

SNAPSHOT: THE STATE OF WINE.

PAST, PRESENT + FUTURE

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U.S MARKET: RECAP + CONTEXT

“The U.S. is projected to be the largest wine market worldwide in 2025, with an estimated **market value of 72.6 billion US dollars**, followed by France and China.”

- Part I. Agriculture driven industry
 - Family-owned farming
 - Ad Hoc evolution
 - Commoditized
- Part II. Prohibition & Three Tier System
 - Nearly 1000 distributors
 - 1995: 1,800 wineries and 3,000 distributors.
 - 2024: 11,654 wineries and 1,054 distributors
- Part III. Per capita consumption
 - USA 2.86 gallon in 2022
 - EU average in 2023 is 6 gallons

BATTLE ZONE: THE WINE INDUSTRY AND THE CONSUMER

2000 to
2024

- Production vs CPG
- “Marketing” in Industry Language
 - Wineries
 - Wholesale
 - Retail
- The Age of Technology
 - Wineries
 - Consumers
 - Retail

WHAT NOW? WHAT'S NEXT? AND WHO ARE YOU?

- **Category trends**
 - Alcohol, No Alcohol, Spirits and Beer
- **Positioning**
 - High touch
 - Self serve
 - Value
 - Volume

RETAIL: KNOW YOUR CUSTOMERS

Demographics

Lifestyle

RETAIL: KNOW YOUR NUMBERS

- **UX**
- **SERVICE**

