

# 2026 Wine & Grape Outlook

Thursday, December 18, 2025



FARM CREDIT

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Editor, *Wine Analytics Report*

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# Wine and Grape Industry Outlook

Andrew Adams

Editor

*Wine Analytics Report*

Dec. 18, 2025

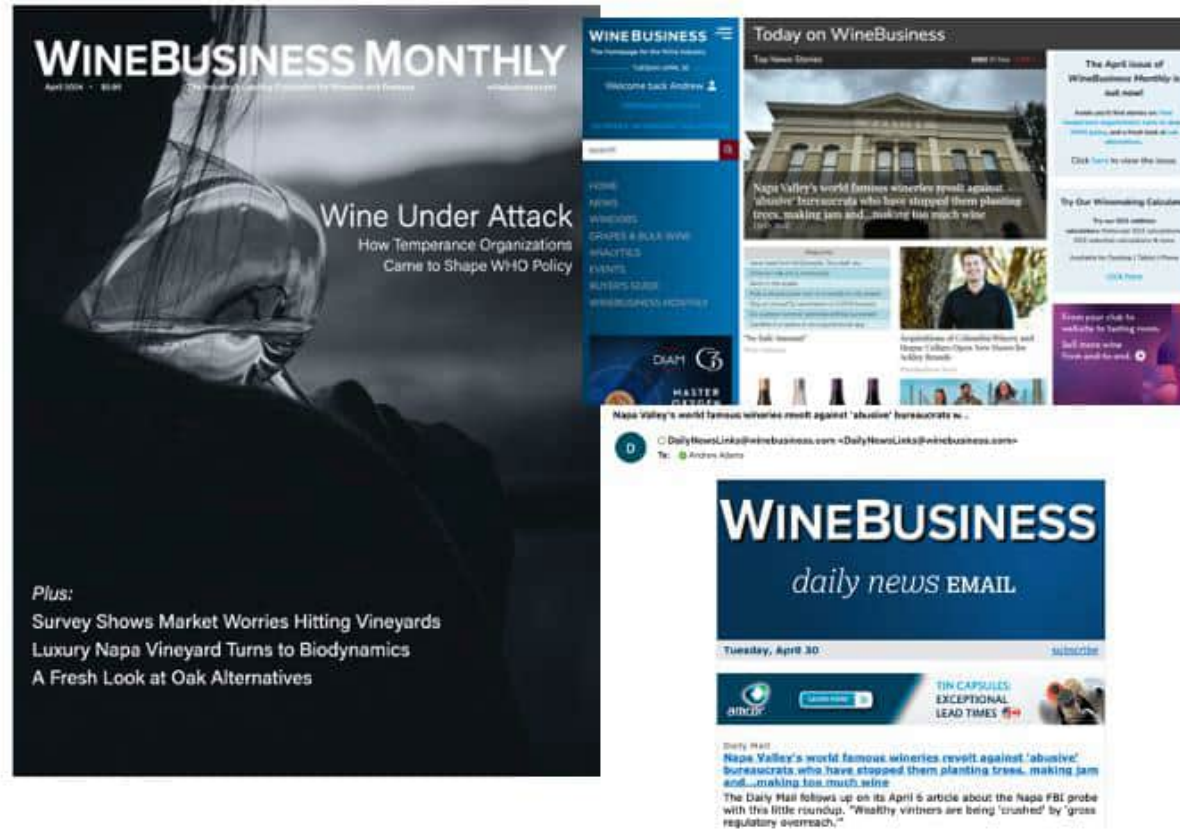
# Overview

- Introduction and overview of WineBusiness
- Total market trends and latest industry metrics
- Closer look at NE wineries
- Challenges, opportunities in 2026

# WineBusiness: Core Products

## PUBLICATIONS

- *WineBusiness Monthly* magazine
- winebusiness.com
- Daily News Email
- Other newsletters



New this year: *Data, Deals and Insights* – business and data focused, subscribe for FREE



# WineBusiness: Insights and Connections



Providing **Everything** an Eastern Winery or Vineyard Could Need

Events such as **Eastern Winery Expo**, March 24-26 in Richmond, VA

Multiple data products and reports



Visit:

[winebusinessanalytics.com](https://winebusinessanalytics.com)

For more free total market data

## WINE ANALYTICS REPORT

The wine industry's leading data source for market strategy and analytics

### Contents

Resolved to a Bitter Fight for Share  
Number of US Wineries Dips Slightly  
Prices up for Key AVAs, Varietals  
Industry Metrics: Total Value Gains 4%  
Upcoming Events

### Total Market Total Reset

January 2025

in f

US Wine Sales +4%	Off-Premise -4%	DTC Shipments -5%	Winery Jobs -28%
(12 month change)			

Five years ago, observers forecasted a long economic recovery from COVID-19, pointing to 2024 as the year when conditions would at last normalize. Yet year-end numbers for the total U.S. wine market suggest an industry still in transition.

### Resolved to a Bitter Fight for Share

As the U.S. economy continues to recover from the impact of multiple shocks, there are fresh ones taking shape as a new administration enters the White House. A decade of massive change which kicked

New year brings new baseline for sales, consumption

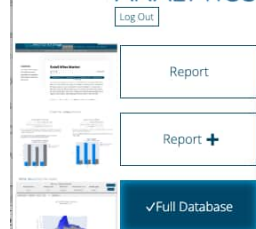
Tax-paid shipments point to growth as travel rebounds

New administration's impacts raise concerns

Export Contacts

See Results

## WINE BUSINESS ANALYTICS



### Database Filters

Apply Filters Reset

#### Geo Filters

##### Country

Select by Country...

##### State Region

Select by State - Region...

##### State

USA - NY USA - PA

##### Wine Region

Select by Wine Region...

##### CA Crush District

Select by CA Crush District...

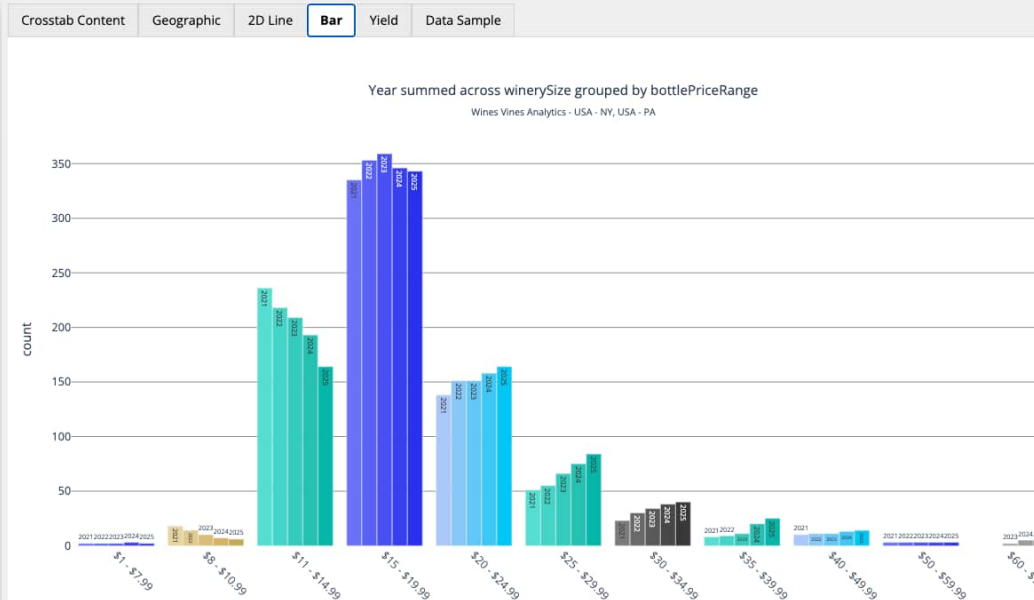
##### County

## WINE ANALYTICS DATABASE

### Results Display Controls

Plot Value Selection Horizontal Values Vertical Values Aux Values (optional) Map Mode Toggler

count Year bottlePriceRange winerySize locState



# WineBusiness: Opportunities

## WINEBUSINESS.COM

- **GRAPES & BULK WINE BOARD**
- Find your supply
- **WINEJOBS.COM**
- No. 1 jobs board for the wine industry
- Key source of accurate data on winery recruiting AND applications
- Other data insights on salaries, skills in demand, trends in winery operations
- **NEW COMPTRACKER**
  - Pay ranges by position
  - Region
  - MORE

