

Dry Red Wine Market Size, Share & Growth Report, H2-2026: Industry Outlook By Grape Varietal, By Body and Style Profile, By Price, By Viticulture, By Packaging Format, By Distribution Channel, Companies and Countries to 2032

<https://marketpublishers.com/r/DB4CDB5BD12FEN.html>

Date: September 2026

Pages: 194

Price: US\$ 3,285.00 (Single User License)

ID: DB4CDB5BD12FEN

Abstracts

The global Dry Red Wine Market is estimated to generate \$171.6 Billion in 2026. Further, between 2026 and 2032, the market size is forecast to grow at a CAGR of 2.6% to reach \$200.2 Billion in 2032. This Dry Red Wine report provides a comprehensive analysis across By Grape Varietal (Cabernet Sauvignon, Merlot, Pinot Noir, Syrah, Malbec, Sangiovese and Tempranillo, Specialty and Regional Varietals), By Body and Style Profile (Light-Bodied Dry Red, Medium-Bodied Dry Red, Full-Bodied Dry Red), By Price (Economy, Mass Premium, Premium and Super-Premium, Fine Wine), By Viticulture (Conventional, Organic and Biodynamic, Sustainable), By Packaging Format (Glass Bottles, Bag-in-Box and Cartons, Canned Wine, PET Bottles), By Distribution Channel (Off-Trade, On-Trade), across 5 geographic regions, and 22 countries.

Dry Red Wine Demand Polarizes Between Accessible Drinking and Premium Provenance

The global dry red wine industry comprises still red wines fermented to low residual sugar, including Cabernet Sauvignon, Merlot, Pinot Noir, Shiraz/Syrah, Malbec, Tempranillo, Sangiovese, and blended styles. Demand is increasingly polarized between value-oriented everyday drinking and premium wines differentiated by origin, vineyard identity, vintage, aging potential, and winemaking technique. Consumers seeking less sweetness often favor dry reds for food pairing, gifting, restaurant occasions, and at-home consumption, while younger legal-drinking-age consumers are

also showing greater interest in lighter styles, approachable tannins, and discovery-led purchasing. Premiumization remains important, but producers face pressure from moderation trends and changing alcohol-consumption patterns. Direct-to-consumer clubs, tasting experiences, limited releases, and digital storytelling are therefore becoming more relevant for maintaining engagement, while sustainability, provenance, bottle weight, and vineyard practices increasingly influence brand positioning.

Luxury Red Wine Releases, Global Sourcing, and Portfolio Consolidation Reshape Competition

Wine producers are responding through portfolio premiumization, cross-regional sourcing, limited editions, and strategic brand consolidation. Penfolds launched its 2025 Collection with 24 wines from Australia, the United States, France, and China, including the debut of FWT 543 Cabernet Sauvignon Syrah, reflecting continued experimentation with global sourcing and established house style. DAOU Vineyards used its 2025 member allocations to introduce three new wines and pre-release the 2023 Soul of a Lion, reinforcing scarcity, membership, and luxury Cabernet-led positioning. The Wine Group completed its 2025 acquisition of several wine brands and production assets from Constellation Brands, adding labels including Meiomi and SIMI while expanding premium and ultra-premium operating capabilities. These strategies show dry red wine manufacturers concentrating on portfolio quality, consumer exclusivity, regional storytelling, and scale efficiencies rather than broad volume expansion alone.

Vineyard Provenance, Limited Releases, and Direct Consumer Engagement Define Winery Strategies

Manufacturer-led trends in dry red wine increasingly center on premium segmentation, controlled scarcity, globalized winemaking, and closer direct relationships with consumers. Producers are using vineyard-designated releases, member allocations, vintage verticals, and limited packaging collaborations to create differentiation that mass retail cannot easily replicate. Cabernet Sauvignon and red blends remain central to luxury portfolios, but wineries are experimenting with cross-country sourcing and unconventional blending to refresh established brand architectures. At the same time, portfolio owners are rationalizing mainstream assets and concentrating investment behind higher-margin labels, visitor experiences, and digital wine clubs. Sustainability is becoming more operational through vineyard certification, water stewardship, renewable energy, and packaging-lightweighting rather than remaining primarily a marketing claim. These activities indicate that dry red wine competition is increasingly defined by

provenance, experience, collectability, and disciplined portfolio management.

