2026

DIRECT TO CONSUMER

Wine Shipping Report

2025 YEAR IN REVIEW

SOVOS ShipCompliant

WINE BUSINESS | ANALYTICS

DIRECT-TO-CONSUMER WINE SHIPPING IN 2025

A year of unprecedented contraction

Largest One-Year Drop in Volume & Value

VOLUME **-15% YoY** to **5.4M cases**

VALUE **-6% YoY** to **$3.7B**

2025

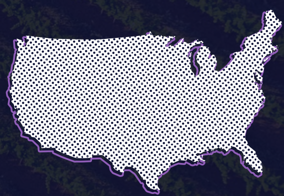
AVERAGE BOTTLE PRICE

Climbs **11%**

Soaring to **$56.78**

All Regions Contract

Volume declined from every region of the U.S.



All Wine Types Recede

Volumes decreased for every varietal tracked

California Shipments Suffer Significant Loss

Top destination state saw a ▼**$142M** **YoY shipment loss**

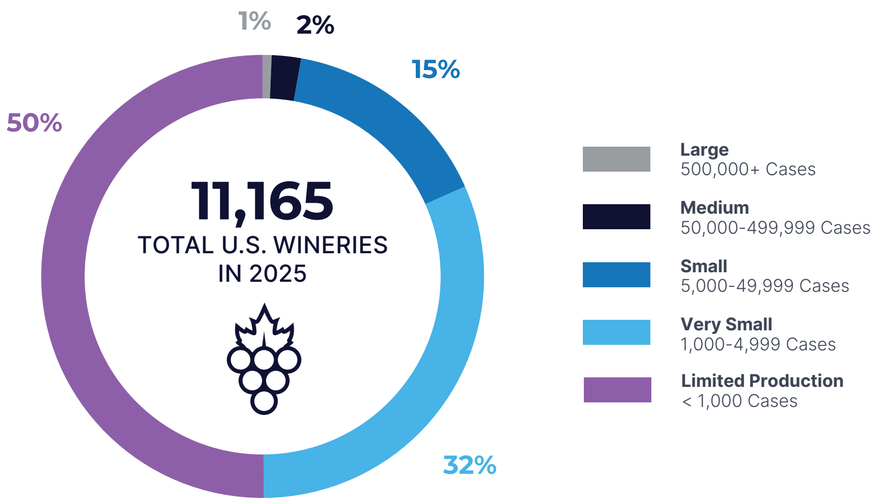
Representing **62%** **of total channel value decline**

Contents

Creation of the Report

This report is an annual collaboration between Sovos ShipCompliant and WineBusiness Analytics. It analyzes anonymized direct-to-consumer (DtC) shipment data from more than 1,300 U.S. wineries, totaling more than 27 million shipments in 2025. Using the WineBusiness Analytics model, the data is projected to represent the total U.S. winery DtC market, excluding DtC purchases picked up or carried out from wineries. Each shipment is edited for submission for governmental tax and reporting requirements, and elements such as varietal are validated against standardized tables.

The data is submitted to a proprietary model that applies weighting to ensure aggregated transactions accurately reflect winery size, location, and average bottle price. The model is built on a database of 11,165 wineries updated monthly by WineBusiness Analytics, representing more than 99% of U.S. wineries. Statistical techniques are used to identify outliers and data anomalies. For more information about the methodology, refer to the Methodology section at the end of this report.



Overview

The 2024 edition of this report acknowledged the multi-year decline in the DtC market, noting, “If the downturn in the DtC shipping channel has reached a bottom, then 2025 should stabilize with smaller losses or flat shipment volumes.”

This year’s data shows that no obvious bottom emerged in 2025, as the year-over-year changes in both volume and value of DtC shipments saw record decreases of 15% and 6%, respectively. Moreover, after three years of smaller increases in average bottle prices, 2025 saw a significant 11% increase in average price per bottle shipped, to a record $56.78.

2025 was the most disappointing year for DtC wine shipments since this report was first published in 2010. All told, in 2025 the DtC shipping channel retreated by more than 967,000 cases and gave up over $230 million.

While this report cannot explain all facets driving declines in the overall wine market (and beverage alcohol at large) and its DtC shipping segment, it does offer insight into the dynamics of the retrenchment in the latter. Most significant is the progressively greater decline in shipments of lower-priced wines. The lowest price category tracked in this report — under $15 — saw the greatest decline in volumes in 2025. In fact, the lower the price category, the greater the declines in volume, a trend that has been underway since 2021 and accelerated in 2025.