The screenshot shows the winejobs.com website. At the top, there's a navigation bar with links for WINEBUSINESS MONTHLY, WINEBUSINESS ANALYTICS, DAILY NEWS EMAIL, and GOMBERG FREDRIKSON. Below this is the winejobs.com logo with the tagline 'The Wine Industry's Leading Online Job Site'. To the right, it says 'created & managed by WINE BUSINESS'. A secondary navigation bar includes links for News, Winejobs, Grapes & Bulk Wine, Classifieds, Buyer's Guide, Events, and More. The main content area features a search bar with fields for Job Category (set to 'All'), Zip (US) & Radius (set to '30 miles'), and Key Word. There are buttons for 'more search options' and 'Search'. Below the search bar is a link to 'Click here to view harvest help listings'. A section titled 'featured this week' contains a table of job listings. To the right of the search bar, there are two boxes: 'Job Seekers' with links for 'Sign In' and 'Create Alert', and 'Employers' with a 'Sign In' link. At the bottom right, there's a section for 'winebusiness.com classifieds' with links for 'grapes & bulk wine', 'used barrels', 'real estate', 'equipment', and 'services & supplies'.

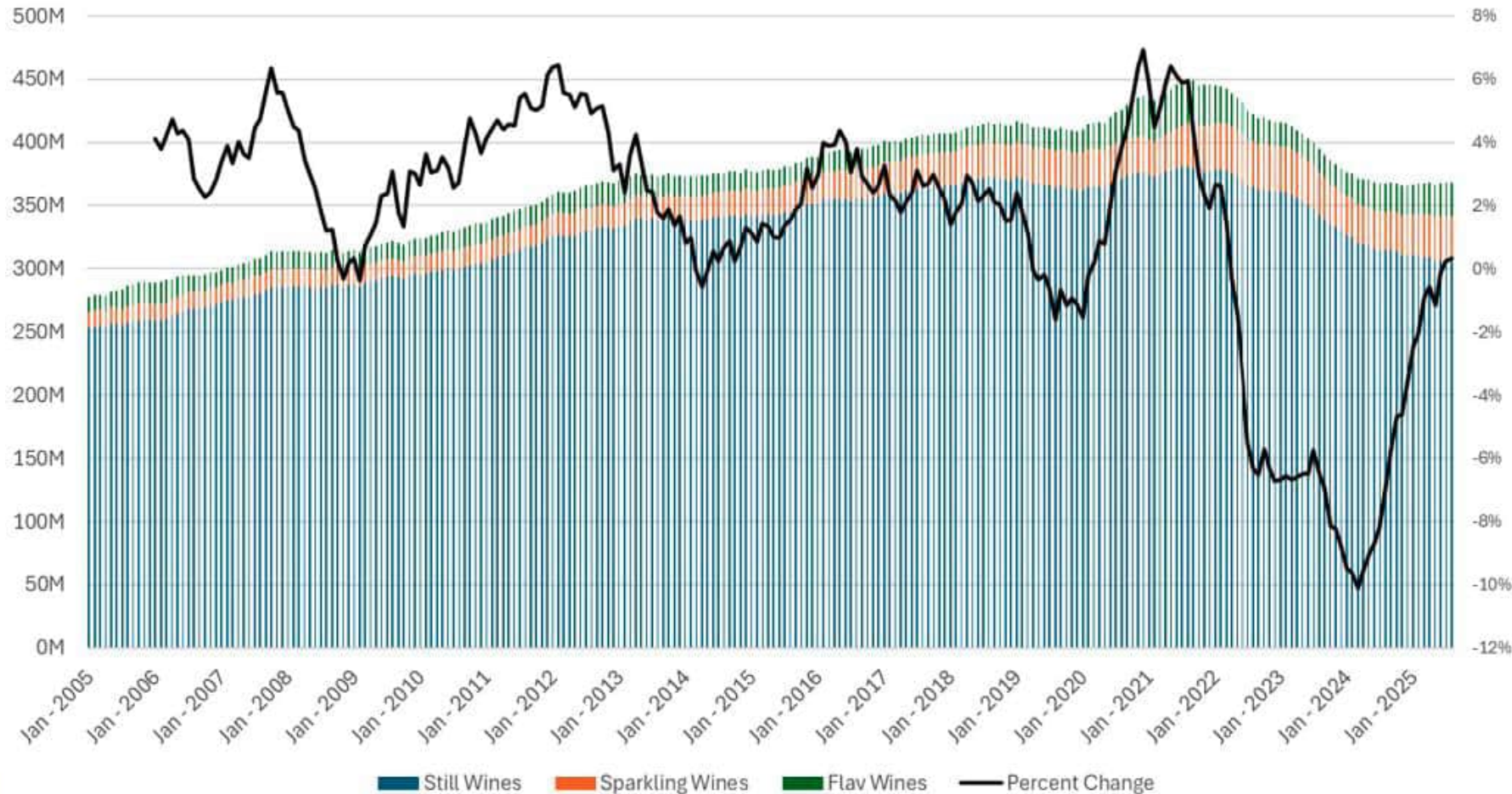
Title	Company	Location
★ Skilled Cellar Worker, Full-Time	Sugarfoot Wine Company	Santa Rosa, CA
★ Hospitality Associate	Domaine Nicolas Jay	Newburg, OR
★ Wine Club and E-Commerce Manager	Shadybrook Estate Winery	Napa, CA
★ Brand Manager	Winemakers Ltd.	Chicago, Illinois
★ Full-Time Tasting Room Manager	Copia Vineyards and Winery	Paso Robles, CA
★ Tasting Salon - Estate Ambassador	Gary Farnet Winery	Healdsburg, CA
★ Assistant Production Manager	Monterey Wine Company	King City, CA
★ Experience Lab/QC Technicians	Monterey Wine Company	King City, CA

# US Wine Market

- Scant growth but stabilizing
- Domestic table wines still down, tariffs have not slowed imports
- Wholesaler inventories improved but still long
- Declining demand from retailers
- Shelves tighter, fewer wine SKUs – more private label, exclusives
- Consolidation remains a driving force in wholesale
- Is this, hopefully, the bottom?

# Total Market Value Flat as Volumes Decline

US Wine Market - 9L (millions)



- Total value up 4% to \$116B in 12 months ended November
- Total volume flat 368M cases as domestic table fell 4% to 203M cases
- Domestic table, at \$10-\$15 per 750ml continue to lead declines. Higher prices relatively more resilient.