Shifting Consumer Expectations and Industry Transformation

Young and adult consumers across markets are increasingly scrutinizing products beyond price and brand, seeking greater visibility into ingredients or materials, their origin, manufacturing location, quality, sourcing practices, and environmental attributes. This is increasing the importance of ingredient lists, nutrition labeling, allergen declarations, certifications, sourcing information and other product claims, while also raising the bar for transparency and substantiation.

In addition, the industry is being reshaped by advances in AI, ingredient and formulation technologies, automation, digital commerce, packaging technology and data analytics, creating new opportunities to accelerate product development, improve product quality and optimize operations. However, these capabilities require higher capital commitments, particularly as companies invest in store expansion and refurbishment, automation, AI-enabled systems, digital infrastructure and other productivity-enhancing technologies.

Competitive dynamics are also shifting as private-label and disruptor brands raise value expectations across selected price points, pushing established players to sharpen their entry, core and premium propositions. Private-label expansion, adjacent-category opportunities, M&A and AI are consequently creating new avenues for growth for manufacturers, suppliers and other industry participants across both developed and developing markets.

Impact of Tariffs and Inflation Rates on Dry Red Wine Markets and Companies

Tariffs and elevated inflation are directly reshaping the cost structure and pricing strategies of Food & Beverages and Consumer Goods companies. The impact is particularly visible in imported ingredients and raw materials, packaging materials, energy, transportation, and other internationally sourced inputs, while higher consumer prices are increasing pressure on household purchasing decisions. The IMF WEO Data 2026 projects global headline inflation at 4.7% in 2026, while the continued use of tariffs and other trade measures is increasing uncertainty around sourcing and cross-border costs.

The report quantifies the impact of tariff changes and inflation on the market by analyzing country-level inflation trends, tariff exposure, import dependence, input-cost

movements and pricing conditions, and assesses their implications for market volumes, revenues and margins.

Key Value-Creating Activities and Participants Across the Dry Red Wine Industry Value Chain

Dry Red Wine value chains are becoming more cost-sensitive and closely integrated, with changes in input prices, sourcing concentration, production efficiency, packaging costs, logistics and channel economics directly influencing margins and competitive positioning at each stage.

The report maps the value chain from upstream suppliers to end-use channels, identifies the principal participants and value-adding activities at each stage, and assesses the relative importance of procurement, manufacturing, packaging, logistics, distribution and retail in the forecast period.

Dry Red Wine Pricing analysis- How Input Costs, Competition and Positioning Influence Dry Red Wine Market Pricing

Pricing analysis in the report establishes how prices differ across products, segments, countries and channels and what is driving those differences. The report provides historical and current price benchmarks, country-level and regional comparisons, product-level pricing, and an assessment of the principal factors influencing price movements.

Five forces analysis- How Competitive Forces Are Shaping the Dry Red Wine Industry

The chapter in the Dry Red Wine report evaluates competitive rivalry, threat of new entrants, bargaining power of suppliers, bargaining power of buyers, and threat of substitutes, with each force assessed against the market's actual operating conditions. It analyzes market factors including fragmentation, product differentiation, manufacturing and distribution requirements, switching costs, supplier concentration, raw-material availability, retailer purchasing power, and the ability of consumers to substitute between brands. The report also examines how e-commerce and marketplaces are lowering certain barriers to market access while intensifying price transparency, and how established distribution networks, brand recognition, scale and customer relationships continue to protect incumbents across categories.

Critical Success Factors- Key Factors Determining Competitive Success in the Dry Red Wine Industry

The report identifies the critical success factors that fuel growth in the Dry Red Wine market, in addition to market trends and company capabilities. The Dry Red Wine report evaluates critical success factors against the market's competitive environment and assesses how leading participants are strengthening them. Further, the chapter identifies the factors with strongest influence on market-share retention, customer loyalty, pricing power, operating performance, and long-term competitive differentiation.

Segmentation analysis- How Demand Is Distributed Across Key Segments of the Dry Red Wine Market

The report analyzes the global and regional markets across key types, applications, and other segments from 2021 to 2025. Further, forecasts are provided from 2026 to 2032. Key segments included in the study are By Grape Varietal (Cabernet Sauvignon, Merlot, Pinot Noir, Syrah, Malbec, Sangiovese and Tempranillo, Specialty and Regional Varietals), By Body and Style Profile (Light-Bodied Dry Red, Medium-Bodied Dry Red, Full-Bodied Dry Red), By Price (Economy, Mass Premium, Premium and Super-Premium, Fine Wine), By Viticulture (Conventional, Organic and Biodynamic, Sustainable), By Packaging Format (Glass Bottles, Bag-in-Box and Cartons, Canned Wine, PET Bottles), By Distribution Channel (Off-Trade, On-Trade).

