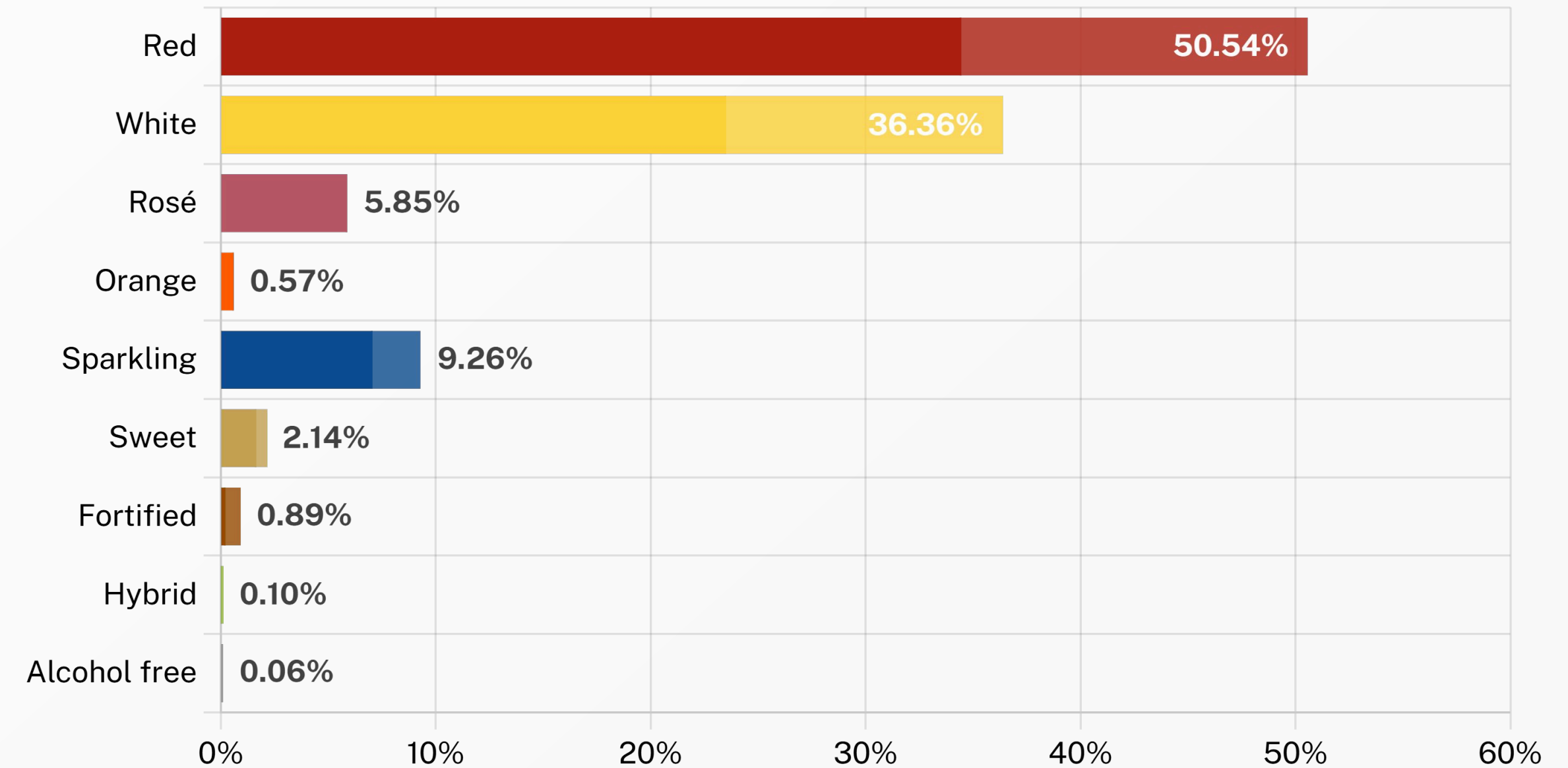
The median on-premise price is **\$12** per glass and **\$60** per bottle, from \$10 and \$42 in Mississippi to \$14 and \$80 in New York.

The US wine market is a strong Bandwagon market, where consumers tend to prefer popularity over rarity and social signaling over exploration; the mere fact of popularity is widely used in sales pitches. It is a “fit-in” culture, as opposed to “stand-out” cultures. Wine consumption in public in the US apparently has a more pronounced performative dimension than in traditional wine-drinking countries or in cultures that exert less social pressure to “fit in”. These cultural differences arguably allow restaurants to maintain higher markups on alcoholic beverages.

There are significantly more placements of red wine in the US than white (the opposite is in the UK, Germany and even in Italy). The share of rosé wines is low, only around 6% of placements (compared to 14% in the UK and 11% in France). For the general American public, rosé wines, which are usually not varietally labelled, are perceived as a single indivisible category that cannot be broken down into other categories, so many restaurants choose to carry only one or two rosé wines.

Non-alcoholic wines are usually highlighted as a growing trend, but in the US their share remains minuscule. The share of non-alcoholic wine placements in the US one-eighth of that in the UK or Germany.

Miscellaneous categories (% of all placements)



Median on-premise price

 **\$12**  **\$60**

Placements in United States, BTG and BTB, placements=1,406,514, wine lists=30,814, establishments=27,985

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Grape varieties

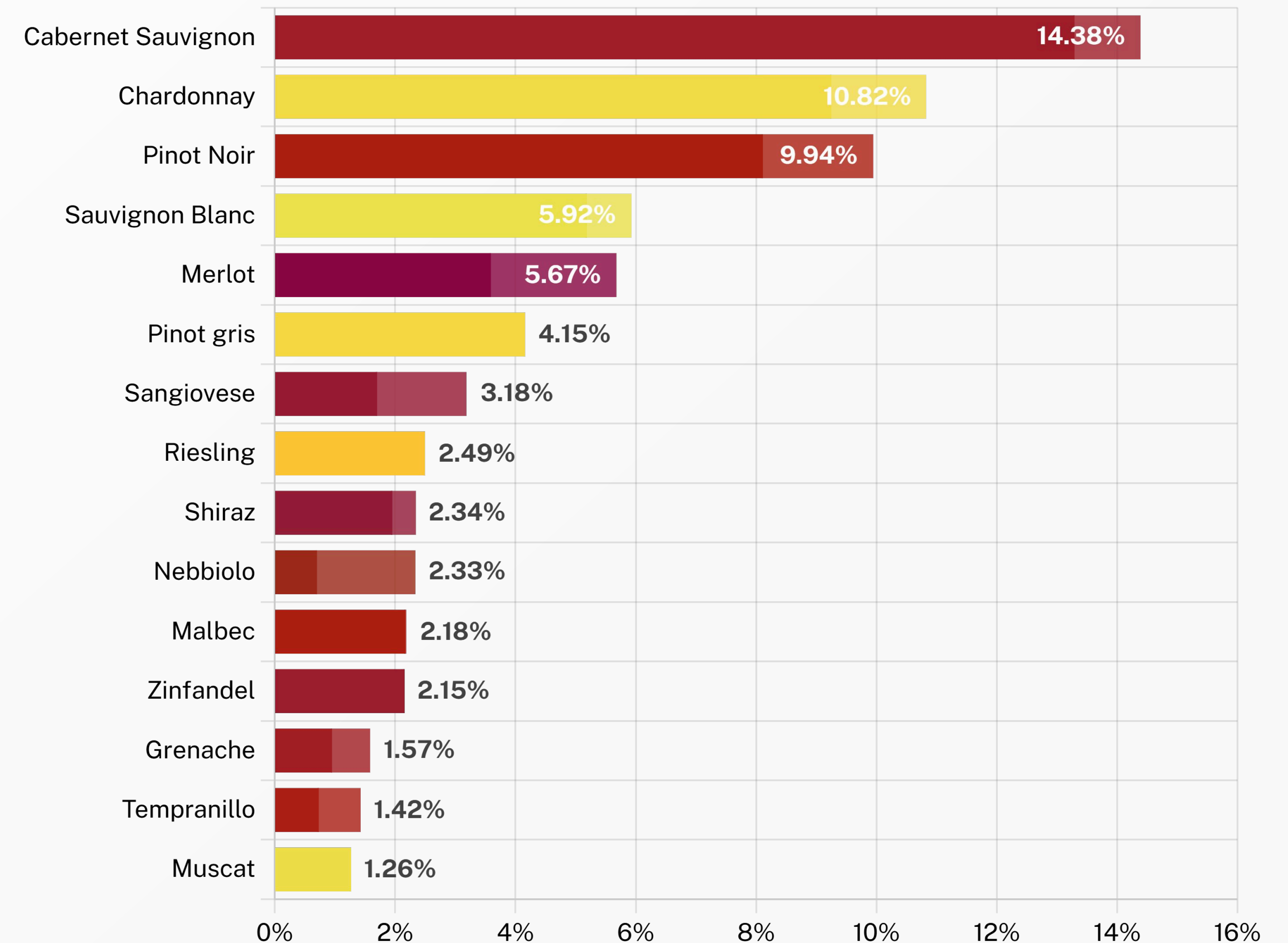
The majority of wines in the US on-premise sector are explicitly varietally labelled. Grape varieties define the most important and understandable categories for American customers. It is safe to say that most Americans perceive the popularity of certain grape varieties as a signal for quality and are reluctant to try new, lesser-known varieties.

This perception originates in the 1970s, when varietally labelled wines constituted a new, emerging premium category, and were a primary means of premiumization for wine producers. Varietal was a synonym for quality and prestige. The notion of terroir was dismissed in the US until recently, and it was varietal typicity that was commonly perceived as indicative of quality. This even caused a linguistic change: the word *varietal* is commonly misused in the wine context in the US instead of the word *variety*. A *blend* is a distinctive separate category for an American consumer.

A stunning 14% of all still wine placements correspond to the wines made fully or predominantly from Cabernet Sauvignon, with 92% of them varietally labelled. At least since the Judgment of Paris in 1976, Cabernet Sauvignon has been the nation's favorite grape variety. Among domestically produced wines, 25% of all still wine placements correspond to varietally labelled Cabernet Sauvignon. Many Americans would be surprised to know that in the UK their favorite variety is in 9th place with only 3.6% of all placements, including non-varietally labelled blends from Bordeaux's left bank.

Chardonnay surged in popularity worldwide in the 1980s, with a particular style of dense, buttery, oaked Californian Chardonnay leading the trend among US consumers. The demand for Pinot Noir grew enormously in the 2000s, reflecting the change from approximately 4,000 hectares in California in 2000 to 15,000 ha in 2010. The 2004 movie *Sideways* undoubtedly contributed to the recognition of the red Burgundian variety in the US Bandwagon market.

Grape varieties in on-premise in the US
(% of all placements, still wines only)



Placements in the United States, BTG and BTB, excluding: Sparkling (explicit and implicit), placements=1,276,335, wine lists=30,553, accounts=27,800

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Countries of origin

Across the US, domestic wines are by far the most popular in the on-premise sector. Taking into account the share of wines for which country of origin hasn't been positively identified by recognition and heuristics algorithms, it is safe to assume that almost half of all still wines offered in the on-premise sector are domestically produced. There are fewer than half of Italian still wine placements than US still wine listings; French wines are in third place with a marginally smaller share, although the median price per bottle is \$120, twice that of Italy.