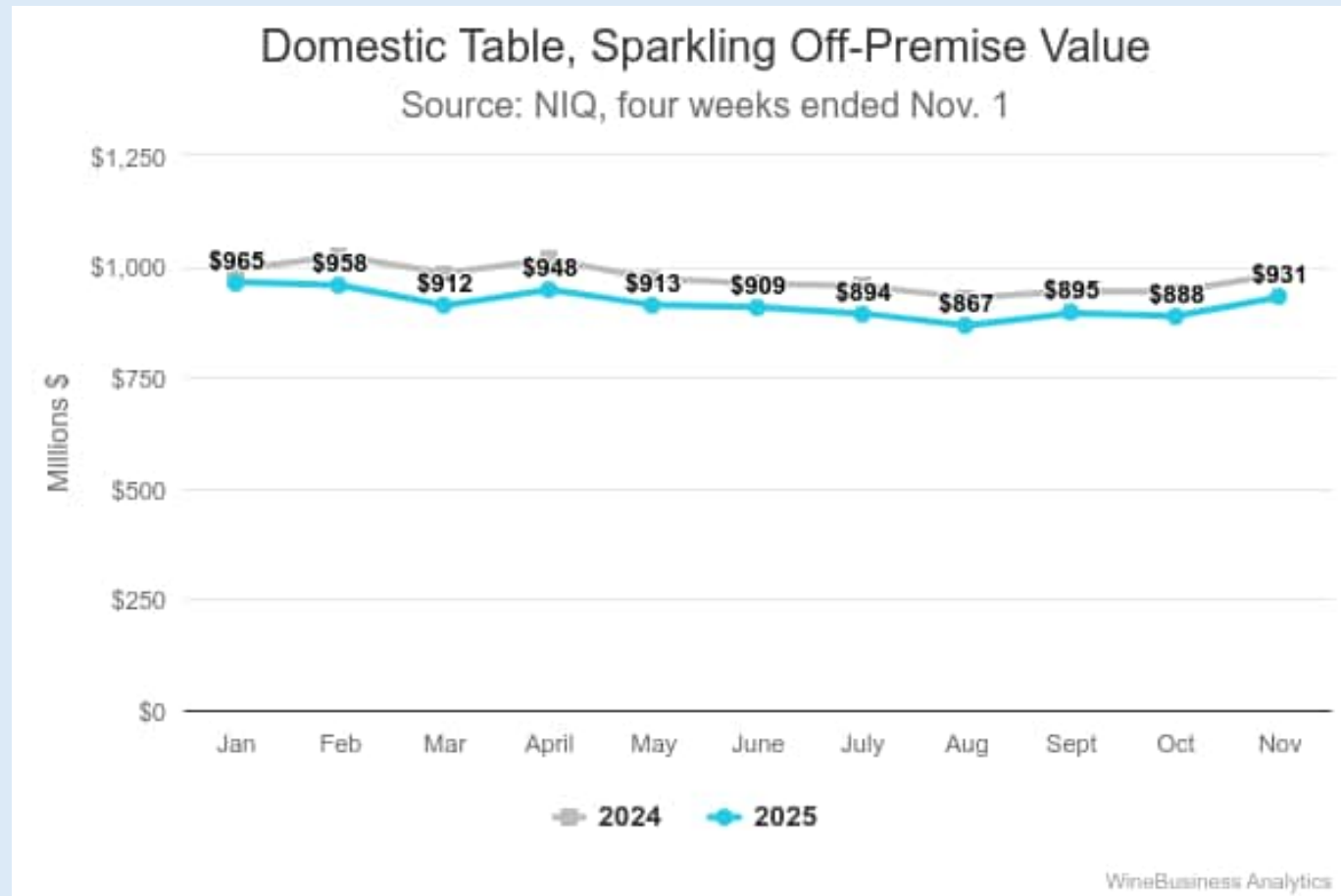
# Industry Metrics:

