



The Premiumization of Wine: A Strategic Analysis for 2025

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Section 1: Strategic Overview

Executive Summary

The global wine industry in 2025 is navigating a period of profound structural transformation, defined by a central paradox: while overall consumption volumes are contracting to levels not seen in decades, the value of the market continues to expand, driven by the powerful and evolving trend of premiumization. This report provides a comprehensive strategic analysis of this phenomenon, dissecting its drivers, market impact, and future trajectory. The findings reveal an industry bifurcating into two distinct markets—one of declining, low-priced volume and another of resilient, high-value premium products.

Premiumization itself has matured. It is no longer a simple function of price but a complex value proposition built on the pillars of demonstrable quality, authentic storytelling, verifiable sustainability, and curated experiences. The modern consumer, particularly the pivotal Millennial cohort, is "drinking less, but better," willingly paying more for wines that offer not just a superior taste but also a narrative and a set of values with which they can align.¹ This "premiumization with purpose" has made environmental and ethical credentials non-negotiable components of a premium brand's identity.²

This shift occurs against a volatile macroeconomic and geopolitical backdrop.

Persistent inflation is slowing the pace of premiumization and forcing consumers to be more discerning, demanding clear justification for higher price points.⁴

Simultaneously, the looming threat of significant tariffs, particularly between the U.S. and Europe, has injected a high degree of uncertainty into global trade, disrupting supply chains and elevating strategic risk management to a paramount concern.⁶

The most critical challenge facing the industry is a demographic one. The decades-long strategy of premiumization, while successful in preserving margins, has led to a neglect of the entry-level market, breaking the traditional "on-ramp" for new consumers.⁸ The industry's core Boomer consumers are aging out, while it struggles to recruit the health-conscious and less alcohol-inclined Gen Z cohort.⁹ The future of the entire category rests on successfully engaging the high-spending but experientially-driven Millennial consumer while simultaneously innovating to build relevance with the next generation.

To thrive in this new landscape, stakeholders must pivot from a volume-centric to a value-centric model. Strategic imperatives for 2025 and beyond include:

1. **Targeted Generational Engagement:** Wineries must develop dual-pronged strategies that cater to the values of high-spending Millennials through experiential marketing and authentic storytelling, while creating new, accessible, and relevant products—such as premium alternative formats and high-quality no/low-alcohol options—to recruit Gen Z.
2. **Portfolio and Viticultural Innovation:** Success requires diversifying beyond traditional offerings. Investment in the rapidly growing no/low-alcohol segment, climate-resilient viticulture, and regenerative agriculture is no longer optional but essential for long-term brand health and relevance.
3. **Integrated, Data-Driven Operations:** The silos between viticulture, winemaking, and marketing must be dismantled. A modern premium winery must operate as a unified ecosystem where consumer data informs product development and authentic production practices are the cornerstone of brand marketing.

The wine industry stands at a turning point. The path forward is not a return to the old model of volume growth but an embrace of a more complex, value-driven future. The brands that succeed will be those that understand that in 2025, "premium" is not just what is in the bottle, but the entire story, experience, and set of values that surround it.

Section 2: The Evolving Definition of Premium Wine in 2025

The concept of wine premiumization has undergone a significant maturation. Once a straightforward strategy centered on moving consumers up the price ladder, it has evolved into a complex and nuanced value proposition. In 2025, a premium wine is defined not merely by its price tag but by a holistic synthesis of perceived quality, brand purpose, and managed exclusivity. This section deconstructs this modern definition, exploring the shift from price to value, the rise of purpose-driven consumption, and the enduring strategic importance of scarcity.

2.1 From Price to Perceived Value: The New Calculus of Premium

The foundational shift in premiumization is the move away from price as the sole determinant of status towards a more sophisticated consumer calculus based on perceived value. The era of simply "whacking an extra tenner on the price tag" to signal quality is over.¹ While price remains a powerful cue, it is no longer sufficient on its own to command consumer loyalty or justify a premium position. The contemporary definition of premium is an amalgam of tangible and intangible attributes that, together, create a compelling value proposition.

Consumers today are not just buying wine; they are buying a story, an experience, and a connection.¹ The perceived value of a premium bottle is now derived from a host of factors, including the demonstrable craftsmanship in the winery, the heritage and history of the estate, the unique influence of its terroir, and the passion of the winemaker.¹ This dynamic is evident across the market. Even in the sub-\$20 price range, a segment traditionally focused on volume, consumers are now demanding "excellent quality performance," signaling a value-conscious mindset that transcends price tiers.¹² This indicates a more educated and discerning consumer who actively evaluates their purchases against a set of personal criteria.

This evolution reframes the strategic imperative for wineries. The goal is no longer simply to price-up, but to "value-up." The central battleground for market share in the premium space is this perception of value. It can be understood as a consumer calculation where the tangible quality of the wine and the emotional resonance of its story must outweigh its price. Wineries that fail to build a compelling narrative and

deliver on the promise of quality will find it impossible to justify a premium price point, regardless of their cost of goods or marketing budget. This transforms premiumization from a purely financial tactic into a fundamental brand-building imperative, where the story behind the bottle is as crucial as the liquid within it.

