Mexico

Wine Landscapes 2023

Contents

Wine Intelligence Viewpoint

Wine remains a relatively small category in Mexico, making up only 1% of the total volume of alcohol sold in the country. However, those that are involved in it seem to be very keen wine drinkers

The wine category currently has around 2.4 million biannual wine drinkers in Mexico, with 2 million of them also classified as monthly wine drinkers.

The proportion of Millennials involved in the wine category has increased significantly since 2020, with almost one in two drinkers now belonging to this age group. However, there are also significantly fewer Gen Z drinkers than in previous years.

Those that do drink wine in Mexico tend to be enthusiastic about it, with three-quarters of respondents saying they hold a strong interest in the beverage. Their frequency of consumption is high, with around 30% drinking wine on more than one occasion each week. In addition, Mexican wine drinkers are increasingly open and willing to experiment with their wine selections.

The Mexican wine market is showing evidence of premiumisation. The average amount spent per bottle by respondents across all occasions has increased since 2020.

Opportunities

Highly enthusiastic drinkers.
High frequency of consumption.
Premiumisation.

Threats

Relatively niche product.
Increasing competition from other alcohol beverages.
Fewer Gen Zs involved with the wine category.

Management Summary

Mexico Wine Landscapes

2023

Management summary

Key takeaways

1. A quarter of Mexican adults are semi-annual wine drinkers

2. Volumes of wine sold in the Mexican market have grown

3. Significantly fewer Gen Zs are getting involved in wine

4. Enthusiasm for the wine category in Mexico is growing

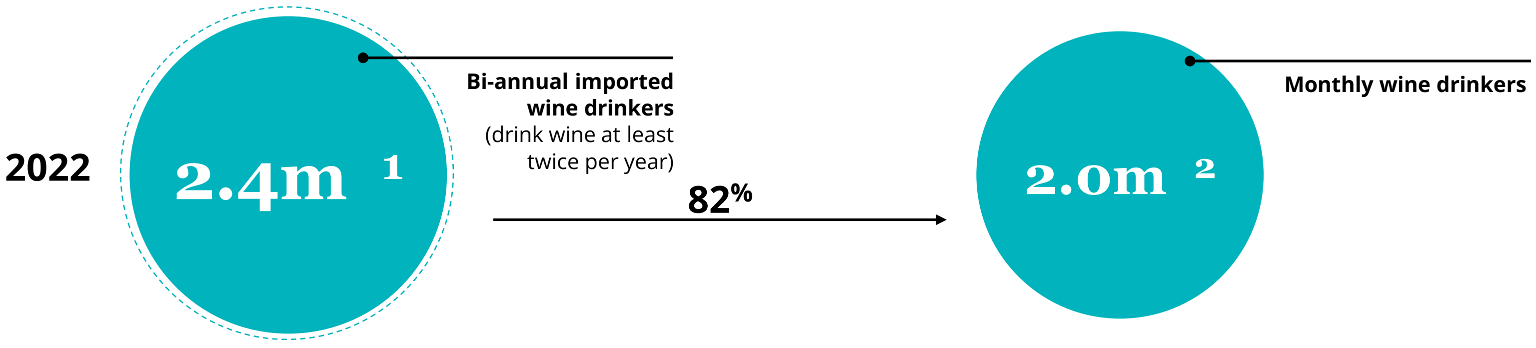
5. Almost 30% of respondents drink wine more than once a week

6. The Mexican wine market shows signs of premiumisation

1. A quarter of Mexican adults* are semi-annual wine drinkers

There is a high conversion rate of those who are biannual drinkers to monthly wine drinkers. This could suggest that those who are engaging with wine are highly involved drinkers who are enthusiastic about it

Mexican wine drinking population



* Sample for our adult population is those aged 18-59 in México Distrito Federal, Guadalajara, and Monterrey; please find the size of our adult population on slide 27
1 Wine Intelligence online calibration study rolling average of 2019-2022 (n=2,972) Mexican adults aged 18-59 in selected cities. Wine=still light wine (red, white, rosé)
2 Wine Intelligence, Vinitrac® Mexico Feb '23, (n=709) Mexican semi-annual imported wine drinkers in selected cities
Note: Please note the methodology has changed from interviews to online studies

2. Volume of wine sold in the Mexican market has grown

Between 2017 and 2022 the volume of wine sold in Mexico increased by 4.3%. The category still makes up a low percentage of the total alcohol market, suggesting it is still a relatively niche product. The success of the wine category in recent years has been driven by both still and sparkling wine which grew by 4% and 8.3% respectively between 2017 and 2022

Total beverage alcohol market volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total beverage alcohol	1,104,477.30	1,183,075.30	4.0%	3.3%
Beer	1,036,808.30	1,110,058.30	4.0%	3.4%
Spirits***	32,710.30	34,302.80	0.8%	1.1%
RTDs	21,424.30	23,949.80	9.2%	5.4%
Wine**	11,739.50	12,764.50	4.3%	2.8%
Cider*	1,795.00	2,000.00	21.3%	5.4%

Market context

Still wine consumption had been growing for decades before Covid-19, although per capita consumption remains small.

Executive Summary Report 2023 Mexico

Source: IWSR

*Cider omitted from pie chart due to low percentage value

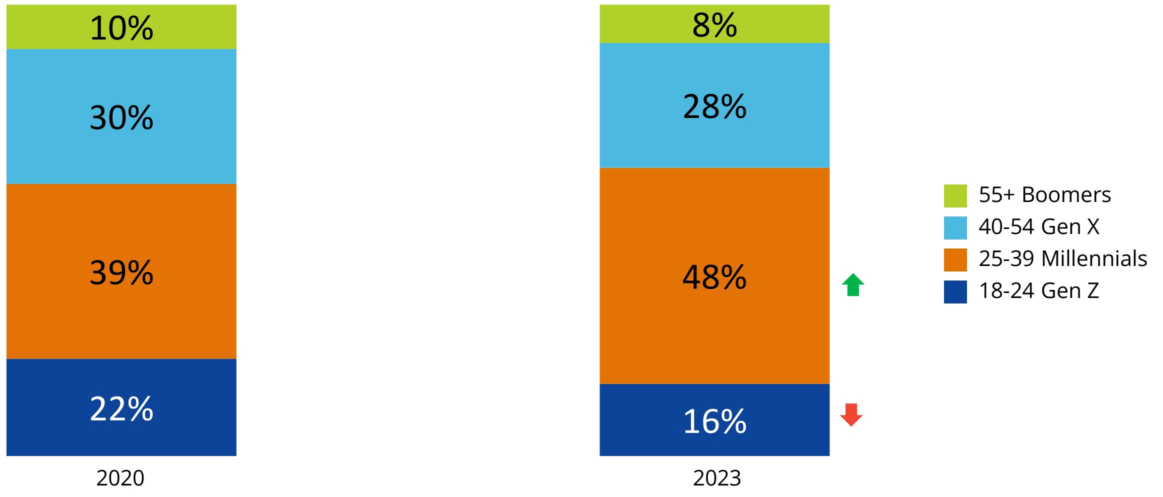
** Wine includes non-grape based wines, still wine, sparkling wine, fortified wine and light aperitifs

*** Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits

3. Significantly fewer Gen Zs are getting involved in wine

The wine category in Mexico appears to have an issue in recruiting younger drinkers to the category, with significantly fewer Gen Z respondents than in previous years

Generation cohorts



↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

4. Enthusiasm for the wine category in Mexico is growing

Mexican respondents' enthusiasm and passion for the wine category has increased in recent years, with more of them saying that they have a strong interest in wine and that wine is important to their lifestyles. In addition, respondents are increasingly open to trying new and different styles of wine on a regular basis. Both developments highlight that the wine category is served by a committed and dedicated following of drinkers

Involvement and perceived expertise in wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

Ranking '23		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
1	Drinking wine gives me pleasure	79%	83%	87%	↑	↑
2	Deciding which wine to buy is an important decision	87%	88%	85%	→	↓
3	I always look for the best quality wines I can get for my budget	87%	89%	84%	→	↓
4	I like to take my time when I purchase a bottle of wine	70%	79%	81%	↑	→
5	I have a strong interest in wine	71%	77%	77%	↑	→
6	Generally speaking, wine is reasonably priced	70%	75%	76%	↑	→
7	Wine is important to me in my lifestyle	49%	51%	65%	↑	↑
8	I feel competent about my knowledge of wine	45%	48%	58%	↑	↑
9	Compared to others, I know less about the subject of wine	43%	42%	43%	→	→
10	Generally speaking, wine is an expensive drink	28%	32%	36%	↑	→
11	I don't understand much about wine	18%	17%	19%	→	→

Attitudes towards wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

	2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
I enjoy trying new and different styles of wine on a regular basis	71%	80%	77%	↑	→
I don't mind what I buy so long as the price is right	7%	3%	7%	→	↑
I know what I like and I tend to stick to what I know	22%	16%	16%	↓	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

5. Almost 30% of respondents drink wine more than once a week

In line with the growing enthusiasm being shown for the wine category by respondents, frequency of consumption has increased since 2020. The increase is led by more Mexican wine drinkers consuming the beverage more often on relaxed occasions, both in the off-trade and on-trade

Wine consumption frequency: Tracking

% who usually drink wine at the following frequency
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

	2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
Most days / every day	**1%**	**3%**	**5%**	↑	→
2-5 times a week	**14%**	**21%**	**23%**	↑	→
About once a week	**33%**	**28%**	**27%**	↓	→
1-3 times a month	**28%**	**26%**	**27%**	→	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Mexico, Jan ’20, Jan ‘21, Feb ‘23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

6. The Mexican wine market shows signs of premiumisation

There was a significant increase in average spend per bottle between 2020 and 2021, with prices stabilising in 2023. This could be due to the pressure of the rising cost of living forcing wine drinkers' to spend less money on alcohol in 2023

Off-trade: Average spend per bottle by occasion

Base = Those who buy wine in the off-trade
All currency values below are in Mexican Peso

	2020	2021	2023	Tracking vs '20	Tracking vs '21
A relaxing drink at the end of the day at home	**$278.74**	**$307.58**	**$317.48**	↑	→
With an informal meal at home	**$259.30**	**$286.56**	**$298.29**	↑	→
With a more formal dinner party at home	**$359.46**	**$384.08**	**$381.17**	↑	→
At a party / celebration at home	**$311.06**	**$345.18**	**$343.71**	↑	→
As a gift for somebody	**$383.27**	**$412.73**	**$407.80**	↑	→

On-trade: Average spend per bottle by occasion

Base = Those who buy wine in the on-trade
All currency values below are in Mexican Peso

	2020	2021	2023	Tracking vs '20	Tracking vs '21
A relaxing drink out at the end of the day	**$322.50**	**$369.22**	**$383.21**	↑	→
With an informal meal in a pub / bar / restaurant	**$337.75**	**$384.68**	**$385.48**	↑	→
With a more formal dinner in a restaurant	**$420.01**	**$458.41**	**$453.43**	↑	→
At a party / celebration / big night out	**$371.20**	**$423.98**	**$415.33**	↑	→
During business lunch or dinner	**$404.74**	**$449.03**	**$443.90**	↑	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Management summary: tracking metrics

California and Tuscany are enjoying significantly higher purchase incidences than in 2020

Top alcoholic beverages

% who have drunk the following beverages in the past 12 months

	2020	2023	Tracking
Red wine	**86%**	**86%**	→
Beer	**86%**	**84%**	→
Tequila	**78%**	**77%**	→
Vodka / Gin	**51%**	**56%**	→
Brandy / Cognac / Whisky	**61%**	**52%**	↓

Top country of origin

% who have drunk wine from the following places in the past six months

	2020	2023	Tracking
Mexico	**56%**	**55%**	→
Spain	**44%**	**39%**	→
France	**39%**	**36%**	→
Chile	**39%**	**35%**	→
California - USA	**20%**	**32%**	↑

Top region of origin

% who have drunk wine from the following regions in the past six months

	2020	2023	Tracking
Rioja	**31%**	**31%**	→
Tuscany	**10%**	**28%**	↑
Bordeaux	**20%**	**23%**	→
Borgoña	**26%**	**22%**	→
Champagne	**24%**	**22%**	→

Top wine brands

% who have bought the following brands in the past three months

	2020	2023	Tracking
Casillero del Diablo	**35%**	**37%**	→
Riunite	**23%**	**27%**	→
Torres	**33%**	**26%**	↓
Sangre de Toro	**25%**	**21%**	↓
Finca Las Moras	**14%**	**20%**	↑

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Management summary: tracking metrics

There has been little significant change to either varietal repertoires or retail channel usage by Mexican wine drinkers, although Moscato/Muscat consumption is significantly higher

Top red varietals
% who have drunk the following varietals in the past six months

	2020	2023	Tracking
Merlot	**60%**	**59%**	➡
Cabernet Sauvignon	**53%**	**53%**	➡
Malbec	**33%**	**35%**	➡
Tempranillo	**25%**	**26%**	➡
Pinot Noir	**26%**	**25%**	➡

Top wine-shopping channels
% who have bought wine from the following channels in the past six months