## Market value has been steady, if not growing





# Off-Premise Sales Consistently Lag





# Relative Strength at Higher Prices

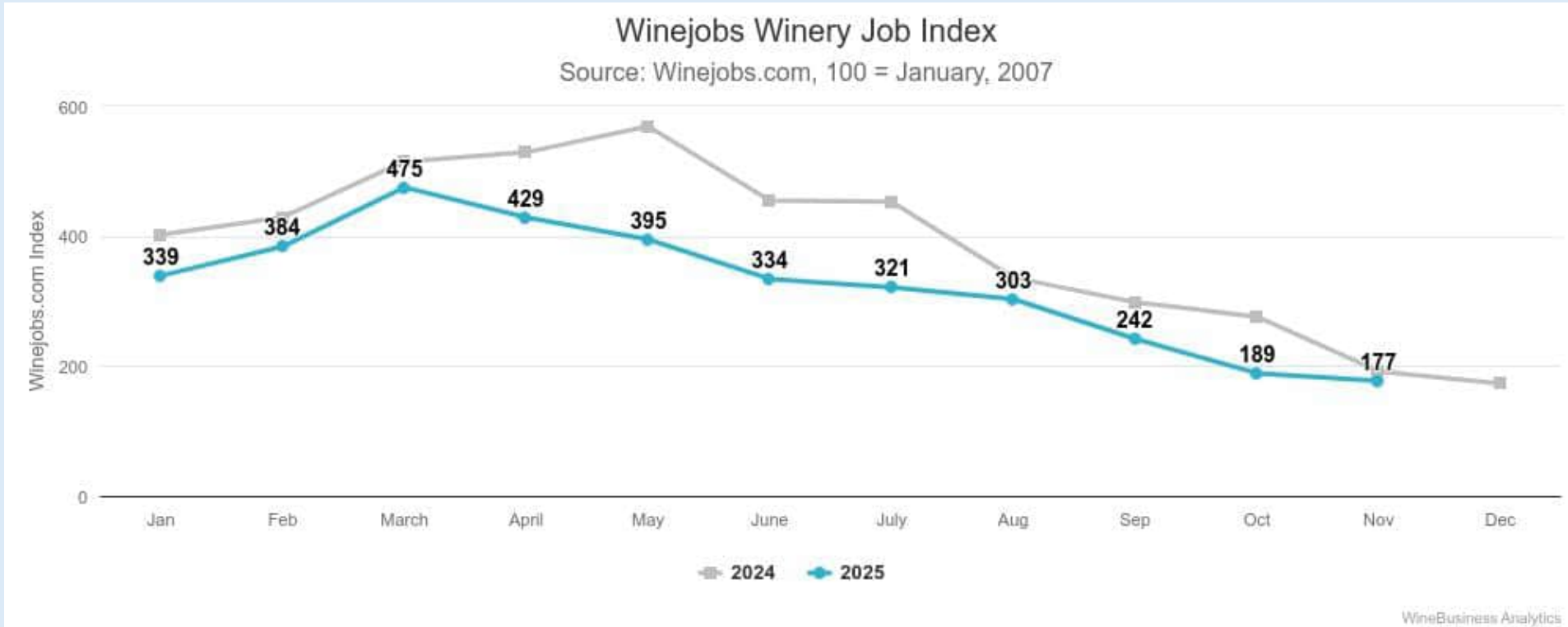


# Winery DtC Shipments Flat by Value as Volume Falls



*November shipments decline 5% to \$522M while volume down 17% to 618K*

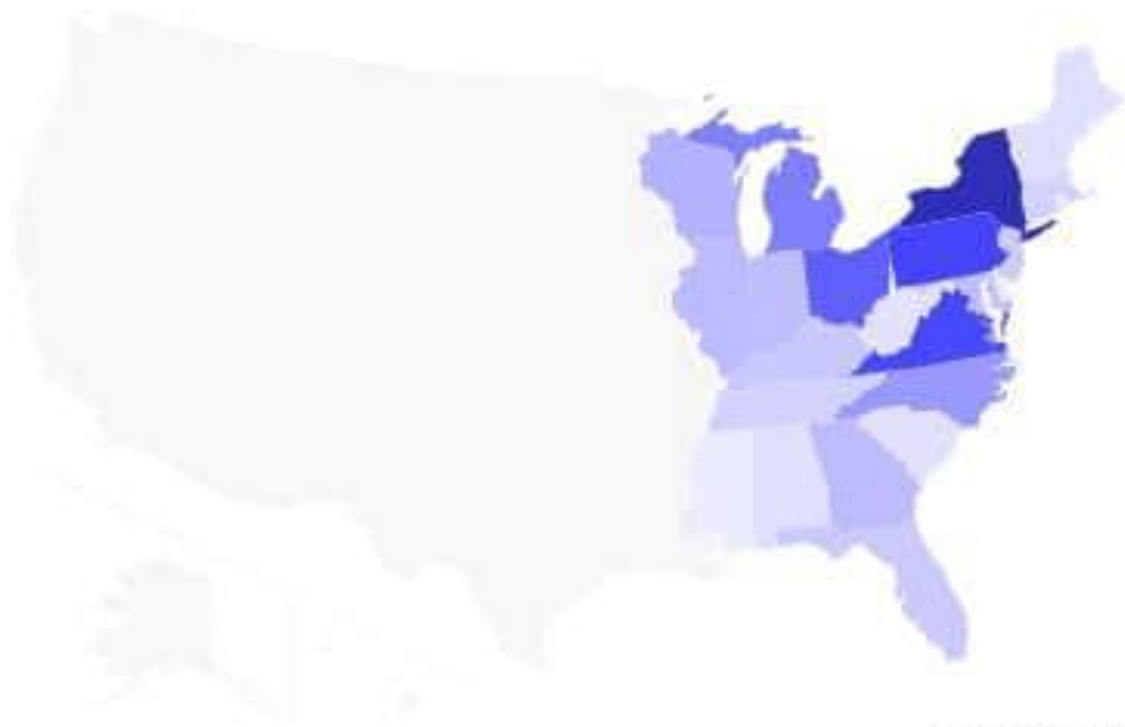
# Weak Demand has Kept Winery Hiring Sluggish



# Eastern US Wineries

Source: Wine Analytics Database

- East Region accounts roughly 20% all US wineries
- Growth outpaced total US
- Share by CA declining

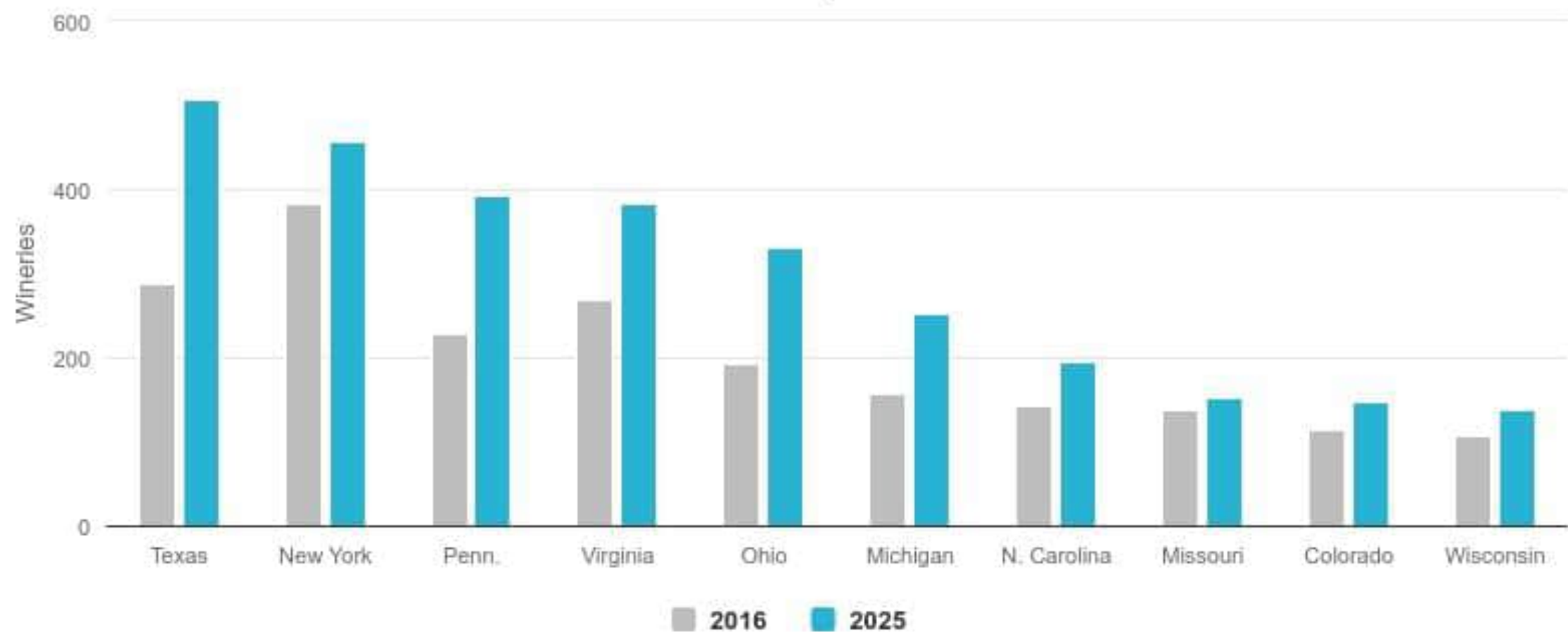


www.everviz.com

	Wineries	Growth 2016-2025	Average Annual Growth
NY	457	19%	2%
PA	394	72%	6%
VA	383	42%	4%
OH	332	71%	6%
MI	253	62%	5%
NC	196	38%	3%
WI	138	30%	3%
IL	119	8%	1%
GA	112	107%	8%
MD	106	34%	3%