2.2 Premiumization with Purpose: The Ascendancy of Values

A defining characteristic of the premium wine market in 2025 is the integration of consumer values into the core brand identity. Attributes such as sustainability, ethical production, and health-consciousness have transitioned from niche interests to non-negotiable pillars of a modern premium wine. This trend, aptly termed "Premiumization with Purpose," reflects a consumer base that seeks products aligning not only with their palate but also with their personal values.²

Consumers increasingly expect and demand that premium wines be produced in an ethically and environmentally responsible manner.¹ This is not a fringe movement but a mainstream expectation, driven with particular force by the Millennial and Gen Z cohorts who represent the future of the premium market.² For these younger, environmentally conscious consumers, a brand's sustainable credentials are a key factor in their purchasing decisions. Ignoring this demand is no longer a viable option, as it risks alienating a critical segment of the market.¹

In response, forward-thinking wineries are embedding sustainability into their operations and marketing. This is manifested through tangible actions such as adopting lightweight glass bottles to reduce shipping weight and carbon emissions, exploring innovative and recyclable packaging materials, and actively promoting organic, biodynamic, or other sustainable certifications on their labels and in their storytelling.¹¹

This dynamic marks a crucial shift in how sustainability is perceived within the industry. It is evolving from a "nice-to-have" marketing claim into a fundamental component of brand risk management. The absence of a credible sustainability story is increasingly viewed as a brand deficit, one that can undermine a wine's premium positioning regardless of its sensory quality or price. Consequently, sustainability is no longer a peripheral marketing angle but an integral part of the premium value proposition itself. Investment in sustainable practices is now a direct investment in

brand equity, perceived quality, and long-term market relevance.

2.3 The Enduring Power of Scarcity and Exclusivity

Alongside the modern drivers of value and purpose, the traditional levers of luxury—scarcity and exclusivity—remain potent forces in the premium wine market. The fundamental principle that "scarcity drives desirability" continues to be a cornerstone of strategy for top-tier brands.¹ Wineries that produce highly sought-after wines strategically control their supply to maintain an aura of exclusivity, which in turn justifies and sustains higher price points.¹

This is most evident at the highest echelons of the market. The "status spirits" category (products over \$100) and collector-grade wines have shown resilience even amidst economic uncertainty, fueled by a more financially insulated consumer base that is less susceptible to price pressures.⁴ The enduring global demand for iconic and rare wines, such as those from Burgundy, demonstrates that for the right product, limited availability is a powerful driver of value.⁶

However, the strategic challenge for a broader range of premium brands lies in navigating the delicate balance between exclusivity and accessibility. The goal is to create a product that is seen as desirable and special, without becoming so unattainable that it alienates potential customers.¹ Overpricing or excessively limiting supply can push a brand out of reach for its target audience, while underpricing or oversupplying can dilute its premium reputation.

In the digital age, the concept of scarcity is evolving beyond mere physical production limits. Wineries are discovering that a sense of exclusivity can be cultivated through curated access and community-building in the digital realm. This "digital scarcity" can be created through offerings such as exclusive access to online content, members-only virtual tastings with the winemaker, or early access to new releases for wine club members.¹⁰ This approach allows brands to engage a wider audience of premium-oriented consumers and build a community of "insiders" without devaluing the core product through overproduction. It represents a more scalable and modern interpretation of exclusivity, one that aligns with how today's consumers, particularly Millennials, discover and interact with brands.

Section 3: The Great Divide: Market Dynamics and Economic Realities

The premiumization of wine is not occurring in a vacuum. It is a powerful current flowing through a turbulent sea of structural market shifts, macroeconomic pressures, and geopolitical uncertainty. The global wine landscape in 2025 is characterized by a profound bifurcation, separating a shrinking market for low-priced volume from a resilient, if challenged, market for high-value premium products. This section provides a data-centric analysis of these dynamics, revealing a deeply divided industry grappling with its economic realities.

3.1 A Tale of Two Markets: Volume Collapse vs. Value Resilience

The most striking feature of the 2025 wine market is the stark divergence between sales volume and sales value. On a global scale, the industry is facing a historic contraction in consumption. Data released in April 2025 by the International Organisation of Vine and Wine (OIV) shows that global wine consumption in 2024 fell to its lowest level in over 60 years.¹⁵ This headline-grabbing decline, however, masks a more complex reality. The collapse in consumption is overwhelmingly concentrated at the lower end of the price spectrum.

According to data from IWSR, global sales volumes of wine priced at the value level or below plummeted by a staggering 27% between 2021 and 2023.¹⁷ This trend is expected to persist, with forecasts predicting that growth between 2025 and 2027 will occur

only in premium-and-above price tiers.² While budget bottles gather dust, sales of premium wines are thriving.¹

The U.S. market provides a clear illustration of this phenomenon. While total wine sales volume in the U.S. dropped by 4% in 2024, the total *value* of the market grew by 4% to reach \$109 billion.¹⁹ This is the practical effect of consumers "drinking less, but better." As shown in Table 1, the market is sharply segmented. The sub-\$9.49 category continues to experience steep declines, while the premium segments—particularly those priced between \$20 and \$50, and those over \$50—are demonstrating robust

value growth.¹⁹

This data signals a fundamental structural decoupling of volume and value within the wine industry. The traditional model, where success was measured by the number of cases shipped, is becoming obsolete. A winery can now achieve significant financial success while selling fewer bottles, provided those bottles command a higher price and deliver greater margin. This shift has profound implications for the entire business model, from vineyard strategies that must prioritize quality over yield, to inventory management that must account for the higher carrying cost of premium wines, to sales team incentives that must be reoriented from volume targets to revenue and profit goals. The key performance indicator for success in the modern wine industry is no longer market share by volume, but market share by value.