US Dry Red Wine Market - Strong Consumer Spending, Private-Label Expansion and Premium Product Demand

The US Dry Red Wine companies are focusing on value positioning, distribution strength, product differentiation, and operating efficiency as private-label products gain ground against national brands. The US store-brand sales reached \$282.8 billion in 2025, growing 3.3% versus 1.2% for national brands, while store brands reached a record 21.3% dollar share and 23.5% unit share according to the Private Label Manufacturers Association. The report provides the US Dry Red Wine market size outlook from 2021 to 2032 and the key factors shaping the market along with key strategies adopted by leading companies.

Canada Dry Red Wine Market - Affordability, Retail Concentration and Supply-Chain Resilience Shape Market Growth

Over the past two years, Canadian companies have been focusing on value, supply-

chain resilience and manufacturing efficiency to overcome trade and cost pressures. Retail demand also remained firm, with food and beverage retail sales increasing 4.4% year-on-year in December 2025, led by packaged dry foods, fresh meat and poultry, and snacks, according to Statistics Canada. The report identifies competitive pricing and product value, retailer access, diversified sourcing, productivity, brand positioning, and portfolio innovation as key success factors across the Canadian Dry Red Wine value chain.

Mexico Dry Red Wine Market- Rising Consumption, Manufacturing Expansion and Export Integration Drive Market Development

Mexico's Dry Red Wine market is supported by a large domestic consumer base, established manufacturing capabilities, and strong export integration, while pricing remains an important consideration for consumers and manufacturers. The INEGI reported that the consumer prices for food, beverages and tobacco increased 5.13% year-on-year in May 2026, compared with 3.94% for overall consumer prices, keeping affordability and price management central to category performance. Leading companies are focusing on domestic manufacturing scale, ingredient availability, export competitiveness, product differentiation, efficient sourcing and supply-chain execution to gain profit margins.

Germany Dry Red Wine Market- Private-Label Strength, Price Sensitivity and Manufacturing Efficiency Shape Competition

Value-for-money, private-label competitiveness, efficient sourcing, and cost control are central to market performance and continue to shape the market outlook. German food prices remained structurally above their pre-inflation baseline: the food and non-alcoholic beverages CPI reached 136.2 in 2025 (2020=100), compared with 121.9 for the overall CPI, although annual food inflation moderated to 2.0% in 2025. The market is also being influenced by Germany's policy push toward healthier eating and greater development of alternative protein products, creating additional opportunities for reformulation and product innovation.

France Dry Red Wine Market- Premium Food Culture, Retail Transformation and Selective Consumer Spending Drive Demand

France's Dry Red Wine market is being shaped by moderating food inflation, cautious household consumption and a shift in retail demand toward value and specialized formats. Household final consumption expenditure increased only 0.4% in volume in

2025, while household purchasing power declined 0.4%, keeping affordability and price-value positioning important despite the easing of inflation. Dry Red Wine companies operating in France are balancing value-oriented pricing with quality and differentiation, strengthening supermarket and alternative-format distribution, managing procurement and supply-chain costs, and responding to increasingly selective household spending.

UK Dry Red Wine Market- Import Dependence, Retail Concentration and Product Portfolio Expansion Influence Market Growth

The UK Dry Red Wine market is strongly influenced by import dependence, household affordability, and retail concentration. Consumer expenditure on food and alcoholic drinks reached ?303.3 billion in real terms in 2025, up 1.1%, with spending on food and drink eaten outside the home increasing 2.3% to ?137.7 billion, while household food expenditure was broadly flat. The structure of the industry also favors companies able to operate efficiently at scale: approximately 98.8% of UK food and drink manufacturing businesses are SMEs, creating a large and fragmented supplier base alongside major manufacturers and retailers. Over the forecast period, competitive pricing, procurement efficiency, product differentiation, retailer and foodservice relationships, import management and the ability to respond remain key success factors.

Spain Dry Red Wine Market- Household Consumption, Tourism and Export-Oriented Manufacturing Support Demand

Spain's Dry Red Wine market is supported by strong household food expenditure, a large tourism-driven consumption base and a highly export-oriented food industry, although consumers remain sensitive to price increases. Tourism provides an additional demand channel: international tourists spent €11.7 billion in Spain in April 2026 alone, up 7.4% year-on-year, including €1.99 billion on food and drinks, up 6.8%. Spain's food industry also reached a record level of exports in 2025, reinforcing its importance as an export manufacturing base and exposing producers to international trade conditions and supply-chain developments.