When the American wine market was actively forming in the mid-20th century, the notion of fine wine was synonymous with French wine; German wines had lost much of their former fame of the 19th century, Italy had only niche appeal and only started to gain traction, and Spain under Franco did not export much of its production. The share of Italian wines in the US on-premise sector (and in many other countries too) can partly be explained by the ubiquity of Italian restaurants, although prestige Italian appellations (*Barolo*, *Brunello di Montalcino*, *Amarone della Valpolicella*) had long become an inseparable part of the American fine dining culture.

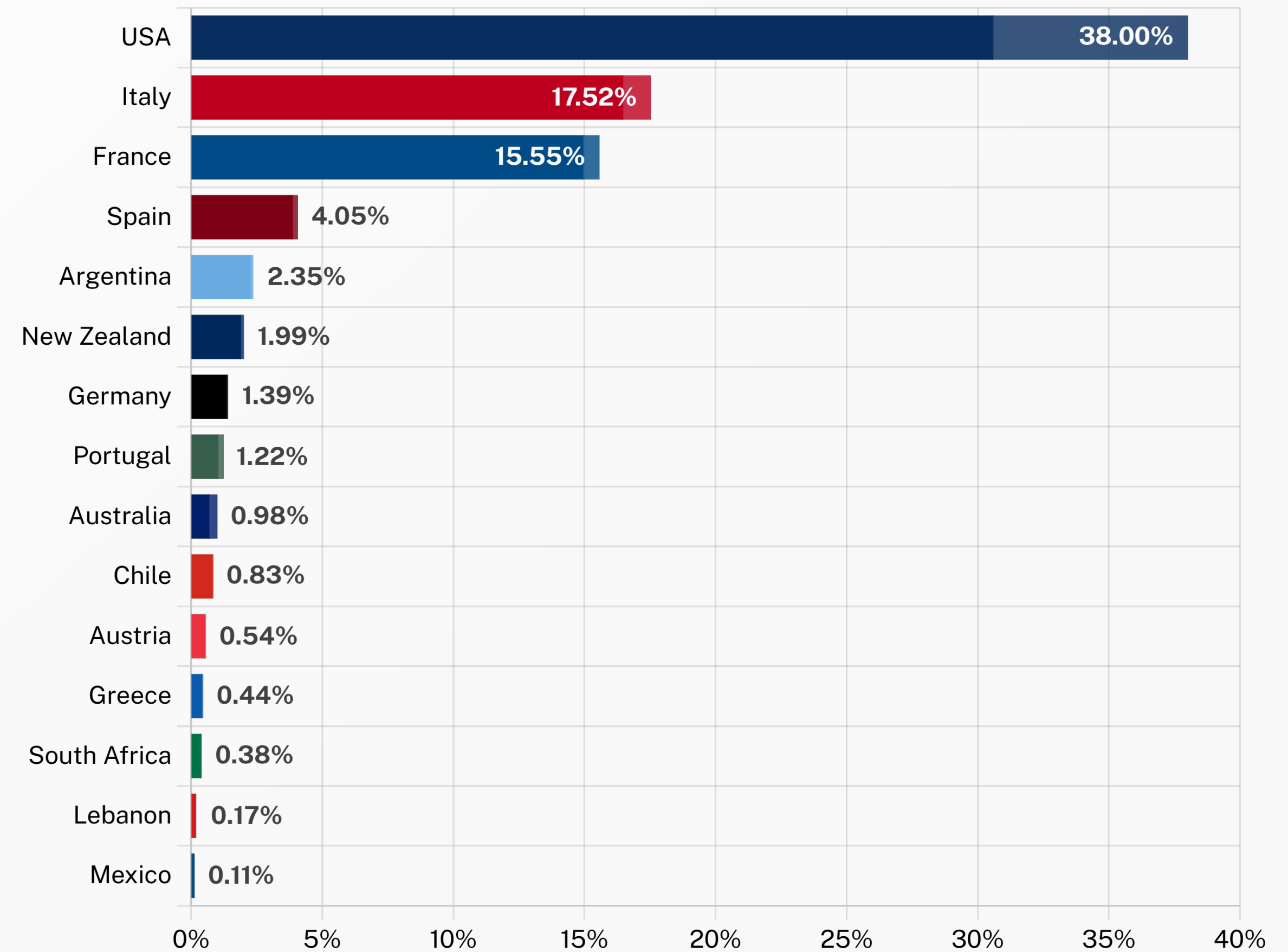
The US on-premise scene is effectively a three-country market, with other countries still being somewhat exotic for mainstream consumers. Americans are cautious, conservative and not very curious about new things.

Spanish wines are noticeably underrepresented in the US wine market, with only 4% of placements – compared to 9% in the UK. The US wine market is lucrative, still with the noticeable dimension of conspicuous consumption, with price being perceived as the most reliable indicator of quality. This is the reason that wine list decision-makers don't actively seek best values for lower price, while sommeliers in less affluent countries do; this is why Spanish wines, being internationally underpriced, are not popular in the US.

Argentina is a prominent leader among New World producers in the US, while in the UK it loses to Australia, South Africa and Chile.

The state of New York has a very different wine market from the rest of the US, with domestically produced wines being only in 3rd place after Italy and France.

Countries of origin in on-premise in the US (% of all placements, still wines only)



Placements in the United States, BTG and BTB, excluding: Sparkling (explicit and implicit), placements=1,276,335, wine lists=30,553, accounts=27,800

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Appellations

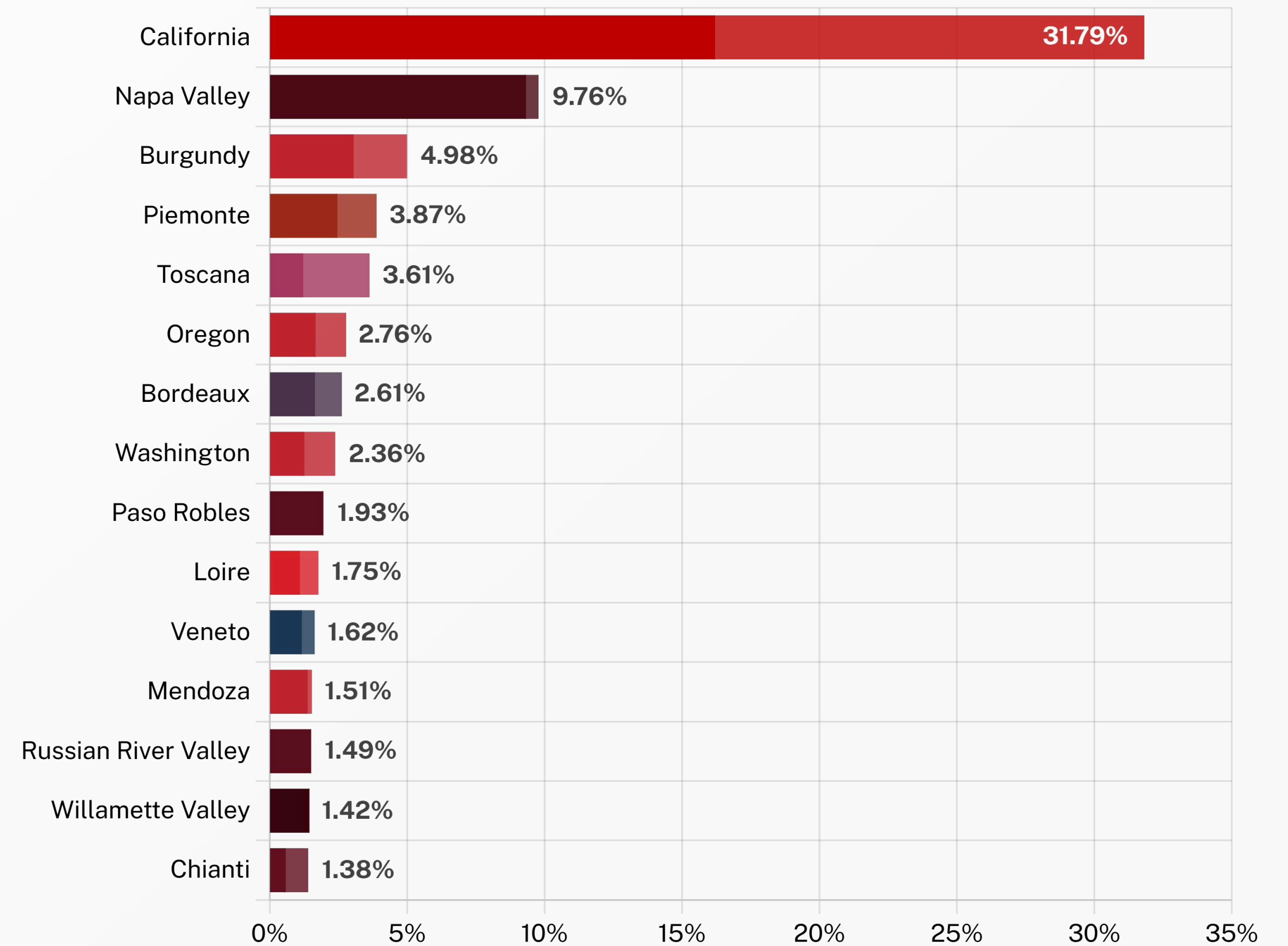
Almost one third of all Californian wines in the on-premise sector originates in Napa Valley. This appellation is a uniquely American place in many senses, and the wines from there embody certain American values, including a distinctive notion of success, and the American perception of the good life. They are expensive, with the median price of \$120 per bottle and \$17 per glass, but less expensive than Burgundy (\$210 / \$17). There almost twice as many placements from Napa Valley alone than from whole Burgundy in American restaurants. But not in New York, where Burgundy wins over Napa.

Burgundy rises in popularity all over the world while the demand for Bordeaux wines is in global decline. The gap between Burgundy and Bordeaux in the US is larger than in the UK. Bordeaux is remarkably unfashionable in the US nowadays, with fewer placements not only than Piedmont or Tuscany, but even than Oregon.

The absence of Rioja is striking. In the UK, there are roughly as many placements from Rioja as from Piedmont or from Bordeaux.

The by-the-glass landscape is utterly dominated by US wines. The most popular foreign appellation among by-the-glass placements is Tuscany, but it still trails Paso Robles and Oregon overall.