Table 1: The Bifurcated U.S. Wine Market: Performance by Price Tier (2023-2025F)

Price Tier	Volume Sales Growth % (2024)	Value Sales Growth % (2024)	Key Consumer Cohort	Dominant Trend
Under \$9.49	Significant Decline	Negative	Lower-Income Consumers, Infrequent Drinkers	Structural Collapse, Loss of Relevance ²⁰
\$9.50-\$14.99	Negative to Flat	Slight Negative	Price-Sensitive Consumers	Stagnation, Intense Competition ⁸
\$15.00-\$19.99	Flat to Slight Positive	Positive	Millennials, Gen X	The New "Entry-Level Quality" ²⁰
\$20.00-\$49.99	Positive	Strong Positive (12% median sales increase)	Millennials, Boomers, Gen X	Premiumization Core, Value Growth ¹⁹
\$50.00+	Positive	Strong Positive (10% median sales increase)	Affluent Boomers, Millennials, Collectors	Aspirational & Status-Driven Growth ¹⁹

Note: Growth figures are based on analysis of multiple industry reports.¹⁹ The table

synthesizes qualitative and quantitative data to illustrate market trends.

3.2 Macroeconomic Headwinds: Inflation and Consumer Confidence

The advance of premiumization is not without resistance. The global economic environment, marked by persistent inflation and fluctuating consumer confidence, is acting as a significant brake on the trend's momentum. With the cost of living rising, inflation remains a top concern for consumers, leading to increased price sensitivity across all categories, including wine.⁵ For many households, expensive wine is a discretionary luxury, and when budgets tighten, it is often one of the first expenditures to be reduced.¹

This economic pressure is a primary reason that the overall pace of premiumization is reported to be slowing, even as the underlying trend remains positive.⁴ Consumers have not abandoned premium wine, but they have become more cautious and discerning in their purchases. They are increasingly seeking tangible proof of value to justify what they perceive as a "bigger level of investment".² This manifests in a greater reliance on recommendations from trusted sources, more careful scrutiny of labels and brand stories, and a search for clear quality cues before committing to a purchase.¹⁷ The fine wine market, a bellwether for the ultra-premium segment, experienced a slight decline in 2024, driven by this cautious consumer spending and some downtrading to less expensive options.²²

Paradoxically, these economic headwinds are serving as a "quality filter" for the premiumization trend. They are forcing brands to rigorously justify their price points and are exposing and punishing those that rely on image and marketing alone without delivering substantive quality or a compelling narrative. In this environment, brands that can clearly and authentically articulate their value proposition—through their story, their sustainable practices, their craftsmanship, and the sensory quality of their wine—are the ones that will succeed. They provide the consumer with the necessary justification to make a premium purchase in a time of financial constraint. In this way, inflation and economic uncertainty are accelerating the evolution of premiumization away from a purely price-based strategy and towards one grounded in authentic, demonstrable value.

3.3 The Tariff Threat: A Sword of Damocles over Global Trade

Looming over the entire global wine market is a significant geopolitical risk: the potential for the United States to impose punitive tariffs, possibly as high as 200%, on European wines.⁶ This is not a distant threat; its shadow is already chilling the market. In late 2024 and early 2025, the mere speculation of such tariffs triggered a wave of massive stockpiling by U.S. importers, who rushed to fill warehouses with European wine before any new duties could take effect.⁶ This has resulted in a stalled market, with bloated inventories and hesitant buyers who are waiting for political and regulatory clarity.

The implementation of a 200% tariff would be a catastrophic event for many European producers, particularly small and mid-sized family-owned wineries that rely heavily on the U.S. market and lack the financial cushion of large corporations.⁷ Such a tariff would make their products prohibitively expensive, leading to a collapse in demand. This could trigger severe liquidity crises, forcing producers into deep discounting to move unsold stock, which would in turn undermine decades of brand-building and premium positioning.⁶ The ripple effect would be felt across the entire ecosystem. Some U.S. distributors and retailers have warned that such a disruption could "crater the whole category," harming even domestic wineries by drastically reducing overall consumer interest and traffic in the wine aisle.⁶

While this scenario creates potential opportunities for producers in New World countries or in European nations that might be exempted (such as Italy, which escaped the 2019 tariffs), the overarching impact is one of profound instability and risk.⁶ This threat is fundamentally reshaping the nature of the wine business, transforming supply chain management from a logistical exercise into a core strategic risk discipline. The value of geographic diversification, both in terms of production sourcing and sales markets, has never been higher. The tariff threat is forcing producers and importers to hedge their bets, accelerating the search for new growth markets in Asia and Latin America and compelling a strategic re-evaluation of domestic market dependencies.³

3.4 The Fine Wine Investment Landscape: A Cautious but Active Market

The fine wine investment market serves as a sensitive barometer for the health and

sentiment at the highest echelon of premiumization. In early 2025, this market is in a state of correction. Key industry benchmarks, such as the Liv-ex Fine Wine 100 and Fine Wine 1000 indices, have recorded declines, reflecting a general softening of prices after a period of strong growth.²⁴

However, falling prices tell only half the story. Beneath the surface, the market is remarkably active. Compared to the same period in 2024, the number of transactions in early 2025 increased by 17.4%, trading volume surged by 31.6%, and the total value of transactions grew by 6.3%.²⁴ This divergence between falling prices and rising activity is highly significant. It indicates that this is not a market collapse, where both prices and volumes would be expected to fall. Instead, it signals a classic market correction in which sellers, perhaps feeling financial pressure, are more motivated to move stock, and buyers, seeing an opportunity, are actively purchasing but are demanding and receiving larger discounts.²⁴