	2020	2023	Tracking
Self-service stores	**70%**	**66%**	➡
Club stores / Cash & Carry	**47%**	**46%**	➡
Departament stores	**36%**	**37%**	➡
Wholesalers	**40%**	**35%**	➡
Convenience stores	**30%**	**31%**	➡

Top white varietals
% who have drunk the following varietals in the past six months

	2020	2023	Tracking
Chardonnay	**41%**	**43%**	➡
Sauvignon Blanc	**42%**	**43%**	➡
Moscato / Muscat	**20%**	**28%**	⬆
Chenin Blanc	**21%**	**19%**	➡
Verdejo	**18%**	**18%**	➡

Top wine-buying retailers
% who mainly use the following retailers to buy wine

	2020	2023	Tracking
Wal-Mart Supercenter	**41%**	**43%**	➡
Sam´ s Club	**32%**	**31%**	➡
La Europea	**28%**	**25%**	➡
Liverpool	**19%**	**20%**	➡
Bodegas Alianza	**15%**	**17%**	➡

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Market Data

Mexico Wine Landscapes

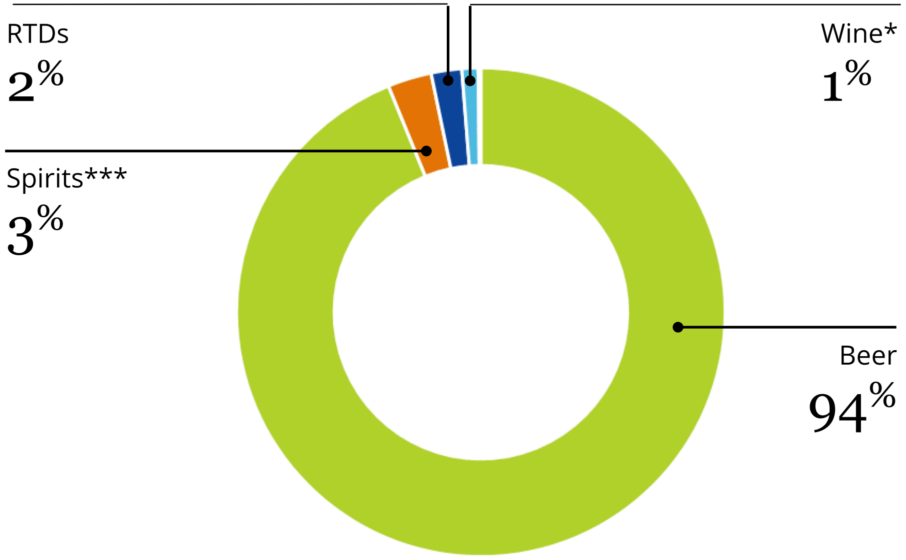
2023

Total beverage alcohol market share by category

Volumes of wine sold in the Mexican market increased between 2017 and 2022, although the category remains only the fourth largest in the market behind beer, spirits and RTDs

Total beverage alcohol market share by category

% of purchases that fall within the categories below



Total beverage alcohol market volumes by category

000s 9-litre cases

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Total beverage alcohol	1,104,477.30	1,183,075.30	4.0%	3.3%
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RTDs	21,424.30	23,949.80	9.2%	5.4%
Wine**	11,739.50	12,764.50	4.3%	2.8%
Cider*	1,795.00	2,000.00	21.3%	5.4%

Source: IWSR

*Cider omitted from pie chart due to low percentage value

** Wine includes non-grape based wines, still wine, sparkling wine, fortified wine and light aperitifs

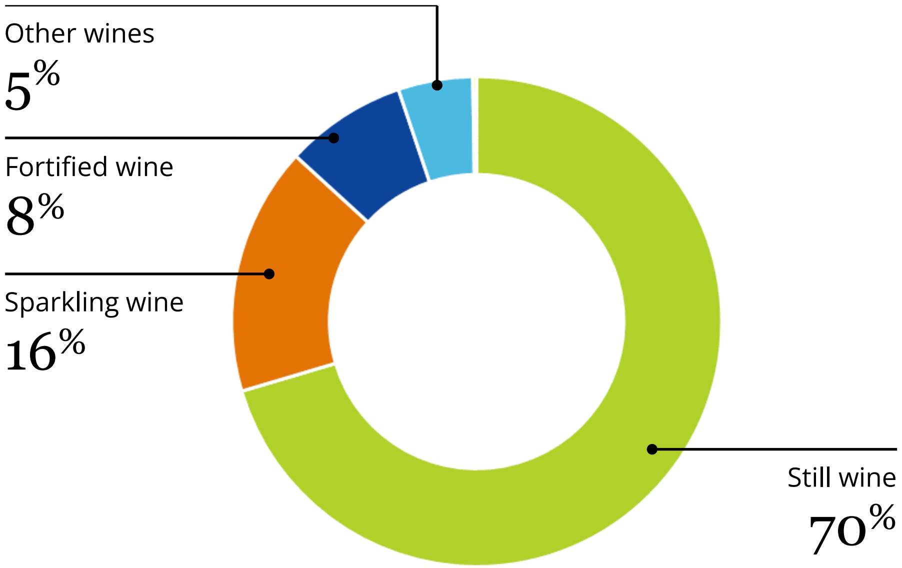
*** Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits

Total wine market volumes

Still wine accounts for 70% of total wine volumes in the Mexican market, with sparkling wine and light aperitifs seeing the largest growth between 2017 and 2022

Total wine share by category

% of purchases that fall within the categories below



Total wine volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total Wine	11,739.50	12,764.50	4.3%	2.8%
Still Wine	8,133.50	8,988.30	4.0%	3.2%
Sparkling Wine	1,901.30	2,091.00	8.3%	3.1%
Fortified Wine	1,064.30	1,025.00	-1.3%	-1.5%
Other Wines**	613.30	629.00	7.0%	2.5%
Light Aperitifs*	27.30	31.30	8.8%	4.7%

Source: IWSR
*Light Aperitifs omitted from pie chart due to low percentage value
**Other Wines includes non-grape based wines

Still wine volumes by origin

All the top 10 countries of origin by volume enjoyed growth between 2017 and 2022; wine from the Spanish-speaking world is prominent in the market with domestic wine the market leader

Total still wine volumes and market share by origin

000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	8,133.50	8,988.30	4.0%	3.2%	
1	Mexican	3,200.00	3,425.00	4.6%	4.2%	38%
2	Chilean	1,683.00	1,926.50	5.2%	4.3%	21%
3	Spanish	1,564.00	1,889.00	2.8%	3.4%	21%
4	Argentinian	722.00	729.30	3.0%	-0.9%	8%
5	US	408.20	392.10	1.1%	-1.9%	4%
6	Italian	255.30	290.00	1.5%	0.6%	3%
7	French	192.30	216.90	4.8%	1.7%	2%
8	German	35.00	46.00	5.6%	1.1%	1%
9	Australian	29.00	27.00	6.2%	-2.9%	0%
10	Portuguese	13.00	15.00	12.0%	3.4%	0%

Market context

Drought in northern Mexico, a key area for wine production and home to Casa Madero, might mean some challenges for the Mexican wine industry in the short and medium term. Any gaps will be filled by imported wines.

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Source: IWSR

Still wine retail price by origin

All countries of origin have higher average prices per bottle than in previous years, with wine from the US seeing the highest rises

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	8.16	4.8%	-0.6%
1	Mexican	6.58	4.1%	-0.7%
2	Chilean	6.54	2.3%	-0.2%
3	Spanish	8.99	5.3%	-1.2%
4	Argentinian	10.75	4.8%	0.5%
5	US	13.13	12.3%	4.0%
6	Italian	10.64	7.5%	0.7%
7	French	17.30	7.2%	2.0%
8	German	8.95	7.5%	0.6%
9	Australian	13.12	5.6%	-0.4%
10	Portuguese	9.37	8.1%	0.0%

*International refers to wine where grapes are from multiple countries of origin

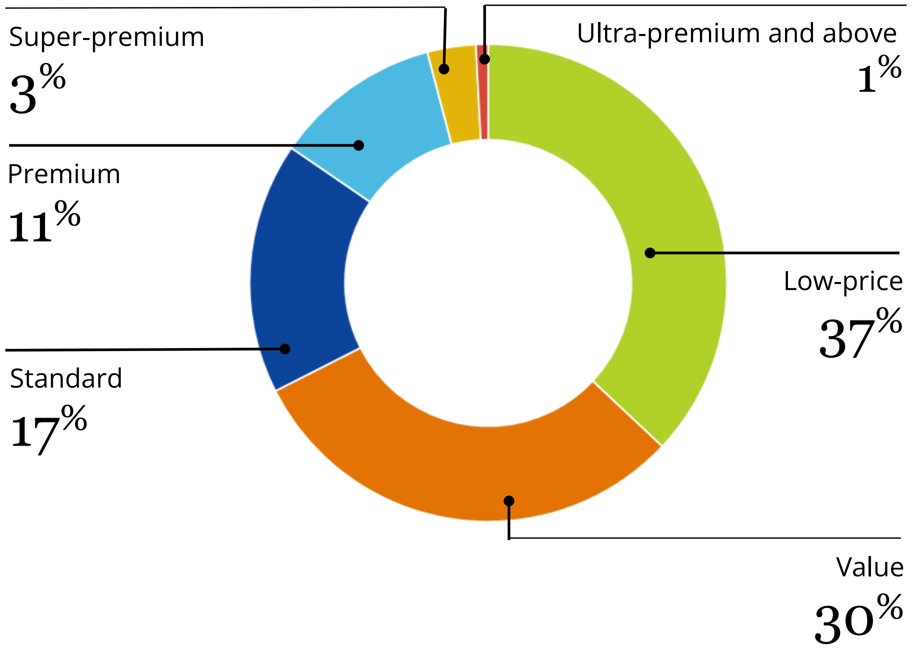
Source: IWSR

Still wine by price band

The majority of still wine sold in the Mexican market is below $100, although the largest growth is at the prestige-and-above price points

Still wine by price band

% of purchases that fall within the categories below



Still wine volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Low-Price (under MXN 50.00)	1,279.30	1,525.00	4.6%	5.8%
Value (between MXN 50.00 to 99.99)	2,916.80	3,311.20	6.1%	4.6%
Standard (between MXN 100.00 to 199.99)	2,667.50	2,731.40	1.9%	0.6%
Premium (between MXN 200.00 to 349.99)	923.80	1,013.70	1.8%	0.2%
Super Premium (between MXN 350.00 to 599.99)	249.60	293.20	5.9%	4.9%
Ultra Premium (between MXN 600.00 to 999.99)	62.30	73.90	2.0%	4.4%
Prestige and above (MXN 1,000.00 and over)*	34.30	40.00	10.0%	4.5%

Price bands are displayed in Mexican peso
*Prestige and above omitted from pie chat due to low percentage value
Source: IWSR

Still wine consumption per capita

Mexico has a relatively low per capita consumption for still wine, with the market featuring outside the top 100

Market context

Although per capita consumption has grown in recent years, it remains very small, at just under a litre. There is clearly further room for growth

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Per capita consumption of still wine

Litres per annum (adult LDA+ population)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Martin and St. Maarten	46.70	49.00	12.3%	5.0%
2	Portugal	43.00	45.70	-0.9%	6.3%
3	Montenegro	41.80	42.60	-0.9%	2.0%
4	Italy	42.20	39.90	-2.8%	-5.2%
5	Slovenia	37.60	37.80	-2.8%	0.5%
6	St. Barths	33.90	37.20	9.3%	9.8%
7	Switzerland	36.10	34.90	-1.6%	-3.3%
8=	France	35.60	33.80	-5.3%	-5.0%
8=	Greece	28.00	33.80	0.5%	20.9%
10	Hungary	31.50	32.70	0.6%	3.6%
11	Denmark	33.30	30.90	-1.3%	-7.2%
12=	Austria	30.90	30.10	-1.3%	-2.6%
12=	Turks and Caicos	27.60	30.10	-2.9%	9.2%
14	Romania	27.50	27.90	2.4%	1.2%
15	US Virgin Islands	27.80	27.80	-2.6%	0.3%
16	Germany	26.40	25.20	-2.5%	-4.8%
17	Argentina	25.30	24.90	-2.7%	-1.5%
18	Malta	21.20	24.30	-6.4%	14.9%
19=	Uruguay	25.60	23.40	-1.3%	-8.6%
19=	Slovakia	22.90	23.40	-0.1%	1.9%
106=	Mexico	0.81	0.89	2.4%	9.2%

Source: IWSR

Sparkling wine volumes by origin

The total volume of sparkling wine sold in the Mexican market increased between 2017 and 2022, with the largest increase coming from French and Spanish sparkling wines

Total sparkling wine volumes and market share by origin

000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	1,901.30	2,091.00	8.3%	3.1%	
1	Italian	1,364.50	1,373.80	8.7%	-0.4%	66%
2	Spanish	201.30	315.30	17.4%	9.5%	15%
3	Mexican	137.00	162.50	2.1%	9.1%	8%
4	Argentinian	145.30	174.00	3.2%	6.7%	8%
5	French	15.50	30.50	34.2%	14.9%	1%
6	US	18.80	17.50	-11.1%	-0.3%	1%
7	German	11.00	7.80	-1.2%	4.7%	0%
8	Chilean	5.50	5.00	-7.8%	5.4%	0%
9	Portuguese	1.00	2.50	0.0%	7.0%	0%
10	International*	0.50	1.30	-12.9%	19.1%	0%