Appellations in on-premise in the US (% of all placements, still wines only)

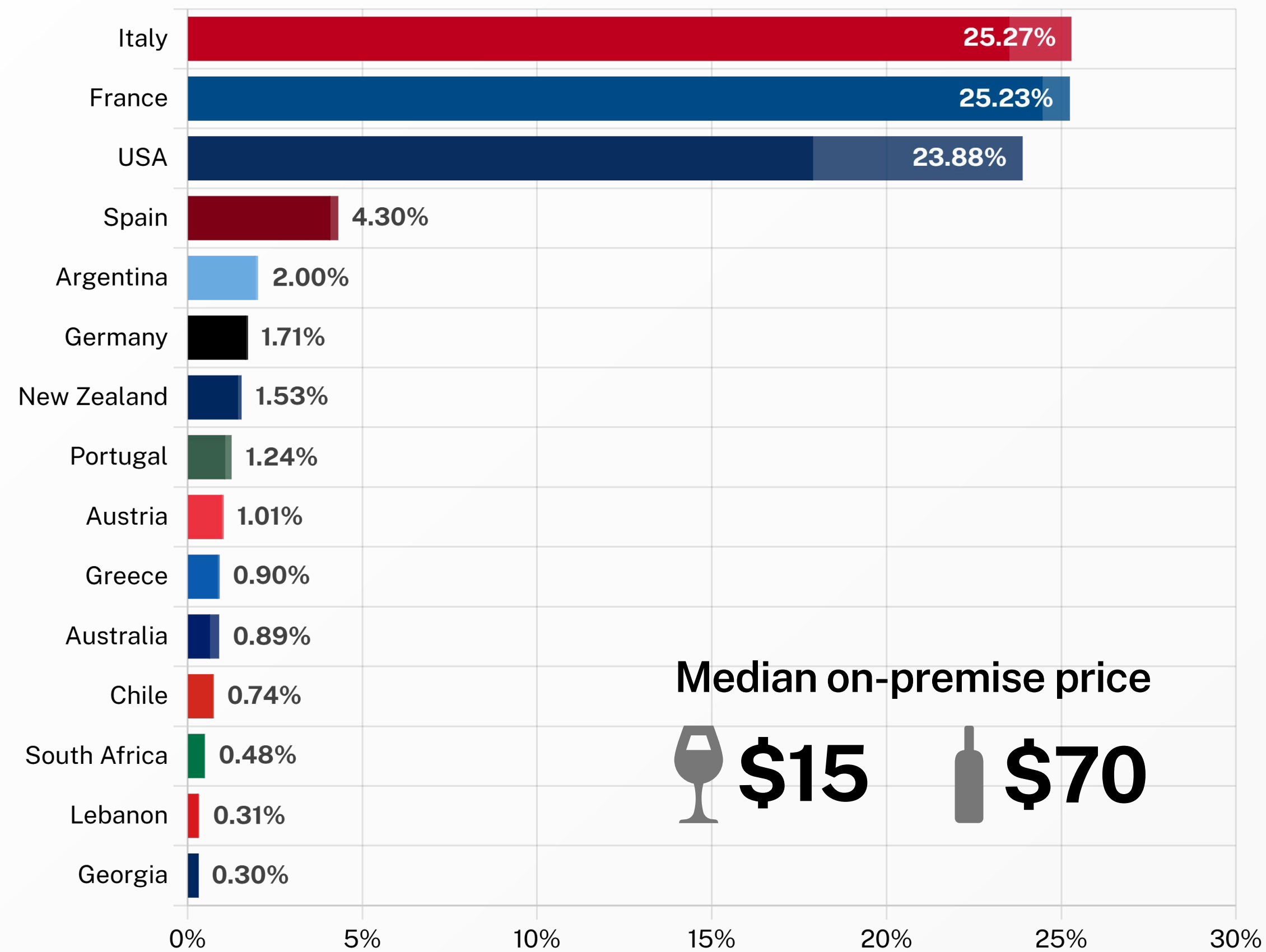


Placements in the United States, BTG and BTB, excluding: Sparkling (explicit and implicit), placements=1,276,335, wine lists=30,553, accounts=27,800

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New York — a very different state

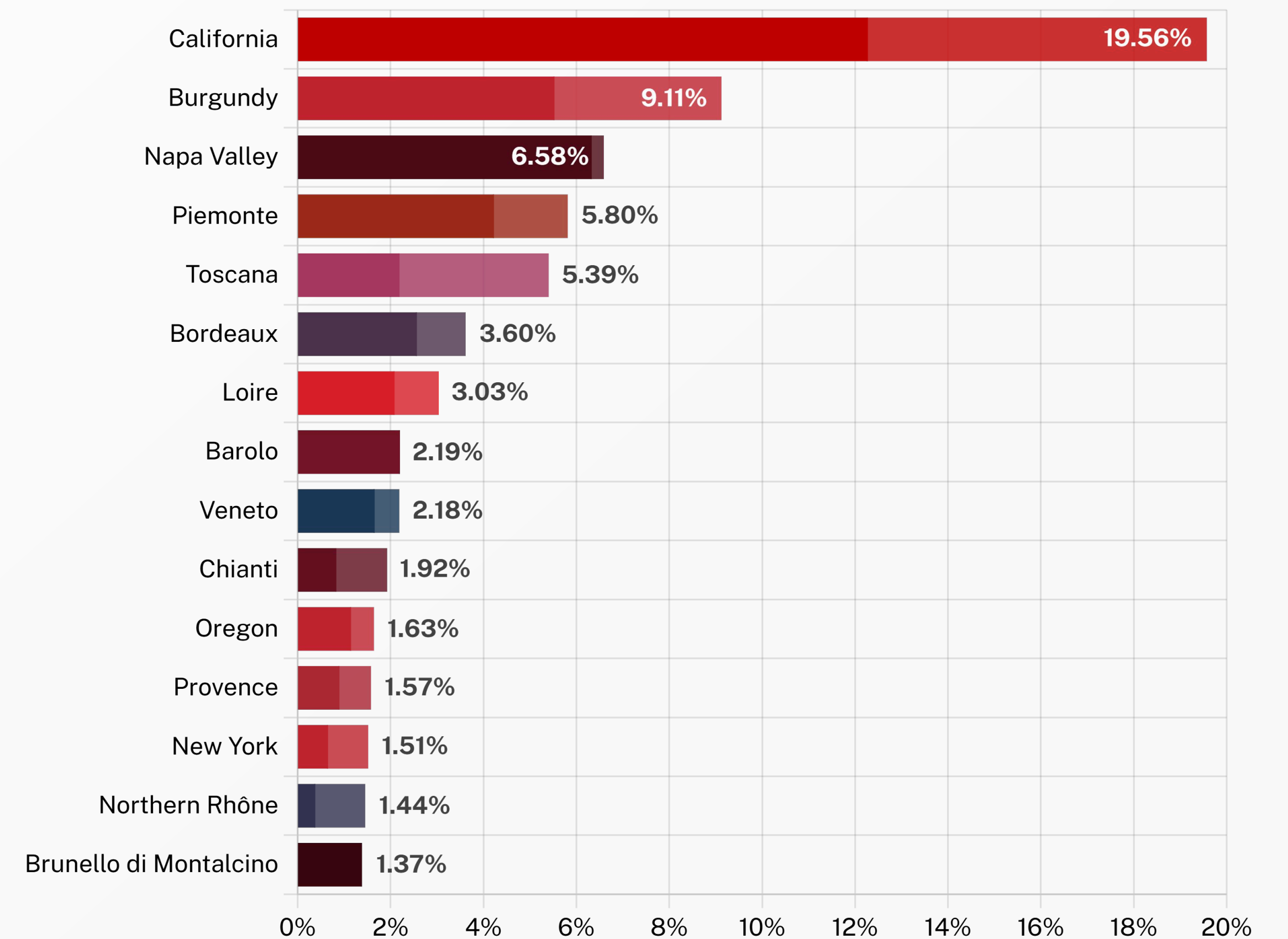
Countries of origin in on-premise in New York (% of all placements, still wines only)



Placements in United States, BTG and BTB, New York, excluding: Sparkling (explicit and implicit), placements=160,969, wine lists=4,183, establishments=3,582

Version: v1.1beta/2026 db Nov 2025

Appellations in on-premise in New York (% of all placements, still wines only)



Placements in United States, BTG and BTB, New York, excluding: Sparkling (explicit and implicit), placements=160,969, wine lists=4,183, establishments=3,582

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Brands

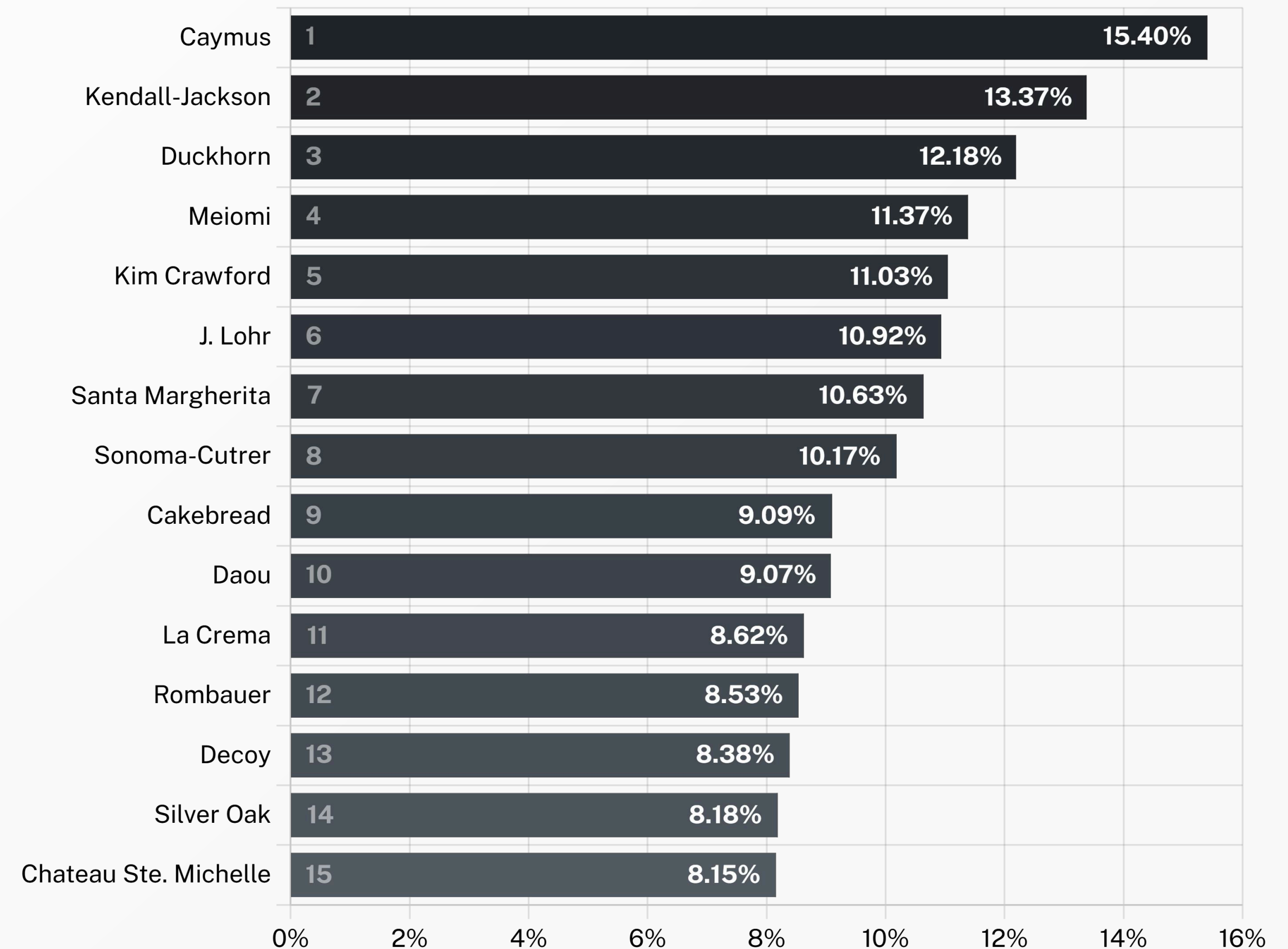
The stunningly high share of restaurants carrying the most popular wine brands is a defining feature of a Bandwagon, *winner-take-all* market. Although the UK has a comparable level of popularity for Champagne brands, among still wines the leading UK wine on-trade brand *Antinori* (which represents a company with a versatile portfolio of appellations and styles) has a market penetration of 4%; in second place, the single-appellation wine brand *Cloudy Bay* has 3.7%.