This correction is not uniform across all regions. The Bordeaux market has seen trade dominated by more recent and modestly-priced vintages, suggesting cautious sentiment. In Burgundy, increased transaction volumes have been driven by a clearance of lower-value stock, which does little to offset price declines at the high end. In stark contrast, the trade volume for Champagne has more than doubled compared to the previous year, indicating continued robust demand for top Champagne brands despite the broader market softening.²⁴

For some investors, the volatility in traditional equity markets has enhanced the appeal of fine wine as a tangible, "safe haven" asset with a low correlation to financial markets.²⁵ The current environment is widely seen as a buyer's market, representing a healthy, if painful, re-pricing after what has been described as an "unprecedented bull run" that peaked in late 2022.²⁵ The high transaction volume is a positive indicator of market liquidity and function. While the speculative froth may have dissipated, the data suggests that a solid foundation of demand and long-term confidence in the asset class remains, preventing a more severe downturn.

Section 4: The Modern Wine Consumer: A Triptych of Generational Divides, Wellness, and Experience

The forces reshaping the premium wine market are not solely economic or political;

they are deeply human. The industry is being compelled to evolve by a new type of consumer whose motivations, values, and behaviors differ starkly from those of previous generations. To understand the future of premiumization, one must first understand the modern wine drinker—a complex figure defined by a triptych of generational divides, a mainstream wellness movement, and an insatiable appetite for experiences.

4.1 The Generational Chasm: Boomers, Millennials, and Gen Z

The 2025 wine market is not a monolith; it is a fractured landscape defined by three distinct and often conflicting generational cohorts. Strategic success depends on understanding and catering to the unique characteristics of each.

- **The Loyal but Declining Boomer:** For decades, the Baby Boomer generation has been the bedrock of the wine industry. They remain a crucial pillar of the premium market today. With greater financial security, they have the disposable income to trade up to higher-priced wines and they exhibit strong loyalty to familiar, trusted brands.²⁰ However, this demographic is a shrinking asset. Boomers are aging, and their frequency of consumption is declining.⁹ While they continue to be a stable and valuable source of revenue, particularly for established wineries, they are not a long-term growth engine.
- **The Pivotal Millennial:** The Millennial generation (currently in their late 20s to early 40s) represents the single most important consumer segment for the future value of the wine industry. They are described as being "highly involved in wine," possessing "experimental tastes," and being "happy to spend more on a bottle" for quality.¹⁷ This cohort is the driving force behind "Premiumization with Purpose," actively seeking out wines that align with their values of sustainability, authenticity, and ethical production.² However, their adventurous nature presents a significant challenge. Millennials' beverage repertoire is broad and diverse, including craft beer, artisanal spirits, and ready-to-drink (RTD) cocktails. Their loyalty is therefore fragmented, and wine must constantly compete for their attention and share of wallet.¹⁷
- **The Elusive Gen Z:** The industry's greatest challenge lies with Generation Z. This cohort consumes significantly less alcohol than previous generations at the same age.⁹ A 2024 Gallup survey found that over 40% of younger consumers believe even moderate alcohol consumption is unhealthy, a sentiment that creates a formidable barrier for the wine industry.⁸ The industry's long-standing

premiumization strategy, which de-emphasized lower-priced products, has inadvertently dismantled the traditional "on-ramp" for younger consumers who have less disposable income.⁸ Gen Z values digital-first engagement, transparency, and different flavor profiles, and the industry has, for the most part, failed to create products and marketing messages that resonate with them.¹³

This generational divide has created what can only be described as a "demographic cliff." The business models, product portfolios, and marketing strategies that were highly effective for the Boomer generation are proving inadequate for their replacements. The failure to recruit Gen Z in significant numbers, combined with the fragmented loyalty of Millennials, poses an existential threat to long-term demand that simply increasing the price of existing products cannot solve. This is not merely a marketing challenge; it is a structural crisis that demands a fundamental rethinking of product innovation and market entry strategies. The industry must urgently pursue a dual approach: continue to extract value from the high-spending Millennial cohort while simultaneously creating new, relevant, and accessible products to build a bridge to Gen Z.

Table 2: Generational Wine Consumer Profile Matrix (2025)

Attribute	Gen Z (Under 28)	Millennials (29-43)	Gen X (44-59)	Boomers (60+)
Share of Consumption	Low volume, very low value	High value, moderate volume	High volume, high value	Declining volume, stable high value
Preferred Price Point	Under \$15, seeks value	\$15-\$50+, willing to spend more	\$15-\$50	\$20+, loyal to premium
Key Purchase Drivers	Health/Wellness, Social Media Trends, Price, Convenience	Story/Authenticity, Sustainability, Quality, Peer Recommendations	Brand Reputation, Quality, Value	Trusted Brand Name, Region (e.g., Napa)
Preferred Channels	Online, Convenience Stores, Social Commerce	DTC/Online, Specialty Retail, On-Premise (experiential)	Supermarkets, Specialty Retail	Wine Clubs, Traditional Retail
Openness to	High	Very High	Moderate	Low

Experimentation				
Primary Competing Beverages	RTDs, Spirits, Hard Seltzers, Non-Alcoholic Options	Craft Beer, Artisanal Spirits, RTDs	Spirits, Craft Beer	Spirits