*International refers to wine where grapes are from multiple countries of origin

Source: IWSR

Sparkling wine retail price by origin

The average price point of sparkling wine sold increased between 2017 and 2022, with sparkling wine from France seeing the biggest rise

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	12.70	5.6%	3.0%
1	Italian	8.11	5.3%	1.2%
2	Spanish	7.49	2.7%	0.1%
3	Mexican	7.69	8.8%	-0.6%
4	French	66.09	11.2%	0.6%
5	Argentinian	19.18	8.9%	0.3%
6	US	10.52	6.4%	0.3%
7	German	14.32	10.9%	0.1%
8	Chilean	9.91	2.6%	0.0%
9	Portuguese	9.90	4.6%	0.0%
10	International*	9.54	5.2%	-0.1%

*International refers to wine where grapes are from multiple countries of origin

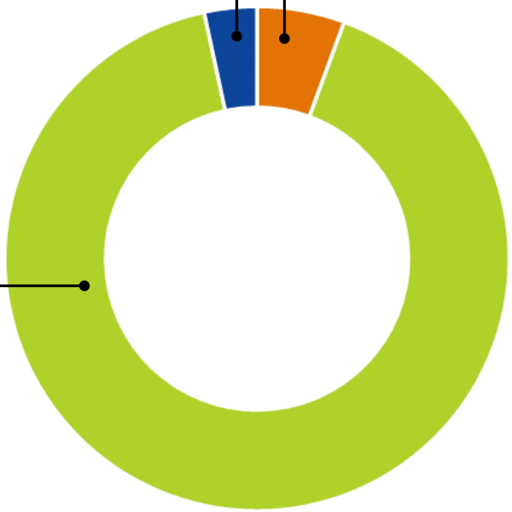
Source: IWSR

Champagne by price band

Most of the Champagne sold in Mexico is priced between $1000 and $1999

Champagne by price brand

% of purchases that fall within the categories below



Champagne volumes by price band

'000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Premium (under MXN 1,000.00)	**3.30**	**7.50**	**1.4%**	**11.6%**
Super Premium (MXN 1,000.00 to 1,999.99)	**102.70**	**121.50**	**0.9%**	**10.5%**
Ultra Premium and above (MXN 2,000.00 and over)*	**3.50**	**4.50**	**4.3%**	**5.0%**

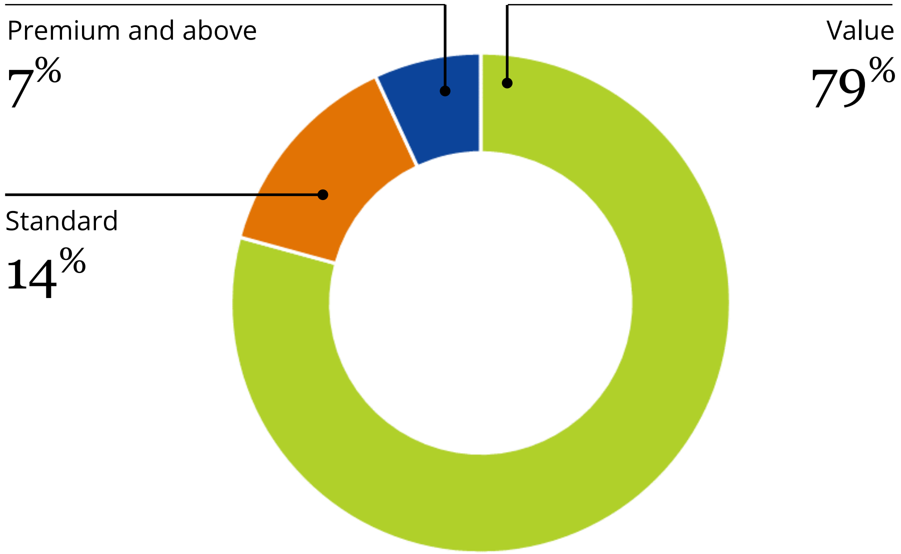
Price bands are displayed in Mexican peso
*Ultra Premium and above includes Prestige and Prestige Plus
Source: IWSR

Other sparkling wine by price band

The bulk of sparkling wine sold in Mexico is below the $100 price point

Sparkling wine by price brand

% of purchases that fall within the categories below



Sparkling wine volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Value (under MXN 100.00)	1,480.70	1,549.70	12.1%	0.9%
Standard (MXN 100.00 to 274.99)	215.50	272.50	-4.0%	6.7%
Premium and above (MXN 275.00 and over)*	95.90	135.40	16.4%	10.4%

Note: Other sparkling wine includes all sparkling wine types except Champagne, and includes no- and low-alcohol

Price bands are displayed in Mexican peso
*Premium and above includes Super Premium and Ultra Premium
Source: IWSR

Sparkling wine consumption per capita

Mexico has a low per capita consumption for sparkling wine, ranking joint 83rd in the world, although per capita volume increased between 2017 and 2022

Per capita consumption of sparkling wine

Litres per annum (LDA+ adults)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Barths	12.50	13.60	13.1%	8.9%
2	St. Martin and St. Maarten	6.30	8.30	21.7%	32.6%
3	Italy	7.90	7.40	-1.2%	-6.2%
4	Turks and Caicos	5.30	6.50	-2.4%	23.4%
5	Germany	5.30	5.50	-1.9%	3.7%
6	Lithuania	4.90	5.10	7.3%	3.6%
7=	Latvia	4.50	4.90	2.6%	9.4%
7=	France	4.70	4.90	-1.3%	2.7%
9	Guadeloupe	4.20	4.80	-1.8%	15.5%
10	Martinique	4.20	4.40	-4.6%	4.8%
11=	Estonia	4.10	4.30	4.0%	6.3%
11=	Belgium and Luxembourg	4.30	4.30	-1.5%	-0.2%
13	Austria	3.40	3.50	0.3%	2.9%
14=	Switzerland	3.20	3.30	0.9%	3.0%
14=	Cayman Islands	3.10	3.30	2.1%	5.8%
14=	Sweden	3.30	3.30	6.7%	0.6%
17=	United Kingdom	3.20	3.00	-0.6%	-4.8%
17=	Slovenia	2.90	3.00	3.0%	4.1%
19=	New Zealand	3.10	2.90	-1.6%	-6.1%
19=	Reunion	2.60	2.90	0.7%	14.7%
83=	Mexico	0.20	0.20	6.7%	8.7%

Source: IWSR

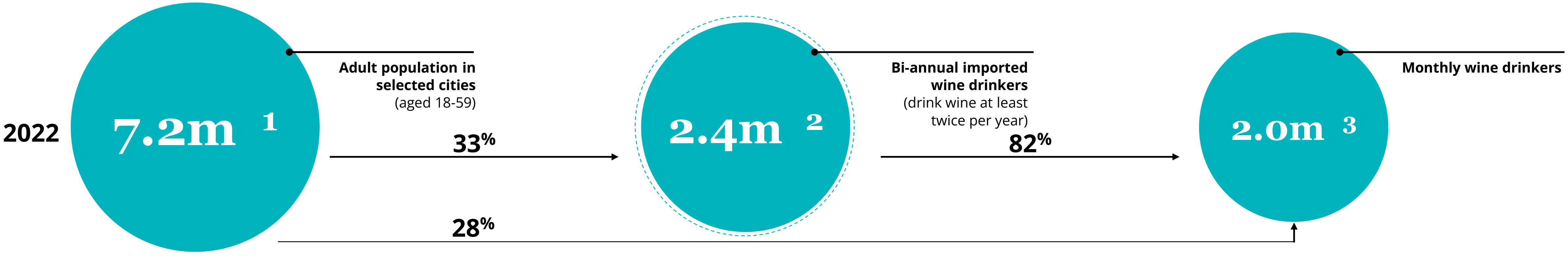
Market Demographics

Mexico Wine Landscapes

2023

Mexican semi-annual imported wine drinkers*

Just over a quarter of our adult population in Mexico are monthly wine drinkers; there is a high conversion rate from those who are biannual drinkers to monthly wine drinkers



Market context

Mexico has one of the best demographics in the world for selling alcohol. It has the 10th highest population and the number of people of legal drinking age is growing quickly

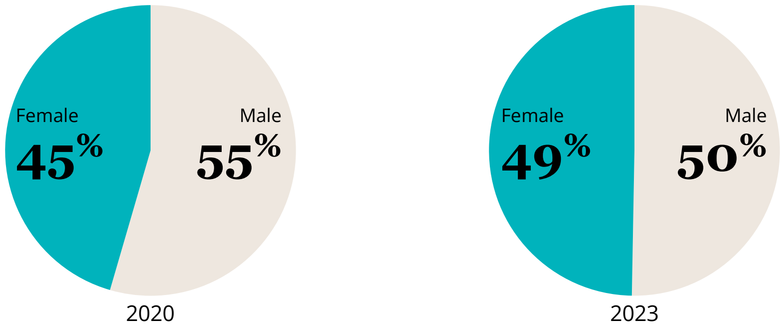
Executive Summary Report 2023 Mexico

1 INEGI – adult population aged 18-59 in México Distrito Federal, Guadalajara, and Monterrey from 2020 Census
2 Wine Intelligence online calibration study rolling average of 2019-2022 (n=2,972) Mexican adults aged 18-59 in selected cities. Wine=still light wine (red, white, rosé)
3 Wine Intelligence, Vinitrac® Mexico Feb '23, (n=709) Mexican *semi-annual imported wine drinkers in selected cities
Note: Please note the methodology has changed from interviews to online studies

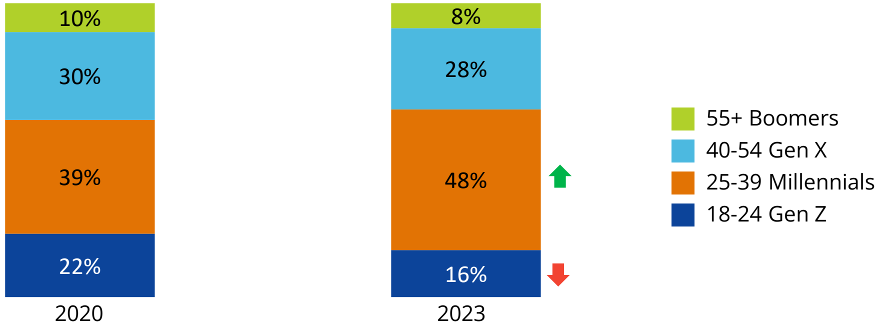
Demographics of semi-annual wine drinkers*

The Mexican wine category is showing signs of struggling to recruit younger drinkers, as significantly fewer Gen Zs are drinking wine than before the pandemic

Gender



Generation cohorts



Cities

	2020	2023	Tracking
México DF	**66%**	**74%**	↑
Guadalajara	**18%**	**16%**	→
Monterrey	**16%**	**10%**	↓

Monthly household income before tax

	2020	2023	Tracking
Less than MXN 2,700	**1%**	**2%**	→
MXN 2,700 - 6,799	**7%**	**6%**	→
MXN 6,800 - 11,599	**17%**	**15%**	→
MXN 11,600 - 34,999	**38%**	**43%**	→
MXN 35,000 - 84,999	**23%**	**24%**	→
MXN 85,000 or more	**9%**	**9%**	→
Prefer not to answer	**4%**	**2%**	↓

Monthly household income before tax is displayed in Mexican peso

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Mexico, Jan ’20, Feb ‘23, (n≥700) *Mexican semi-annual imported wine drinkers in selected cities

Drinking Repertoire

Mexico Wine Landscapes

2023

Drinking repertoire

The beverage repertoire of semi-annual drinkers has expanded to include more drinks that are typically associated with celebratory occasions such as RTDs, cocktails, rosé wine and sweet or dessert wines. As a result, still wine is facing increased competition from other categories

Alcoholic beverage repertoire: Tracking, top 15

% who have drunk the following beverages in the past 12 months
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

Ranking '23		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
1	Red wine	86%	87%	86%	→	→
2	Beer	86%	87%	84%	→	→
3	Tequila	78%	77%	77%	→	→
4	Vodka / Gin	51%	54%	56%	→	→
5	Brandy / Cognac / Whisky	61%	53%	52%	↓	→
6	Pre-mixed / ready to drink alcoholic beverages	39%	38%	47%	↑	↑
7=	Rum	42%	43%	44%	→	→
7=	White wine	44%	45%	44%	→	→
9	Mezcal	39%	37%	42%	→	→
10	Cocktails	34%	33%	40%	↑	↑
11	Rosé wine	34%	33%	39%	↑	↑
12	Lambrusco	35%	33%	37%	→	→
13	Liqueurs	32%	31%	35%	→	→
14=	Sweet / dessert wine	27%	25%	32%	↑	↑
14=	Cider	39%	38%	32%	↓	↓

=Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Varietal consumption

The varietal repertoire of respondents is broadly the same as in 2020; Moscato and Carménère have higher consumption incidences

White varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

Ranking '23		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
1=	Chardonnay	41%	43%	43%	→	→
1=	Sauvignon Blanc	42%	40%	43%	→	→
3	Moscato / Muscat	20%	26%	28%	↑	→
4	Chenin Blanc	21%	22%	19%	→	→
5=	Verdejo	18%	22%	18%	→	→
5=	Pinot Grigio / Pinot Gris	17%	17%	18%	→	→
5=	White Zinfandel	n/a	n/a	18%	n/a	→
8=	Torrontés	17%	20%	16%	→	→
8=	Sémillon	18%	17%	16%	→	→
10	Albariño	14%	15%	15%	→	→
11=	Pedro Jimenez	13%	15%	13%	→	→
11=	Colombard	10%	12%	13%	→	→
13	Viognier	13%	13%	11%	→	→
14=	Gewürztraminer	9%	11%	9%	→	→
14=	Riesling	9%	8%	9%	→	→

Red varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

Ranking '23		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
1	Merlot	60%	55%	59%	→	→
2	Cabernet Sauvignon	53%	49%	53%	→	→
3	Malbec	33%	33%	35%	→	→
4	Tempranillo	25%	27%	26%	→	→
5	Pinot Noir	26%	23%	25%	→	→
6	Carménère	17%	19%	21%	↑	→
7	Petit Verdot	19%	19%	19%	→	→
8=	Pinotage	15%	19%	16%	→	→
8=	Sangiovese	16%	17%	16%	→	→
10	Shiraz / Syrah	14%	16%	15%	→	→
11	Bonarda	12%	15%	13%	→	→
12=	Zinfandel	13%	14%	12%	→	→
12=	Grenache / Garnacha	12%	16%	12%	→	→
12=	Gamay	11%	12%	12%	→	→
15	Tannat	11%	12%	11%	→	→

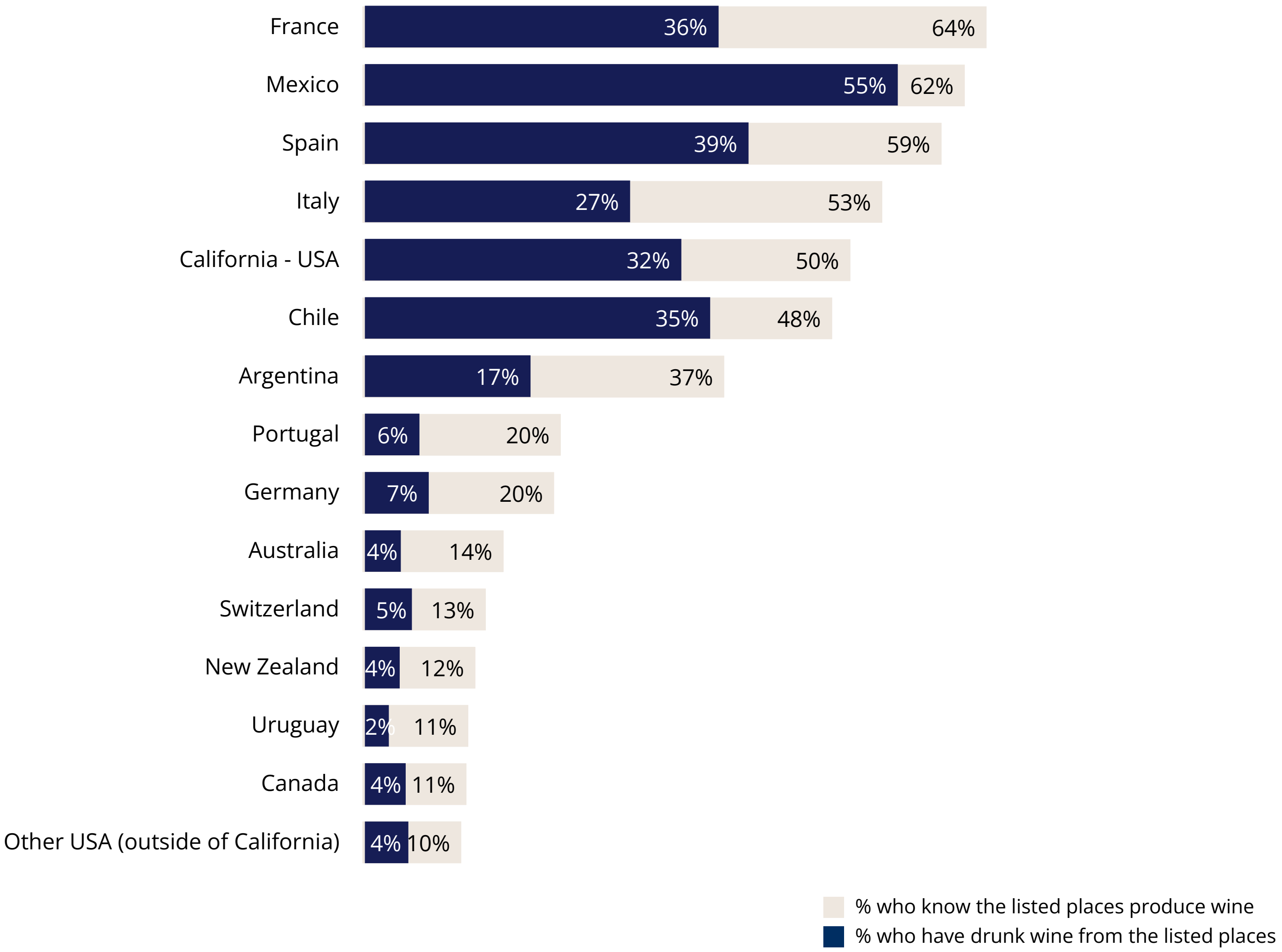
= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Country of origin consumption and awareness

Mexico is the leading country of origin by far for consumption among respondents. The gap between chasing France, Spain, Chile and California is narrow

Country of origin: Top 15 awareness and consumption levels

% of those who know of or have drunk wine from the following places
Base = All Mexican semi-annual imported wine drinkers in selected cities (n=709)



Source: Wine Intelligence, Vinitrac®, Mexico, Feb '23, (n=709) Mexican semi-annual imported wine drinkers in selected cities

Country of origin awareness

The two leading European countries of origin, France and Spain, have seen their awareness rates decline significantly since 2020. California has significantly higher awareness than before

Country of origin awareness: Tracking, top 15

% of those who know the following places produce wine
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

Ranking '23		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
1	France	70%	68%	64%	⬇	➡
2	Mexico	64%	63%	62%	➡	➡
3	Spain	67%	67%	59%	⬇	⬇
4	Italy	54%	57%	53%	➡	➡
5	California - USA	40%	47%	50%	⬆	➡
6	Chile	52%	47%	48%	➡	➡
7	Argentina	41%	37%	37%	➡	➡
8=	Portugal	18%	19%	20%	➡	➡
8=	Germany	25%	23%	20%	⬇	➡
10	Australia	15%	14%	14%	➡	➡
11	Switzerland	13%	16%	13%	➡	⬇
12	New Zealand	8%	12%	12%	⬆	➡
13=	Uruguay	11%	12%	11%	➡	➡
13=	Canada	9%	10%	11%	➡	➡
15	Other USA (outside of California)	10%	16%	10%	➡	⬇

= Represents equal ranking

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Country of origin consumption

Californian wine is now a top five country of origin for Mexican wine drinkers, gaining a significantly higher consumption incidence among respondents. Spain and France, which have significantly lower awareness incidences, do not suffer from lower levels of consumption as a result

Country of origin consumption: Tracking

% who have drunk wine from the following places in the past six months
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

Ranking '23		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
1	Mexico	56%	55%	55%	→	→
2	Spain	44%	44%	39%	→	→
3	France	39%	37%	36%	→	→
4	Chile	39%	31%	35%	→	→
5	California - USA	20%	29%	32%	↑	→
6	Italy	25%	29%	27%	→	→
7	Argentina	19%	14%	17%	→	→
8	Germany	10%	7%	7%	↓	→
9	Portugal	5%	4%	6%	→	→
10	Switzerland	3%	5%	5%	→	→
11=	Other USA (outside of California)	3%	7%	4%	→	→
11=	Canada	3%	4%	4%	→	→
11=	Australia	3%	2%	4%	→	→
11=	New Zealand	1%	3%	4%	↑	→
15	Brazil	1%	1%	3%	→	→

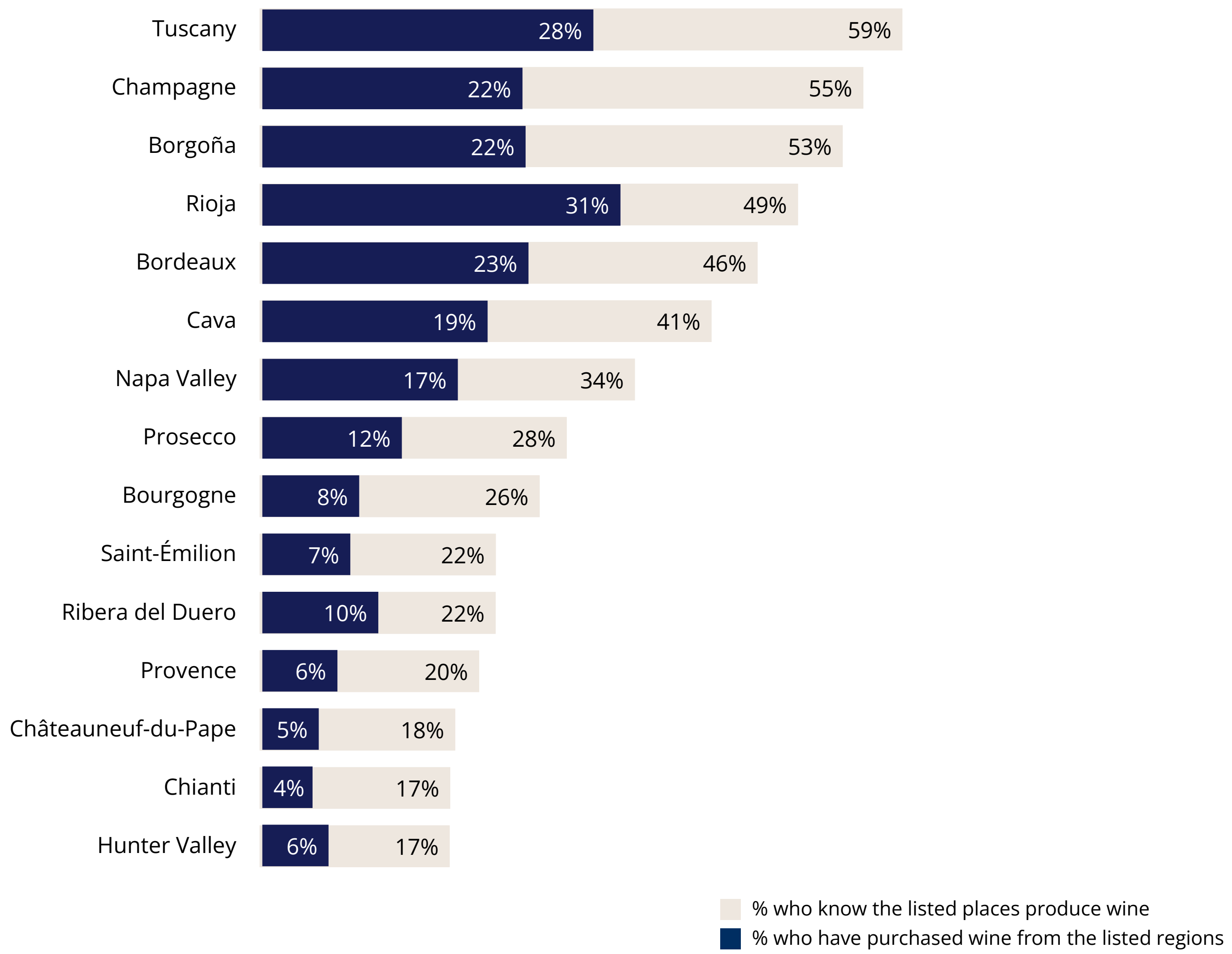
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Region of origin consumption and awareness

Rioja is the leading region for consumption among respondents, followed by Tuscany and Bordeaux

Region of origin: Top 15 awareness and consumption levels

% of those who know of or have purchased wine from the following regions
Base = All Mexican semi-annual imported wine drinkers in selected cities (n=709)



Source: Wine Intelligence, Vinitrac®, Mexico, Feb '23, (n=709) Mexican semi-annual imported wine drinkers in selected cities

Region of origin awareness

Tuscany has enjoyed a significant rise in awareness in recent years to become the leading region

Region of origin awareness: Top 15, tracking

% of those who know the following regions produce wine
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

Ranking '23		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
1	Tuscany	32%	60%	59%	↑	→
2	Champagne	58%	58%	55%	→	→
3	Borgoña	59%	56%	53%	↓	→
4	Rioja	51%	51%	49%	→	→
5	Bordeaux	49%	48%	46%	→	→
6	Cava	38%	42%	41%	→	→
7	Napa Valley	33%	36%	34%	→	→
8	Prosecco	22%	26%	28%	↑	→
9	Bourgogne	29%	29%	26%	→	→
10=	Saint-Émilion	14%	24%	22%	↑	→
10=	Ribera del Duero	24%	27%	22%	→	↓
12	Provence	20%	22%	20%	→	→
13	Châteauneuf-du-Pape	17%	15%	18%	→	→
14=	Chianti	23%	22%	17%	↓	→
14=	Hunter Valley	15%	19%	17%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Region of origin consumption

