VINOSHIPPER®

NATIONAL DIRECT SALES ANNUAL REPORT

2025

CONTENTS

EXECUTIVE SUMMARY

Market Overview

In 2024, the DTC wine market revealed a story of selective growth and strategic adaptation. Notably, the market displayed an almost even three-way split between growth (32.93%), decline (36.55%), and flat performance (30.52%) in sales, solidifying the theory that success depends increasingly on a winery's individual positioning rather than overall category momentum.

In 2024, average order value (AOV) reached $135.15, representing a 6.37% increase from the previous year. The price per liter rose to $35.87, continuing an upward trend since 2021. Units per order remained stable at around 5.2, while average discounting levels held steady between 14-15%.

Key Market Trends

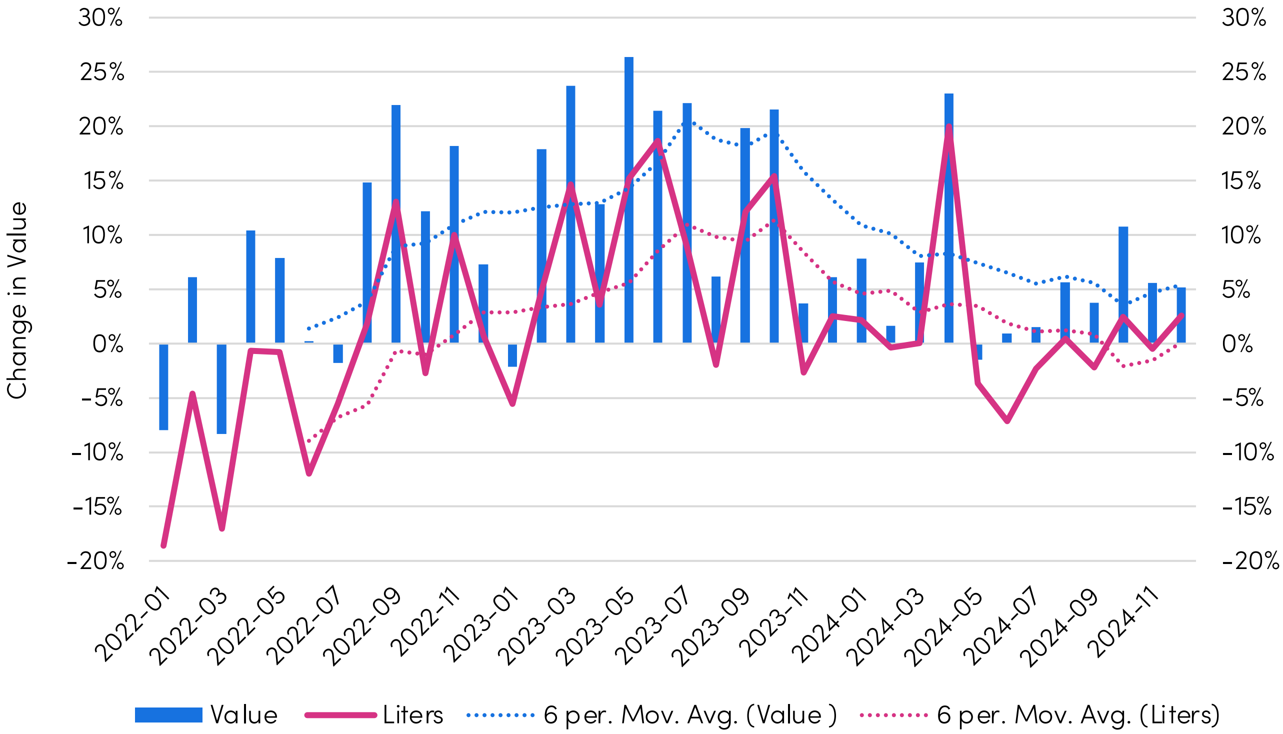
- There were notable geographic trends as certain regions demonstrated stronger growth patterns; however, all regions saw even declines pointing to overall market pressure.
- Newer wineries showing stronger performance than established players displayed that market opportunities remained even during a challenging industry period.
- There was a continued adoption of wine club models, with customization emerging as a key driver of success. However, there is room for wineries to focus in on why customers are cancelling their memberships and directly address those reasons.
- Technology integration was noted as a defining factor in operational success, particularly in direct-to-consumer channels where it is important for all sales channels and tools to work together.
- The rise of alternative revenue streams beyond wine sales indicated wineries are adapting to the market and are thinking of creative ways to make the most out of their physical and brand assets.

About the Data

The statistics in this report combine direct-to-consumer (DTC) transactional data from 3,200 clients across 47 states and Washington D.C., along with insights from our inaugural industry survey of 220 respondents. While Vinoshipper serves all types of beverage alcohol producers, this report focuses primarily on still and sparkling wine, with a separate cider industry report to be released independently.

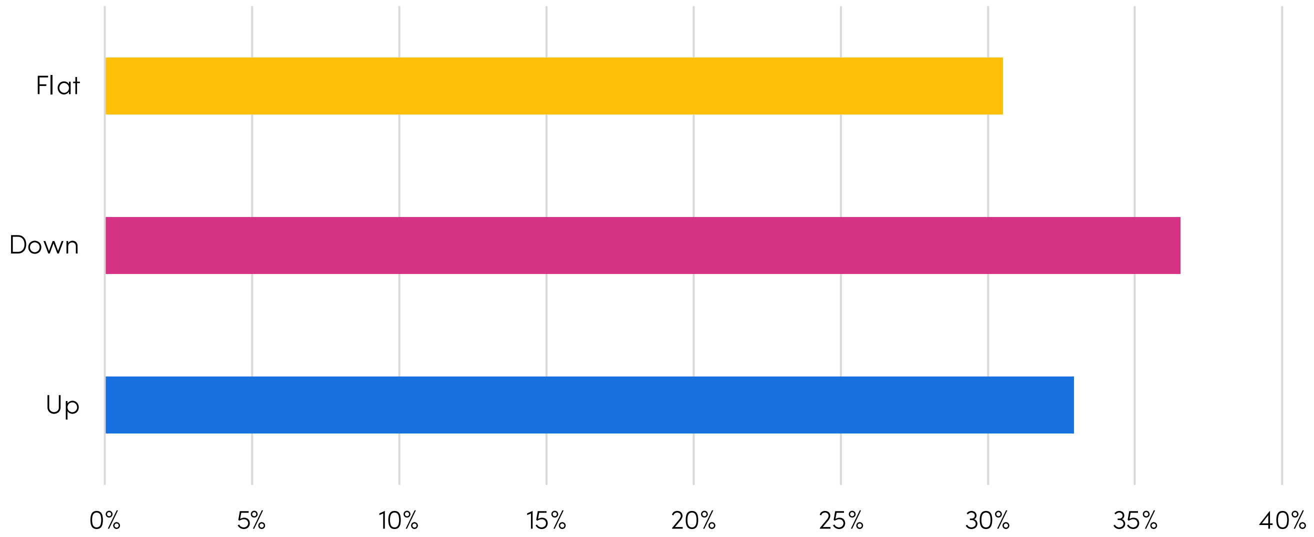
PERCENT CHANGE IN DTC VALUE & LITERS

Prior year, same month



Although the Direct-to-Consumer (DTC) wine market showed a pattern of selective growth rather than uniform expansion across the industry, the overall value continued to show positive momentum, while volume metrics advanced at a more modest pace. This difference between value and volume performance reflected both pricing adjustments by producers and evolving consumer purchasing patterns.

OVERALL MARKET PERFORMANCE



The 2024 industry survey revealed a clear picture of the mixed market performance across the industry. While 32.93% of producers reported growth, a larger segment of 36.55% experienced declining sales. The remaining 30.52% of producers maintained flat performance.

ORDER AVERAGES

Average Order Value, Price per Liter, Units per Order, Average Order Discount

	AOV*	Price/Liter	Units/Order	Avg Order Disc
2018	$115	$28.98	5.3	12%
2019	$112	$29.61	5.1	14%
2020	$105	$26.36	5.4	12%
2021	$113	$28.72	5.2	13%
2022	$127	$31.78	5.3	14%
2023	$135	$34.11	5.3	15%
2024	$136	$35.87	5.1	14%

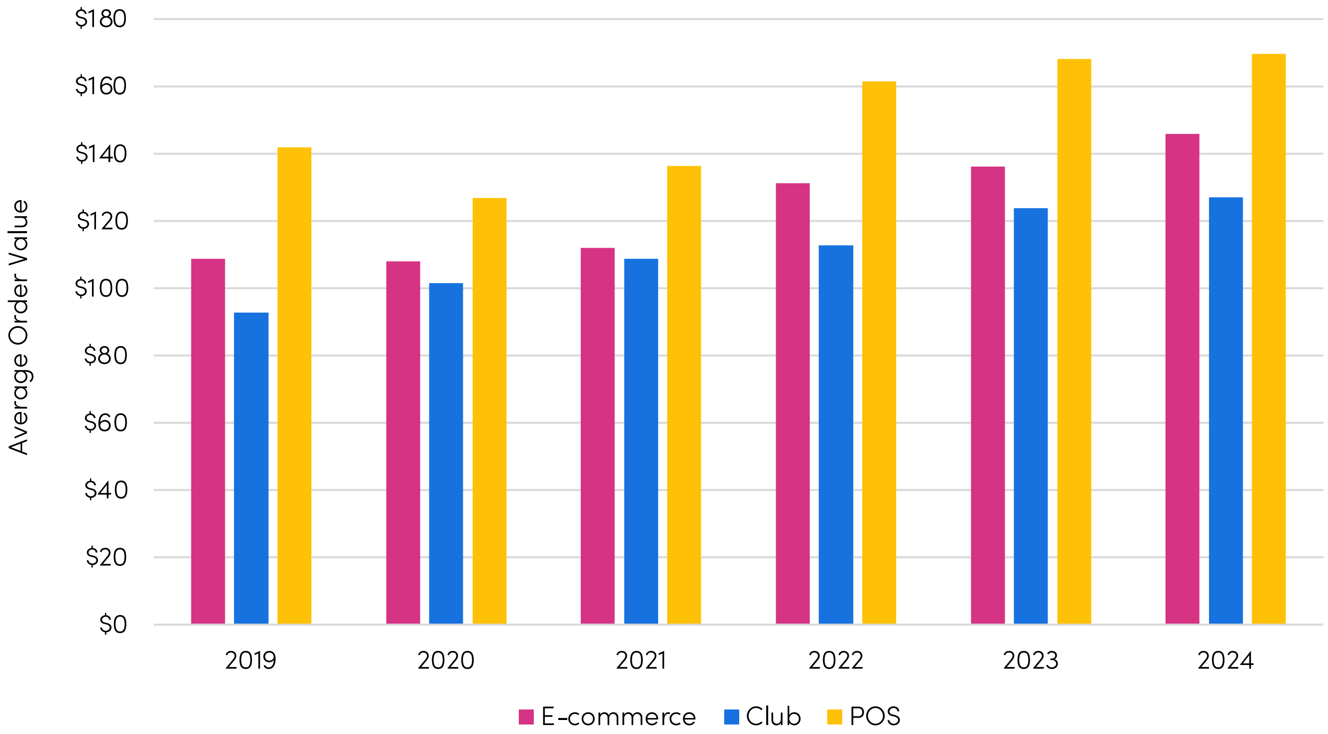
The seven-year pricing data revealed three distinct market phases. The pre-pandemic period (2018-2019), which showed stable pricing and order patterns. The pandemic disruption of 2020, in which AOV dropped to $105 as producers adjusted prices and new businesses entered the digital and DTC market. And from 2021 onwards, in which prices grew consistently year-over-year, with AOV climbing from $113 to $136 and price per liter increasing from $28.72 to $35.87, tracking alongside inflation during this period.