Source: Synthesized from multiple sources including.²

4.2 The Sober-Curious Revolution: Moderation as a Mainstream Driver

The global health and wellness movement has profoundly reshaped consumer behavior, and its impact on the beverage alcohol industry is undeniable. "Mindful drinking," moderation, and even temporary abstinence are no longer niche behaviors but have become a "mainstream cultural phenomenon" that cuts across all demographics.⁴ This shift is driven primarily by a greater awareness of the health impacts of alcohol, a trend amplified by public health campaigns, but it is also reinforced by financial pressures that encourage reduced spending.¹⁶

This powerful trend has a dual impact on the wine market. On one hand, it directly fuels premiumization. The mantra of "drinking less, but better" encourages consumers who are reducing their overall intake to make the occasions when they do drink more special by choosing a higher-quality, more expensive bottle of wine.¹ This behavior underpins the value growth seen in the market despite falling volumes.

On the other hand, the moderation trend has created a surge in demand for No-and-Low-Alcohol (NoLo) beverage options. The NoLo wine category has shed its reputation as a "second-rate alternative" and is now recognized as a sophisticated and high-growth market segment in its own right.¹¹ Advances in production technology, such as delicate reverse osmosis and vacuum distillation, have dramatically improved the quality and flavor authenticity of these products.²⁰ This has enabled the emergence of premium non-alcoholic offerings, such as non-alcoholic Champagne retailing for over €100, that command high price points and appeal to discerning consumers.²³

The NoLo category is thus evolving from being merely a wine *alternative* to becoming a wine brand *extension*. It is no longer a defensive play against declining consumption

but an offensive strategy for growth and relevance. It provides premium wine brands with a way to remain part of their consumers' lives even on occasions when they are choosing not to drink alcohol, effectively expanding their addressable market. Furthermore, and perhaps most critically, the high-quality NoLo segment serves as a vital "on-ramp" to bring wellness-focused Gen Z consumers, who might otherwise avoid the wine category altogether, into a winery's brand ecosystem.

4.3 The Experience Economy: From Product to Participation

In the modern consumer landscape, the transaction has become secondary to the interaction. This is the essence of the experience economy, and it is fundamentally reshaping how premium wine is marketed and sold. Today's consumers, with Millennials and Gen Z at the forefront, are not just purchasing a physical product; they are seeking to buy into an *experience*.¹ This desire for participation and connection is a powerful force driving the premiumization trend.

This shift is visible across all sales channels. In the on-premise environment, diners are moving beyond the standard house wine. They are more discerning and adventurous, seeking out restaurants and bars that offer interesting wine flights, thoughtfully curated food pairings, and distinctive by-the-glass selections from artisanal or limited-production labels.²⁰ These offerings transform a simple meal into an educational and memorable experience.

The most potent manifestation of the experience economy is in wine tourism. Wineries are no longer just production facilities; they are being transformed into "playgrounds of the senses".³² Successful wineries are moving beyond the traditional pour-and-sip tasting model to create immersive, shareable, and personalized events. These can range from behind-the-scenes vineyard tours and blending seminars with the winemaker to multi-sensory tastings that incorporate music and art, or pop-up events at lifestyle venues like music festivals and art shows.²⁰

This experiential focus extends into the digital realm. Virtual tastings, interactive online content, and augmented reality labels allow wineries to engage with a global audience, sharing their story and creating a personal connection with consumers who may never physically visit the vineyard.²⁰

The strategic importance of this trend cannot be overstated. Experiential marketing is

becoming the most effective tool for building brand equity in the premium space. It directly addresses the modern consumer's need for the tangible "value" and authentic "story" that they require to justify a premium price. An experience, whether physical or digital, is the most powerful way to communicate a brand's narrative, demonstrate its authenticity, and forge a lasting emotional connection. In the 2025 market, the experience is no longer adjacent to the product; it is an integral part of the product itself and a primary driver of its perceived premium value.

Section 5: Strategic Imperatives for a Premium Future

Navigating the complexities of the 2025 wine market requires more than just a premium product; it demands a sophisticated and integrated premium strategy. The traditional, siloed approach to viticulture, winemaking, and marketing is no longer sufficient. Success in this new era depends on a holistic model where product innovation is informed by deep consumer understanding, marketing is fueled by authentic production stories, and sustainable practices are a core component of the brand's value proposition. This section translates the preceding analysis into a set of actionable strategic imperatives for wineries aiming to build a resilient and profitable premium future.

5.1 Crafting the Premium Brand: The New Marketing Playbook

Building a premium brand in 2025 is a multi-faceted endeavor that must be digital-native, story-driven, and focused on fostering direct relationships with consumers.

5.1.1 Digital-First Engagement

In an era where consumer attention is fragmented and digitally focused, wine brands must adopt a "digital-first" marketing mindset.³⁵ This is no longer optional; it is essential for relevance and reach. The strategy must go beyond simply having a

website and a social media presence. It requires leveraging platforms like Instagram and TikTok not just for generating "likes," but for building a genuine community through content that educates, entertains, and connects.¹³ This could include behind-the-scenes looks at harvest, winemaker Q&A sessions, or food pairing tutorials.