Tuscany has seen consumption increase among Mexican wine drinkers and is now the number two region

Region of origin consumption: Top 15, tracking

% who have bought wine from the following wine-producing regions in the past 3 months
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

Ranking '23		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
1	Rioja	31%	28%	31%	→	→
2	Tuscany	10%	28%	28%	↑	→
3	Bordeaux	20%	23%	23%	→	→
4=	Borgoña	26%	21%	22%	→	→
4=	Champagne	24%	21%	22%	→	→
6	Cava	18%	16%	19%	→	→
7	Napa Valley	15%	15%	17%	→	→
8	Prosecco	8%	9%	12%	↑	→
9	Ribera del Duero	11%	11%	10%	→	→
10	Bourgogne	7%	7%	8%	→	→
11	Saint-Émilion	5%	7%	7%	↑	→
12=	Provence	5%	4%	6%	→	↑
12=	Hunter Valley	3%	6%	6%	↑	→
12=	Loire Valley	3%	4%	6%	↑	→
15=	Médoc / Haut-Médoc	5%	5%	5%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Wine-Buying Behaviours

Mexico Wine Landscapes

2023

Wine-buying channel usage

Around half of respondents who live in México DF, Guadalajara and Monterrey have purchased wine online in the past six months, highlighting the importance of e-commerce to wine drinkers

Wine-buying channel usage: Tracking, top 15

% who have bought wine from the following channels in the past six months
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

Ranking '23		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
1	Self-service stores	70%	69%	66%	→	→
2	Club stores / Cash & Carry	47%	45%	46%	→	→
3	Departament stores	36%	35%	37%	→	→
4	Wholesalers	40%	38%	35%	→	→
5	Convenience stores	30%	28%	31%	→	→
6	Shop specialised in wine	33%	26%	29%	→	→
7	From a supermarket / hypermarket website	n/a	25%	25%	n/a	→
8	From an online retailer	n/a	19%	24%	n/a	↑
9	From a delivery app	n/a	10%	12%	n/a	→
10	From a winery during a visit	n/a	11%	11%	n/a	→
11=	Corner shops / Ordinary grocery store	14%	11%	10%	↓	→
11=	Duty free	8%	5%	10%	→	↑
13=	From a winery's website	n/a	9%	9%	n/a	→
13=	From a wine club or membership organization	n/a	6%	9%	n/a	→

↑**48%** are online wine buyers vs **42%** in 2021

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Wine-buying retailer usage

Retailer usage by Mexican wine drinkers remains broadly the same as in previous years

Wine-buying retailer usage: Tracking, top 15

% who mainly use the following retailers to buy wine
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

Ranking '23		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
1	Wal-Mart Supercenter	41%	43%	43%	→	→
2	Sam´ s Club	32%	31%	31%	→	→
3	La Europea	28%	25%	25%	→	→
4	Liverpool	19%	18%	20%	→	→
5=	Bodegas Alianza	15%	16%	17%	→	→
5=	Costco	16%	15%	17%	→	→
5=	Oxxo	17%	16%	17%	→	→
8	Bodega Aurrerá	13%	12%	14%	→	→
9	Chedraui	13%	14%	13%	→	→
10	Soriana	15%	16%	12%	→	↓
11	Palacio de Hierro	7%	10%	10%	↑	→
12=	Vinoteca de Mexico	7%	7%	7%	→	→
12=	La Divina	7%	7%	7%	→	→
14	7-eleven	6%	5%	6%	→	→
15=	Commercial Mexicana	5%	5%	5%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Consumption frequency

During the pandemic, frequency of consumption by Mexican wine drinkers increased, with almost 30% consuming wine more than once a week. These levels are broadly similar across all age groups, except Boomers

Wine consumption frequency: Tracking

% who usually drink wine at the following frequency
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

	2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
Most days / every day	1%	3%	5%	↑	→
2-5 times a week	14%	21%	23%	↑	→
About once a week	33%	28%	27%	↓	→
1-3 times a month	28%	26%	27%	→	→

Wine consumption frequency: by generation

% who usually drink wine at the following frequency
Base = All Mexican semi-annual imported wine drinkers in selected cities (n=709)

	All Mexican Semi-annual Imported Wine Drinkers in Selected Cities (n=709)	18-24 Gen Z (n=113)	25-39 Millenials (n=340)	40-54 Gen X (n=196)	55-59 Boomers (n=60)
Most days / every day	5%	5%	6%	3%	3%
2-5 times a week	23%	22%	26%	23%	11%
About once a week	27%	18%	30%	29%	22%
1-3 times a month	27%	31%	23%	29%	38%

% / %: Statistically significantly higher / lower than all semi-annual imported wine drinkers in selected cities at a 95% confidence l
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Off-trade consumption frequency

An increase in frequency of consumption among respondents is likely to be led by more wine drinking on relaxed and informal meal occasions

Off-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the off-trade

	2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
A relaxing drink at the end of the day at home	**5.56**	**6.87**	**6.70**	↑	→
With an informal meal at home	**3.62**	**4.61**	**4.76**	↑	→
With a more formal dinner party at home	**3.16**	**3.85**	**3.62**	→	→
At a party / celebration at home	**2.72**	**2.82**	**2.80**	→	→

Market context

Some of the at-home wine drinking that started during the pandemic has remained. For many Mexicans, wine has become a common option to drink at home

Executive Summary Report 2023 Mexico

Note: Table above shows the number of days per month that consumers are drinking wine at these occasions

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

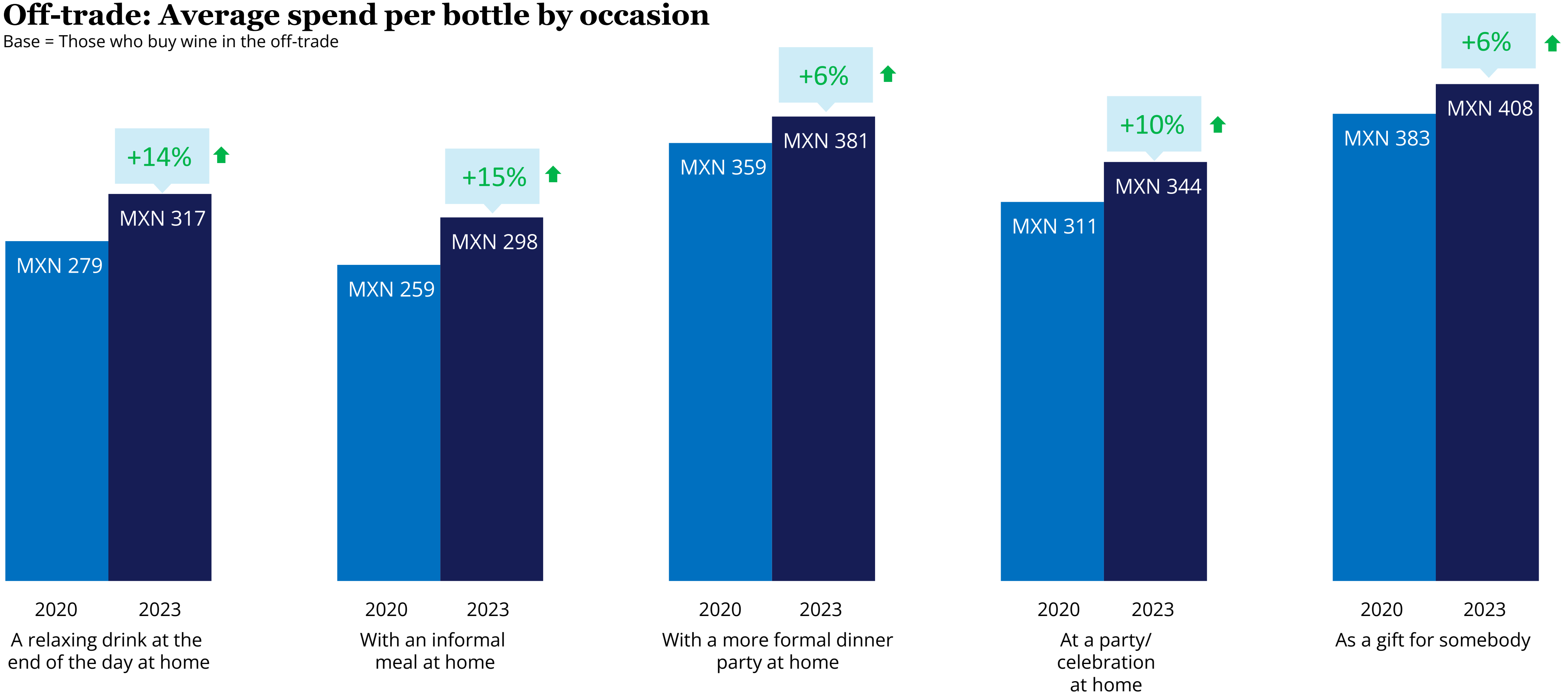
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Average off-trade spend

The amount spent by Mexican wine drinkers has increased significantly across all off-trade occasions, with the largest rises around relaxed occasions, informal meals and celebrations

Off-trade: Average spend per bottle by occasion

Base = Those who buy wine in the off-trade



Spend is displayed in Mexican peso

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

On-trade consumption

Wine consumption in restaurants has increased significantly since before the pandemic. Millennials have the highest consumption incidences for on-trade consumption

Wine purchase in on-trade

% who buy wine in a bar, pub or restaurant
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

On-trade location		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
Bar or pub	Yes	55%	53%	53%	→	→
	No	45%	47%	47%	→	→
Restaurant	Yes	79%	77%	83%	→	↑
	No	21%	23%	17%	→	↓
On-trade drinkers	Yes	84%	82%	86%	→	→
	No	16%	18%	14%	→	→

Wine purchase in on-trade: by generation

% who buy wine in a bar, pub or restaurant
Base = All Mexican semi-annual imported wine drinkers in selected cities (n=709)

On-trade location		All Mexican Semi-annual Imported Wine Drinkers in Selected Cities (n=709)	18-24 Gen Z (n=113)	25-39 Millenials (n=340)	40-54 Gen X (n=196)	55-59 Boomers (n=60)
Bar or pub	Yes	53%	60%	56%	48%	41%
	No	47%	40%	44%	52%	59%
Restaurant	Yes	83%	84%	87%	80%	63%
	No	17%	16%	13%	20%	37%
On-trade drinkers	Yes	86%	91%	91%	82%	64%
	No	14%	9%	9%	18%	36%

% / %: Statistically significantly higher / lower than all semi-annual imported wine drinkers in selected cities at a 95% confidence l
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

On-trade consumption frequency

Drinking wine on relaxed occasions in the on-trade has increased significantly among Mexican wine drinkers

On-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the on-trade

	2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
A relaxing drink out at the end of the day	**3.85**	**5.20**	**4.83**	↑	→
With an informal meal in a pub / bar / restaurant	**3.00**	**2.77**	**3.00**	→	→
With a more formal dinner in a restaurant	**2.77**	**2.95**	**2.83**	→	→
At a party / celebration / big night out	**2.56**	**2.69**	**2.86**	→	→
During business lunch or dinner	**2.54**	**3.04**	**2.81**	→	→

Note: Table above shows the number of days per month that consumers are drinking wine at these occasions