In comparison, an incredible 15% of American restaurants carry *Caymus*, the most popular premium commercial wine brand in the US in on-premise. It is peculiar that among the top 15 wine brands only one, *Rombauer*, is owned by *Gallo*, and it is a rather recent acquisition.

The US winemaking industry is extremely consolidated compared to other wine-producing countries, with around eight companies owning about 65% of production by volume; “around eight” because portfolio transfers, mergers and acquisitions are common. The largest producer is *Gallo* (formerly *E & J Gallo*), accounting for approximately 27% of produced volume. Many large producing conglomerates don’t put their names on wine labels; this practice was started in the 1970s by *E & J Gallo* when the company’s wines were boycotted by United Farm Workers, a trade union led by Cesar Chavez.

It became a common practice that many US commercial wine brands are connected neither to particular vineyards nor to production facilities. Legislation is lenient and allows the use of high-color concentrates such as Mega Purple; as much as 6% of total vineyard area in California is planted with Rubired, a teinturier variety used almost solely for high-color concentrates. In varietally labelled wines, up to 25% of other grapes are allowed, and many California-produced Pinot Noirs allegedly contain Petite Syrah. The Americans deem the opaque color a sign of quality.

Brands in on-premise in the US
(% of all establishments carrying, still wines only)

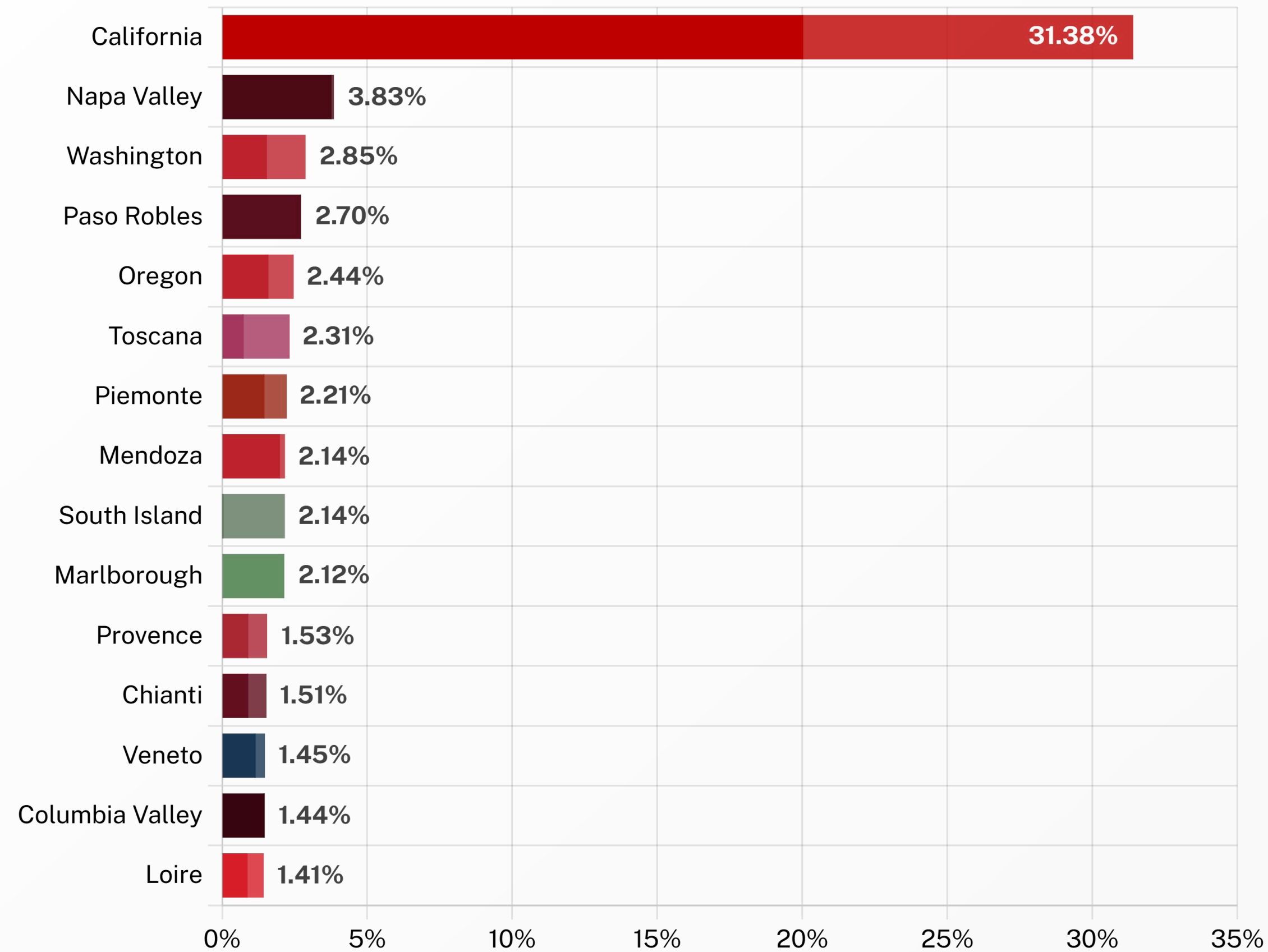


Establishments in the United States, BTG and BTB, placements=1,406,510, wine lists=30,813, establishments=27,984

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By the glass

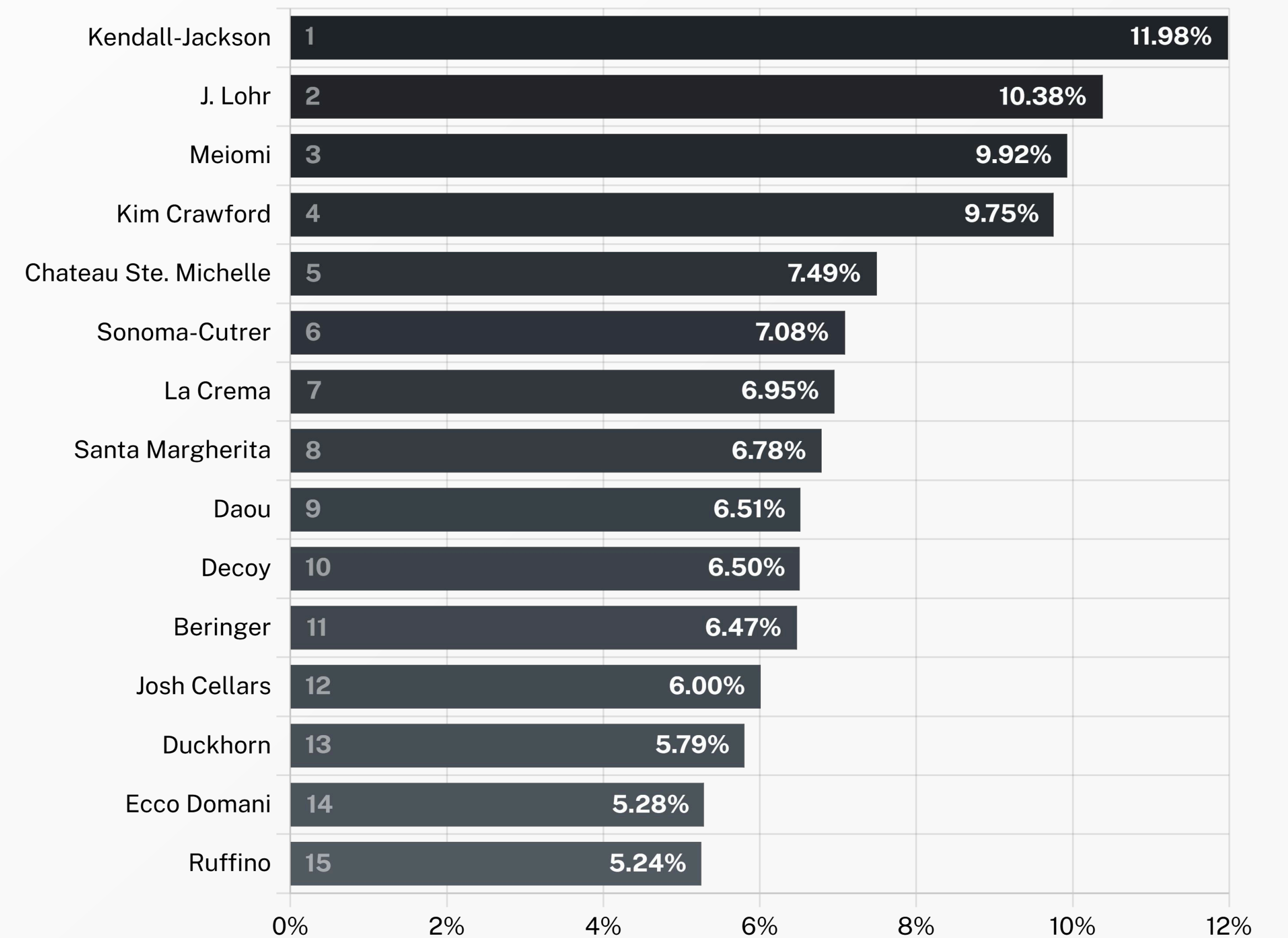
BTG, appellations in on-premise in the US
 (% of all by-the-glass placements, still wines only)



Placements in United States, BTG only, excluding: Sparkling (explicit and implicit), placements=347,249, wine lists=22,184, establishments=20,552

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BTG, brands in on-premise in the US
 (% of all establishments carrying by-the-glass, still wines only)



Establishments in United States, BTG only, excluding: Sparkling (explicit and implicit), placements=347,249, wine lists=22,184, establishments=20,552

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Sparkling wine

The proportions of sparkling wine appellations in the on-premise sector are remarkably similar in the US and UK, even with a similar share of domestic production in third place after Champagne and Prosecco. Strangely, unlike other Spanish wines, Cava is twice as popular in the US than in the UK.