Italy Dry Red Wine Market- Product Quality, Heritage and Export Competitiveness Remain Key Market Drivers

Italy's consumption structure favors companies capable of maintaining value across differentiated price points: household consumption expenditure averaged €2,738 per month in 2023, up 4.3% from 2022, although the increase reflected both higher spending and price effects. Italy's large manufacturing and export base supports

demand for products with strong quality, provenance, and differentiation, particularly where Italian origin provides a competitive advantage. Companies that can combine Italy's established food-manufacturing capabilities with tighter cost control and differentiated products are better positioned to navigate slower domestic consumption and renewed price pressure.

China Dry Red Wine Market- Digital Commerce, Brand Trust and Selective Consumer Spending Reshape Demand

China's Dry Red Wine markets are being shaped by large-scale domestic consumption, rapid online retail expansion, increasingly selective spending and a widening performance gap between categories. Total retail sales of consumer goods reached RMB 50.1 trillion in 2025, up 3.7%, significantly outperforming beverages at 1.0%. Online retail is particularly important: physical-goods online sales reached RMB 13.1 trillion, representing 26.1% of total consumer-goods retail sales, while online sales of food increased 14.5% according to the National Bureau of Statistics of China. Established brands retain an advantage where consumers prioritize familiarity and brand authority, while the rapid expansion of online food sales creates opportunities for digitally native brands and manufacturers capable of using data, AI, and platform ecosystems.

India Dry Red Wine Market- Rising Consumption, Increasing Investment and Expanding Distribution Create Growth Opportunities

India's Dry Red Wine market is being supported by rising household consumption, a large and increasingly diversified consumer base, expansion of food processing and continued investment in formal food manufacturing. India's rural monthly per-capita consumption expenditure reached ₹4,122 in 2023–24, up from ₹3,773 in 2022–23, while urban MPCE increased to ₹6,996, highlighting the continued expansion of household purchasing capacity across both rural and urban markets. The supply side is also becoming more organized and processing-intensive. Digital commerce and AI-enabled consumer engagement are also becoming increasingly relevant, particularly as Indian consumers adopt digital tools across product discovery and purchasing.

Japan Dry Red Wine Market- Aging Consumers, Household Price Sensitivity and Digital Purchasing Reshape the Market

Japan's Dry Red Wine markets are being shaped by high food expenditure, renewed price pressure and increasingly cautious real household consumption, alongside a

structurally mature consumer base. Price pressure has also remained visible in 2026, with Japan's headline CPI increasing 1.5% year-on-year in May 2026, while core inflation excluding fresh food increased 1.4%. Meanwhile, online purchasing remains an important route to consumers: 55.3% of two-or-more-person households used online shopping in May 2026, with food contributing materially to the increase in online-shopping expenditure. Companies also need to manage smaller household sizes and differing consumption patterns by age, while maintaining strong product differentiation in a mature market where incremental volume growth is more difficult to achieve.

Brazil Dry Red Wine Market- Strong Domestic Consumption and Export-Oriented Manufacturing Drive Growth

Brazil's Dry Red Wine market is supported by a large domestic consumption base, a highly integrated agricultural and food-processing sector, and exceptional export competitiveness, while renewed food-price pressure is keeping affordability important. The country's food and beverage industry generated R\$1.388 trillion in revenue in 2025, equivalent to 10.9% of national GDP, with domestic sales reaching R\$1.02 trillion; retail accounted for R\$732 billion and foodservice R\$287.9 billion. Real industry sales increased 2.2%, while companies invested R\$41.3 billion, up 6.8%, including R\$26.7 billion in innovation, plant modernization and new technologies.

Middle East Africa Dry Red Wine Market- Import Dependence and Value-Added Products Gaining Steady Demand Growth

The Middle East Dry Red Wine markets are being shaped by high dependence on food imports, food-security investment, urbanization, tourism, premium retail and increasingly selective consumer spending, with conditions differing substantially between Gulf markets and the wider region. The GCC recorded overall inflation of only 1.8% in 2025, while food and beverage prices increased 1.2%, indicating relatively contained consumer-price pressure compared with many global markets. Across the region, this combination of import exposure and localization is increasing the importance of supplier diversification, local production, inventory management, and efficient logistics, while strong tourism, hospitality, and modern retail ecosystems are supporting demand for differentiated, convenience-oriented, and premium products.