Paid social advertising is a crucial component of this digital-first approach. It allows for precise, data-driven targeting to reach specific and valuable consumer segments. Geo-targeted ads can drive foot traffic to retail partners, while campaigns aimed at high-spending Millennials or specific lifestyle interest groups can build brand awareness and drive e-commerce sales effectively, even with a modest budget.¹³ Underpinning all of this is the need for data-driven marketing. The use of Customer Data Platforms (CDPs) and Customer Relationship Management (CRM) systems is vital for capturing consumer data, understanding purchase habits, and delivering the kind of personalized marketing messages and recommendations that modern consumers expect.³⁵

5.1.2 The Power of Authentic Storytelling

In a crowded premium market, a brand's unique story is its most powerful and defensible asset. Effective storytelling is the thread that connects the tangible quality of the wine to the intangible values that drive premium perception. The most resonant narratives are those that "humanize the vineyard" by showcasing the people, the passion, and the craftsmanship that go into every bottle.¹¹

Authenticity is paramount. Consumers, particularly Millennials, are adept at spotting inauthentic marketing. The most compelling stories are those grounded in truth. Narratives that artfully balance a winery's deep-rooted heritage with its modern innovations and sustainable practices can appeal across multiple consumer segments.²⁰ Similarly, stories of resilience—how a winery has overcome challenges posed by climate change or other adversities—can foster a deep sense of authenticity and build trust with consumers.²⁰ This storytelling must be consistent across all touchpoints, from the winery's website to its social media and, critically, to its packaging. The wine label and bottle design are the brand's physical ambassadors. Minimalist aesthetics, elegant typography, and motifs that evoke a sense of place can effectively communicate a story of quality, heritage, and authenticity before the bottle

is even opened.¹

5.1.3 Mastering Direct-to-Consumer (DTC)

Direct-to-Consumer (DTC) channels—which include tasting rooms, wine clubs, and e-commerce platforms—are absolutely essential for premium wineries. They offer the dual benefits of capturing higher profit margins by bypassing the traditional three-tier system and, more importantly, building direct, lasting relationships with a loyal customer base.¹⁰

However, the traditional DTC model is under pressure. Tasting room visitation, long the primary engine of wine club acquisition, is declining. This is partly due to the aging Boomer population traveling less, and partly due to rising tasting fees that can discourage younger, more price-conscious consumers.¹⁰ To counteract this, wineries must reinvent the tasting room as a "destination experience." The focus must shift from a simple tasting flight to an immersive, shareable, and interactive event that provides a compelling reason to visit.¹⁰

Simultaneously, wineries must build a world-class digital DTC ecosystem. A seamless, user-friendly, and visually rich e-commerce platform is critical for converting customers who may discover the brand online and will never visit in person.¹⁰ This digital storefront should be supported by sophisticated email marketing and flexible wine club models that offer customization and cater to modern consumer expectations. The goal is to create a frictionless path to purchase and membership, whether the customer is standing in the tasting room or sitting on their couch hundreds of miles away.

5.2 Innovating the Premium Product: Beyond the 750ml Red

A premium brand strategy is unsustainable without a corresponding product innovation strategy. Wineries must look beyond their traditional core offerings to develop a diversified portfolio that meets the evolving needs of the modern consumer and is resilient to the environmental challenges of the future.

5.2.1 Portfolio Diversification for a New Consumer

To remain relevant and capture new audiences, wineries must strategically diversify their product portfolios. This means making a serious and authentic investment in the high-quality No-and-Low-Alcohol (NoLo) category. This is not about creating a cheap afterthought; it is about developing a sophisticated, well-crafted beverage that can stand proudly alongside the winery's traditional offerings and appeal to the large and growing segment of wellness-minded consumers.¹²

Diversification also extends to packaging and format. The 750ml glass bottle will remain the standard for fine wine, but there is a significant opportunity in alternative formats that offer convenience, accessibility, and sustainability. Premium canned wines, elegant single-serve bottles, and high-quality bag-in-box wines are no longer a novelty. They are effective tools for introducing wine into new occasions (e.g., picnics, concerts) and can serve as a crucial "on-ramp" for younger drinkers who may be intimidated by the cost and formality of a full bottle.⁸

5.2.2 Viticulture for a New Era: Sustainability and Resilience

The foundation of any premium wine is, and always will be, the quality of the grapes. Therefore, the most critical long-term innovation must happen in the vineyard. Investment in regenerative agriculture is becoming a hallmark of the world's most forward-thinking premium producers. This approach goes beyond standard organic or biodynamic farming; it is a holistic system focused on actively improving the ecosystem of the vineyard by enhancing soil health, promoting biodiversity, and sequestering carbon.³¹

The benefits of regenerative agriculture are twofold. First, it provides a powerful and authentic sustainability story that is a key purchase driver for modern consumers.¹² Second, and more importantly, it builds resilience against the existential threat of climate change. Healthier soils are better able to retain water during droughts and manage excess water during floods, helping to future-proof vineyards against extreme weather events.⁷ This commitment to resilience must also include experimentation with a wider range of grape varieties. Planting lesser-known or hybrid

grape varieties that are naturally more resistant to heat and drought is a crucial strategy for ensuring the long-term viability of wine production in a warming world.⁷

5.2.3 Technology in the Vineyard and Winery

Technology is a key enabler of both quality and authenticity in modern premium wine production. In the vineyard, the use of AI-powered sensors, drones, and advanced data analytics is revolutionizing viticulture. These tools allow for precision management of vineyard blocks, providing real-time data on soil moisture, vine stress, and disease pressure. This enables winemakers to make more informed decisions about irrigation, canopy management, and harvest timing, ultimately leading to higher-quality grapes.²³