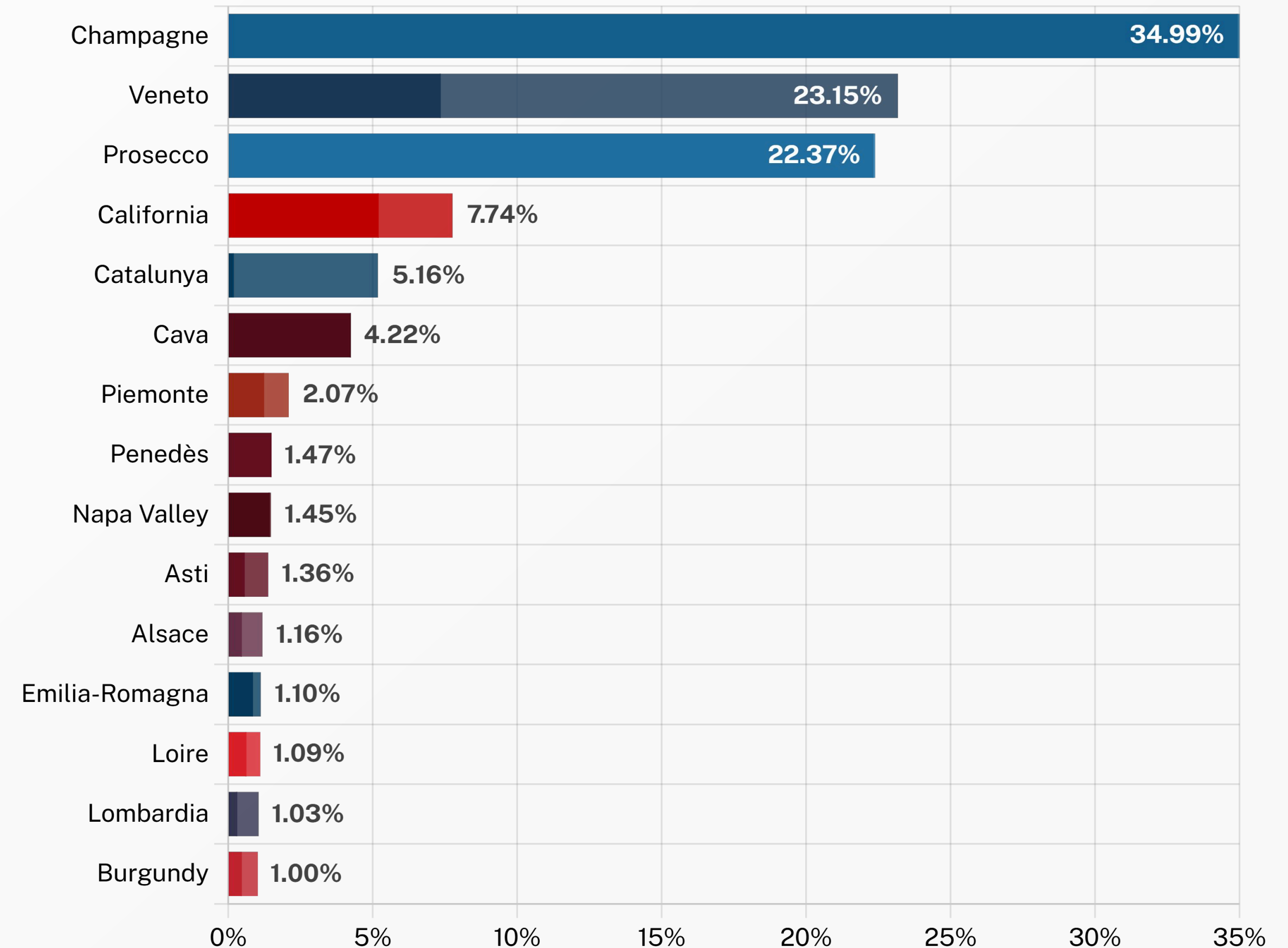
The worldwide success of Prosecco has been a textbook case in the wine business. With similar price points as Cava's, but with dramatically lower production costs, industrially produced Prosecco wins over traditional-method Cava at by factor of at least five not only in the US but worldwide. Even in France, Prosecco is just behind Champagne, with more placements than any Crémant appellation. Only the Spanish seem to boycott Prosecco with only 2% of sparkling wine placements. And the Italians themselves don't fall for their own trick: there are almost 50% more Franciacorta than Prosecco labels in Italian restaurants.

Cava, however, remains second among sparkling wine appellations requiring the traditional method, after Champagne. Each Crémant appellation accounts for less than 1% of sparkling wine placements. Franciacorta also constitutes about 1%, and Trentodoc is one third of Franciacorta. Corpinnat, despite being perceived as fashionable in the professional community, represents 0.2% of sparkling wines in the US on-premise sector.

Median on-premise price

 **\$15**  **\$65**

Sparkling wine appellations in on-premise in the US (% of all sparkling wine placements)



Placements in United States, BTG and BTB, filtered by tags: Sparkling (explicit and implicit), placements=130,181, wine lists=20,747, establishments=19,826

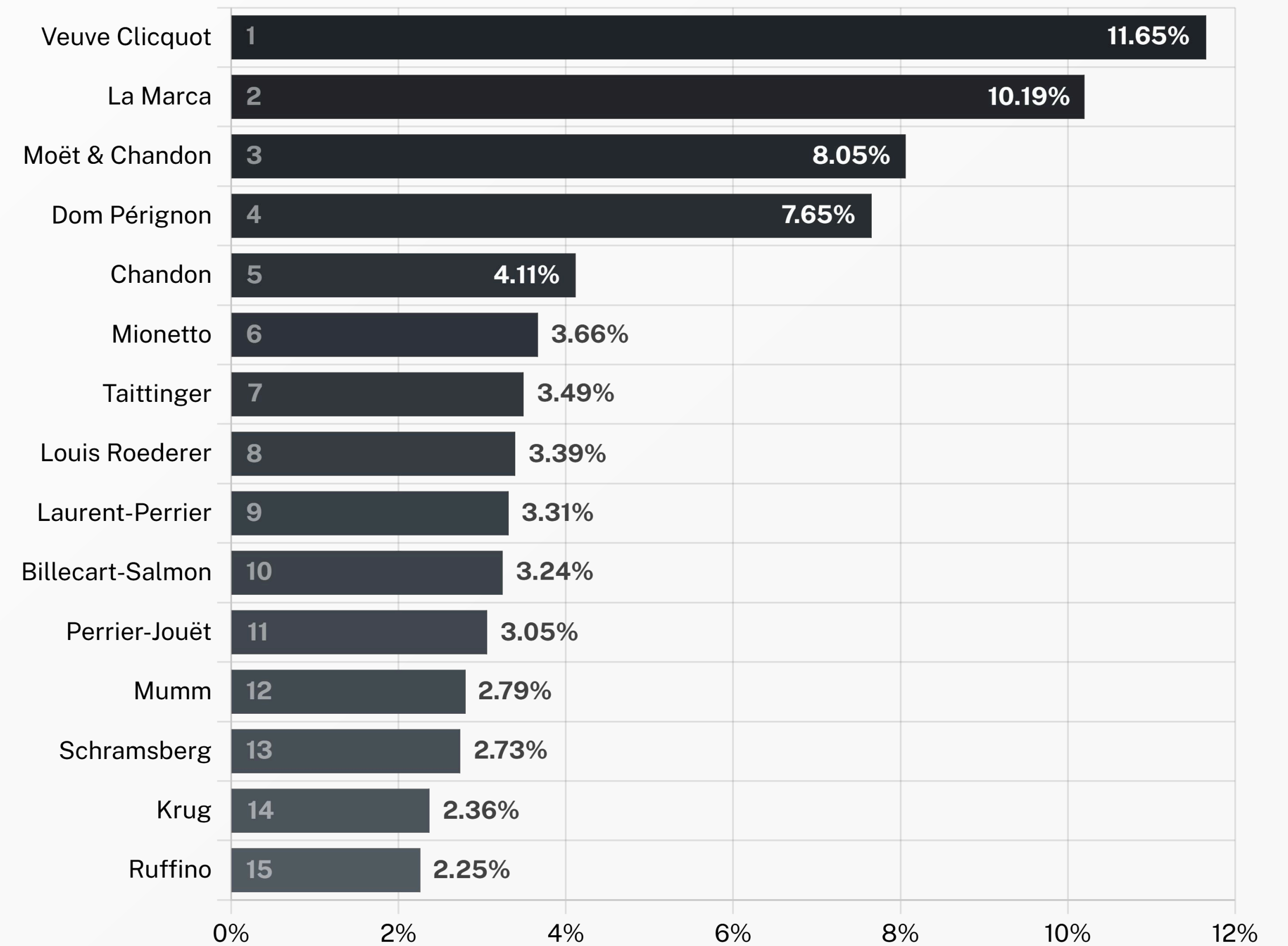
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Sparkling wine brands

Despite having similar structures in terms of appellations, the US and the UK on-premise markets noticeably differ in the popularity of brands. In the US, the wineries owned by *LVMH* lead the charts, while in the UK *Laurent-Perrier* is by far the most popular Champagne, with the striking market penetration of 23% of restaurants.

In the Prosecco category, *Gallo*-owned *La Marca* dominates the national market. The market penetration is similar to that of *Veuve Clicquot*; in total placements it surpasses even *Veuve Clicquot*, making *La Marca* the sparkling wine brand with the most listings nationwide. The second most popular is *Mionetto*; it has, however, only one third of the market penetration of *La Marca*.

Sparkling wine brands in on-premise in the US (% of all establishments carrying)