Dry Red Wine Competitive Landscape

The Dry Red Wine competitive landscape is becoming more fragmented as established multinational brands compete simultaneously with private-label products, regional

manufacturers, digitally native brands and category-focused disruptors. Competitive advantage is increasingly determined by the ability to balance price, product quality, innovation, distribution reach and speed of response rather than by brand scale alone. The report provides detailed analysis of leading companies including business profile, SWOT analysis, products and services, and financial profiles of E&J Gallo Winery, Constellation Brands, Inc., Treasury Wine Estates, Concha y Toro, Pernod Ricard, Accolade Wines, The Wine Group, CastellMurev, Marqu?s de C?ceres, Campari Group.

Dry Red Wine Market Segmentation

By Grape Varietal

Cabernet Sauvignon

Merlot

Pinot Noir

Syrah

Malbec

Sangiovese and Tempranillo

Specialty and Regional Varietals

By Body and Style Profile

Light-Bodied Dry Red

Medium-Bodied Dry Red

Full-Bodied Dry Red

By Price

Economy

Mass Premium

Premium and Super-Premium

Fine Wine

By Viticulture

Conventional

Organic and Biodynamic

Sustainable

By Packaging Format

Glass Bottles

Bag-in-Box and Cartons

Canned Wine

PET Bottles

By Distribution Channel

Off-Trade

On-Trade

Geographical Coverage

North America (US, Canada, Mexico)

Europe (Germany, UK, Spain, France, Italy, Russia, Rest of Europe)

Asia Pacific (China, India, Japan, South Korea, Southeast Asia, Rest of APAC)

Latin America (Brazil, Argentina, Rest of South and Central America)

Middle East and Africa (Saudi Arabia, UAE, MENA, South Africa, Sub-Saharan Africa)

Leading Companies in Dry Red Wine Industry

E&J Gallo Winery

Constellation Brands, Inc.

Treasury Wine Estates

Concha y Toro

Pernod Ricard

Accolade Wines

The Wine Group

CastellMurev

Marqu?s de C?ceres

Campari Group

Frequently Asked Questions

1. What is the current size of the Dry Red Wine market?

The Dry Red Wine market is estimated at US\$171.6 Billion in 2026, based on the report's market sizing methodology. Demand is supported by new product launches, while competition from local labels is influencing near-term market performance. The market is expected to reach US\$200.2 Billion by 2032, reflecting the investment expansion of leading companies.

2. How fast is the Dry Red Wine market expected to grow through the forecast

period?

The Dry Red Wine market is projected to expand at a 2.6% CAGR between 2026 and 2032, with growth concentrated in Asia Pacific.

3. Which segment currently accounts for the largest share of the Dry Red Wine market?

The report analyzes the report across By Grape Varietal (Cabernet Sauvignon, Merlot, Pinot Noir, Syrah, Malbec, Sangiovese and Tempranillo, Specialty and Regional Varietals), By Body and Style Profile (Light-Bodied Dry Red, Medium-Bodied Dry Red, Full-Bodied Dry Red), By Price (Economy, Mass Premium, Premium and Super-Premium, Fine Wine), By Viticulture (Conventional, Organic and Biodynamic, Sustainable), By Packaging Format (Glass Bottles, Bag-in-Box and Cartons, Canned Wine, PET Bottles), By Distribution Channel (Off-Trade, On-Trade).

4. Which regions are generating the largest demand for Dry Red Wine products?

Differences in consumer preferences, pricing, regulation and distribution infrastructure continue to create significant variations in market performance across regions. Asia Pacific is the fastest growing market driven by China, India, Southeast Asia, and other emerging markets.

5. Which companies are leading the Dry Red Wine market?

The Dry Red Wine market includes major participants such as E&J Gallo Winery, Constellation Brands, Inc., Treasury Wine Estates, Concha y Toro, Pernod Ricard, Accolade Wines, The Wine Group, CastellMurev, Marqu?s de C?ceres, Campari Group. Leading companies compete through product portfolio, distribution, technology, while recent competitive activity includes M&A, product launches, capacity expansion, and geographic expansion. Market leadership varies significantly by product category and geography.