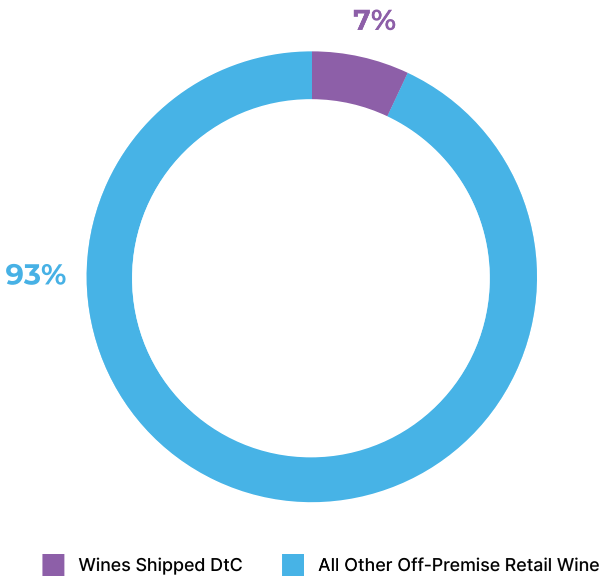
The data in this report demonstrates that this dynamic is not a matter of consumers simply trading up for more expensive wines. Rather, it appears that consumers buying at the lower ends of the DtC channel are not only purchasing less wine but are likely dropping out of the channel altogether.

Data shows that wine sales in both the on-premise and off-premise markets are down in 2025. The DtC shipping channel is not anomalous, though the 15% decline in volume of DtC shipments and 6% decline in the value of those shipments indicate that just as the DtC channel grew at faster rates than the overall wine market for the past decade-plus, it now appears to be declining at a faster rate than other purchasing channels.

Overview (Cont’d)

In 2025, winery DtC wine shipments represented 7% of the total off-premise market for domestically made wines. According to Jon Moramarco, managing partner at market research firm bw166, the total estimated off-premise sales of domestic table and sparkling wines was $51.5 billion. Representing approximately 7% of that market at $3.7 billion, the DtC channel declined from 2024, when it made up 8% of domestic off-premise sales. For perspective, this is down from 12% in 2021.

DtC as a Percent of Total Off-Premise $ Sales of Domestically Made Wines



2025 Key Takeaways

Largest one-year drop in both volume and value of DtC shipments

The 15% drop in volume and 6% decrease in the value of shipments from 2024 are the largest declines seen in 17 years of tracking the DtC wine shipping market. The channel contracted by 967,000 cases and $230 million in 2025, both records for the past 17 years. These results come as the channel saw an 11% increase in the average price per bottle shipped.

Fourth consecutive drop in volume and second consecutive drop in value of shipments

For the fourth year in a row, the volume of the DtC shipping channel has decreased. This is in tandem with a second straight year of decline in the value of DtC shipments.

Declines in all regions

2025 saw drops in the volume of DtC wine shipments across all regions in the U.S.; only one region, Napa, eked out a gain in value of shipments at 1%. The Rest of California region experienced a drop in volume of 32%, resulting in a 47% decline in the volume of shipments from Rest of California since 2021.

Largest wineries suffer most in DtC shipping downturn

The Large Winery category, those producing more than 500,000 cases annually, saw a 23% decrease in the volume of wines shipped direct-to-consumer, greater than any other winery size category.

All wine types decline in volume of shipments

No wine type escaped the downturn in shipments in 2025, with every wine tracked by this report showing lower volumes from 2024.