In the winery, technological advancements are improving the quality of innovative products. As mentioned, new dealcoholization techniques are making it possible to produce NoLo wines that retain their aromatic complexity and flavor profile.²⁰ For the consumer, one of the most promising technological applications is blockchain. This technology can be used to create an immutable digital ledger that tracks a wine's journey from the vineyard to the bottle. This offers the potential for irrefutable proof of provenance, which can be used to combat fraud in the fine wine market and provide consumers with a new level of transparency and trust in a brand's authenticity.³¹

Section 6: Global Perspectives on Premiumization

The trend of premiumization is a global phenomenon, but its expression is not uniform. It is shaped and refracted through the unique cultural, economic, and regulatory prisms of different markets. A "one-size-fits-all" premium strategy is therefore destined to fail. Success in the global marketplace requires a nuanced understanding of how premiumization manifests in key regions, from the dynamic but volatile U.S. market to the heritage-bound but challenged European heartland and the high-growth emerging markets of the future.

6.1 The United States: The Dynamic Epicenter of Opportunity and Risk

The United States continues to be the world's largest and most dynamic wine market, making it a top priority for producers globally.¹¹ It is the epicenter of many of the trends defining modern premiumization. The market is characterized by strong value growth despite declining overall volumes, driven by a consumer base that is willing to spend more for quality and experience.¹⁹ The U.S. leads in the development of powerful Direct-to-Consumer (DTC) sales channels, and its consumers, particularly Millennials, show a high willingness to experiment with new styles, formats, and brands.¹⁰ This has led to a redefinition of "entry-level quality," with the \$15-\$20 price point now seen as the new baseline for a quality bottle.²⁰

However, the U.S. market is also fraught with challenges. Wine faces fierce cross-category competition from artisanal spirits, craft beer, and a booming ready-to-drink (RTD) sector, all competing for the same consumer occasions.⁵ The industry is confronting a profound generational problem, with an aging core consumer and immense difficulty in recruiting younger drinkers.⁸ Above all, the market's stability is threatened by the unresolved trade dispute with Europe. The potential for crippling tariffs casts a long shadow over the import market, creating extreme uncertainty for European producers and the U.S. businesses that depend on them.⁶

6.2 Europe (Old World): Defending the Heritage Stronghold

European markets represent the historical and cultural heartland of wine. The continent remains the undisputed center of fine wine production, accounting for 75% of the global total, and its iconic regions like Bordeaux, Burgundy, and Champagne continue to set the standard for quality and prestige.²² In times of economic uncertainty, consumers often gravitate towards these "classic" and familiar names, which are seen as reliable bastions of quality.¹¹ The premium identity of European wine is deeply rooted in centuries of heritage, terroir, and tradition.

Despite this strength, the European market is facing significant structural headwinds. Domestic consumption has been in a long-term decline in many key countries, a trend exacerbated by recent economic pressures and a growing moderation movement.¹⁶ A 2025 Prowein report revealed widespread pessimism among producers in Italy, Germany, and Austria, with many reporting a shift in consumer purchasing towards

lower price brackets.⁴⁵ The key strategic challenge for European producers is to adapt to new consumer tastes—such as the demand for NoLo products, innovative packaging, and new wine styles—without diluting the very heritage and tradition that form the foundation of their premium status. Compounding this challenge is the acute threat of climate change, which is already altering viticultural conditions in historic regions and forcing a re-evaluation of long-established practices.⁷

6.3 Emerging Markets: The New Frontiers of Growth

As mature markets in the West face saturation and demographic decline, the primary engine for future growth in the global beverage alcohol industry is shifting towards developing markets.⁴ Countries with large, young populations and expanding middle classes, such as India, Brazil, Mexico, and nations across Southeast Asia, represent the new frontiers for wine premiumization.³

In these regions, rising disposable incomes are creating a new cohort of aspirational consumers who are eager to explore premium and imported goods, including wine.³ For many of these new consumers, wine is a symbol of status and sophistication, and they are often willing to pay a premium for well-known international brands. These markets offer a crucial opportunity for global wine brands to diversify their sales and reduce their dependence on the increasingly volatile and competitive markets of North America and Europe.⁶

However, success in these emerging markets is not guaranteed. It requires a long-term commitment and a willingness to adapt to local tastes, cultural norms, and complex regulatory environments. Brands cannot simply export their Western marketing strategies; they must invest in building brand awareness from the ground up and developing distribution networks in markets where the infrastructure for wine sales may be less developed. The greatest potential lies with brands that can successfully navigate these challenges and establish themselves as trusted and desirable names for the next generation of global wine consumers.

Section 7: Horizon Scan: Challenges, Opportunities, and Recommendations for 2025 and Beyond

As the global wine industry looks towards the latter half of the decade, the premiumization trend will continue to be the central organizing principle for value creation. However, its path is not without significant obstacles. The future will be defined by how the industry navigates the challenges of market saturation and intense competition, adapts to the existential threat of climate change, and resolves the inherent paradox of its own premiumization strategy. This concluding section synthesizes the report's findings into a forward-looking analysis, identifying the most critical long-term challenges and offering clear, strategic recommendations for industry stakeholders.

7.1 Navigating Market Saturation and Cross-Category Competition

The premium wine space is becoming a victim of its own success. As a growing number of producers around the world "follow a trend and strategy of premiumisation," the market is becoming increasingly crowded, making it more difficult for individual brands to stand out.⁴⁷ This heightened internal competition is compounded by fierce external competition from other beverage categories.