## East of the Rockies Top States

Source: Wine Analytics Database



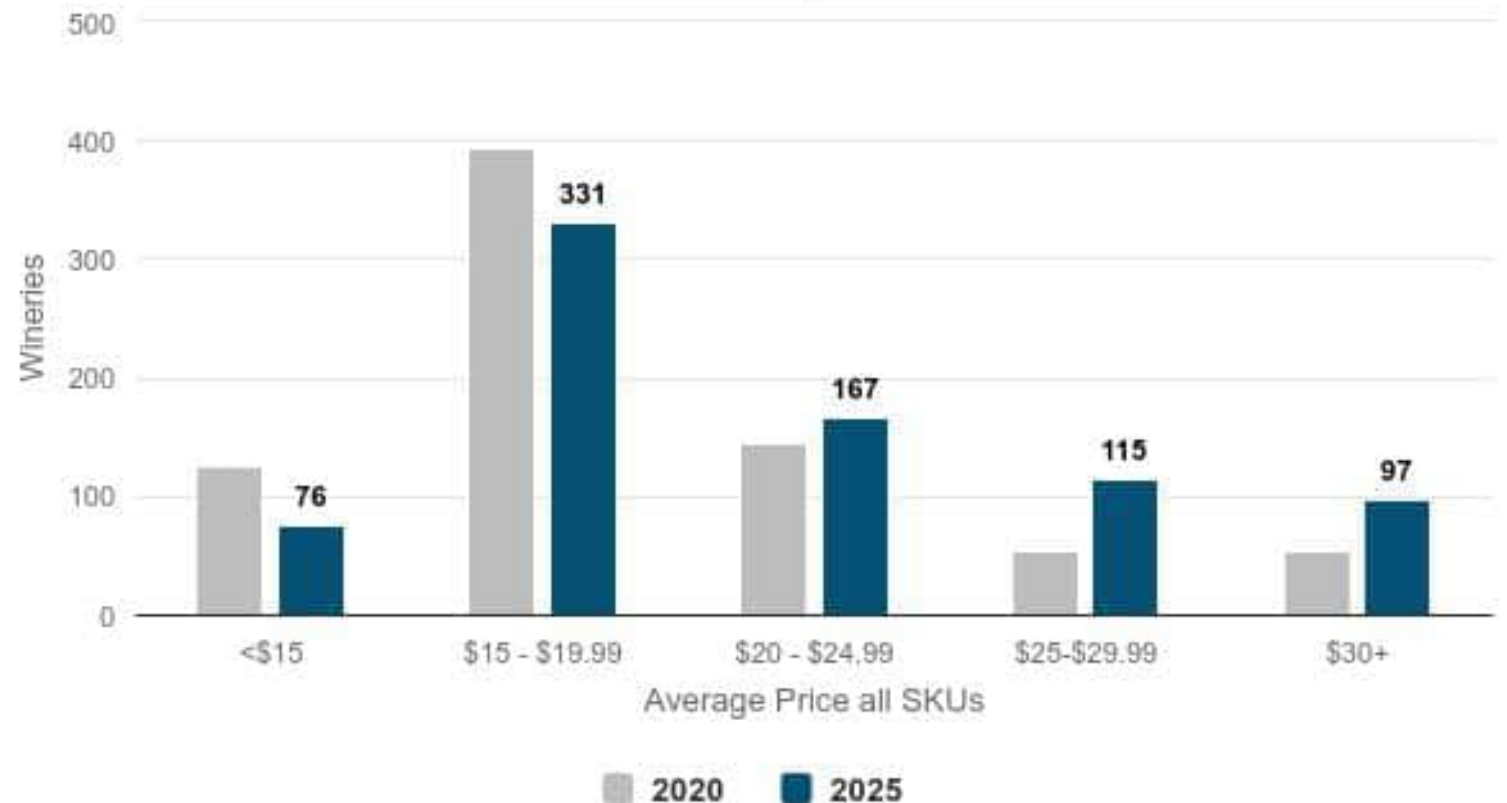
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# Wineries in the Northeast

State	2016	2020	2025
NY	383	434	457
NJ	57	80	80
CT	41	59	62
MA	51	69	59
VT	28	42	41
NH	29	39	36
ME	32	35	34
RI	11	16	20
<b>Total</b>	<b>632</b>	<b>774</b>	<b>786</b>

## NE Wineries by Average Price

Source: Wine Analytics Database



WineBusiness Analytics



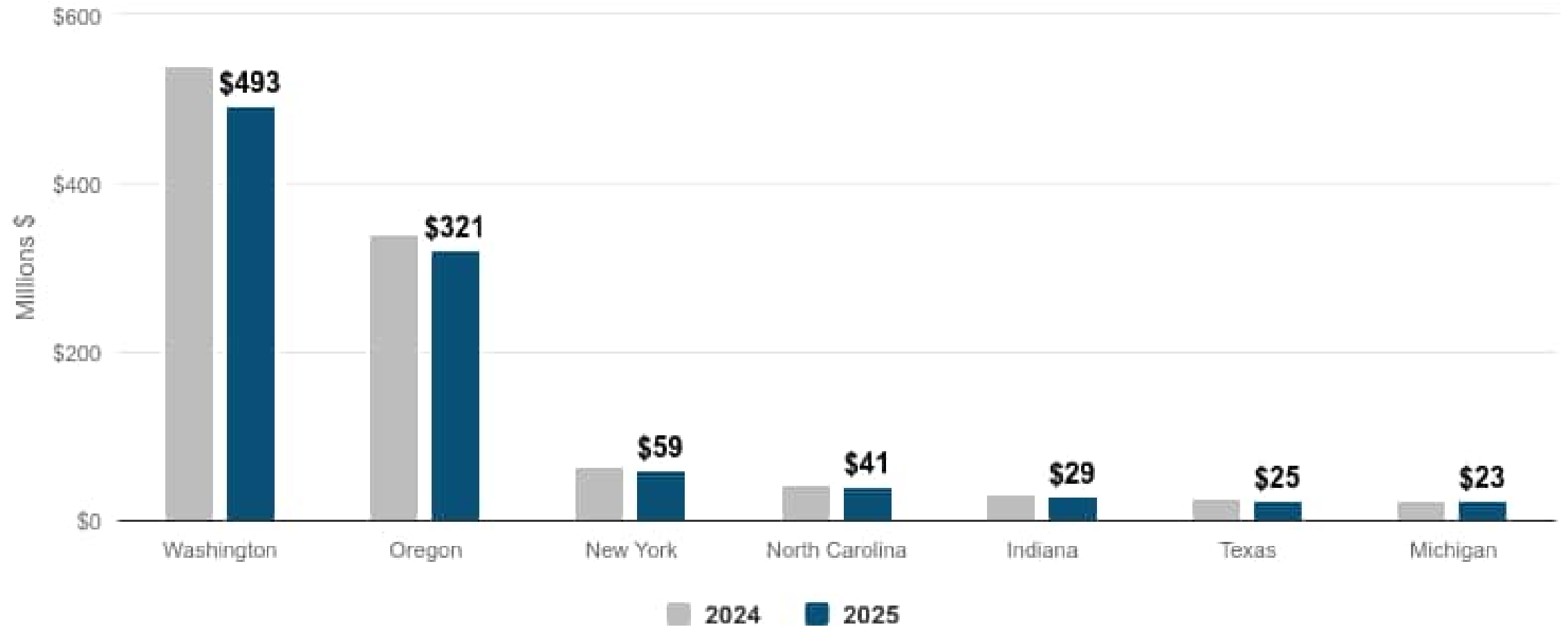
# 2024 NE Wine Markets

State	Total Volume (000s 9L Cases)	Share Domestic	Share CA	Wine Share All Servings
NY	23000	45%	39%	18.5%
NJ	11929	47%	43%	18.3%
MA	10070	46%	41%	18.4%
CT	4956	46%	41%	18.8%
NH	2720	65%	61%	16.3%
ME	1941	65%	61%	15.0%
RI	1412	52%	47%	16.8%
VT	981	52%	47%	17.3%