The 24% increase in price per liter since 2021 occurred while units per order remained stable at approximately 5.2. Meanwhile, average discounts increased from 12% to 14-15%. These metrics paint a picture of a market where businesses are actively managing pricing and promotional strategies while navigating changing market conditions.

*Average Order Values include discounts

SALES BY CHANNEL

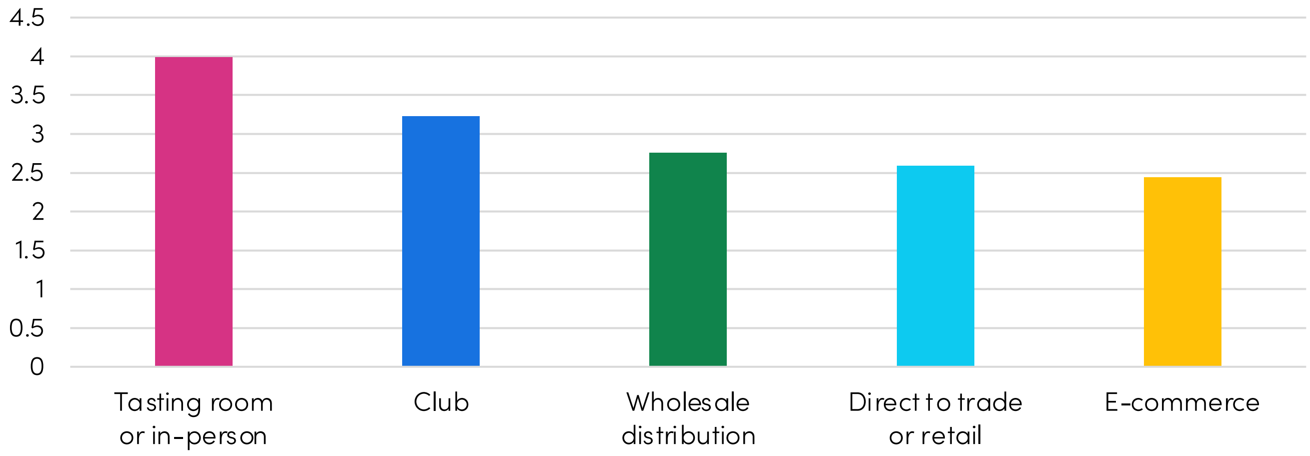
Average Order Value: Online, Wine Club, POS



The channel-specific AOV (Average Order Value) data revealed distinct purchasing patterns across different sales methods. Point of Sale (POS) transactions consistently commanded the highest AOV, growing from $140 in 2019 to $168 in 2024. This premium for in-person sales reflects the impact of direct customer engagement and the absence of shipping costs, which consumers often redirect into additional purchases.

E-commerce orders showed steady growth from $110 to $145, demonstrating successful digital sales optimization. However, wine club AOV, while increasing from $95 to $125, consistently trailed both other channels. This gap was particularly noteworthy given our survey data showing 42% of producers prioritizing club sales for future growth.

CURRENT SALES DISTRIBUTION

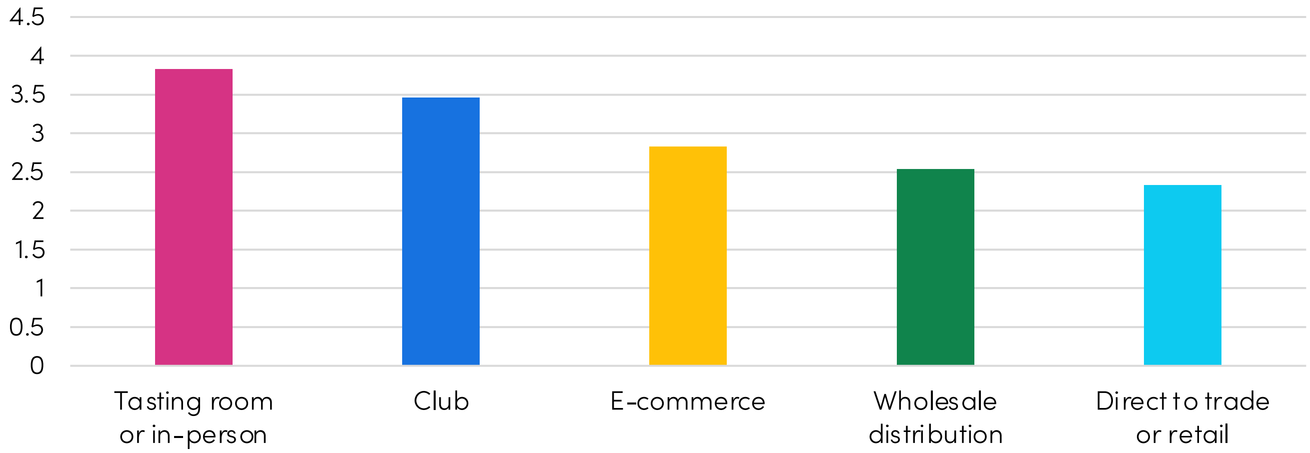


The wine industry's sales channel revenue distribution in 2024 revealed a market divided by producer size, with clear patterns emerging in how different segments achieved success. The overall revenue distribution showed tasting rooms as the dominant revenue source, while deeper analysis by producer size revealed smaller producers found greater relative success through digital channels and club models, highlighting a market that rewards size-appropriate strategy over traditional approaches.

Key Findings

- The traditional tasting room model demonstrated highest revenue contribution (48.36% ranking it as their top revenue channel) and highest AOV ($168), but success skewed heavily toward larger producers. This channel dominance comes with higher operational costs and staffing challenges.
- Club sales demonstrated remarkable stability across producer sizes. This reliability, combined with predictable revenue streams, explains the strong industry pivot toward club models, particularly among small to mid-sized producers seeking sustainable growth.
- Channel effectiveness followed clear size-based patterns: e-commerce and direct to trade success decreased with size, while wholesale showed a U-shaped curve. The data indicates that optimal strategy is closely tied to production capacity, with mid-sized producers experiencing distinct challenges in market positioning between craft and scale operations.

DESIRED SALES DISTRIBUTION

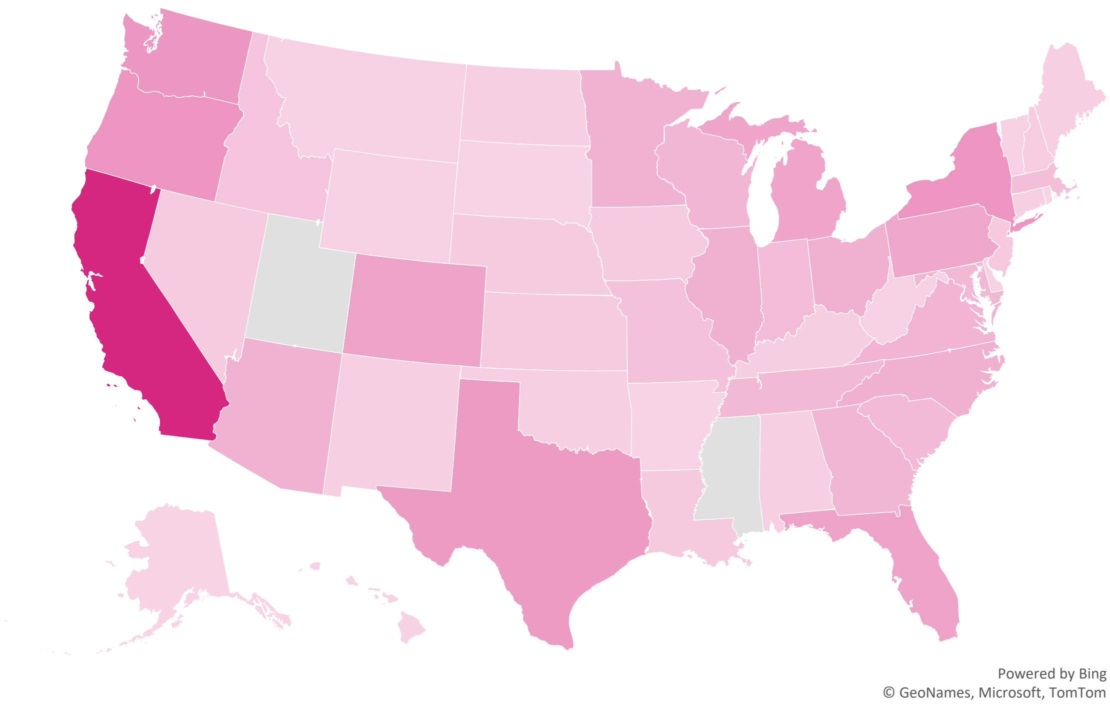


Producers across all size segments indicated their desire to reduce dependency on traditional distribution models in their future planning. This shift reflects broader market dynamics where direct relationships increasingly drive sustainable growth. While tasting rooms maintained their current revenue leadership, producers noted they would like to bring in more revenue through clubs and e-commerce.