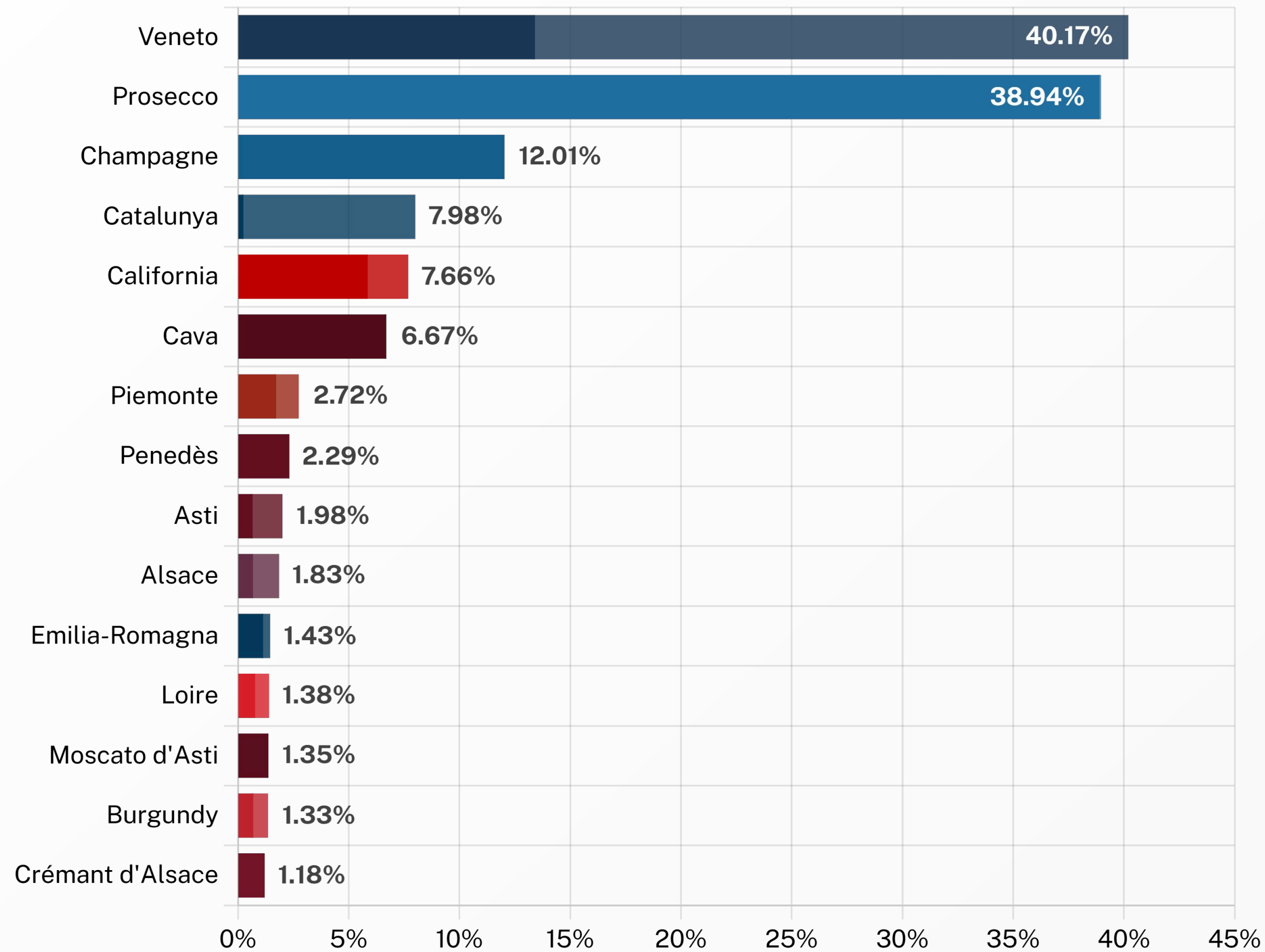


Placements in the United States, BTG and BTB, filtered by tags: Sparkling (explicit and implicit), placements=130,181, wine lists=20,747, establishments=19,826

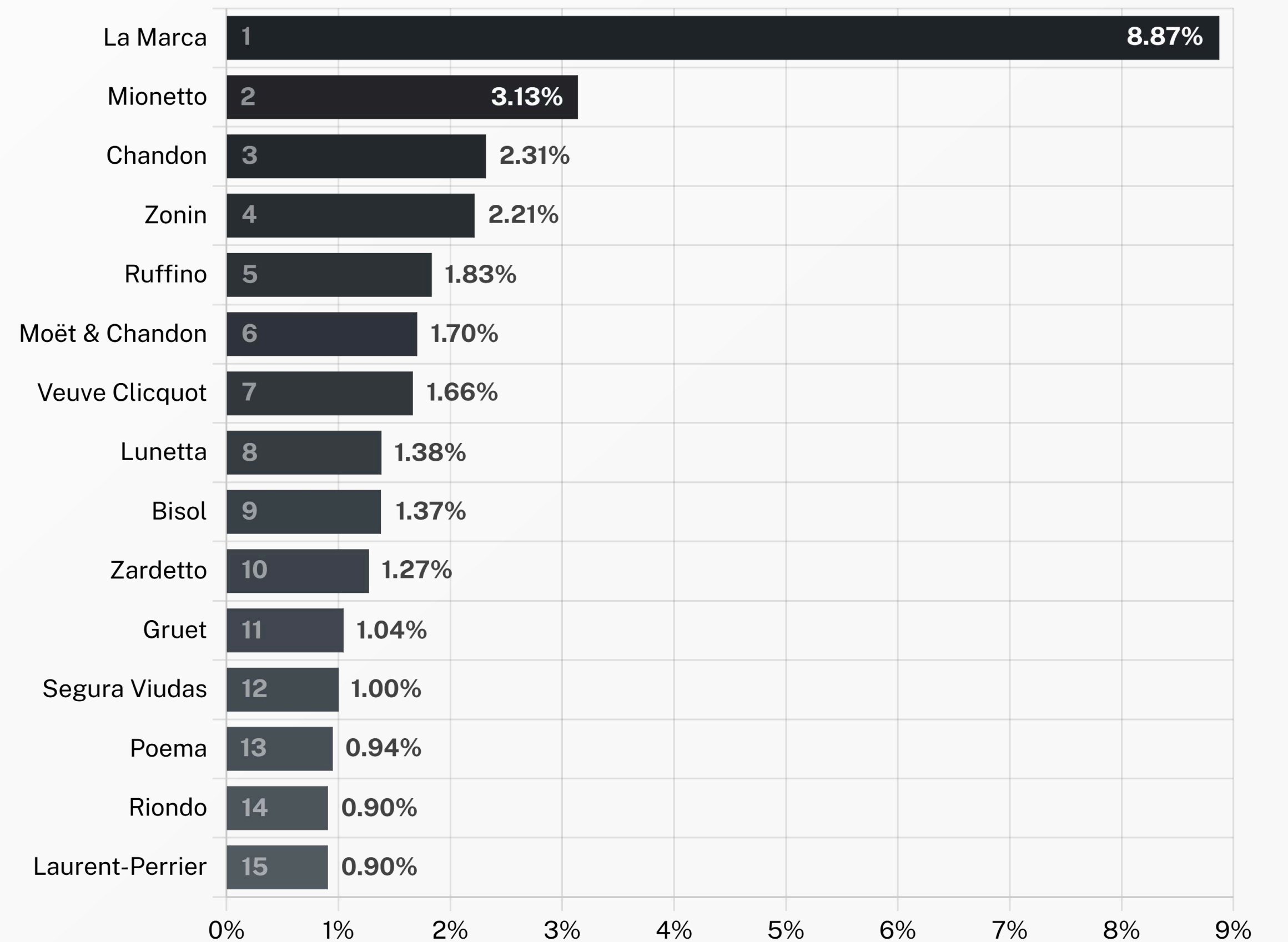
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Sparkling wine by the glass

BTG, appellations in on-premise in the US
(% of all by-the-glass placements)



BTG, brands in on-premise in the US
(% of all establishments carrying by-the-glass)



Placements in United States, BTG only, filtered by tags: Sparkling (explicit and implicit), placements=37,114, wine lists=14,674, establishments=14,104

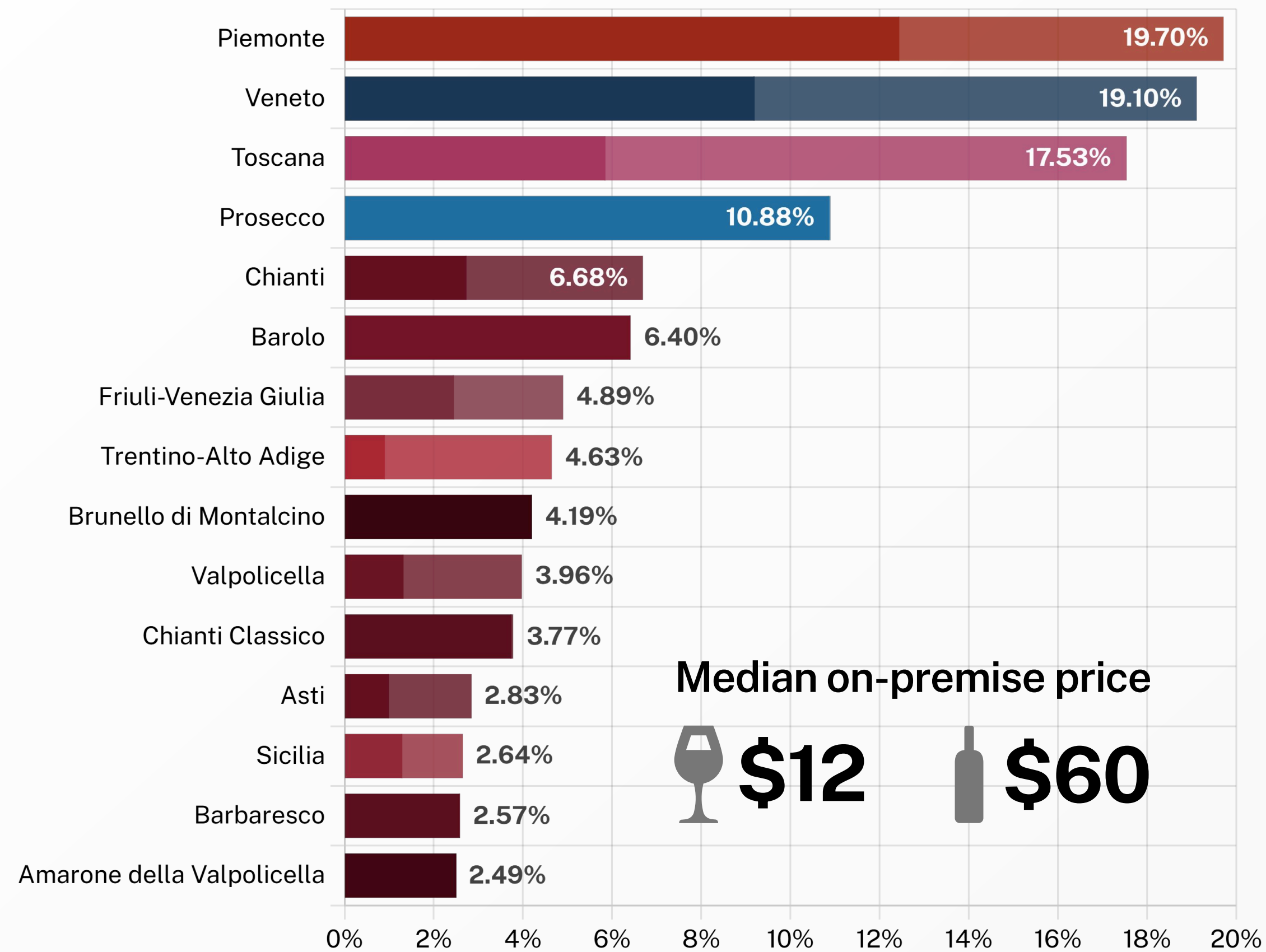
Establishments in the United States, BTG only, placements=384,368, wine lists=22,357, establishments=20,673