Contents

CHAPTER 1- EXECUTIVE SUMMARY

- 1.1. Market Snapshot: Market Size, CAGR, and Growth Outlook to 2032
- 1.2. Key Industry Highlights, 2026
- 1.3. Premium Market Insights
 - 1.3.1. Potential Dry Red Wine Market Types and Applications
 - 1.3.2. Fastest Growing Countries Over the forecast period
- 1.4. Market Scope and Segmentation
 - 1.4.1. Key Market Segments
 - 1.4.2. Key Countries and Regions
 - 1.4.3. Top Companies in the Dry Red Wine Industry
- 1.5. Macroeconomic and Demographic Outlook
 - 1.5.1. GDP Outlook by Top 20 Countries, 2010-2030
 - 1.5.2. Population Forecast by Country, 2010-2030
 - 1.5.3. Inflation Trends in Leading Countries
- 1.6. Impact of Trade Policies, Regulations, and Sustainability
 - 1.6.1. Trade tariffs and localization requirements
 - 1.6.2. ESG and sustainability pressures
 - 1.6.3. Compliance-driven structural changes in the value chain

CHAPTER 2- RESEARCH METHODOLOGY

- 2.1. Report Coverage
- 2.2. Secondary Research
- 2.3. Primary Research
- 2.4. Data Triangulation
- 2.5. Market Modeling and Forecasting

CHAPTER 3- GLOBAL DRY RED WINE MARKET TRENDS, GROWTH DRIVERS, CHALLENGES, AND OPPORTUNITIES THROUGH 2032

- 3.1. An Introduction to Global Dry Red Wine Markets in 2026
- 3.2. Global Historic and Forecast Dry Red Wine Market Size Outlook, USD Million, 2021-2032
- 3.3. Annual Market Size Growth Rate (Y-o-Y), %, 2021-2032
- 3.4. Market Dynamics
 - 3.4.1. Key Dry Red Wine Market Driving Forces and Their Impact on Market Outlook

- 3.4.2. Short and Long-Term Trends and Insights Shaping the Future
- 3.4.3. Potential Dry Red Wine Market Opportunities for Industry Stakeholders
- 3.4.4. Potential Challenges across Dry Red Wine Value Chain

CHAPTER 4- DRY RED WINE MARKET COMPETITIVE LANDSCAPE, STRATEGIC ANALYSIS, AND VALUE CHAIN ASSESSMENT

- 4.1. Porter's Five Forces Analysis
 - 4.1.1. Bargaining Power of Buyers
 - 4.1.2. Bargaining Power of Suppliers
 - 4.1.3. Threat of Substitutes
 - 4.1.4. Threat of New Entrants
 - 4.1.5. Intensity of Competitive Rivalry
 - 4.1.6. Market Attractiveness Analysis by Segment
 - 4.1.7. Market Attractiveness Analysis by Country
- 4.2. Competitive Landscape
 - 4.2.1 Product Analysis of Leading Dry Red Wine Companies
 - 4.2.2 Recent Strategic Developments
 - 4.2.3 Mergers, Acquisitions, and Partnerships
 - 4.2.4 Key Success Factors
- 4.3. Value Chain Analysis
 - 4.3.1. Key Value Chain Segments
 - 4.3.2. Dominant players by value-chain stage
- 4.4. SWOT Analysis
 - 4.4.1. Key Strengths and Opportunities
 - 4.4.2. Major Weaknesses and Threats
- 4.5 Technology Roadmap

CHAPTER 5- DRY RED WINE MARKET OUTLOOK BY SEGMENTS

- 5.1. Market Size Outlook by Type, USD Million, 2021- 2025 and 2026-2032
 - 5.2. Market Size Outlook by Application, USD Million, 2021- 2025 and 2026-2032
 - 5.3. Market Size Outlook by Country, USD Million, 2021- 2025 and 2026-2032
- By Grape Varietal
- Cabernet Sauvignon
 - Merlot
 - Pinot Noir
 - Syrah
 - Malbec

Sangiovese and Tempranillo
Specialty and Regional Varietals
By Body and Style Profile
Light-Bodied Dry Red
Medium-Bodied Dry Red
Full-Bodied Dry Red
By Price
Economy
Mass Premium
Premium and Super-Premium
Fine Wine
By Viticulture
Conventional
Organic and Biodynamic
Sustainable
By Packaging Format
Glass Bottles
Bag-in-Box and Cartons
Canned Wine
PET Bottles
By Distribution Channel
Off-Trade
On-Trade

CHAPTER 6- SCENARIO ANALYSIS AND OUTLOOK

6.1. Base Case Scenario
 6.1.1. Definitions and Insights
 6.1.2. Market Size Outlook to 2032
6.2. Low Growth Case Scenario
 6.2.1. Definitions and Insights
 6.2.2. Market Size Outlook to 2032
6.3. High Growth Case Scenario
 6.3.1. Definitions and Insights
 6.3.2. Market Size Outlook to 2032