Key Findings

- Club sales emerged as the primary growth target, with desired revenue scores exceeding current revenue across all winery size segments. Mid-sized producers showed particular ambition in this channel.
- E-commerce aspirations varied significantly by producer size, with larger producers showing the strongest desire to increase revenue in this channel.
- Despite tasting rooms showing highest current revenue, only 15% of producers prioritized it for future growth. Producers noted they would rather maintain than expand this channel.
- Despite generating stable revenues for larger producers, wholesale distribution attracted little interest (<5%) from survey respondents. While producers acknowledged wholesale's necessity, they did not see it as a key driver of future growth, suggesting a shift away from traditional distribution channels as an expansion strategy.

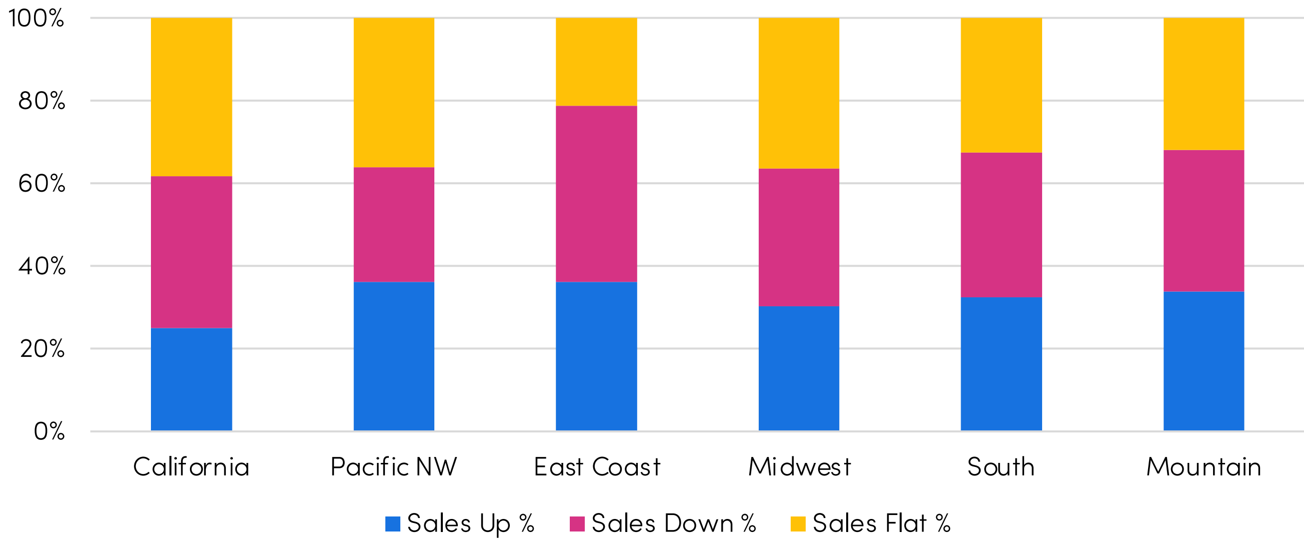
DESTINATION STATES



The DTC shipping heat map revealed clear geographic patterns in wine sales during 2024. California dominated with the highest concentration of sales, shown by the darkest shading, while Texas, Oregon, Washington, Colorado, and New York, emerged as a strong secondary market. Several eastern states also demonstrated significant wine sales activity. This geographic distribution pattern showed that while DTC wine shipping reached across the country, certain regions and states are still established as particularly strong markets for direct wine sales.

SALES COMPARISON

Region & sales performance

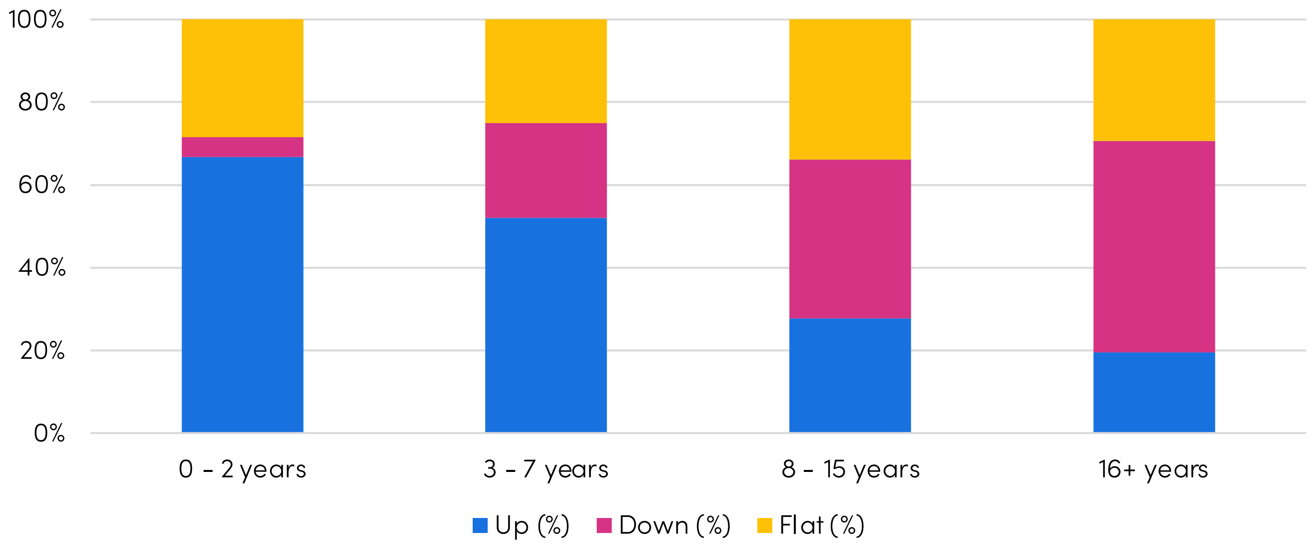


The survey data pointed to California wineries experiencing more challenging conditions than their counterparts in other regions. The higher growth rates in non-California regions showed a shift in the industry's dynamics, with emerging wine regions gaining momentum and capturing more of their own market share. The similar decline rates across regions indicated that while growth opportunities varied by region, the challenges facing the industry were relatively uniform across the country. Broader industry-wide factors are affecting all regions similarly, while local market conditions are creating different opportunities for growth.

- In California, 25.0% reported sales up, 36.7% down, and 38.3% flat.
- The Pacific Northwest (OR, WA) showed a more balanced performance with 36.1% reporting increased sales, 27.8% down, and 36.1% flat. This region demonstrated the lowest percentage of declining sales among all regions.
- The East Coast presented a polarized picture with 36.2% reporting increased sales but 42.6% reporting decreased sales - the highest decline rate among all regions. Only 21.3% reported flat sales, indicating more volatility in this market.
- The Midwest showed moderate stability with an even distribution: 30.3% up, 33.3% down, and 36.4% flat.
- In the crucial comparison of California versus the rest of the USA, non-California regions showed stronger growth with 36.7% of wineries reporting increased sales compared to California's 25.0%. However, the decline rates remained similar (36.7% CA vs 36.1% rest of USA).

SALES COMPARISON

Business age & sales performance



The analysis of business age versus sales performance revealed several fascinating patterns in 2024.

Most strikingly, newer wineries (0-2 years) showed remarkable success with 66.7% reporting increased sales and only 4.8% showing declines. While new wineries are likely rising from a smaller base, this growth remains impressive as the current environment presents challenges across all business sizes.

The most established wineries (16+ years) appeared to be facing the greatest challenges, with only 19.5% reporting growth and 51.2% experiencing declining sales.

The pattern raises important questions about the potential need for established wineries to adapt themselves to maintain competitiveness in an evolving market.

TASTING ROOM

Location & Sales

Wineries without tasting rooms showed better performance metrics in 2024, with higher growth rates and significantly lower decline rates.

Detailed Insights

- Wineries without tasting rooms demonstrated the most consistent performance, with 38.3% reporting increased sales and only 19.1% experiencing declines. In contrast, wineries with tasting rooms showed more mixed results, with 32.5% reporting growth and 41.4% reporting declines. This pattern is connected to the previous data, where new wineries found success, many beginning with a digital-first strategy.

- Location Variations: Tasting room location presented more performance dynamics. Off-property and on-property tasting rooms showed similar patterns of growth (around 33-38.5%). The most significant deviation came from wineries managing both on and off-property locations, which exhibited dramatically lower performance, with only 16.7% reporting growth and 41.7% experiencing sales declines.

- Wineries might benefit from critically evaluating their tasting room strategies, exploring more flexible sales channels, and considering whether the substantial investments in physical tasting spaces deliver proportionate long term returns.

ORDER ANALYSIS

By channel

Average Order Value

	E-commerce	Club	POS
2019	$108.74	$92.72	$141.80
2020	$108.05	$101.45	$126.86
2021	$111.91	$108.73	$136.36
2022	$131.24	$112.67	$161.42
2023	$136.07	$123.76	$168.16
2024	$145.94	$126.94	$169.67

Price per Liter

	E-commerce	Club	POS
2019	$27.28	$31.21	$28.07
2020	$24.94	$31.24	$27.59
2021	$24.92	$31.85	$30.62
2022	$28.15	$33.04	$34.25
2023	$29.07	$35.44	$37.32
2024	$30.87	$36.49	$39.92

Units per Order

	E-commerce	Club	POS
2019	5.4	4.0	6.8
2020	5.9	4.4	6.3
2021	5.9	4.6	6.1
2022	6.1	4.6	6.3
2023	6.0	4.7	6.0
2024	6.3	4.7	5.7

ORDER ANALYSIS

Continued

The 2019-2024 sales channel data revealed distinct patterns in how consumers engaged with different purchasing options. Point of Sale (POS) transactions consistently commanded the highest Average Order Value (AOV), reaching $169.70 in 2024, and demonstrated the strongest price per liter at $39.90. The decline in POS units per order from 6.8 to 5.7, coupled with rising AOV, reinforced the broader market trend of consumers purchasing fewer bottles but at higher price points.