Gomberg Fredrikson Detailed State Wine Report 2024

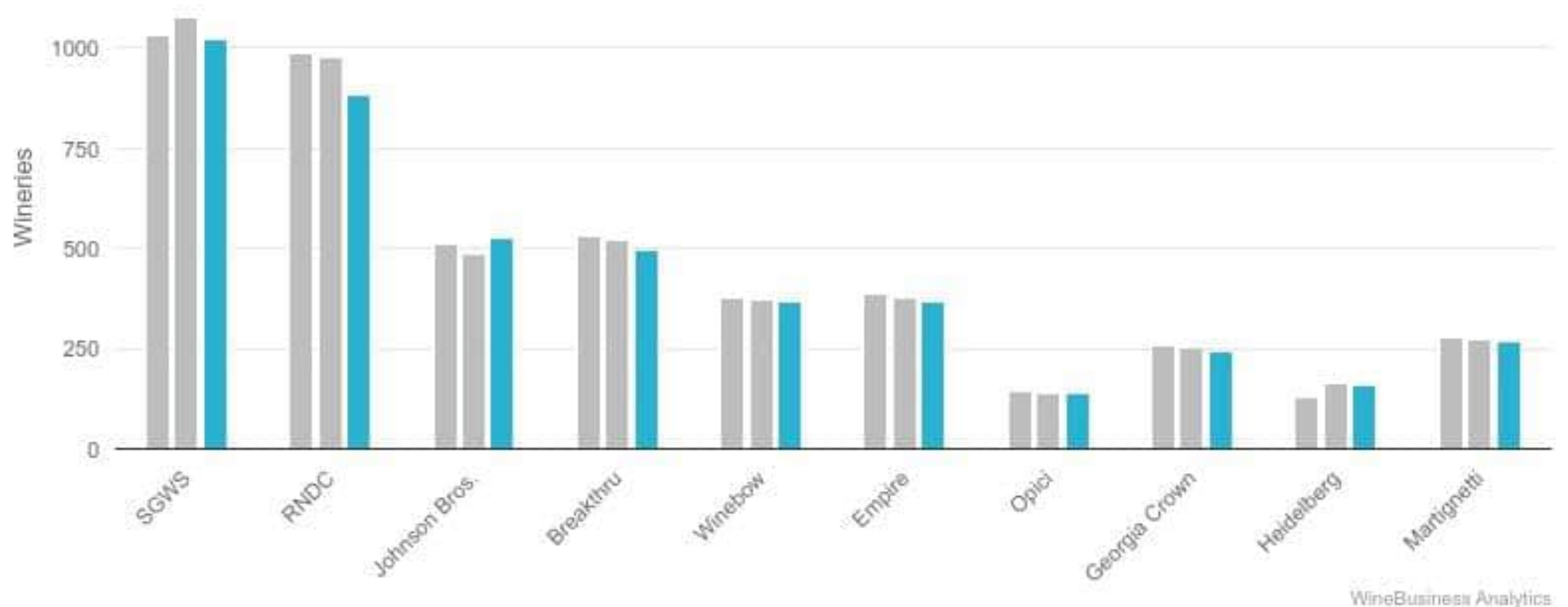
## Off-Premise Value Other US States

Source: NIQ, 52 weeks ended Nov. 1



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# Distribution remains a challenge

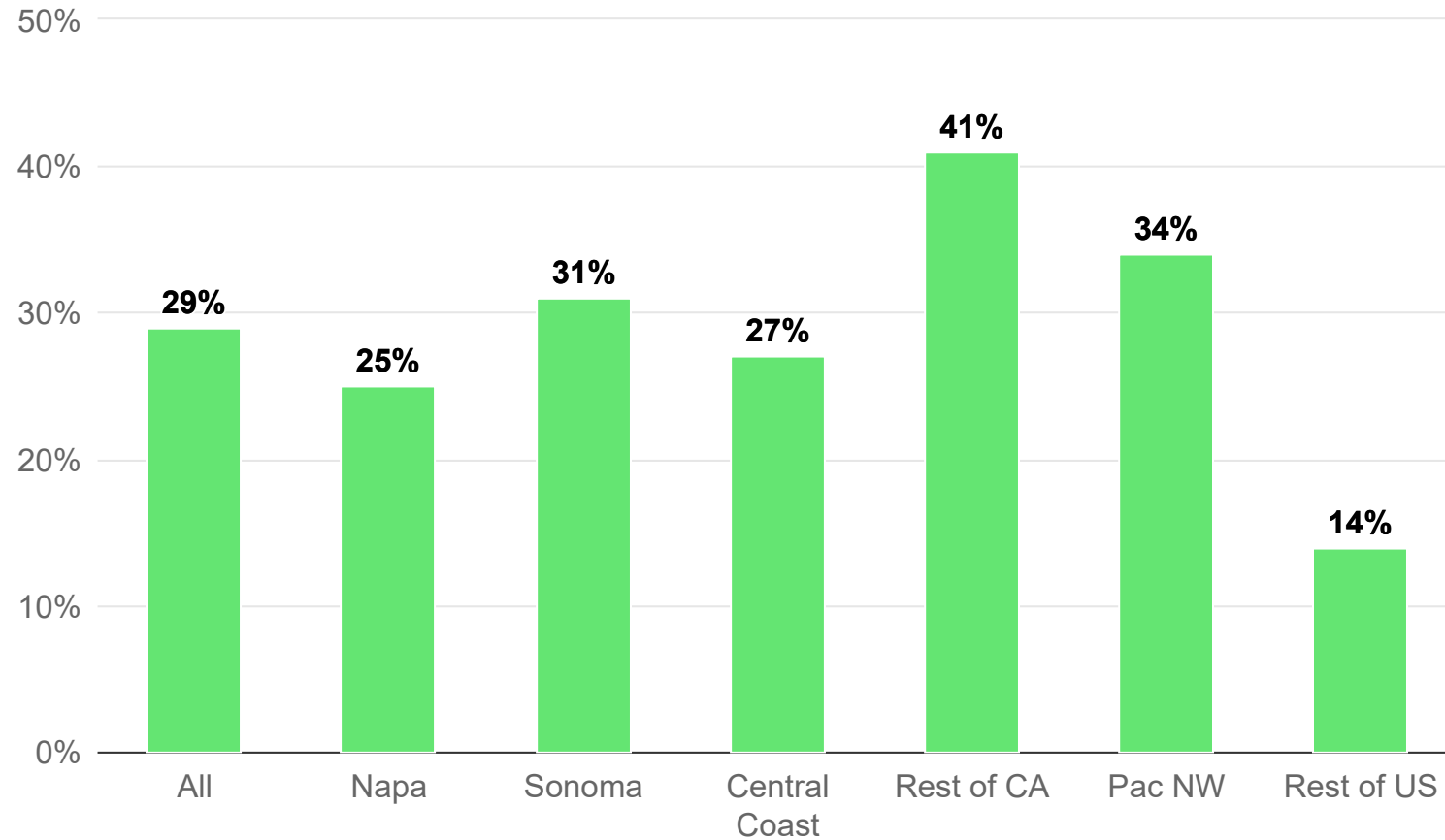


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# Other challenges and opportunities in 2026