CHAPTER 7- NORTH AMERICA DRY RED WINE MARKET SIZE ANALYSIS AND OUTLOOK

- 7.1. North America Dry Red Wine Market Overview
- 7.2. Leading Companies Operating in North America
- 7.3. Key Industry Statistics, 2026
- 7.4. North America Dry Red Wine Market Trends and Growth Opportunities to 2032
- 7.5. North America Dry Red Wine Market Size Outlook by Type
- 7.6. North America Dry Red Wine Market Size Outlook by Application
- 7.7. North America Dry Red Wine Market Size Outlook by Country
- 7.8. United States
 - 7.8.1. Key Statistics
 - 7.8.2. The US Dry Red Wine Market Size Outlook, 2021- 2032
 - 7.8.3. Key Market Drivers and Industry Developments in the US Dry Red Wine Companies
- 7.9. Canada
 - 7.9.1. Key Statistics
 - 7.9.2. Canada Dry Red Wine Market Size Outlook, 2021- 2032
 - 7.9.3. Key Market Drivers and Industry Developments in Canada Dry Red Wine Companies
- 7.10. Mexico
 - 7.10.1. Key Statistics
 - 7.10.2. Mexico Dry Red Wine Market Size Outlook, 2021- 2032
 - 7.10.3. Key Market Drivers and Industry Developments in Mexico Dry Red Wine Companies

CHAPTER 8- EUROPE DRY RED WINE MARKET SIZE ANALYSIS AND OUTLOOK

- 8.1. Europe Dry Red Wine Market Overview
- 8.2. Leading Companies Operating in Europe
- 8.3. Key Industry Statistics, 2026
- 8.4. Europe Dry Red Wine Market Trends and Growth Opportunities to
- 8.5. Europe Dry Red Wine Market Size Outlook by Type
- 8.6. Europe Dry Red Wine Market Size Outlook by Application
- 8.7. Europe Dry Red Wine Market Size Outlook by Country
- 8.8. Germany
 - 8.8.1. Key Statistics
 - 8.8.2. Germany Dry Red Wine Market Size Outlook, 2021- 2032
 - 8.8.3. Key Market Drivers and Industry Developments in Germany Dry Red Wine Companies
- 8.9. France
 - 8.9.1. Key Statistics

- 8.9.2. France Dry Red Wine Market Size Outlook, 2021- 2032
- 8.9.3. Key Market Drivers and Industry Developments in France Dry Red Wine Companies
- 8.10. United Kingdom
 - 8.10.1. Key Statistics
 - 8.10.2. United Kingdom Dry Red Wine Market Size Outlook, 2021- 2032
 - 8.10.3. Key Market Drivers and Industry Developments in the UK Dry Red Wine Companies
- 8.11. Spain
 - 8.11.1. Key Statistics
 - 8.11.2. Spain Dry Red Wine Market Size Outlook, 2021- 2032
 - 8.11.3. Key Market Drivers and Industry Developments in Spain Dry Red Wine Companies
- 8.12. Italy
 - 8.12.1. Key Statistics
 - 8.12.2. Italy Dry Red Wine Market Size Outlook, 2021- 2032
 - 8.12.3. Key Market Drivers and Industry Developments in Italy Dry Red Wine Companies
- 8.13. Rest of Europe
 - 8.13.1. Key Statistics
 - 8.13.2. Rest of Europe Dry Red Wine Market Size Outlook, 2021- 2032
 - 8.13.3. Key Market Drivers and Industry Developments in Rest of Europe Dry Red Wine Companies

CHAPTER 9- ASIA PACIFIC DRY RED WINE MARKET SIZE ANALYSIS AND OUTLOOK

- 9.1. Asia Pacific Dry Red Wine Market Overview
- 9.2. Leading Companies Operating in Asia Pacific
- 9.3. Key Industry Statistics, 2026
- 9.4. Asia Pacific Dry Red Wine Market Trends and Growth Opportunities to
- 9.5. Asia Pacific Dry Red Wine Market Size Outlook by Type
- 9.6. Asia Pacific Dry Red Wine Market Size Outlook by Application
- 9.7. Asia Pacific Dry Red Wine Market Size Outlook by Country
- 9.8. China
 - 9.8.1. Key Statistics
 - 9.8.2. China Dry Red Wine Market Size Outlook, 2021- 2032
 - 9.8.3. Key Market Drivers and Industry Developments in China Dry Red Wine Companies