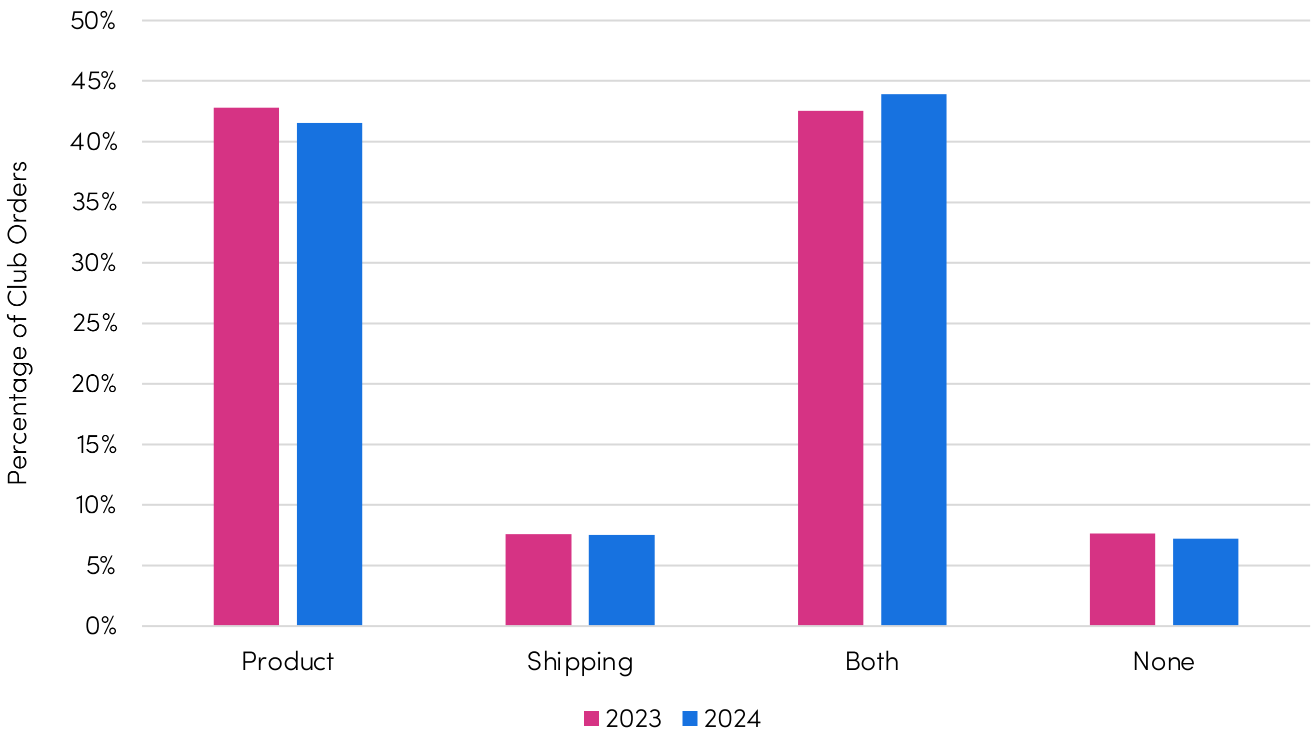
E-commerce channels showed steady growth across all metrics, with AOV increasing from $108.70 to $145.90 and maintaining the highest units per order at 6.3 in 2024. This higher unit count likely reflects consumers optimizing their shipping costs, as the cost per bottle decreases significantly up to 12 bottles - making larger purchases more economically attractive for online buyers.

Wine club metrics painted a picture of stability and gradual growth, with AOV rising from $92.70 to $126.90 and price per liter increasing from $31.20 to $36.50. The increase in units per order from 4.0 to 4.6 between 2019 and 2021 coincided with Vinoshipper's introduction of customizable wine shipments, suggesting members responded positively to increased choice in their club selections.

These trends highlight how in-person buyers often redirect potential shipping costs into their purchases, while online consumers prioritize quantity and shipping efficiency. Successful wineries will adapt their approach to each channel's unique dynamics - leveraging the premium positioning of POS sales, optimizing the accessibility and shipping incentives of online purchasing, and building stable relationships through customizable wine clubs.

DISCOUNTS

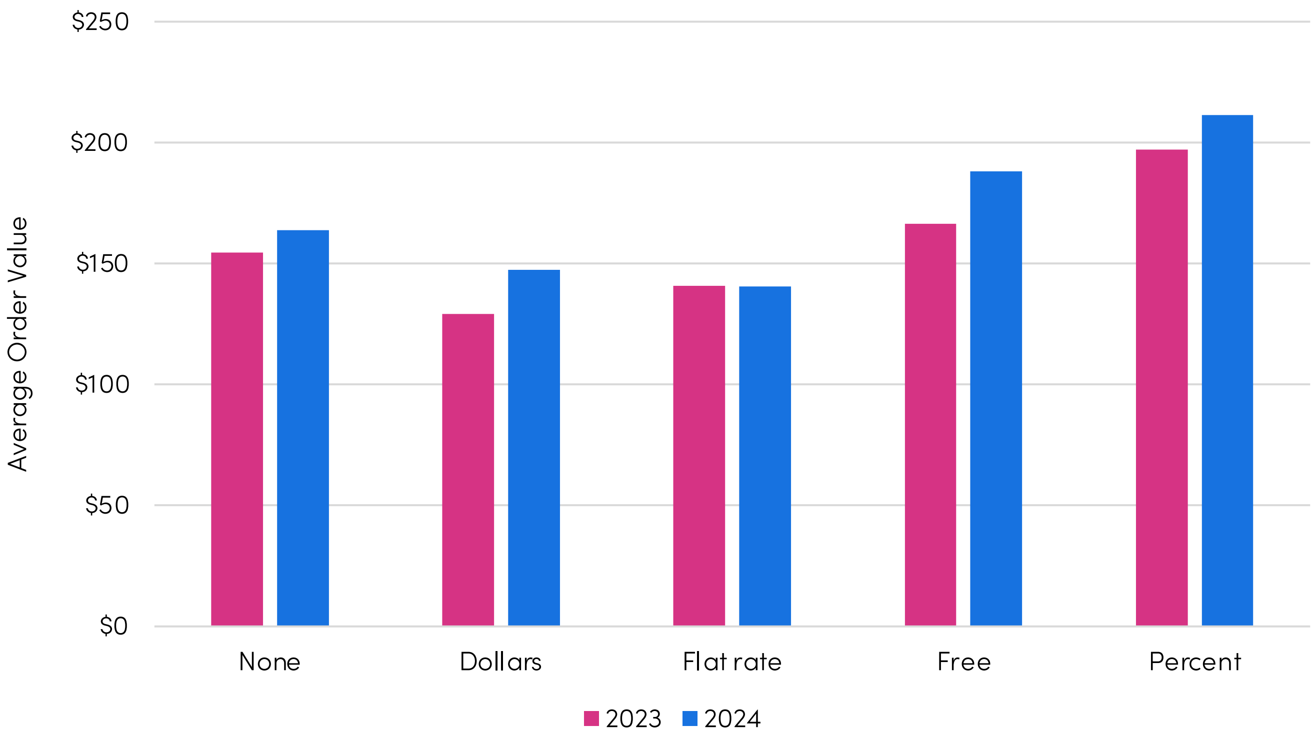
Club discounts



Wine club discount strategies among US wineries in 2024 showed clear preferences in how producers structured their membership benefits. The combination of shipping and product discounts emerged as the leading approach, with 44% of wineries choosing this comprehensive strategy. Product-only discounts followed closely as the second most common choice at 41%. Shipping-only discounts remained relatively uncommon at 12-13%. The data showed that approximately 85% of all club shipments included some form of product discount, establishing this as a standard expectation for club memberships. While product discounts appear to be table stakes for most clubs - particularly given that price emerged as the primary reason for membership cancellations - this widespread approach also creates opportunities for wineries to differentiate through unique club structures and value propositions beyond pure pricing incentives.

DISCOUNTS

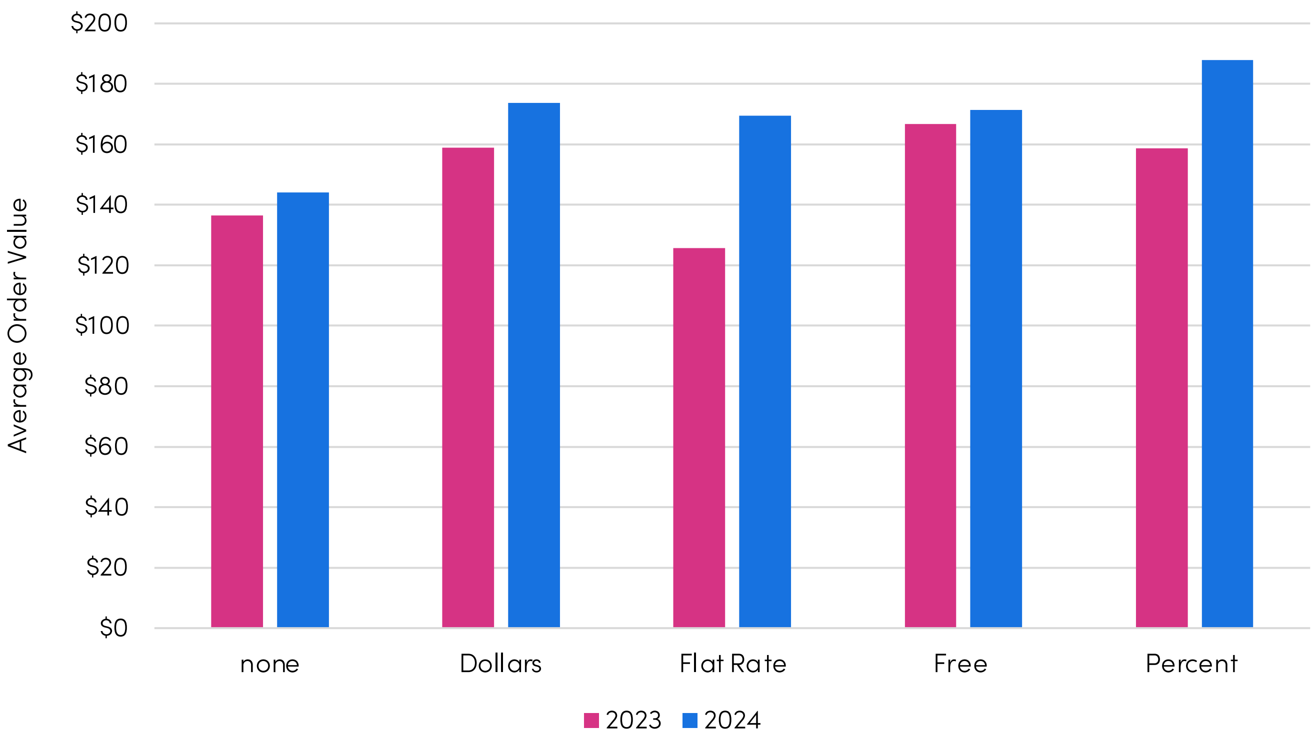
Club shipping discounts



Club shipping incentives emerged as a differentiating factor in club offerings, as only roughly 50% of club orders included a shipping incentive. Percentage off shipping discounts and free shipping discounts correlated with the highest Average Order Values (AOVs). Modern club management software typically allows for tiered discount structures, allowing members to earn greater discounts on products or shipping by adding bottles to their standard club release. These customizable, volume-based shipping incentives are valuable tools for driving higher AOVs.