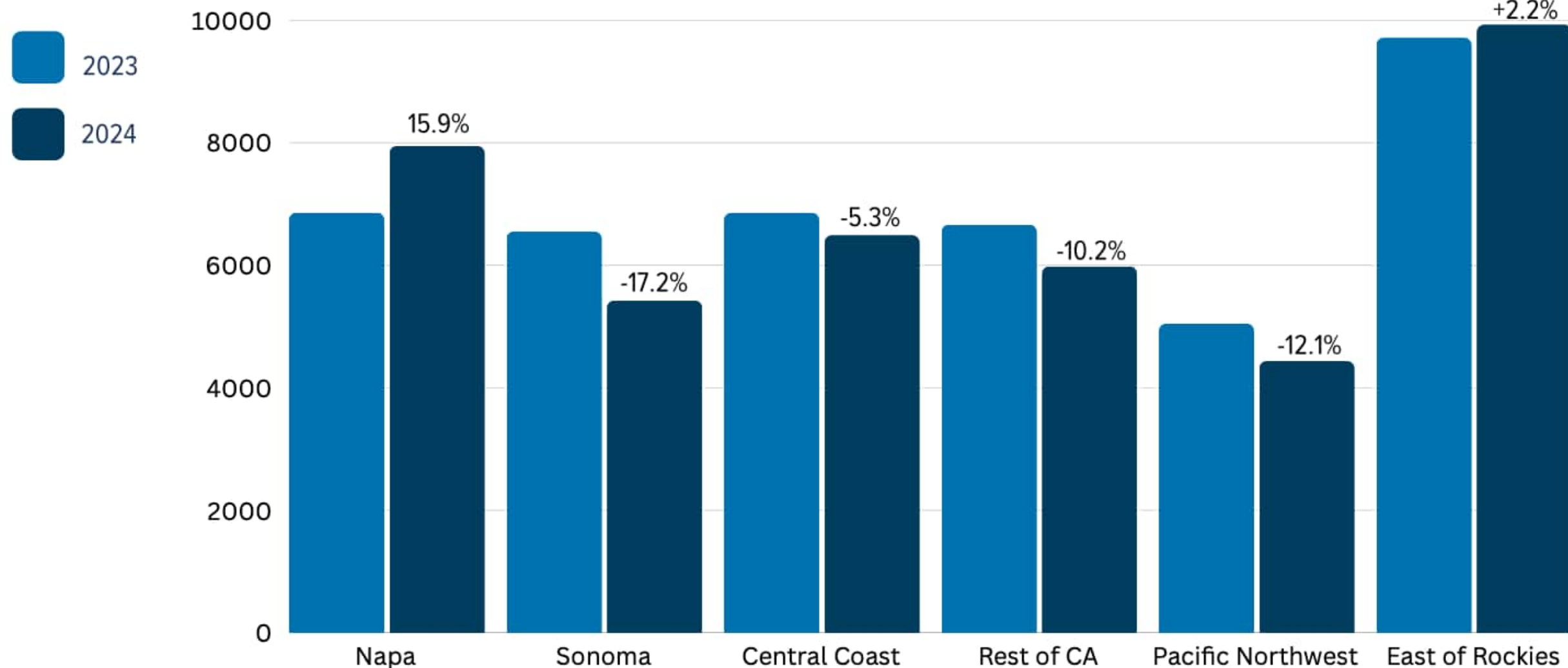
How much of your 2024 crop were you unable to sell?

Source: WineBusiness Monthly Vineyard Survey

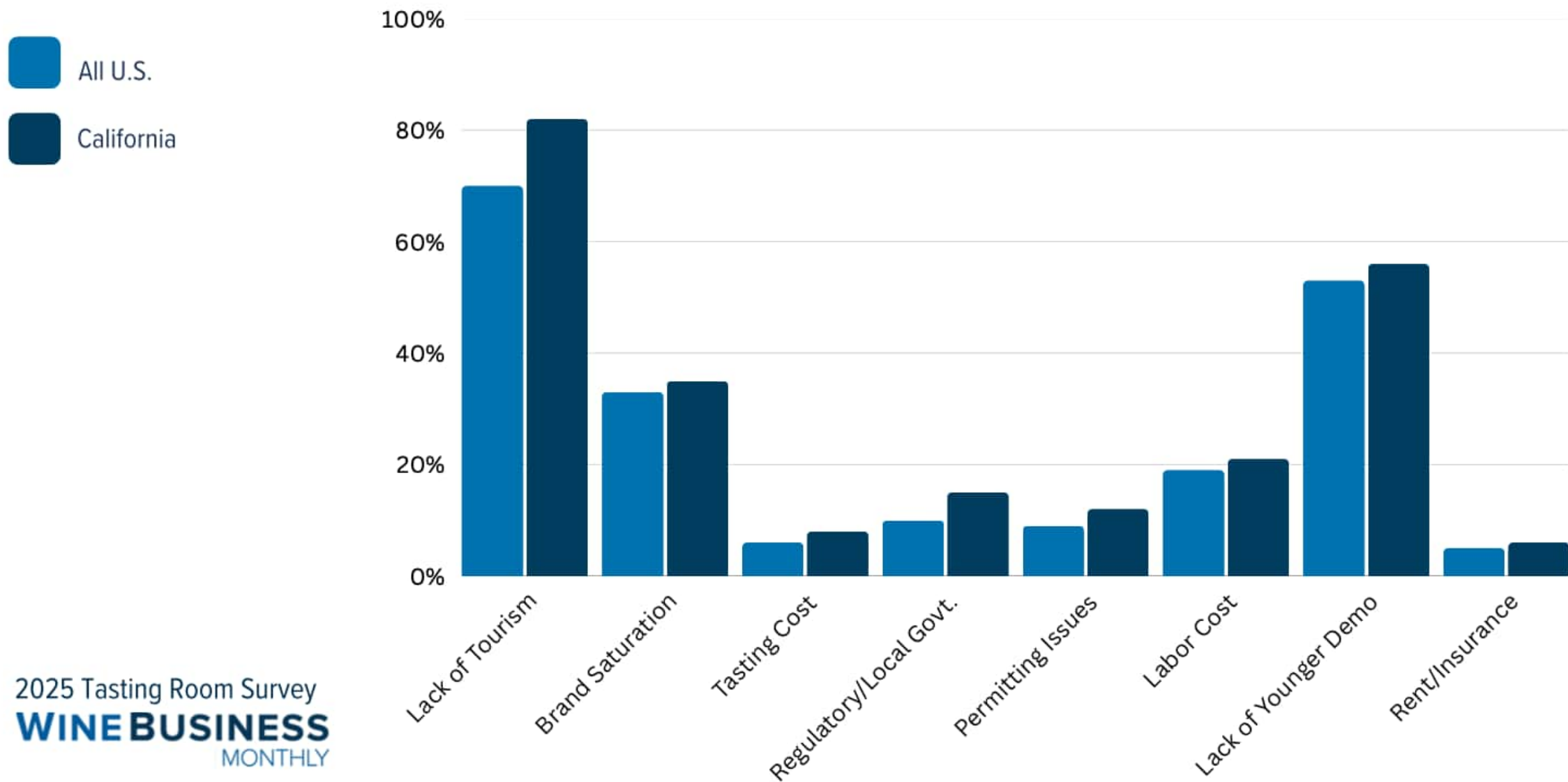


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# Median Annual Tasting Room Visitors