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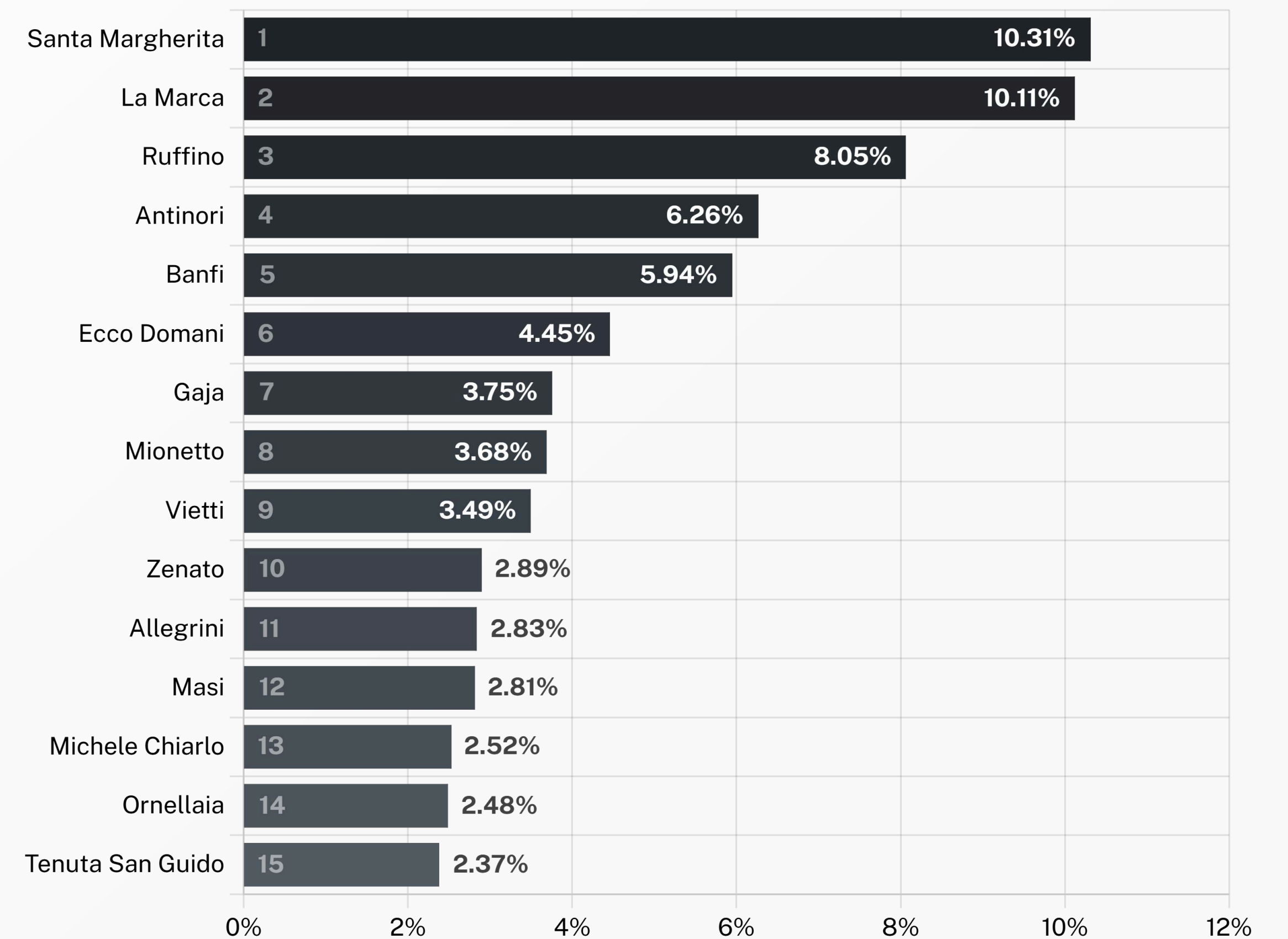
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Italian wines in the US

Appellations in on-premise in the US
(% of all Italian wine placements)



Italian wine brands in on-premise in the US
(% of all establishments carrying)



Placements in the United States, BTG and BTB, filtered by tags: Italy (explicit and implicit), placements=263,276, wine lists=20,550, establishments=19,401

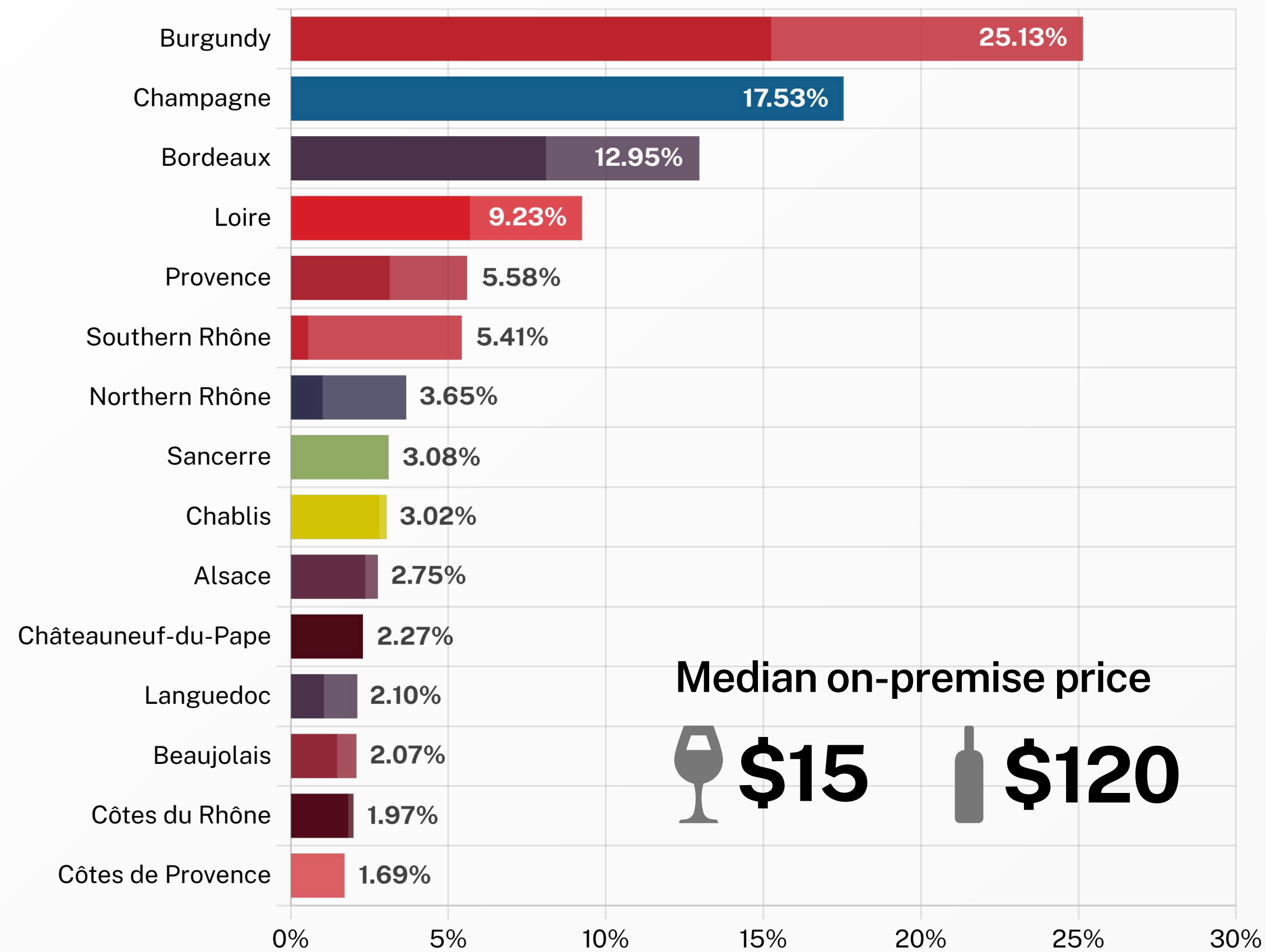
Establishments in the United States, BTG and BTB, filtered by tags: Italy (explicit and implicit), placements=263,276, wine lists=20,550, establishments=19,401

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French wines in the US

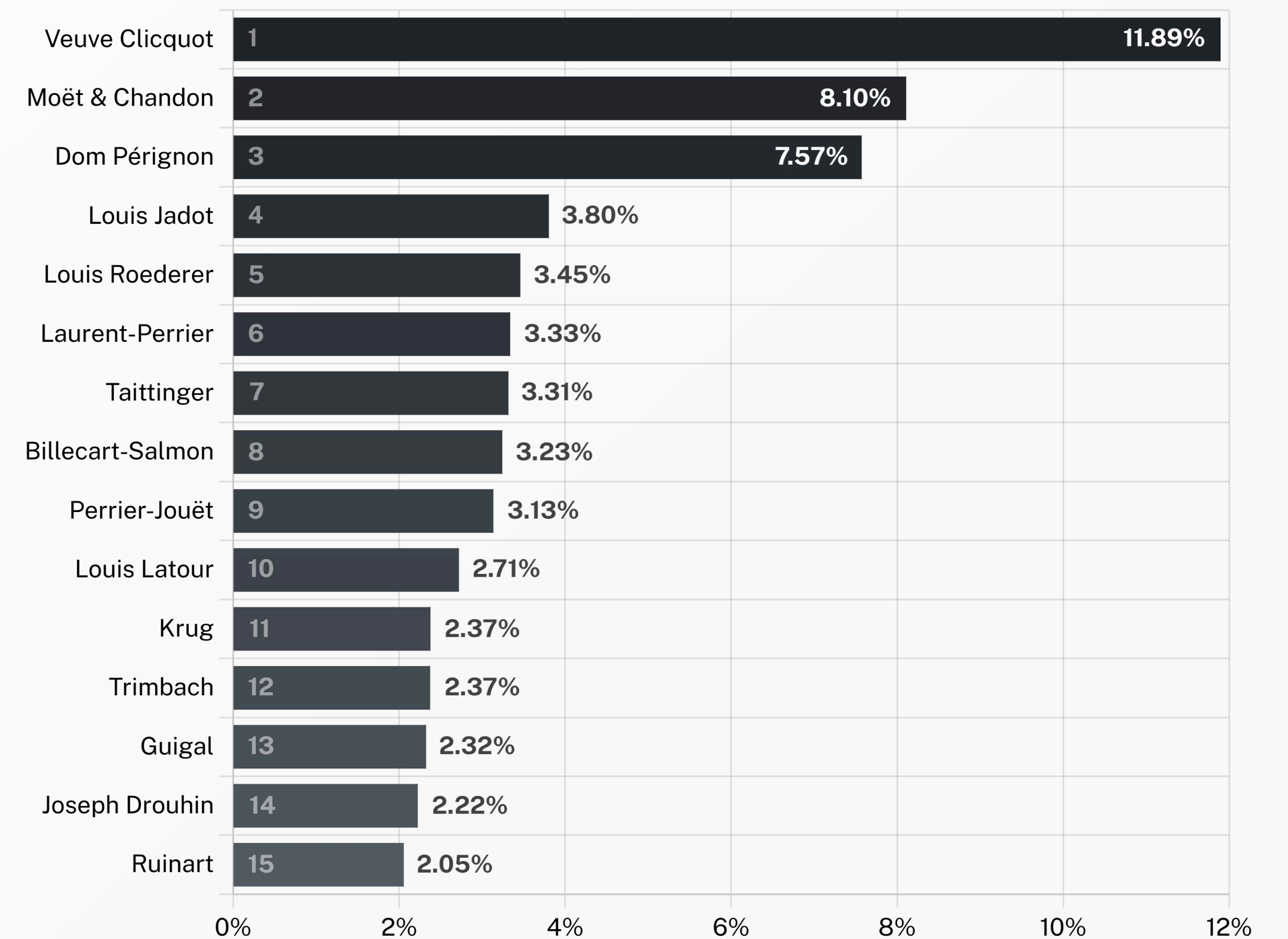
Appellations in on-premise in the US (% of all French wine placements)