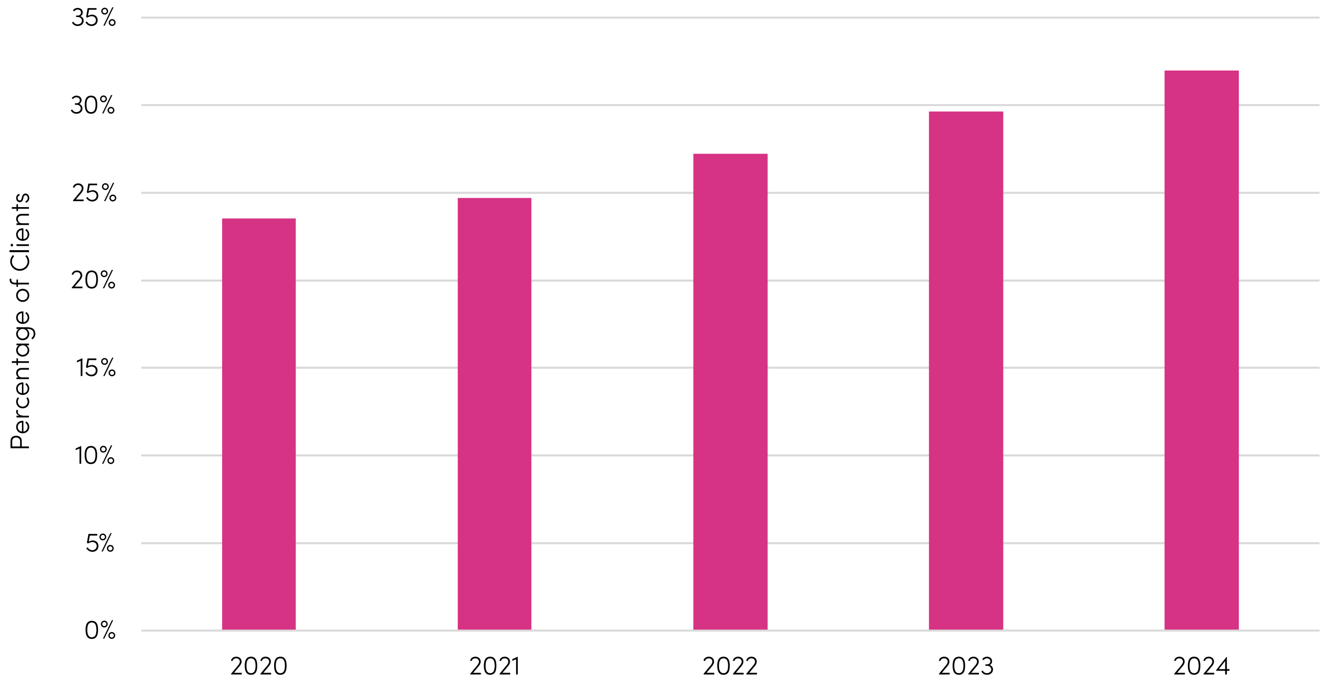
DISCOUNTS

E-commerce AOVs with shipping discounts



In the e-commerce channel percentage-based shipping discounts led to the highest Average Order Value (AOV) at $190, with free shipping and dollar-amount discounts following at $170-175. All discount methods demonstrated consistent growth from 2023, with orders utilizing any type of shipping incentive generating notably higher AOVs compared to those without discounts.

NUMBER OF PRODUCERS RUNNING CLUBS

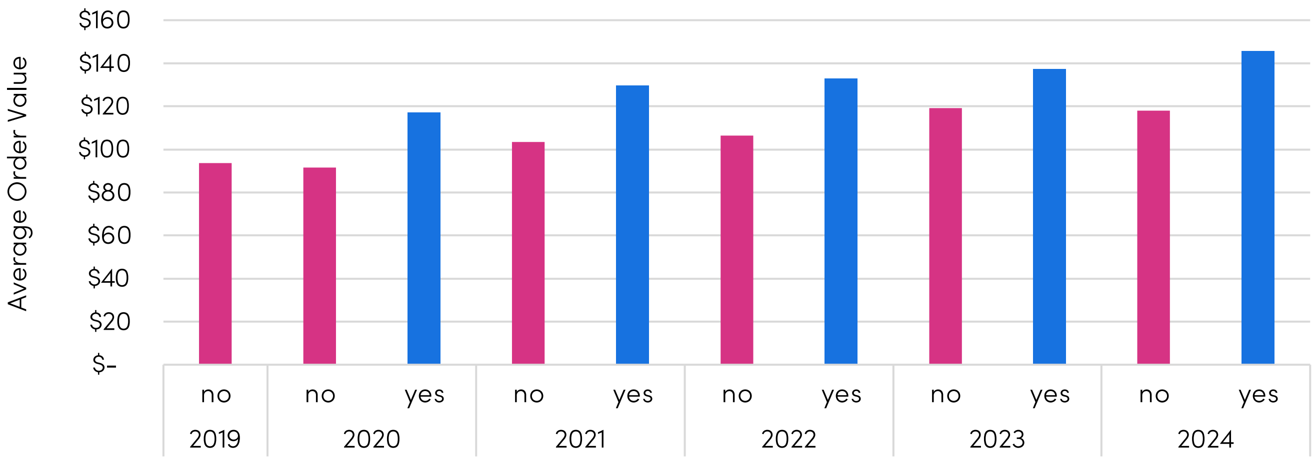


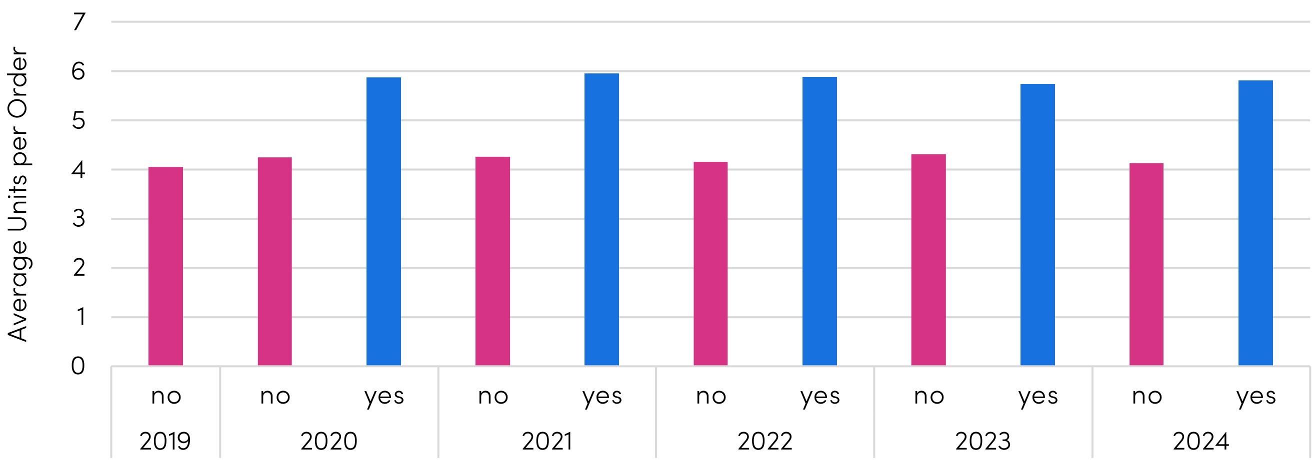
The wine club landscape showed notable expansion from 2020 to 2024, with producer adoption rising from 23% to 32%. Year-over-year growth maintained a steady pace of 2-3 percentage points annually, demonstrating continued producer investment in the club model during this period.

This evolution moved wine clubs from a niche revenue stream to a mainstream sales channel, with nearly one-third of producers operating clubs by 2024. The sustained growth pattern throughout these years indicated ongoing opportunities in the club segment, as producers continued to embrace this model.