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

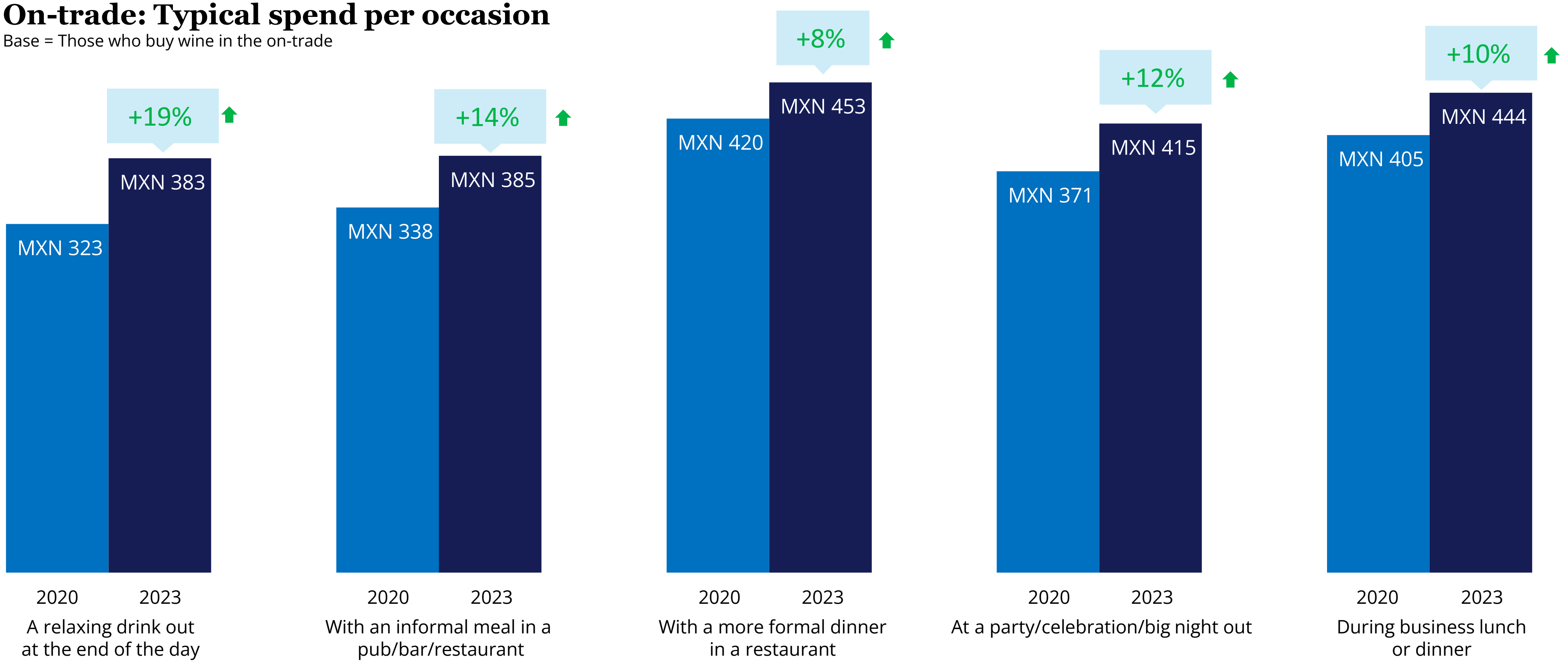
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Typical on-trade spend

The spend among respondents has increased significantly across all on-trade occasions, with a relaxing drink at the end of the day seeing the biggest increase

On-trade: Typical spend per occasion

Base = Those who buy wine in the on-trade



Spend is displayed in Mexican peso

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Wine Views and Attitudes

Mexico Wine Landscapes

2023

Attitudes towards wine

Significantly more Mexican wine drinkers are open to trying new and different styles of wine on a regular basis than in 2020. Greater numbers of Gen Z are price sensitive about wine

Attitudes towards wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

	2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
I enjoy trying new and different styles of wine on a regular basis	**71%**	**80%**	**77%**	↑	→
I don't mind what I buy so long as the price is right	**7%**	**3%**	**7%**	→	↑
I know what I like and I tend to stick to what I know	**22%**	**16%**	**16%**	↓	→

Attitudes towards wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Mexican semi-annual imported wine drinkers in selected cities (n=709)

	All Mexican Semi-annual Imported Wine Drinkers in Selected Cities (n=709)	18-24 Gen Z (n=113)	25-39 Millenials (n=340)	40-54 Gen X (n=196)	55-59 Boomers (n=60)
I enjoy trying new and different styles of wine on a regular basis	**77%**	**70%**	**82%**	**78%**	**60%**
I don't mind what I buy so long as the price is right	**7%**	**14%**	**5%**	**4%**	**11%**
I know what I like and I tend to stick to what I know	**16%**	**16%**	**12%**	**18%**	**29%**

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
% / %: Statistically significantly higher / lower than all semi-annual imported wine drinkers in selected cities at a 95% confidence l
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Wine involvement

Gen Z and Boomers have the lowest levels of involvement in the wine category when compared with all Mexican wine drinkers

Wine involvement: Tracking

Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

	All Mexican Semi-annual Imported Wine Drinkers in Selected Cities (n=709)	18-24 Gen Z (n=113)	25-39 Millenials (n=340)	40-54 Gen X (n=196)	55-59 Boomers (n=60)
High involvement	**33%**	**19%**	**38%**	**35%**	**23%**
Medium involvement	**44%**	**48%**	**42%**	**46%**	**41%**
Low involvement	**23%**	**33%**	**21%**	**19%**	**36%**

Note: Tracking for involvement is not available due to changes in calculations

% / %: Statistically significantly higher / lower than all semi-annual imported wine drinkers in selected cities at a 95% confidence l

Source: Wine Intelligence, Vinitrac®, Mexico, Feb '23, (n=709) Mexican semi-annual imported wine drinkers in selected cities

Involvement and perceived expertise (1)

Mexican wine drinkers' passions for the category have increased since 2020 with significantly more saying they hold a strong interest in it and that it is important to their lifestyle

Involvement and perceived expertise in wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

Ranking '23		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
1	Drinking wine gives me pleasure	79%	83%	87%	↑	↑
2	Deciding which wine to buy is an important decision	87%	88%	85%	→	↓
3	I always look for the best quality wines I can get for my budget	87%	89%	84%	→	↓
4	I like to take my time when I purchase a bottle of wine	70%	79%	81%	↑	→
5	I have a strong interest in wine	71%	77%	77%	↑	→
6	Generally speaking, wine is reasonably priced	70%	75%	76%	↑	→
7	Wine is important to me in my lifestyle	49%	51%	65%	↑	↑
8	I feel competent about my knowledge of wine	45%	48%	58%	↑	↑
9	Compared to others, I know less about the subject of wine	43%	42%	43%	→	→
10	Generally speaking, wine is an expensive drink	28%	32%	36%	↑	→
11	I don't understand much about wine	18%	17%	19%	→	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Involvement and perceived expertise (2)

Gen Z agree with fewer of the top involvement statements than Mexican wine drinkers generally; taking time when purchasing a bottle of wine is the lead involvement measure for this age group

Involvement and perceived expertise in wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Mexican semi-annual imported wine drinkers in selected cities (n=709)

Ranking '23		All Mexican Semi-annual Imported Wine Drinkers in Selected Cities (n=709)	18-24 Gen Z (n=113)	25-39 Millenials (n=340)	40-54 Gen X (n=196)	55-59 Boomers (n=60)
1	Drinking wine gives me pleasure	87%	79%	88%	93%	80%
2	Deciding which wine to buy is an important decision	85%	73%	85%	90%	90%
3	I always look for the best quality wines I can get for my budget	84%	74%	85%	88%	86%
4	I like to take my time when I purchase a bottle of wine	81%	82%	82%	82%	75%
5	I have a strong interest in wine	77%	64%	80%	80%	75%
6	Generally speaking, wine is reasonably priced	76%	75%	76%	77%	75%
7	Wine is important to me in my lifestyle	65%	48%	69%	70%	60%
8	I feel competent about my knowledge of wine	58%	52%	61%	57%	50%
9	Compared to others, I know less about the subject of wine	43%	42%	43%	41%	54%
10	Generally speaking, wine is an expensive drink	36%	42%	34%	35%	39%
11	I don't understand much about wine	19%	22%	17%	19%	33%

% / %: Statistically significantly higher / lower than all semi-annual imported wine drinkers in selected cities at a 95% confidence l
Source: Wine Intelligence, Vinitrac®, Mexico, Feb '23, (n=709) Mexican semi-annual imported wine drinkers in selected cities

Wine knowledge and confidence

The knowledge base of Mexican wine drinkers has declined in the past 12 months and is lower than before the pandemic. Confidence has increased significantly, probably as a result of growing enthusiasm for the category

Wine knowledge index: Tracking

Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

	2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
Knowledge Index	28.6	29.4	27.6	➡	⬇

-1.0 Index change

Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.
*Wine knowledge index is the 'objective' measurement of consumer knowledge about wine.

Wine confidence index: Tracking

Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

	2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
Confidence Index	55.5	56.2	58.4	⬆	⬆

+3.0 Index change

Wine confidence index (0–100) is calculated based on the extent to which consumers feel competent about their wine knowledge. Wine confidence index uses consumers' answers to three attitudinal statements: 1) I feel competent about my knowledge of wine / 2) Compared to others, I know less about the subject of wine / 3) I don't understand much about wine.
**Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge.

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Wine-drinking motivations

Mexican respondents are most motivated to drink wine to help celebrate special occasions, to relax or because they love the taste

Wine drinking motivations

% who selected the following as reasons why they drink wine
Base = All Mexican semi-annual imported wine drinkers in selected cities (n=709)

Ranking '23		All Mexican Semi-annual Imported Wine Drinkers in Selected Cities (n=709)	18-24 Gen Z (n=113)	25-39 Millenials (n=340)	40-54 Gen X (n=196)	55-59 Boomers (n=60)
1	To celebrate special occasions	65%	51%	65%	73%	68%
2	Drinking wine makes me feel relaxed	61%	47%	63%	65%	60%
3	I really love the taste of wine	59%	44%	64%	60%	59%
4	Wine is about sharing with a partner / close friend or family member	54%	45%	52%	61%	66%
5	Wine enhances food and meals	52%	40%	51%	58%	59%
6	Drinking wine can be good for my health	45%	33%	41%	53%	60%
7=	I treat myself with wine at the end of the day	42%	29%	47%	44%	40%
7=	Wine helps create a warm / friendly atmosphere	42%	35%	43%	40%	53%
9	I like learning about new wines	38%	36%	40%	36%	35%
10	Wine is about sharing something with others	36%	33%	35%	37%	44%
11	I like shopping / choosing wines to drink	27%	23%	30%	25%	26%
12	Wine is a refreshing drink	23%	21%	24%	22%	28%
13	It makes people sophisticated	17%	20%	18%	14%	12%
14	It makes me feel individual and unique	16%	12%	21%	12%	13%
15	Most of my friends drink wine	14%	14%	14%	16%	7%
16	Wine is a fashionable drink	8%	8%	9%	6%	9%

= Represents equal ranking
% / %: Statistically significantly higher / lower than all semi-annual imported wine drinkers in selected cities at a 95% confidence l
Source: Wine Intelligence, Vinitrac®, Mexico, Feb '23, (n=709) Mexican semi-annual imported wine drinkers in selected cities

Wine-buying choice cues

Mexican respondents are taste-focused, with three of the top four choice cues relating to it; brand awareness is also a leading choice cue

Wine choice cues: Tracking

% who indicate each of the following factors is 'important' or 'very important' when buying wine
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

Ranking '23		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
1=	A brand I am aware of	86%	83%	84%	→	→
1=	Wine that matches or complements food	80%	84%	84%	→	→
3=	Grape variety (eg Cabernet Sauvignon, Chardonnay, etc)	80%	85%	82%	→	→
3=	Taste or wine style descriptions displayed on the shelves or on wine labels	82%	80%	82%	→	→
5	Wines with long tradition and heritage	75%	78%	77%	→	→
6	Recommendation by friend or family	78%	74%	75%	→	→
7	The country of origin (eg France, Australia, Spain, Chile, USA etc)	71%	72%	72%	→	→
8	Whether or not the wines are produced in an environmentally friendly way	69%	71%	70%	→	→
9	The region of origin (eg Bordeaux, Casablanca, Barossa Valley)	69%	73%	69%	→	→
10	Recommendation by wine critic or writer	66%	70%	67%	→	→
11	Alcohol content	61%	61%	66%	→	→
12	Promotional offer (eg price discount or 3 for the price of 2)	59%	56%	64%	↑	↑
13=	Recommendation by wine guide books	58%	63%	63%	↑	→
13=	Whether or not the wine has won a medal or award	60%	63%	63%	→	→
15=	Recommendations from shop staff or shop leaflet	57%	56%	62%	↑	↑
15=	Appeal of the bottle and / or label design	53%	55%	62%	↑	↑