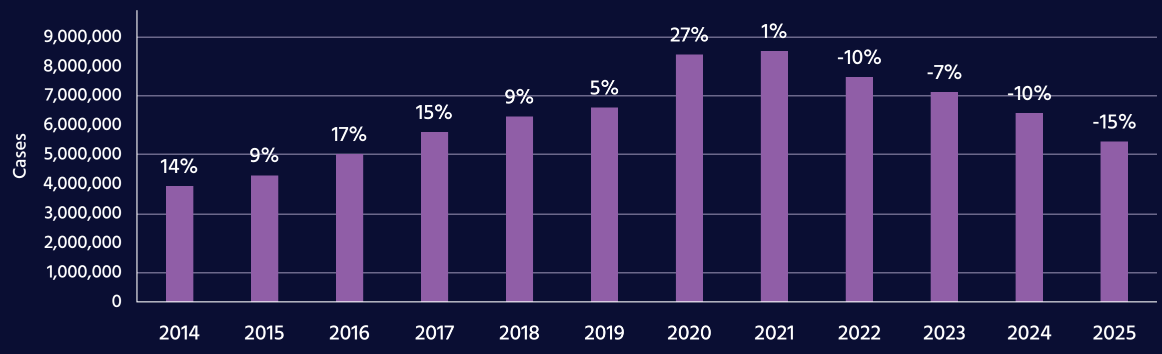
Shipments to California suffer significant decline

The most common destination of wine shipments, California, experienced $142 million in lost shipments in 2025, accounting for 62% of the channel's total loss in value in 2025.

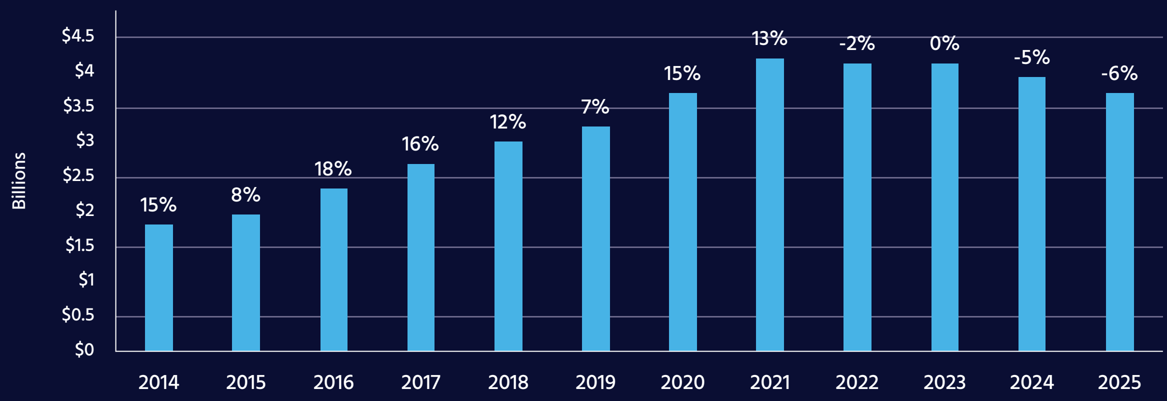
Least expensive wines experience largest loss in volume

The 2025 data confirms that purchasers of lower-priced wines are buying less and dropping out of the DtC shipping channel in greater numbers than buyers of higher-priced wines. Contrary to the narrative of premiumization, in which buyers trade up from lower- to higher-priced wines, this "mix shift" sees higher-priced wines capturing a larger percentage of the DtC shipping market as there are fewer buyers of lower-priced bottles.

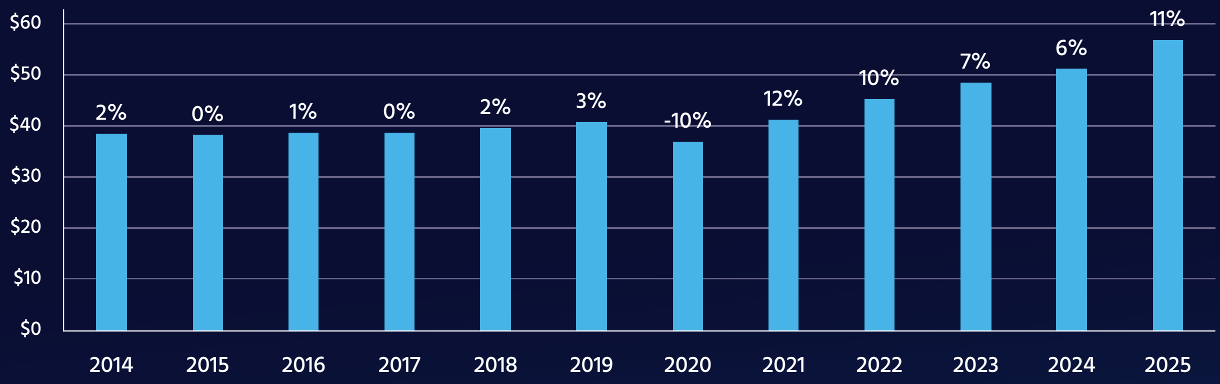
Volume of Shipments with Annual Change 2014-2025