CUSTOM CLUB RELEASES

Core releases (no) vs custom releases (yes)

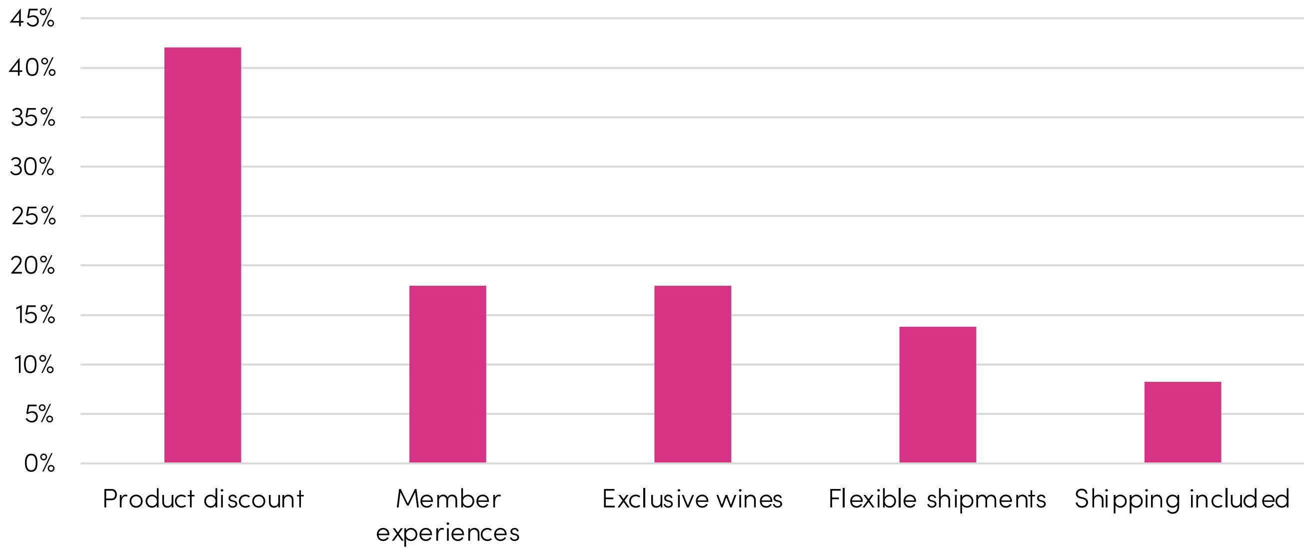




The wine club data from 2019-2024 demonstrated the impact of allowing club members to customize their club releases, either by adding or replacing bottles of their choice. Custom club shipments consistently outperformed standard club shipments, generating a 20-25% higher AOV ($145 vs $118 in 2024) and maintaining higher units per shipment (5.8 vs 4.1 units in 2024).

The AOV difference between custom and non-custom shipments expanded from $25 in 2019 to $27 in 2024, while the unit volume difference held steady at approximately 1.7 additional units for custom shipments. This higher unit count in customizable clubs reflects how member choice drives both engagement and larger order sizes, a particularly relevant insight given that price remained the primary factor in club cancellations.

CLUB RETENTION ANALYSIS

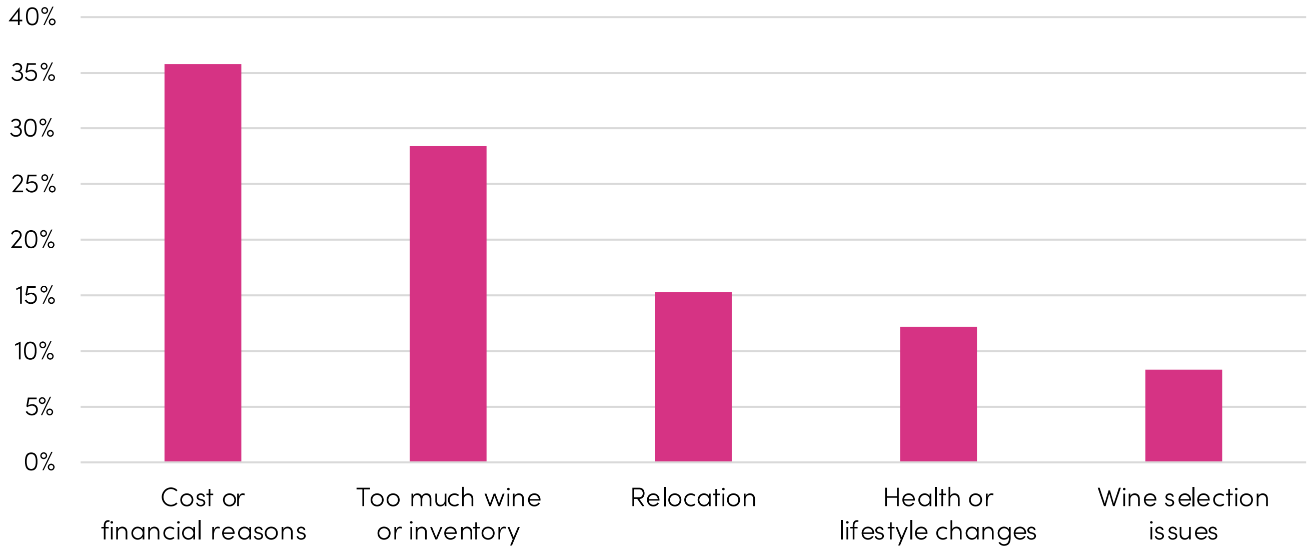


The wine industry's club member retention data in 2024 revealed clear patterns in what drove club member loyalty. Price discounts dominated retention strategies, with over 40% of wineries citing them as their primary tool - reflecting how price incentives may have become table stakes for club programs. This reliance on discounting highlights an opportunity to diversify retention approaches.

The data showed three distinct tiers of retention strategies: price-focused (42%), experience-based (around 18% each for member experiences and exclusive wines), and logistics-oriented (13% flexible shipments, 8% shipping included). This distribution demonstrates how wineries balance monetary and non-monetary benefits.

Wineries that combined approaches across these tiers reported stronger retention rates. While price discounts remain the foundation, successful programs integrate experiential elements and flexibility options. This multi-faceted approach addresses varied member needs while building deeper brand connections beyond just a transactional relationship.

CLUB CANCELLATION ANALYSIS



The relationship between wine club cancellation reasons and retention strategies in 2024 revealed both alignments and critical gaps in how wineries approached member retention. While the industry showed strong alignment between financial concerns and pricing strategies (35% of cancellations were cost-related, matched by 42% of wineries focusing on price discounts), other areas demonstrated significant mismatches in approach versus need.

Most notably, while 28% of members left due to excess inventory ("too much wine"), only 13% of wineries noted flexible shipment as a top retention strategy. This represents the largest gap between problem and solution in the retention landscape. This inventory challenge points to a deeper consideration in wine club retention: the sale cycle extends beyond delivery, to actual consumption.

Moving forward, wineries may consider balancing their retention strategies while maintaining successful price discount programs. This might include developing hybrid solutions that combine pricing incentives with flexibility options, such as offering shipping benefits or temporary holds for relocated members. The data strongly suggests that while price sensitivity remained the primary concern, addressing the secondary factors of ‘too much wine’ and lifestyle changes could improve retention rates.

TOP 20 DTC VARIETALS

Ranked by 2024 total sales value

Varietal Type	Varietal Name	2024 Rank	2023 Rank	2024 $/Liter	2023 $/Liter	Change in $/Liter
Red	Pinot Noir	1	1	$53.19	$47.65	12%
Red	Red Blend	2	3	$38.83	$37.53	3%
Red	Cabernet Sauvignon	3	2	$54.53	$55.17	-1%
White	Chardonnay	4	4	$37.07	$35.58	4%
White	Riesling	5	7	$29.29	$27.80	5%
Red	Syrah/Shiraz	6	10	$47.44	$42.61	11%
Red	Cabernet Franc	7	5	$39.92	$40.52	-1%
White	White Blend	8	6	$25.96	$25.09	3%
Sparkling	White	9	8	$41.84	$40.20	4%
Red	Merlot	10	9	$39.90	$39.27	2%
White	Sauvignon Blanc	11	11	$31.86	$31.13	2%
Rosé	Rosé	12	12	$27.86	$26.13	7%
Red	Red Table Wine	13	13	$31.01	$28.19	10%
Red	Malbec	14	14	$39.22	$37.72	4%
Red	Zinfandel	15	15	$43.33	$40.92	6%
White	Pinot Gris/Grigio	16	16	$26.36	$25.59	3%
Red	Sangiovese	17	22	$40.80	$38.30	7%
Sparkling	Rosé	18	21	$36.50	$37.07	-2%
Rosé	Pinot Noir Rosé	19	18	$32.01	$32.92	-3%
Red	Grenache	20	19	$43.64	$41.97	4%

TOP 20 DTC VARIETALS

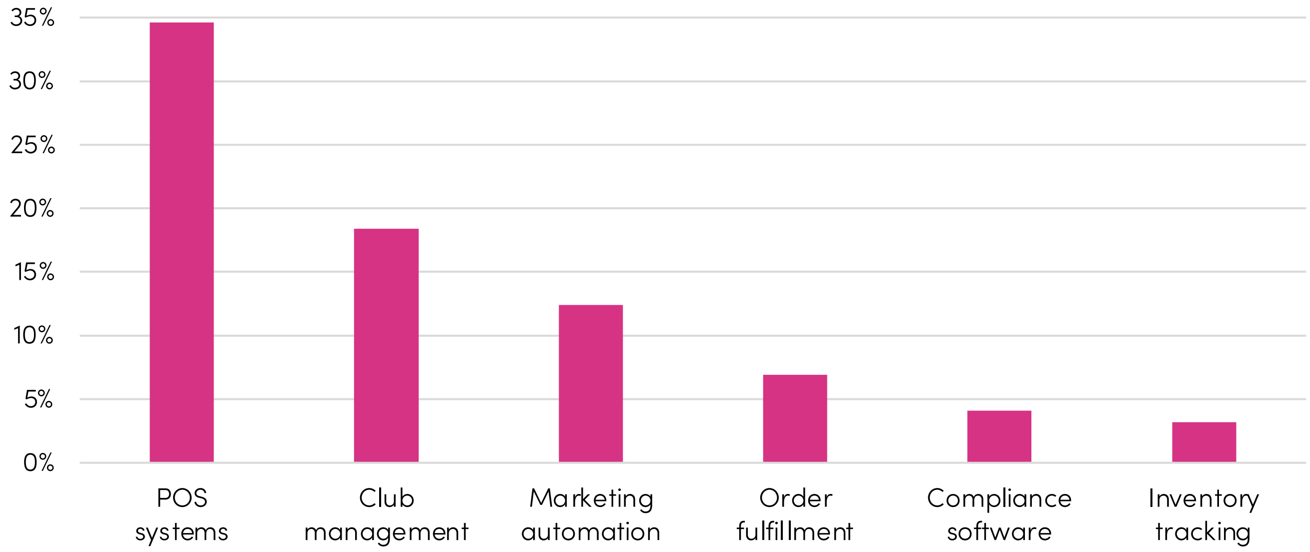
Continued

The 2024 varietal rankings showed remarkable stability in market preferences. Pinot Noir maintained its position at the top of the value rankings while also demonstrating strong pricing momentum, with a 12% increase in price per liter. Traditional favorites held their ground, with Red Blends moving to second position and Cabernet Sauvignon maintaining its presence in the top three despite a slight price decrease.