Premium wine is no longer just competing with other premium wines. It is fighting for a share of the consumer's wallet and attention against a rapidly expanding field of premium alternatives. This includes premium-plus and craft beers, a booming artisanal spirits sector (led by high-growth categories like tequila and mezcal), and a sophisticated array of high-end ready-to-drink (RTD) cocktails.⁴ The price competitiveness of some of these alternatives, particularly premium beer, presents a significant challenge. Consumers seeking a premium experience can often obtain it for a lower out-of-pocket cost with a craft beer than with a premium bottle of wine.⁴ This intense cross-category competition threatens to place a ceiling on how high premium wine prices can go and forces wine to justify its value proposition more rigorously than ever before.

7.2 The Climate Imperative: From Challenge to Strategic Differentiator

Climate change represents the most significant and undeniable long-term existential threat to the global wine industry.⁷ Its impacts are no longer theoretical; they are being felt today. Unpredictable and extreme weather events, rising average temperatures, and prolonged droughts are already impacting vintage quality and yields, threatening the viability of traditional vineyards in iconic regions, and increasing the costs and risks of production.⁷

Adaptation is not optional; it is a prerequisite for survival. This requires substantial and sustained investment in a range of strategies, including the adoption of new agricultural technologies, the planting of more climate-resilient grape varieties, and a fundamental shift towards regenerative viticultural practices that build healthier, more resilient vineyard ecosystems.³¹

While the costs and challenges of this adaptation are immense, this imperative also presents a profound strategic opportunity. As established in this report, the modern premium consumer is increasingly driven by values of sustainability and environmental responsibility. Therefore, wineries that become leaders in climate-smart and sustainable practices can build a powerful and deeply authentic brand narrative. By transparently communicating their efforts to combat and adapt to climate change, they can forge a strong connection with the values of their target audience, transforming a critical challenge into a core strategic differentiator and a key driver of their premium identity.

7.3 The Premiumization Paradox Revisited: The Risk of an Empty Core

This report concludes by revisiting the central tension that defines the wine industry in 2025: the premiumization paradox. The industry-wide strategic pivot towards premium and super-premium wines has been a demonstrably successful short-term strategy. It has preserved and even enhanced revenues and margins in the face of declining overall consumption volumes.⁸ However, this success has come at a significant long-term cost: a systemic neglect of the entry-level market.⁸

By focusing resources and innovation on the top end of the market, the industry has allowed the traditional "on-ramp" for new and younger consumers to decay.⁸ This has exacerbated the "demographic cliff," making it increasingly difficult to recruit the next generation of wine drinkers to replace the aging Boomer cohort. The long-term health of the premium segment is not independent of the rest of the market; it depends on a

healthy and vibrant entry-level segment to cultivate and educate future consumers. Without a steady stream of new recruits who can begin their wine journey with accessible, affordable, and appealing products, the premium market risks becoming an exclusive, aging, and ultimately shrinking enclave. The industry cannot afford to focus solely on the top of the pyramid while its base crumbles.

7.4 Strategic Recommendations for 2025 and Beyond

To navigate this complex future, stakeholders across the wine industry must adopt a more holistic and forward-looking approach. The following strategic recommendations are offered:

- **For Wineries:**
 - **Adopt a Dual-Pronged Portfolio Strategy:** Defend and enhance the profitable premium core through continued investment in quality, authentic storytelling, and experiential marketing. Simultaneously, dedicate significant resources to innovating at the entry-level. This means creating accessible, high-quality, and culturally relevant products—such as premium alternative formats and sophisticated no/low-alcohol wines—that are specifically designed to recruit and engage Gen Z consumers.
 - **Integrate Sustainability into the Business Core:** Move beyond sustainability as a marketing talking point and embed it into the core of the business model, from regenerative viticulture to energy-efficient winery operations and transparent reporting. This is both a risk mitigation strategy against climate change and a powerful brand-building tool.
- **For Marketers:**
 - **Shift from Broad Advertising to Targeted Engagement:** Reallocate marketing budgets away from traditional, broad-based advertising and towards data-driven digital engagement, influencer marketing that targets specific consumer niches, and the creation of immersive experiential marketing programs (both physical and digital).
 - **Make Authenticity the Central Message:** Place the real stories of the vineyard, the winemakers, and the brand's commitment to sustainability and quality at the absolute center of all marketing communications. Ensure every claim is verifiable and every story is authentic.
- **For Distributors and Retailers:**
 - **Curate for a Bifurcated Market:** Build and manage portfolios that reflect the

reality of the market's divide. This means balancing trusted, "classic" premium brands that appeal to established wine drinkers with a selection of innovative, accessible, and exciting products that can attract younger, more experimental consumers.

- **Optimize for Value, Not Just Volume:** Utilize sales data to optimize shelf space and promotional activity based on value and margin contribution, rather than just on case volume. Educate staff to guide consumers through the value proposition of premium wines.
- **For Investors:**
 - **Prioritize Resilient and Forward-Looking Brands:** Focus investments on wineries and wine businesses that exhibit strong Direct-to-Consumer (DTC) capabilities, have a diversified geographic market presence to hedge against trade risks, and can demonstrate a tangible and long-term commitment to sustainability and product innovation.
 - **Recognize the Generational Imperative:** Understand that the long-term value of any wine brand will be driven by its ability to forge a meaningful connection with the high-spending Millennial cohort while simultaneously building a bridge to the elusive but essential Gen Z consumer. Brands that fail on this front face a future of managed decline.

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