9.9. Japan

9.9.1. Key Statistics

9.9.2. Japan Dry Red Wine Market Size Outlook, 2021- 2032

9.9.3. Key Market Drivers and Industry Developments in Japan Dry Red Wine Companies

9.10. India

9.10.1. Key Statistics

9.10.2. India Dry Red Wine Market Size Outlook, 2021- 2032

9.10.3. Key Market Drivers and Industry Developments in India Dry Red Wine Companies

9.11. South Korea

9.11.1. Key Statistics

9.11.2. South Korea Dry Red Wine Market Size Outlook, 2021- 2032

9.11.3. Key Market Drivers and Industry Developments in South Korea Dry Red Wine Companies

9.12. Australia

9.12.1. Key Statistics

9.12.2. Australia Dry Red Wine Market Size Outlook, 2021- 2032

9.12.3. Key Market Drivers and Industry Developments in Australia Dry Red Wine Companies

9.13. Southeast Asia

9.13.1. Key Statistics

9.13.2. Southeast Asia Dry Red Wine Market Size Outlook, 2021- 2032

9.13.3. Key Market Drivers and Industry Developments in Southeast Asia Dry Red Wine Companies

CHAPTER 10- SOUTH AND CENTRAL AMERICA DRY RED WINE MARKET SIZE ANALYSIS AND OUTLOOK

10.1. South and Central America Dry Red Wine Market Overview

10.2. Leading Companies Operating in South and Central America

10.3. Key Industry Statistics, 2026

10.4. South and Central America Dry Red Wine Market Trends and Growth Opportunities to

10.5. South and Central America Dry Red Wine Market Size Outlook by Type

10.6. South and Central America Dry Red Wine Market Size Outlook by Application

10.7. South and Central America Dry Red Wine Market Size Outlook by Country

10.8. Brazil

10.8.1. Key Statistics

- 10.8.2. Brazil Dry Red Wine Market Size Outlook, 2021- 2032
- 10.8.3. Key Market Drivers and Industry Developments in Brazil Dry Red Wine Companies
- 10.9. Argentina
 - 10.9.1. Key Statistics
 - 10.9.2. Argentina Dry Red Wine Market Size Outlook, 2021- 2032
 - 10.9.3. Key Market Drivers and Industry Developments in Argentina Dry Red Wine Companies
- 10.10. Rest of Latin America
 - 10.10.1. Key Statistics
 - 10.10.2. Rest of Latin America Dry Red Wine Market Size Outlook, 2021- 2032
 - 10.10.3. Key Market Drivers and Industry Developments in Rest of Latin America Dry Red Wine Companies

CHAPTER 11- MIDDLE EAST AND AFRICA DRY RED WINE MARKET SIZE ANALYSIS AND OUTLOOK

- 11.1. Middle East and Africa Dry Red Wine Market Overview
- 11.2. Leading Companies Operating in Middle East and Africa
- 11.3. Key Industry Statistics, 2026
- 11.4. Middle East and Africa Dry Red Wine Market Trends and Growth Opportunities to
- 11.5. Middle East and Africa Dry Red Wine Market Size Outlook by Type
- 11.6. Middle East and Africa Dry Red Wine Market Size Outlook by Application
- 11.7. Middle East and Africa Dry Red Wine Market Size Outlook by Country
- 11.8. Saudi Arabia
 - 11.8.1. Key Statistics
 - 11.8.2. Saudi Arabia Dry Red Wine Market Size Outlook, 2021- 2032
 - 11.8.3. Key Market Drivers and Industry Developments in Saudi Arabia Dry Red Wine Companies
- 11.9. United Arab Emirates
 - 11.9.1. Key Statistics
 - 11.9.2. The UAE Dry Red Wine Market Size Outlook, 2021- 2032
 - 11.9.3. Key Market Drivers and Industry Developments in the UAE Dry Red Wine Companies
- 11.10. Africa
 - 11.10.1. Key Statistics
 - 11.10.2. Africa Dry Red Wine Market Size Outlook, 2021- 2032
 - 11.10.3. Key Market Drivers and Industry Developments in Africa Dry Red Wine Companies

CHAPTER 12- COMPANY PROFILES

12.1. Top Companies in Dry Red Wine Industry

E&J Gallo Winery

Constellation Brands, Inc.

Treasury Wine Estates

Concha y Toro

Pernod Ricard

Accolade Wines

The Wine Group

CastellMurev

Marqu?s de C?ceres

Campari Group

12.2. Business Description

12.3. SWOT Profiles

12.4. Products and Services

CHAPTER 13- APPENDIX

Glossary of Terms

Research Methodology & Data Sources

Conclusion & Strategic Recommendations

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