The data revealed notable consistency across both years, with the top 20 varietals remaining similar from 2023 to 2024, suggesting well-established consumer preferences. Within this stability, some varietals showed interesting movement - Syrah/Shiraz climbed four positions to rank 6th with an 11% price increase. Sangiovese's rise to 17th position from outside the top 20 with a 7% price increase points to a potential new trend.

The relative stability of varietal rankings while prices generally increased across categories indicates a market where consumer preferences remain well-defined but pricing dynamics continue to evolve. Looking ahead to 2025, movements of varietals, such as Sangiovese into the top 20, could signal emerging trends in consumer preferences.

TECHNOLOGY & INNOVATION INVESTMENTS

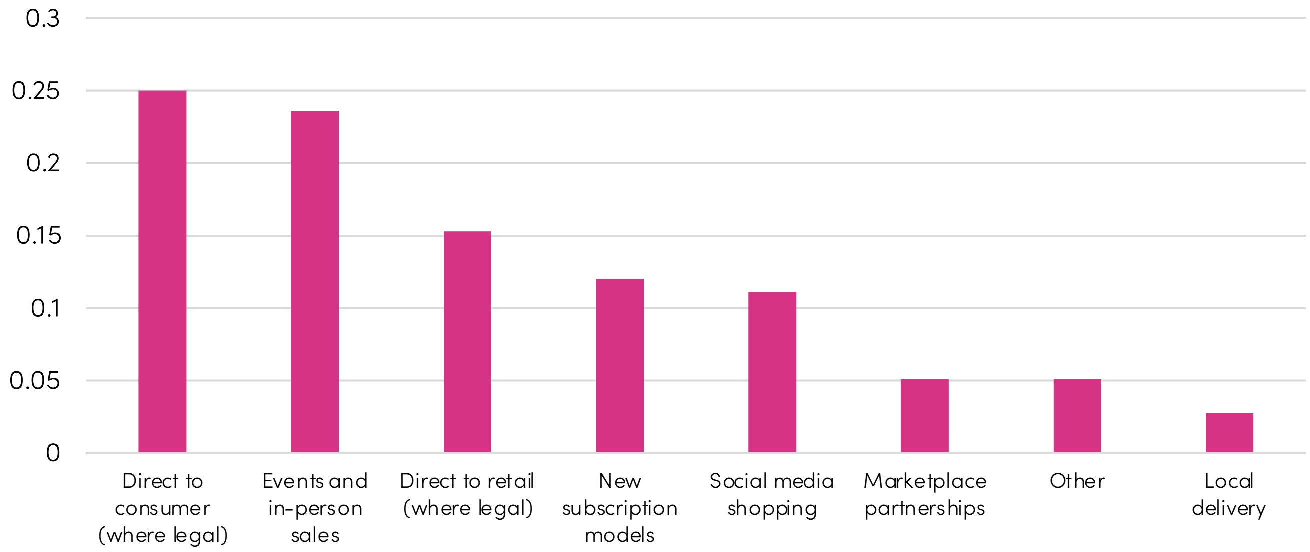


Wineries were asked about their best technology investment in 2024, in terms of return on investment (ROI). 34.6% of wineries reported their best ROI came from point-of-sale (POS) systems. Club management software ranked second at 18.4%, aligning with the industry's growing adoption of wine clubs for steady revenue. This investment reflects wineries' focus on robust tools for member relationship management. Marketing automation tools represented 12.4% of best-ROI technology, pointing to an increasing emphasis on systematic customer engagement.

Order fulfillment (6.7%), compliance software (4.1%), and inventory tracking (3.2%) represented smaller but essential investment categories, reflecting the operational requirements of running a modern winery. The relatively lower percentages in these categories indicates that while necessary, these tools are not perceived as primary drivers of business value.

The survey responses highlight a trend toward integrated technology solutions that streamline operations while enhancing customer experience, with POS and club management software showing particularly strong returns when bridging in-person and digital interactions.

SALES CHANNEL INTEREST IN 2025



Wineries were asked what sales channels interested them the most for 2025. Direct-to-Consumer led the way with 25% of producers prioritizing this channel for future expansion, highlighting the continued shift toward building direct relationships.

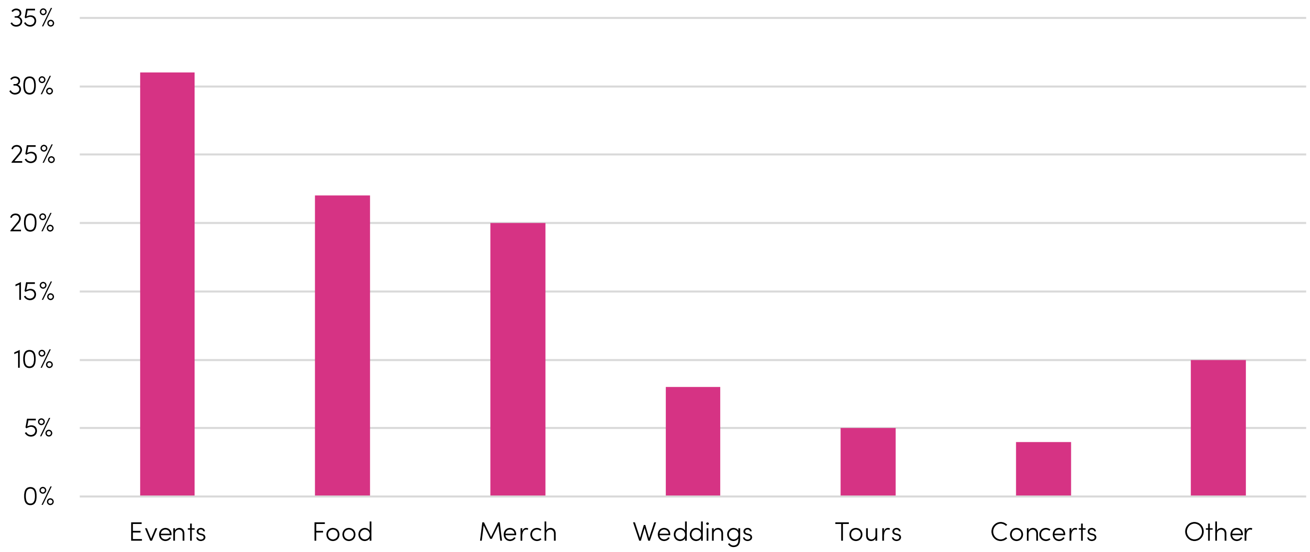
Events and in-person sales ranked second at 23%, reflecting how producers increasingly recognize their physical spaces as assets that can generate revenue beyond traditional wine sales.

Direct-to-retail captured 15% of interest, suggesting a new approach to traditional distribution channels. This shows the desire to have B2B relationships but with the control remaining at the hands of the winery, rather than in the three-tier system.

Social media shopping (11%) and new subscription models (12%) are emerging channels, showing wineries are adapting to digital models. These new channels showed particular appeal among mid-sized wineries seeking scalable growth.

Marketplace partnerships (5%) and local delivery (3%) remain niche strategies, though they may grow as technology and logistics improve in these channels. The remaining 6% represented other specialized approaches, largely reflecting a nuanced approach to wholesale and distribution.

ALTERNATIVE REVENUE CHANNELS



The analysis of wineries' non-wine revenue streams revealed a diversified approach to supplementary income in the wine industry in 2024. Events emerged as the dominant secondary revenue source, with 31% of wineries identifying them as their largest non-wine income generator. This high percentage reflects the industry's successful leveraging of their venues and brand for additional revenue.

Food service followed at 22%, highlighting the natural synergy between wine and food. Merchandise represented 20% of top secondary revenue sources, showing that there is a place for branded items in a tasting room that matches your brand.

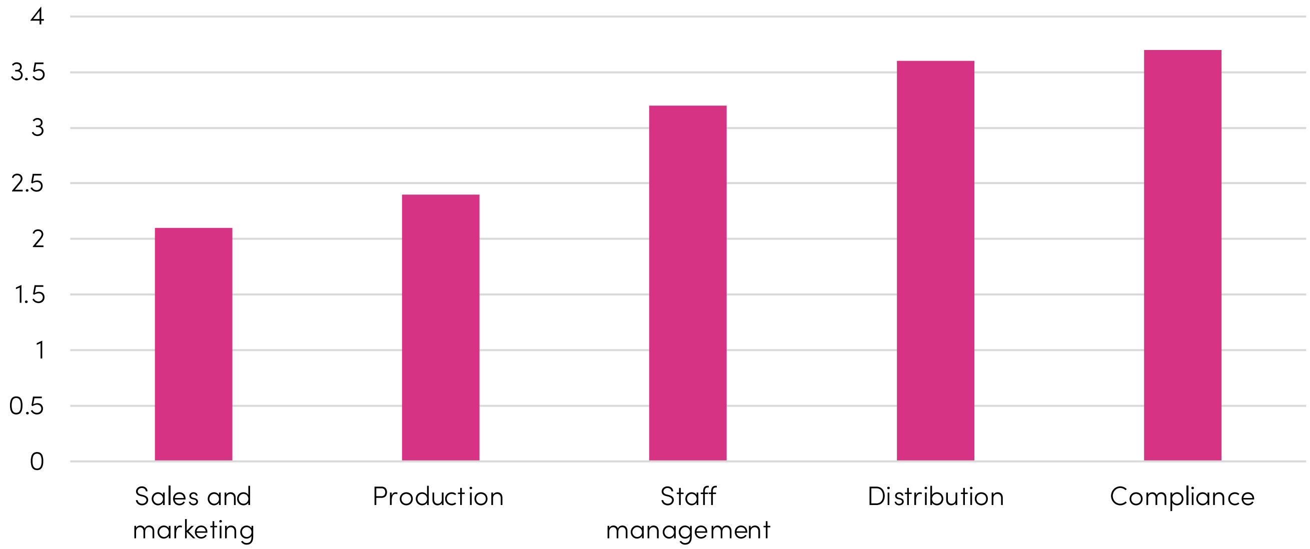
Special events like weddings (8%), tours (5%), and concerts (4%) formed a secondary tier of revenue streams. The remaining 10% includes diverse revenue sources such as olive oil production, lodging, and specialty products.