# ○ ○ ○ ○ Biggest Issue Facing Tasting Rooms in 2025

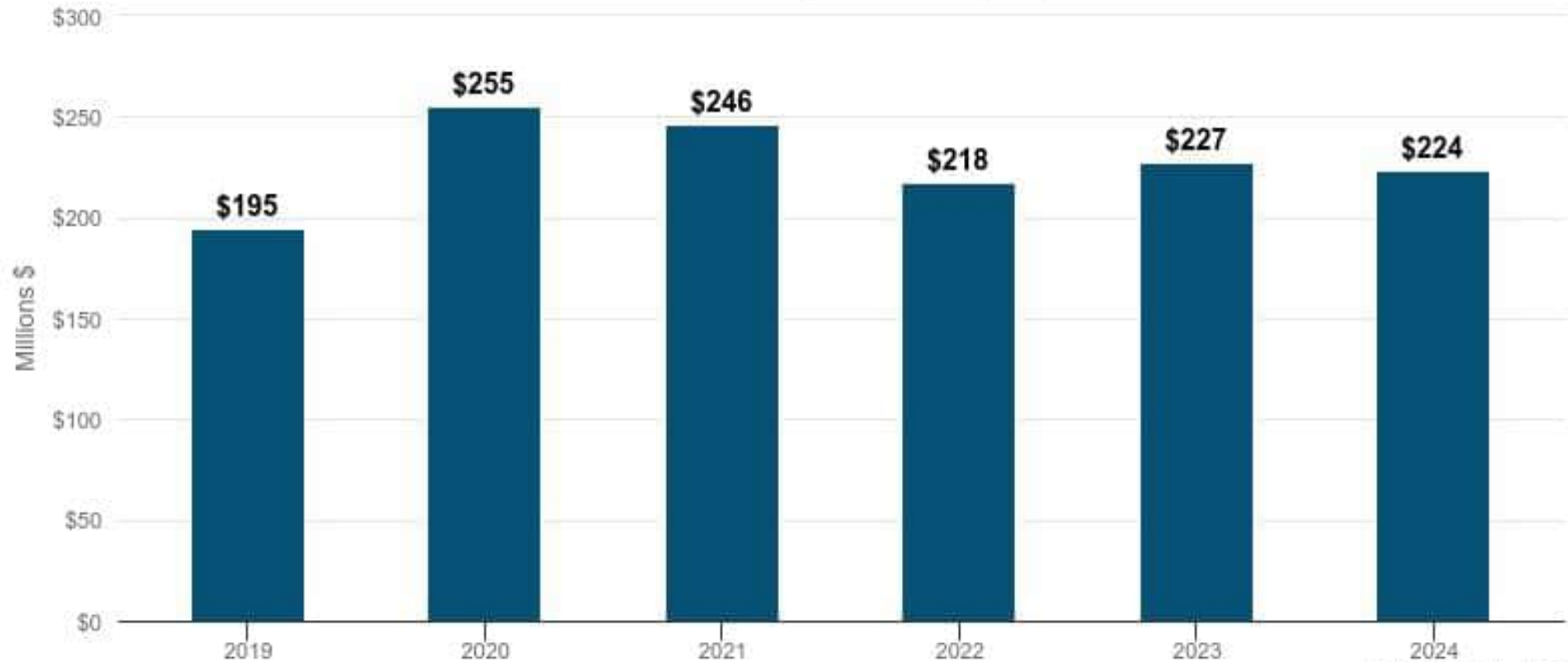




# Direct sales, direct control

## East of Rockies DtC Shipment Value

Source: WineBusiness Analytics/Sovos ShipCompliant

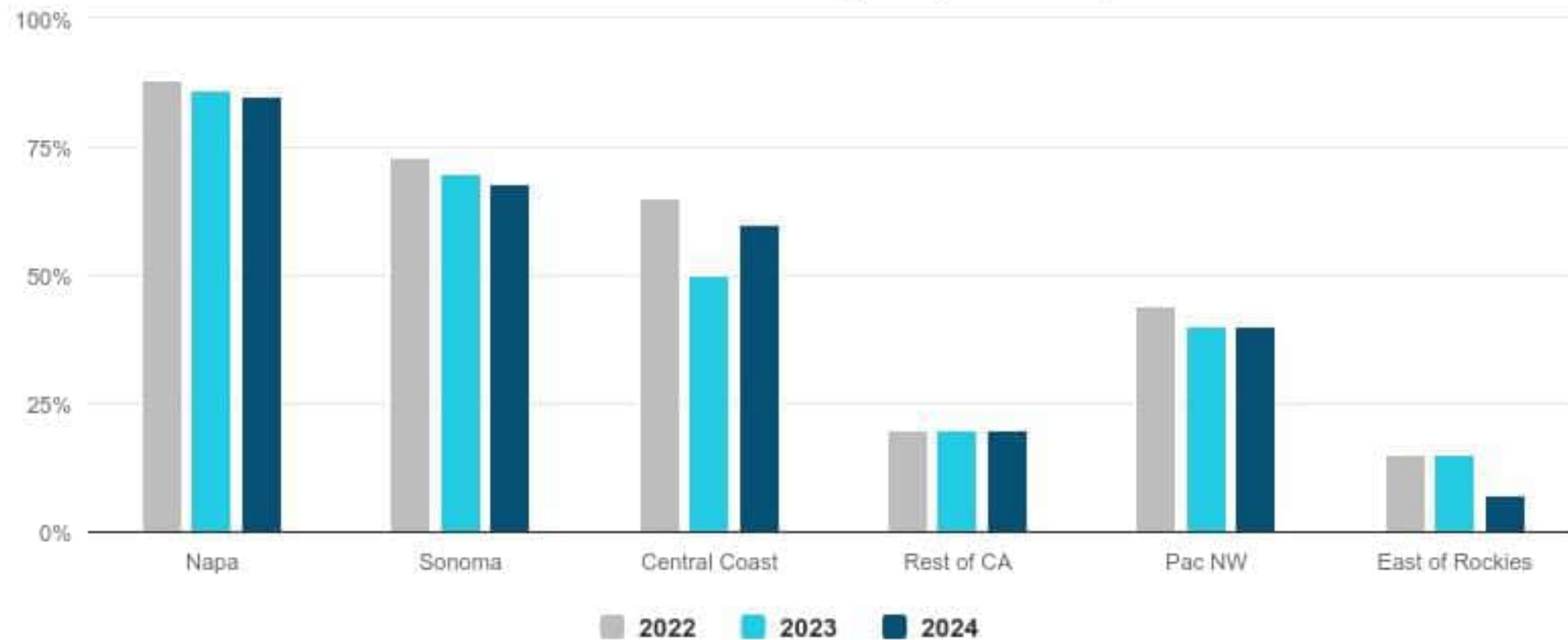


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# Room for growth

## Median Wine Club Volume Share Shipped

Source: WineBusiness Monthly Tasting Room Survey



WineBusiness Analytics

# East of the Rockies DtC Shipments

- Only 7% of club shipments and just 1% of tasting room sales shipped. Convert drop-in visitors to club members
- Consider "subscriptions" with options for more casual customers
- Sparkling wine shipment value doubled in 2025 on tiny volume
- Ideal channel for specialty, premium wines

Wine Type	\$ Share
Red blend	21%
Other red	8%
White blend	6%
Sparkling	6%
Riesling	6%
Other white	5%
Cabernet S.	5%
Chardonnay	5%
Cabernet F.	4%
Rose	4%
Pinot Noir	4%
Merlot	3%
Other	23%

State	\$ Share
NY	21%
TX	8%
MI	6%
VA	6%
PA	6%
FL	5%
CO	5%
CA	5%
MD	4%
AZ	4%
NC	4%
IL	3%
All others	23%

# Persistent challenges in 2026

- Decline in wine consumption by Baby Boomer generation
- Younger consumers less interested, less buying power
- Wine losing ground in consumption occasions
- Health concerns
- Cost and affordability
- Loss of Canada market
- US and global economy

# Potential opportunities in 2026

- Increased awareness, appreciation for local and regional wines
- Value, authentic and quality still resonate in off and on-premise
- Direct sales, forge relations
- Younger consumers need time and on-ramps
- Take advantage of affordable supply if practical, profitable
- Consider subscriptions, boost club membership and sales
- Trends and consumer sentiment always changing

# Thank you

Andrew Adams

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Please take our surveys!

Production survey now live:

<https://www.surveymonkey.com/r/ZLH7P6V>

Tasting room survey going live in early 2026