Value of Shipments with Annual Change 2014-2025



Average Price Per Bottle Shipped with Annual Change 2014-2025



2025
Month-by-Month Analysis

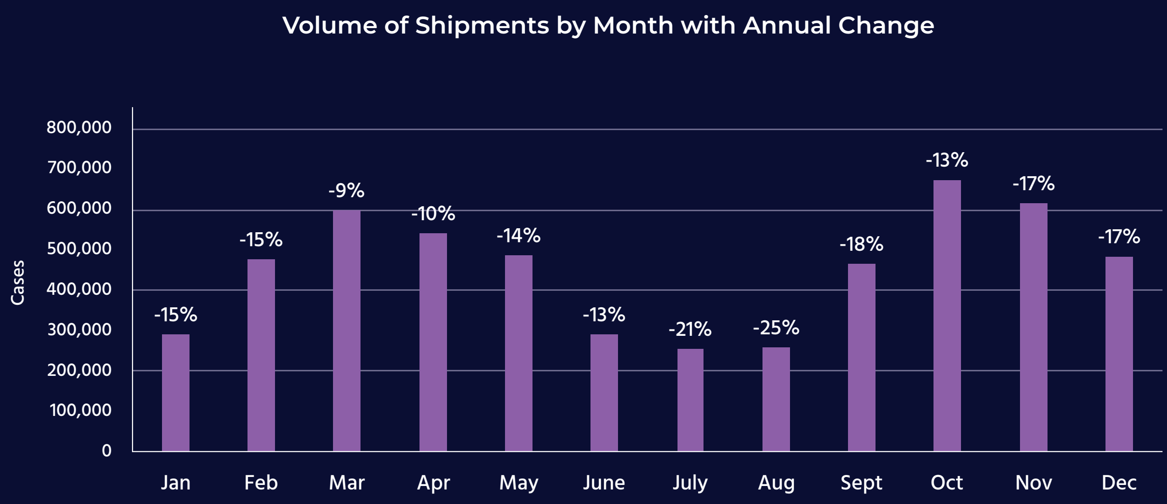
The familiar club release and weather-based patterns of wine shipments remained in place in 2025 despite the overall turmoil in the channel. Winter and summer months saw the smallest volume of shipments, while traditional wine club shipping months in spring and fall saw greater volumes shipped.

July and August saw particularly steep declines in the volume of DtC shipments, down 21% and 25%, respectively, from the previous year. DtC shipments in August were down more than 50% since 2021. A mere 15% of total 2025 DtC shipments were sent during the summer months of June, July, and August.

The spring months of March, April, and May saw an 11% year-over-year decrease in volume of shipments, a slight overperformance in a year that saw an overall 15% decline in total volume of shipments. Collectively, these months represent 30% of total shipments and 29% of the value of the DtC shipping channel overall.

Fall remained the season with the largest number of shipments, with September, October, and November responsible for 32% of all DtC shipping volume. Still, the fall experienced a 16% decrease in shipments from 2024.

October and November are notable for the fact that wine shipped during these months had an average price per bottle of $73.64 and $70.38, respectively. These prices represent a 14% and 15% increase over 2024, with October's average price per bottle shipped representing a nearly 50% gain over the average price per bottle shipped during October of the last pre-pandemic year of 2019.