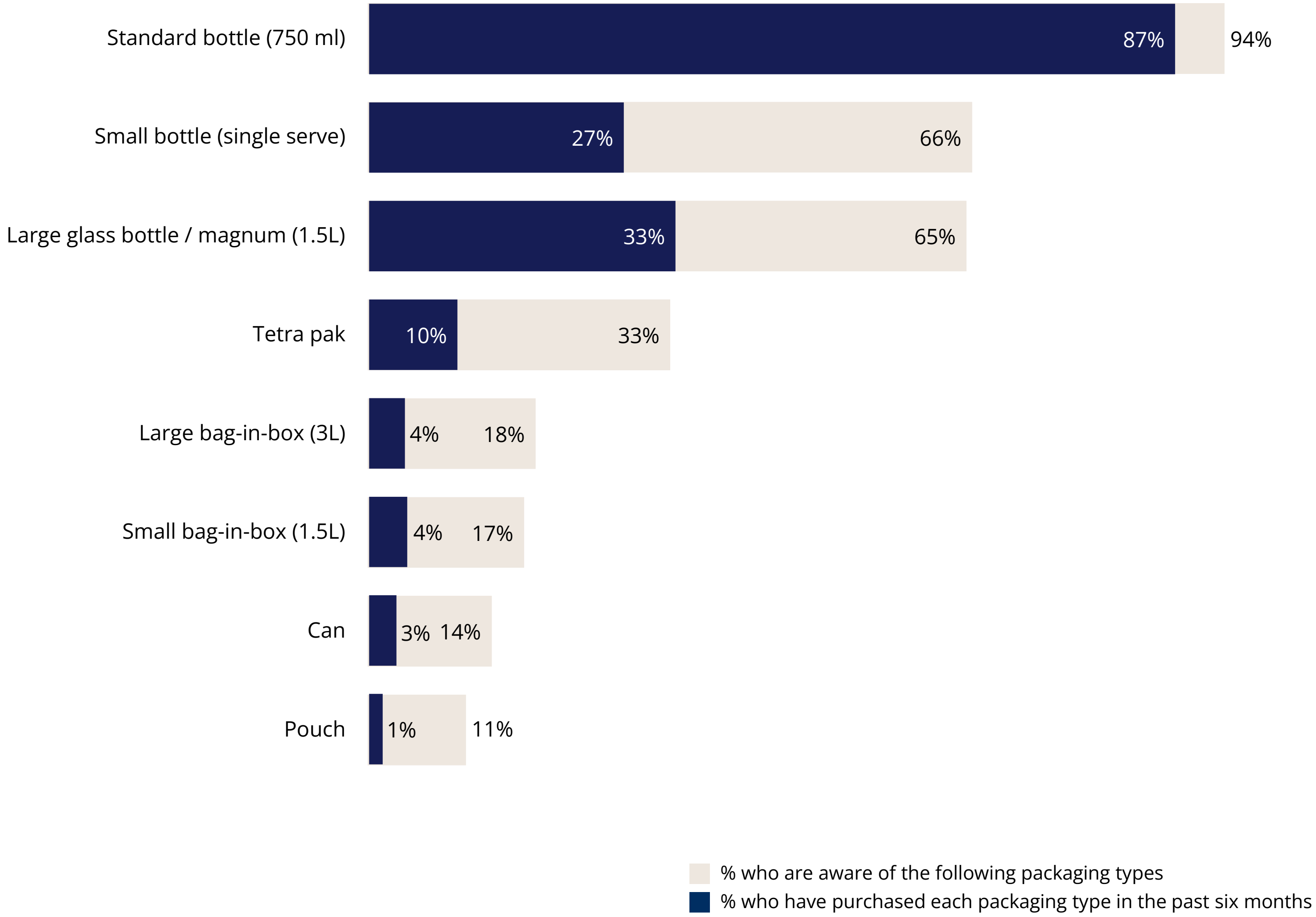
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Packaging type consumption and awareness

Standard bottles are the leading packaging type among Mexican wine drinkers, followed by magnums and single-serve bottles

Packaging types: Awareness and consumption levels

% of those who are aware of or have purchased wine in the following packaging types
Base = All Mexican semi-annual imported wine drinkers in selected cities (n=709)



Source: Wine Intelligence, Vinitrac®, Mexico, Feb '23, (n=709) Mexican semi-annual imported wine drinkers in selected cities

Packaging purchase

A smaller proportion of Gen Z than Mexican wine drinkers as a whole buy standard bottles of wine

Packaging purchase: by generation

% who have purchased wine in the following packaging types
Base = All Mexican semi-annual imported wine drinkers in selected cities (n=709)

Ranking '23		All Mexican Semi-annual Imported Wine Drinkers in Selected Cities (n=709)	18-24 Gen Z (n=113)	25-39 Millenials (n=340)	40-54 Gen X (n=196)	55-59 Boomers (n=60)
1	Standard bottle (750 ml)	87%	75%	88%	92%	85%
2	Large glass bottle / magnum (1.5L)	33%	42%	36%	24%	27%
3	Small bottle (single serve)	27%	30%	30%	20%	33%
4	Tetra pak	10%	6%	12%	9%	5%
5=	Small bag-in-box (1.5L)	4%	7%	4%	4%	0%
5=	Large bag-in-box (3L)	4%	5%	4%	4%	2%
7	Can	3%	3%	3%	3%	2%
8	Pouch	1%	3%	1%	2%	0%

= Represents equal ranking

% / %: Statistically significantly higher / lower than all semi-annual imported wine drinkers in selected cities at a 95% confidence l

Source: Wine Intelligence, Vinitrac®, Mexico, Feb '23, (n=709) Mexican semi-annual imported wine drinkers in selected cities

Brand Health

Mexico Wine Landscapes

2023

Global Wine Brand Power Index

Brand health measures included in the index

Awareness	% who have heard of each brand (when prompted with a list of brand names with logos) Base = All wine drinkers	**Brand awareness index**
Purchase	% who have bought each brand in the past 3 months Base = All wine drinkers	**Brand purchase index**
Conversion	% who have bought each brand in the past 3 months Base = Those who have heard of each brand	
Consideration	% who would consider buying each brand Base = Those who have heard of each brand	
Affinity	% who think each brand is right for people like them Base = Those who have heard of each brand	**Brand connection index**
Recommendation	% who would recommend each brand to a friend Base = Those who have heard of each brand	

Wine Brand Power Index

Mexico Brand Power

The top three most powerful brands in Mexico have remained unchanged since 2022

Casillero del Diablo — 1st

TORRES — 2nd

Riunite — 3rd

Mexico Brand Power Index 2023

Casillero del Diablo has a large lead over second and third placed brands Torres and Riunite; Finca Las Moras has seen an increase in its ranking since 2022 due to higher purchase, affinity and recommendation incidences

Mexican Brand Power Index 2023

The top 30 most powerful wine brands in the Mexican market based on consumer feedback from six key brand health measures
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥708)

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
1	Casillero del Diablo	95.9	=	-0.4
2	Torres	84.3	=	-8.1
3	Riunite	83.3	=	1.5
4	Finca Las Moras	75.8	⬆+5	3.6
5	Sangre de Toro	74.4	=	-4.3
6	Concha y Toro	73.2	=	-5.4
7	Concha y Toro Reservado	72.1	=	-3.5
8	Cu4tro Soles	68.0	⬆+2	2.5
9	Casa Madero	67.7	⬇-5	-12.6
10	California Wines	66.1	⬆+2	2.1
11	L.A. Cetto	64.9	⬇-3	-8.5
12	Gato Negro	63.8	⬆+1	3.0
13	Sangre de Cristo	62.7	⬇-2	-2.5
14	Marqués del Valle	61.7	=	1.4
15	Marqués de Cáceres	58.2	=	-1.5

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
16	Carlo Rossi	57.8	=	1.2
17	Santa Helena	55.7	⬆+9	8.1
18	Monte Xanic	55.6	⬆+1	3.2
19	Marqués de Riscal	54.8	⬇-1	0.2
20	F. Chauvenet	53.0	=	0.7
21	Padre Kino	50.3	⬆+3	-0.5
22	Santa Carolina	50.2	⬇-5	-4.7
23=	Pata Negra	49.6	⬆+2	0.6
23=	San Pedro	49.6	⬇-2	-1.6
25	Marques de Casa Concha	49.3	⬇-2	-1.8
26	Trapiche	47.5	⬆+2	1.0
27	Viña Maipo	45.8	=	-0.8
28	Yellow Tail	43.8	⬆+6	0.8
29	Protos	43.3	=	-2.4
30	Don Simon	43.1	⬆+5	0.2

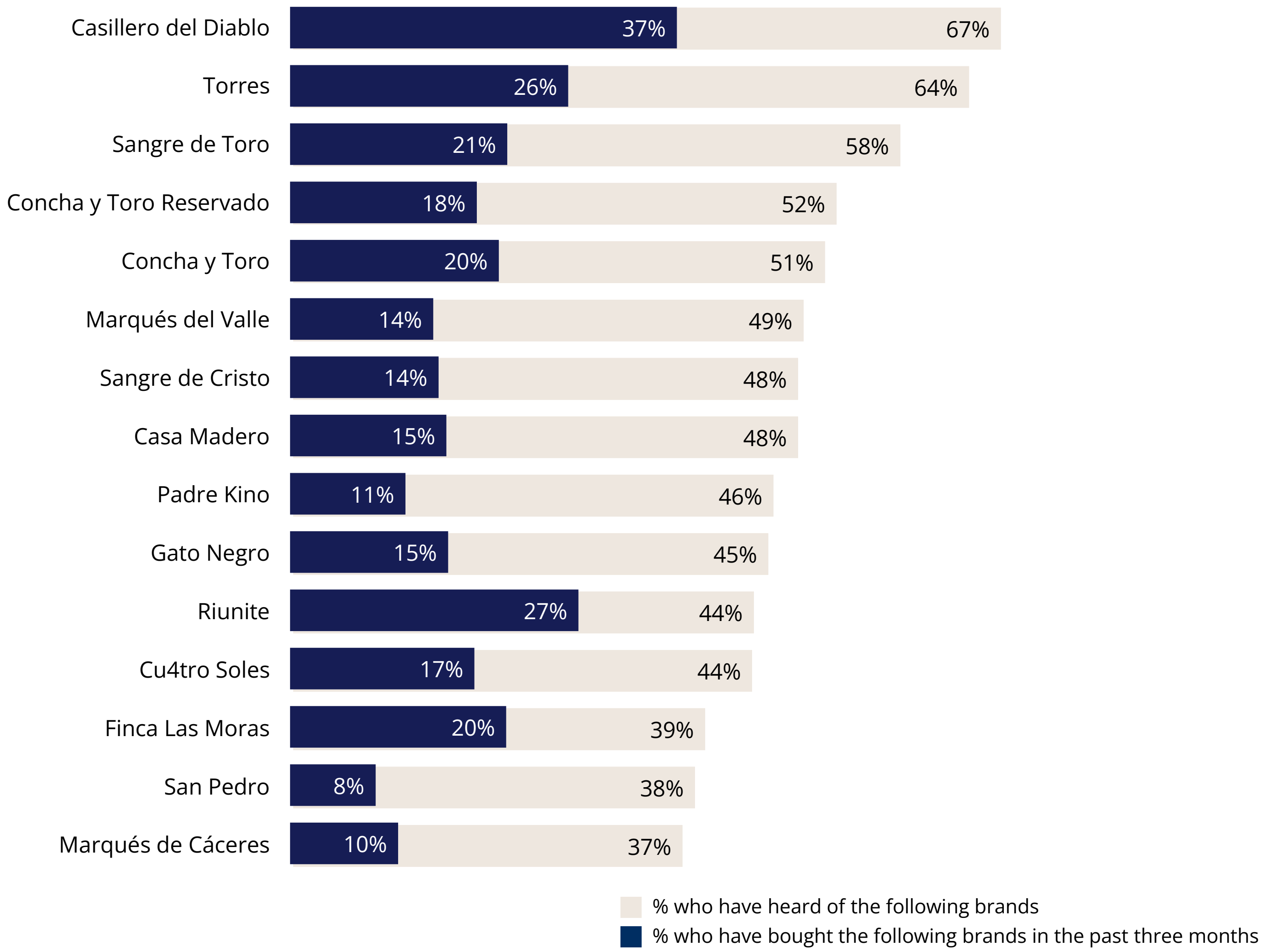
Source: Wine Intelligence, Vinitrac®, Mexico, Feb '22, Feb '23, (n≥708) Mexican semi-annual imported wine drinkers in selected cities

Brand health: Consumption and awareness

Casillero del Diablo has the highest awareness and purchase incidence among Mexican wine drinkers, with Riunite having a high purchase incidence relative to its awareness

Brand health: Top 15 awareness and purchase levels

Base = All Mexican semi-annual imported wine drinkers in selected cities (n=709)



Source: Wine Intelligence, Vinitrac®, Mexico, Feb '23, (n=709) Mexican semi-annual imported wine drinkers in selected cities

Brand awareness: Tracking

It is a mixed picture for brands in Mexico, with several experiencing either significantly higher or lower awareness incidences, which indicates that the brand space in Mexico is changing

Awareness: Tracking

% who have heard of the following brands
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

Ranking '23		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
1	Casillero del Diablo	68%	68%	67%	→	→
2	Torres	75%	66%	64%	↓	→
3	Sangre de Toro	64%	64%	58%	↓	↓
4	Concha y Toro Reservado	n/a	n/a	52%	n/a	n/a
5	Concha y Toro	59%	54%	51%	n/a	n/a
6	Marqués del Valle	44%	49%	49%	→	→
7=	Sangre de Cristo	58%	50%	48%	↓	→
7=	Casa Madero	59%	57%	48%	↓	↓
9	Padre Kino	50%	47%	46%	→	→
10	Gato Negro	38%	43%	45%	↑	→
11=	Riunite	39%	44%	44%	→	→
11=	Cu4tro Soles	35%	37%	44%	↑	↑
13	Finca Las Moras	37%	39%	39%	→	→
14	San Pedro	43%	42%	38%	→	→
15	Marqués de Cáceres	38%	46%	37%	→	↓

Ranking '23		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
16	California Wines	30%	36%	36%	↑	→
17	Marques de Casa Concha	40%	42%	35%	→	↓
18	Carlo Rossi	37%	35%	34%	→	→
19	Santa Helena	28%	24%	33%	↑	↑
20	L.A. Cetto	35%	38%	32%	→	↓
21=	Santa Carolina	29%	32%	31%	→	→
21=	Monte Xanic	31%	32%	31%	→	→
23	Marqués de Riscal	36%	35%	30%	↓	→
24	Pata Negra	28%	29%	29%	→	→
25	Don Simon	16%	22%	28%	↑	↑
26	Domecq	34%	33%	26%	↓	↓
27	Viña Maipo	24%	24%	24%	→	→
28=	Santo Tomás	n/a	28%	22%	n/a	↓
28=	Castillo de Líria	22%	26%	22%	→	↓
30=	F. Chauvenet	22%	22%	21%	→	→