This revenue distribution demonstrates the wine industry's adaptation to consumer desires for comprehensive experiences beyond wine.

The data indicates that successful wineries are increasingly positioning themselves as destination venues rather than solely production facilities, creating multiple revenue streams that complement their core wine business while enhancing overall customer engagement and leading to more covert marketing.

TIME ALLOCATION

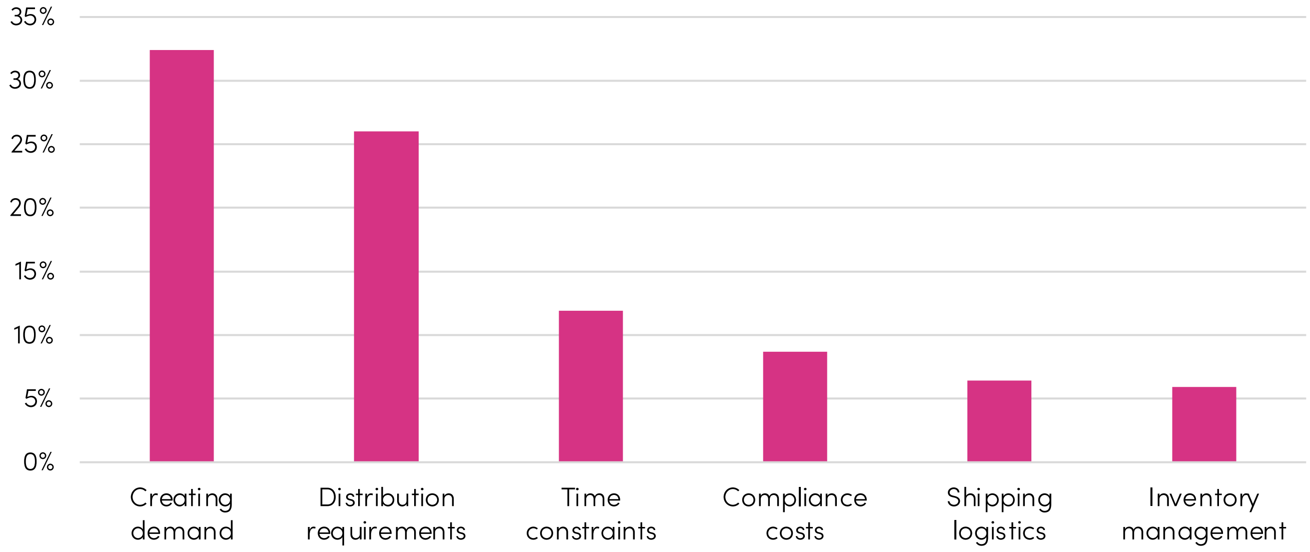
Lower score equates to being more time consuming



The analysis of time allocation across winery operations in 2024 revealed a clear hierarchy of demands. Sales and marketing emerged as the most time-intensive activity (average rank 2.1), followed closely by production/winemaking (2.4). While more producers listed production as their most time-consuming activity, sales and marketing averaged more time overall.

The data also highlighted an interesting contrast: while compliance ranked as least time-consuming in daily operations, it was frequently cited as a major challenge in other survey responses. This suggests that while compliance might require less daily attention, it creates significant periodic demands on winery resources.

MARKET BARRIERS

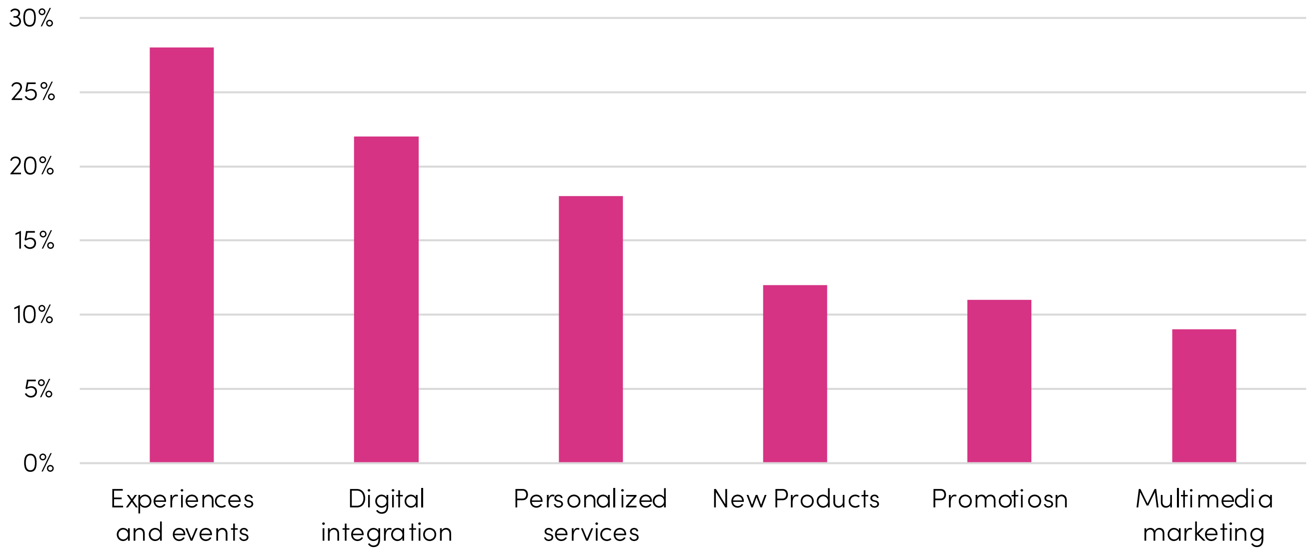


Wineries were asked about their greatest challenges to entering new markets. Creating demand emerged as a primary obstacle in 2024, cited by 32.4% of respondents. The ideal distribution of market barriers would be 100% focused on factors wineries can control, such as creating demand, time management, and inventory. Distribution requirements, compliance costs, and shipping logistics remain mostly outside winery control, creating blockers once the winery has successfully created demand.

Reducing market entry barriers should be a critical industry priority, particularly since demand generation already poses a significant challenge. With 25% of wineries identifying distribution requirements as an obstacle, addressing these structural barriers could unlock substantial market expansion opportunities.

TECHNOLOGY & FUTURE GROWTH

What innovative approach to DTC sales has drawn the most customers?



Experiences and events dominated DTC sales innovation, with 28% of wineries reporting success through curated experiences like comparative tastings, winemaker access, and themed events. One producer's "Jazzy Friday" model exemplifies this approach, as they are consistently drawing 200-400 weekly visitors.

Digital integration emerged as the second most effective strategy (22%), with emphasis on integrated platforms combining e-commerce, club management, and customer engagement. Notable success comes from automated marketing sequences.

Personalized service approaches (18%) showed strong results, particularly through staff education and customer relationship management. This includes customized tastings and one-on-one engagement strategies that create lasting customer connections. Creating a higher value customer rather than more customers can work for some wineries.

Most successful programs layer multiple approaches, with integrated technology enabling personalization at scale while maintaining high-touch engagement.

TECHNOLOGY & FUTURE GROWTH

What technology has made or would make the biggest difference to your business?

The survey responses revealed a strong desire for technology solutions that streamline operations, boost efficiency, and drive growth. Wineries expressed enthusiasm for tools that have improved key aspects of their business, such as shipping, compliance, online sales, and club management. They also highlighted the potential impact of solutions they currently lack, including automated reporting, AI-powered marketing, comprehensive inventory tracking, and alternative distribution channels.

The overall sentiment suggests that wineries are eager to adopt user-friendly, affordable, and integrated technologies that simplify complex processes and enable them to focus on their core business. Seamless integration between various systems, such as POS, ecommerce, and compliance, is a top priority. Wineries also emphasize the importance of mobile-friendly design and intuitive user interfaces to enhance customer engagement and streamline operations.

FINAL THOUGHTS

What producers think about the next 1-3 years

The wine industry faces a challenging outlook, with mixed sentiment among producers. While some are optimistic about DTC growth driven by e-commerce, younger consumers, and experiential offerings, others foresee headwinds from rising competition, costs, regulations, and changing consumer preferences. Key themes include leveraging technology and data, focusing on retention, exploring new models like subscriptions, expanding omni-channel strategies, and adapting to demographic shifts.

While hurdles persist, opportunities exist for agile brands that can effectively respond to the changing market dynamics.

Our thoughts

Success in this evolving landscape will depend on finding a balance between traditional wine industry values and modern consumer expectations. Producers who can effectively combine personal relationships with technological efficiency, while maintaining operational flexibility, appear best positioned for success in the coming years.

The wine industry is diverse and there are pockets of proven success happening despite widespread headwinds which will continue to threaten inflexible organizations.

Those that will succeed in 2025 are the producers willing to work hard at maintaining customers, understanding that the market cannot be tackled with one size fits all approaches. Define your core customer base and develop meaningful strategies around retention. Get creative around expanding products and services to attract new customers. Embrace technologies that help you to connect to customers AND drive revenue.

Ask yourself, “What makes our winery truly unique and special?”

Market that.

Our hypothesis for 2025 is producers will get out what they put in. Success is there for the taking.

ABOUT VINOSHIPPER

Transforming Direct Sales in the Beverage Alcohol Industry

Founded in 2006, Vinoshipper stands as the leading compliance-driven platform empowering beverage alcohol producers to expand sales, connect with customers, and simplify their business. Our robust compliance engine powers direct sales success for wineries, cideries, meaderies, and distilleries nationwide through a fully integrated suite of solutions including a compliance-backed online store, intuitive point-of-sale system, dynamic club management tools, and streamlined UPS integration.

Our commitment to innovation stems from a deep understanding of the beverage alcohol industry's unique challenges. Through our comprehensive Compliance Management Services, we handle all aspects of regulatory compliance, allowing our partners to focus on growing their business.

The Vinoshipper team continuously develops our platform to enhance operational efficiency, ensure compliance, and create new opportunities for our partners' success.

If your business is interested in learning more about Vinoshipper, visit us at vinoshipper.com or email us at customerservice@vinoshipper.com.

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