Placements in the United States, BTG and BTB, filtered by tags: France (explicit and implicit), placements=257,124, wine lists=16,808, establishments=15,372

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French wine brands in on-premise in the US (% of all establishments carrying)

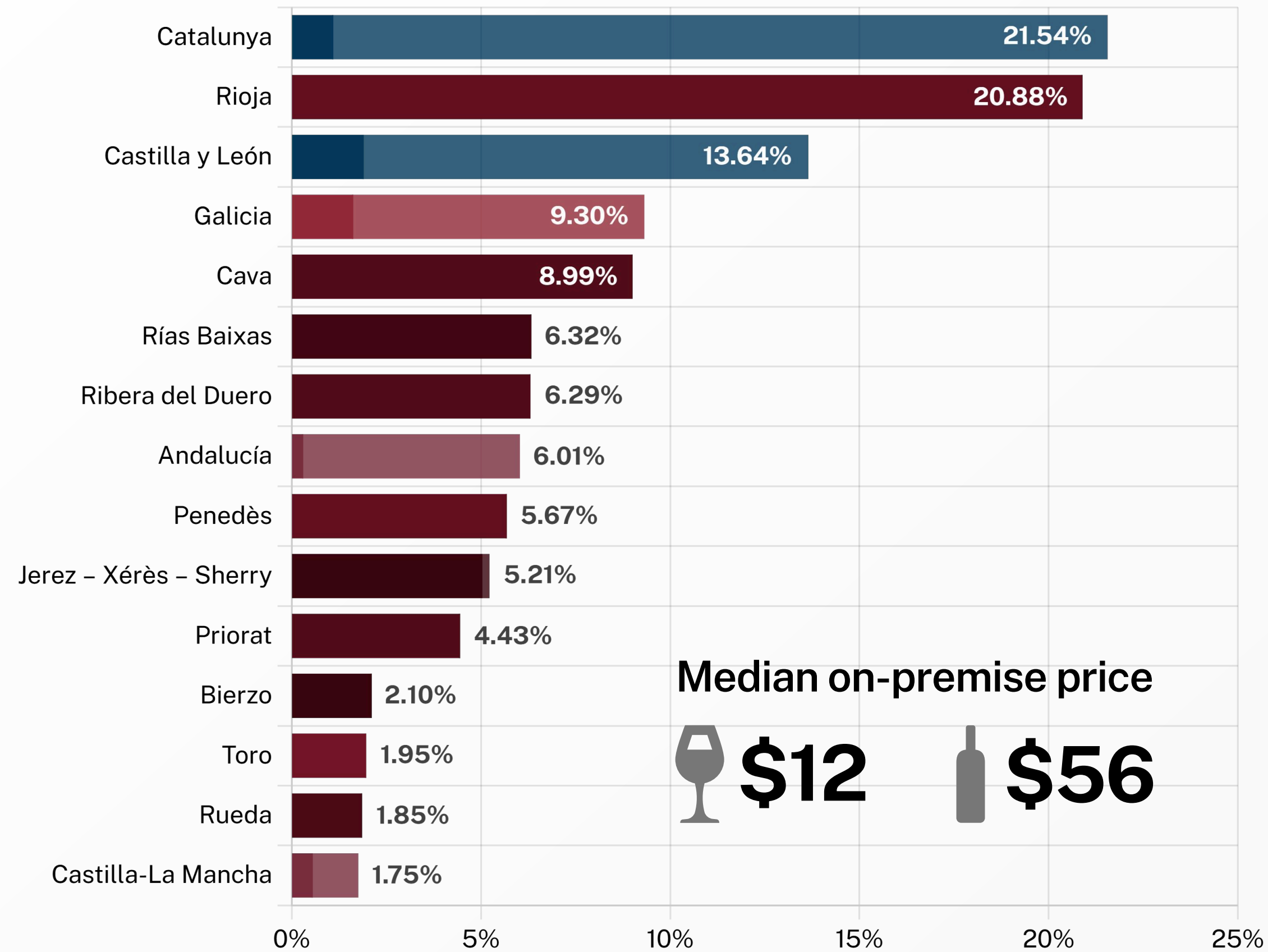


Establishments in United States, BTG and BTB, filtered by tags: France (explicit and implicit), placements=257,124, wine lists=16,808, establishments=15,372

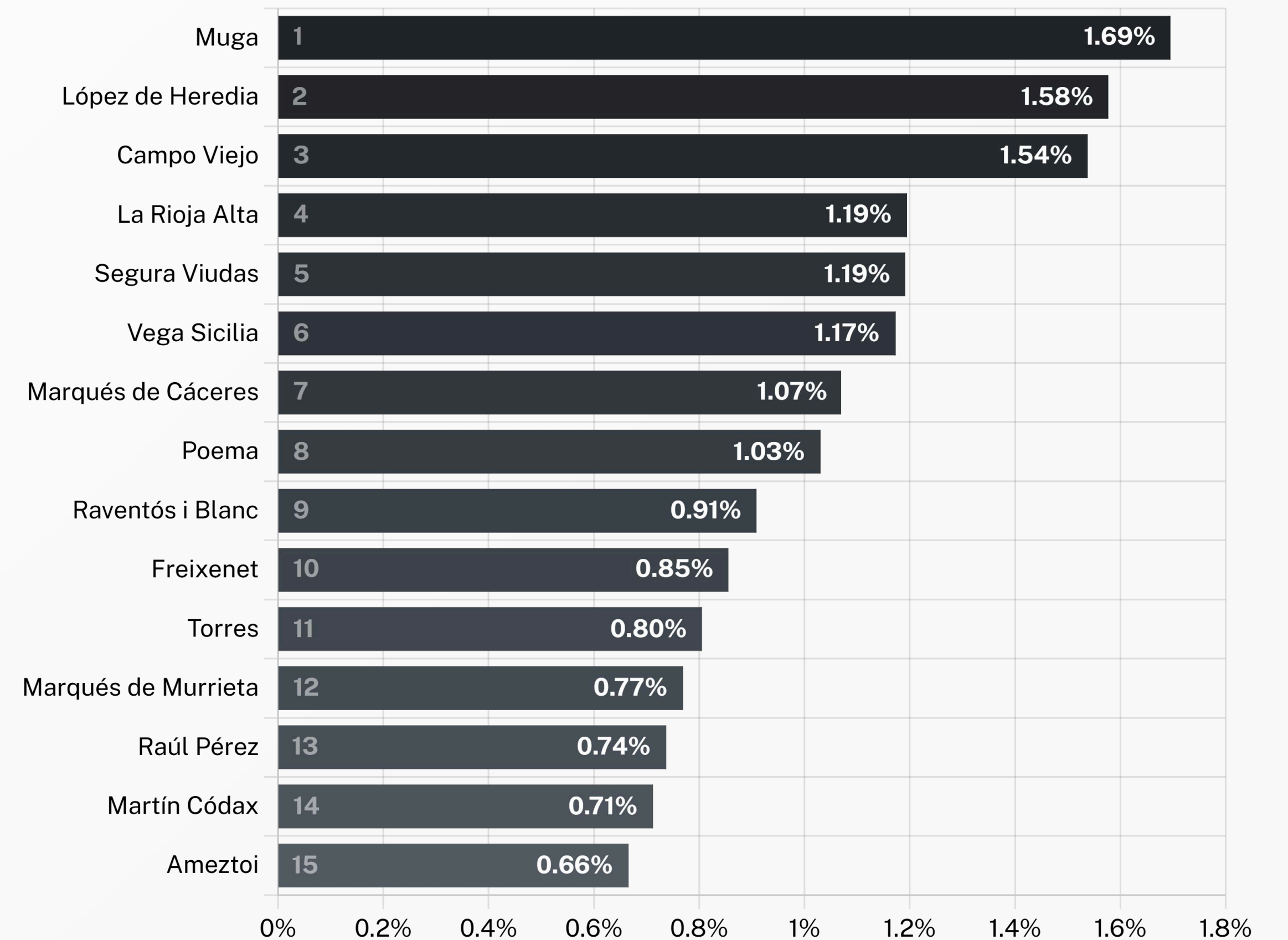
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Spanish wines in the US

Appellations in on-premise in the US
(% of all Spanish wine placements)



Spanish wine brands in on-premise in the US
(% of all establishments carrying)



Placements in the United States, BTG and BTB, filtered by tags: Spain (explicit and implicit), placements=59,910, wine lists=9,479, establishments=8,549

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Establishments in United States, BTG and BTB, filtered by tags: France (explicit and implicit), placements=257,124, wine lists=16,808, establishments=15,372

Version: v1.1beta/2026 db Nov 2025

Appendix 1. Median prices for selected wines in on-premise in the US

	On-premise median bottle	On-premise median glass	Price at Total Wine	On-/off- premise ratio
Barefoot Merlot	\$22	\$7	\$5.99	3.67
J Lohr Cabernet Sauvignon	\$44	\$11	\$13.47	3.27
Whispering Angel	\$54	\$15	\$16.97	3.18
Cloudy Bay Sauvignon Blanc	\$75	\$18	\$34.99	2.14
Rombauer Chardonnay	\$75	\$18	\$37.99	1.97
Tenuta San Guido Guidalberto	\$140	\$35	\$64.99	2.15
Banfi Brunello di Montalcino	\$150	\$34	\$66.99	2.24
Silver Oak Alexander Valley	\$165	\$35	\$70.99	2.32
Silver Oak Napa Valley	\$265	\$50	\$149.99	1.77
Tignanello	\$320	\$80	\$179.97	1.78
Dom Perignon Brut	\$485	\$95	\$227.97	2.13
Louis Roederer Cristal	\$650	\$110	\$279.97	2.32

Appendix 2. WineMarkets.co functionality and pricing

Free tier

Free of charge

- Aggregated data available at the country or US state level, including brands, appellations, countries of origin and grape varieties.
- Flexible filters by brand, appellation, country of origin or grape variety.
- Popularity maps by brand, appellation, country of origin or grape variety.
- Aggregated BTG and BTB prices for any filtered subset.

Sign up for free

Premium tier

\$249 per month for 12 months

Billed at \$2,988 annually

- Everything from the Free tier.
- Detailed geographical data (by city or town and zip/postal code).
- Detailed maps aggregated at the locality, postal code or account level.
- Separate BTG reports.
- Market penetration reports.
- Access to placement-level data.
- Finding similar accounts using feature vectors.
- **Calculation of ideal target profiles for a wine brand or a specific wine.**
- **Automatic creation of target account lists based on pre-calculated target profiles.**

Sign up and upgrade

Enterprise tier

Individual pricing

- Everything from the Free and Premium tiers.
- API integration.
- Brand portfolio management.
- Analytics for the uploaded data.
- Additional metrics.

Contact us