Results for all brands available in the data table

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan ’20, Jan ‘21, Feb ‘23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Brand purchase: Tracking

Several leading and mid-market brands are experiencing either significantly higher or lower purchase incidences, reinforcing that the brand landscape in Mexico is evolving

Purchase: Tracking

% who have bought the following brands in the past three months
Base = All Mexican semi-annual imported wine drinkers in selected cities (n≥700)

Ranking '23		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
1	Casillero del Diablo	35%	33%	37%	→	→
2	Riunite	23%	23%	27%	→	→
3	Torres	33%	30%	26%	↓	→
4	Sangre de Toro	25%	24%	21%	↓	→
5=	Finca Las Moras	14%	11%	20%	↑	↑
5=	Concha y Toro	30%	24%	20%	n/a	n/a
7	Concha y Toro Reservado	n/a	n/a	18%	n/a	n/a
8	Cu4tro Soles	12%	14%	17%	↑	→
9=	Gato Negro	11%	14%	15%	↑	→
9=	Casa Madero	19%	22%	15%	↓	↓
11=	Sangre de Cristo	20%	19%	14%	↓	↓
11=	L.A. Cetto	15%	16%	14%	→	→
11=	California Wines	9%	12%	14%	↑	→
11=	Marqués del Valle	10%	11%	14%	↑	→
15	Padre Kino	13%	14%	11%	→	→

Ranking '23		2020 (n=700)	2021 (n=700)	2023 (n=709)	Tracking vs. '20	Tracking vs. '21
16=	Carlo Rossi	9%	10%	10%	→	→
16=	Marqués de Cáceres	8%	11%	10%	→	→
16=	Santa Helena	5%	3%	10%	↑	↑
19	Monte Xanic	9%	8%	9%	→	→
20=	Santa Carolina	6%	7%	8%	→	→
20=	San Pedro	11%	9%	8%	→	→
20=	Pata Negra	7%	6%	8%	→	→
20=	Don Simon	3%	6%	8%	↑	→
24=	Marqués de Riscal	8%	8%	7%	→	→
24=	Marques de Casa Concha	7%	7%	7%	→	→
26=	F. Chauvenet	4%	5%	6%	→	→
26=	Viña Maipo	8%	5%	6%	→	→
26=	Santa Rita 120	n/a	n/a	6%	n/a	→
26=	Domecq	5%	9%	6%	→	↓
30=	Gallo Family Vineyards	4%	5%	5%	→	→

Results for all brands available in the data table

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Brand conversion: Tracking

Conversion rates for Riunite and Finca Las Moras have increased significantly compared with previous years

Conversion: Tracking

% who have bought the following brands in the past three months
Base = Those who have heard of each brand

Ranking '23		2020	2021	2023	Tracking vs. '20	Tracking vs. '21
1	Riunite	60%	53%	62%	→	↑
2	Casillero del Diablo	52%	49%	54%	→	→
3	Finca Las Moras	38%	29%	52%	↑	↑
4	L.A. Cetto	44%	43%	43%	→	→
5	Torres	44%	45%	41%	→	→
6	Cu4tro Soles	34%	39%	40%	→	→
7	Concha y Toro	51%	45%	39%	n/a	n/a
8	California Wines	31%	33%	38%	→	→
9	Sangre de Toro	40%	38%	36%	→	→
10	Concha y Toro Reservado	n/a	n/a	34%	n/a	n/a
11	Gato Negro	29%	33%	33%	→	→
12=	Casa Madero	32%	38%	31%	→	↓
12=	Santa Rita 120	n/a	n/a	31%	n/a	→
14=	Carlo Rossi	25%	27%	30%	→	→
14=	F. Chauvenet	19%	22%	30%	↑	→

Ranking '23		2020	2021	2023	Tracking vs. '20	Tracking vs. '21
14=	Yellow Tail	24%	17%	30%	→	→
17=	Sangre de Cristo	35%	39%	29%	→	↓
17=	Santa Helena	19%	13%	29%	↑	↑
17=	Cune	27%	27%	29%	→	→
17=	Monte Xanic	28%	26%	29%	→	→
21=	Marqués del Valle	23%	23%	28%	→	→
21=	Marqués de Cáceres	21%	24%	28%	→	→
23=	Don Simon	21%	27%	27%	→	→
23=	Pata Negra	24%	19%	27%	→	→
23=	Barefoot	26%	25%	27%	→	→
26=	Santa Carolina	21%	23%	26%	→	→
26=	Beringer	23%	30%	26%	→	→
28=	Gallo Family Vineyards	22%	23%	25%	→	→
28=	Trapiche	12%	20%	25%	↑	→
28=	Marqués de Riscal	21%	23%	25%	→	→

Results for all brands available in the data table

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Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Brand consideration: Tracking

Riunite's lead in consideration incidence has increased significantly when compared with previous years; California Wines and Trapiche having also seen significant increases

Consideration: Tracking

% who would consider buying the following brands
Base = Those who have heard of each brand

Ranking '23		2020	2021	2023	Tracking	
					vs. '20	vs. '21
1	Riunite	53%	47%	62%	↑	↑
2	Finca Las Moras	50%	51%	57%	→	→
3	Casillero del Diablo	52%	54%	56%	→	→
4	F. Chauvenet	44%	47%	55%	↑	→
5	L.A. Cetto	51%	49%	54%	→	→
6	California Wines	43%	47%	53%	↑	→
7=	Yellow Tail	34%	55%	52%	↑	→
7=	Trapiche	30%	39%	52%	↑	↑
7=	Torres	47%	53%	52%	→	→
7=	Luis Felipe Edwards	45%	49%	52%	→	→
11=	Cu4tro Soles	45%	48%	51%	→	→
11=	Casa Madero	49%	56%	51%	→	→
11=	Monte Xanic	49%	47%	51%	→	→
14=	Concha y Toro Reservado	n/a	n/a	50%	n/a	n/a
14=	Concha y Toro	54%	50%	50%	n/a	n/a

Ranking '23		2020	2021	2023	Tracking	
					vs. '20	vs. '21
14=	Marqués de Riscal	46%	46%	50%	→	→
17=	Carlo Rossi	36%	47%	48%	↑	→
17=	Puerto Nuevo	34%	n/a	48%	→	→
19=	Gato Negro	39%	46%	47%	↑	→
19=	Sangre de Toro	46%	47%	47%	→	→
19=	Marqués de Cáceres	45%	42%	47%	→	→
22=	Santa Rita 120	n/a	n/a	46%	n/a	→
22=	Santa Carolina	37%	35%	46%	→	↑
24=	Protos	36%	53%	45%	→	→
24=	Santa Helena	39%	40%	45%	→	→
24=	Cune	43%	50%	45%	→	→
27=	Barefoot	40%	47%	44%	→	→
27=	Beringer	29%	44%	44%	↑	→
29=	Viña Maipo	47%	32%	43%	→	↑
29=	Dark Horse	n/a	40%	43%	n/a	→

Results for all brands available in the data table

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Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Brand affinity: Tracking

Leading brands Riunite and Finca Las Moras have seen their affinity incidences increase significantly, with California Wines now in joint third with Casillero del Diablo

Affinity: Tracking

% who think the following brands are right for people like them
Base = Those who have heard of each brand

Ranking '23		2020	2021	2023	Tracking vs. '20	Tracking vs. '21
1	Riunite	59%	52%	61%	→	↑
2	Finca Las Moras	49%	44%	60%	↑	↑
3=	Casillero del Diablo	53%	51%	55%	→	→
3=	California Wines	40%	45%	55%	↑	↑
5	L.A. Cetto	48%	56%	52%	→	→
6=	Concha y Toro	52%	48%	49%	n/a	n/a
6=	Torres	51%	55%	49%	→	↓
8	F. Chauvenet	38%	43%	48%	→	→
9=	Carlo Rossi	32%	43%	46%	↑	→
9=	Cu4tro Soles	43%	43%	46%	→	→
9=	Concha y Toro Reservado	n/a	n/a	46%	n/a	n/a
9=	Marqués de Riscal	42%	39%	46%	→	→
13=	Santa Helena	31%	29%	45%	↑	↑
13=	Yellow Tail	35%	41%	45%	→	→
15=	Monte Xanic	35%	39%	44%	→	→

Ranking '23		2020	2021	2023	Tracking vs. '20	Tracking vs. '21
15=	Sangre de Toro	45%	44%	44%	→	→
17	Casa Madero	48%	48%	43%	→	→
18	Marqués de Cáceres	36%	35%	42%	→	→
19	Trapiche	29%	29%	41%	↑	↑
20=	Marqués del Valle	32%	30%	40%	↑	↑
20=	Cune	45%	41%	40%	→	→
22=	Pata Negra	35%	35%	39%	→	→
22=	Dark Horse	n/a	41%	39%	n/a	→
22=	Gato Negro	31%	35%	39%	→	→
25	Santa Carolina	25%	28%	38%	↑	↑
26=	Protos	30%	36%	37%	→	→
26=	Viña Maipo	34%	32%	37%	→	→
26=	Sangre de Cristo	39%	42%	37%	→	→
26=	Barefoot	34%	34%	37%	→	→
30=	Beringer	35%	38%	36%	→	→

Results for all brands available in the data table

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n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Brand recommendation: Tracking

More than half of respondents would recommend Casillero del Diablo, Finca Las Moras and Riunite to a friend; both Casillero del Diablo and Finca Las Moras recommendation incidences have increased significantly

Recommendation: Tracking

% who would recommend the following brands to a friend
Base = Those who have heard of each brand

Ranking '23		2020	2021	2023	Tracking vs. '20	Tracking vs. '21
1	Casillero del Diablo	52%	46%	54%	→	↑
2	Finca Las Moras	40%	41%	52%	↑	↑
3	Riunite	53%	46%	51%	→	→
4	L.A. Cetto	49%	44%	47%	→	→
5=	Torres	49%	50%	45%	→	→
5=	California Wines	34%	39%	45%	↑	→
7	Concha y Toro Reservado	n/a	n/a	44%	n/a	n/a
8=	F. Chauvenet	35%	38%	42%	→	→
8=	Yellow Tail	29%	33%	42%	→	→
10=	Casa Madero	49%	48%	41%	↓	→
10=	Concha y Toro	49%	47%	41%	n/a	n/a
10=	Cu4tro Soles	40%	39%	41%	→	→
13	Sangre de Toro	42%	44%	40%	→	→
14=	Sangre de Cristo	37%	40%	39%	→	→
14=	Apothic	n/a	33%	39%	n/a	→

Ranking '23		2020	2021	2023	Tracking vs. '20	Tracking vs. '21
14=	Marqués de Cáceres	30%	33%	39%	↑	→
14=	Gato Negro	28%	35%	39%	↑	→
14=	Marqués de Riscal	37%	36%	39%	→	→
19=	Monte Xanic	36%	33%	38%	→	→
19=	Cono Sur	n/a	37%	38%	n/a	→
21=	Beringer	28%	32%	37%	→	→
21=	Carlo Rossi	33%	33%	37%	→	→
23=	Trapiche	25%	29%	36%	→	→
23=	Santa Helena	28%	26%	36%	→	↑
23=	Viña Maipo	36%	27%	36%	→	→
26	Pata Negra	28%	30%	35%	→	→
27=	Santa Rita 120	n/a	n/a	34%	n/a	→
27=	Protos	28%	36%	34%	→	→
29=	André	n/a	25%	33%	n/a	→
29=	Marqués del Valle	29%	32%	33%	→	→

Results for all brands available in the data table

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↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

Research Methodology

Mexico Wine Landscapes

2023

Research methodology

QUANTITATIVE

Data was collected in Mexico since October 2016.

The January 2020 and January 2021 waves were tracked against February 2023.

Data was gathered via Wine Intelligence's Vinitrac® online survey.

Respondents were screened to ensure that they: were 18-59 years old; drank imported red, white or rosé wine at least twice a year; and bought wine in the off-trade or in the on-trade.

Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis.

The data is representative of Mexican semi-annual imported wine drinkers in selected cities in terms of age, gender* and region.

The distribution of the sample is shown in the table.

		Jan-20	Jan-21	Feb-23
	n=	700	700	709
Gender*	Male	55%	53%	50%
	Female	46%	47%	49%
	Total	***100%***	***100%***	***99%***
Age	18-24	22%	20%	16%
	25-34	26%	39%	34%
	35-44	23%	17%	24%
	45-54	20%	16%	18%
	55-59	10%	8%	8%
	Total	***100%***	***100%***	***100%***
Region	Mexico DF	66%	65%	74%
	Guadalajara	18%	22%	16%
	Monterrey	16%	12%	10%
	Total	***100%***	***100%***	***100%***

Source: Wine Intelligence, Vinitrac®, Mexico, Jan '20, Jan '21, Feb '23, (n≥700) Mexican semi-annual imported wine drinkers in selected cities

**Please note that additional gender categories were also surveyed. These categories fell naturally in the sample and were not enforced via quotas*

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