Volume of Shipments by Month with Annual Change
Cases
800,000
700,000
600,000
500,000
400,000
300,000
200,000
100,000
0
-15%
-15%
-9%
-10%
-14%
-13%
-21%
-25%
-18%
-13%
-17%
-17%
Jan
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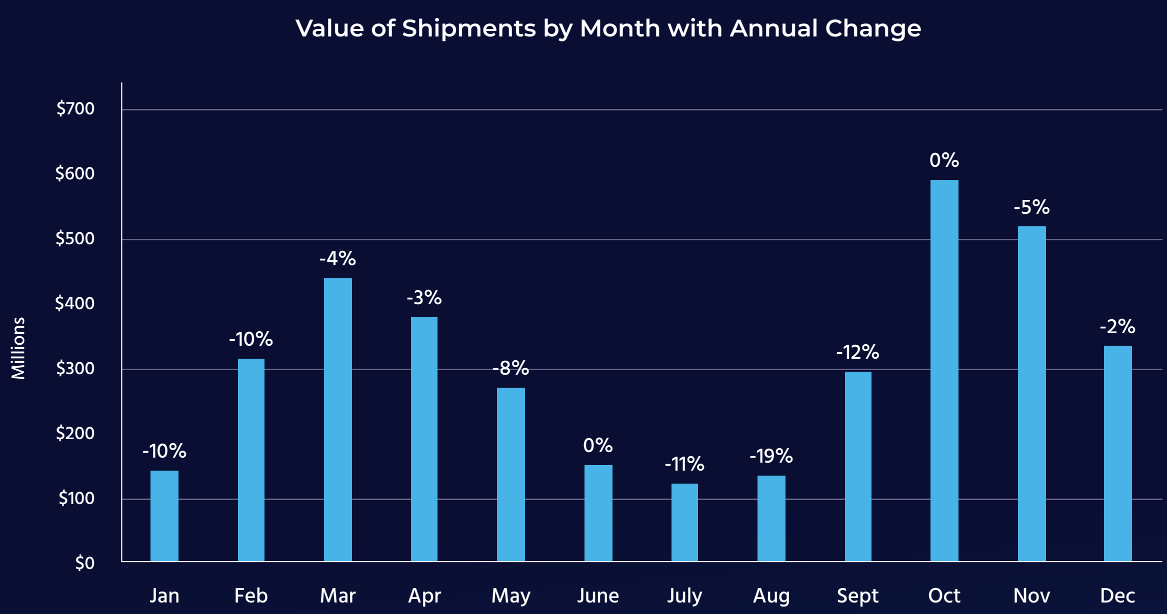
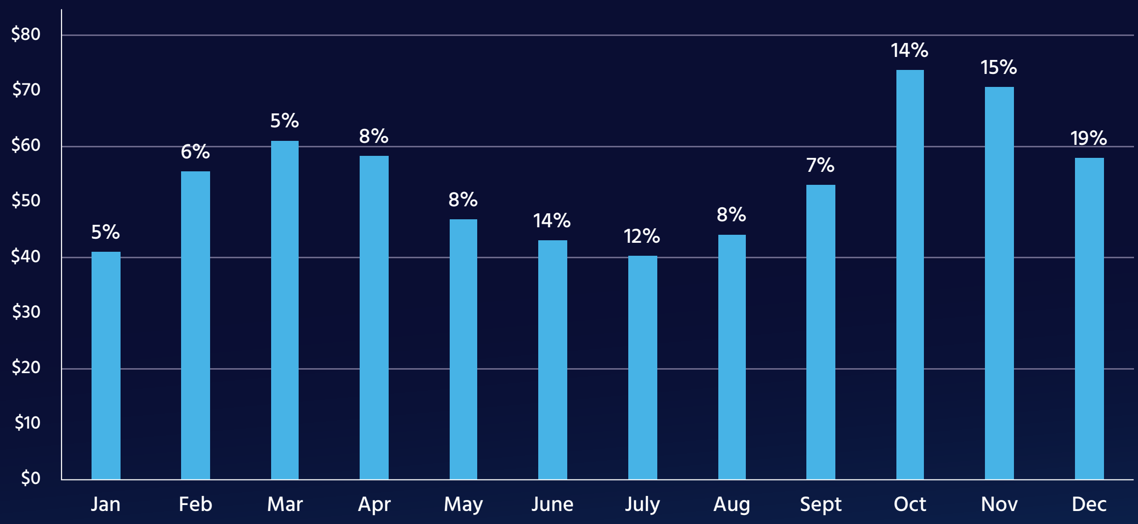
Aug
Sept
Oct
Nov
Dec


Value of Shipments by Month with Annual Change
Millions
$700
$600
$500
$400
$300
$200
$100
$0
-10%
-10%
-4%
-3%
-8%
0%
-11%
-19%
-12%
0%
-5%
-2%
Jan
Feb
Mar
Apr
May
June
July
Aug
Sept
Oct
Nov
Dec

Average Bottle Price by Month with Annual Change



2025 Analysis by Winery Region

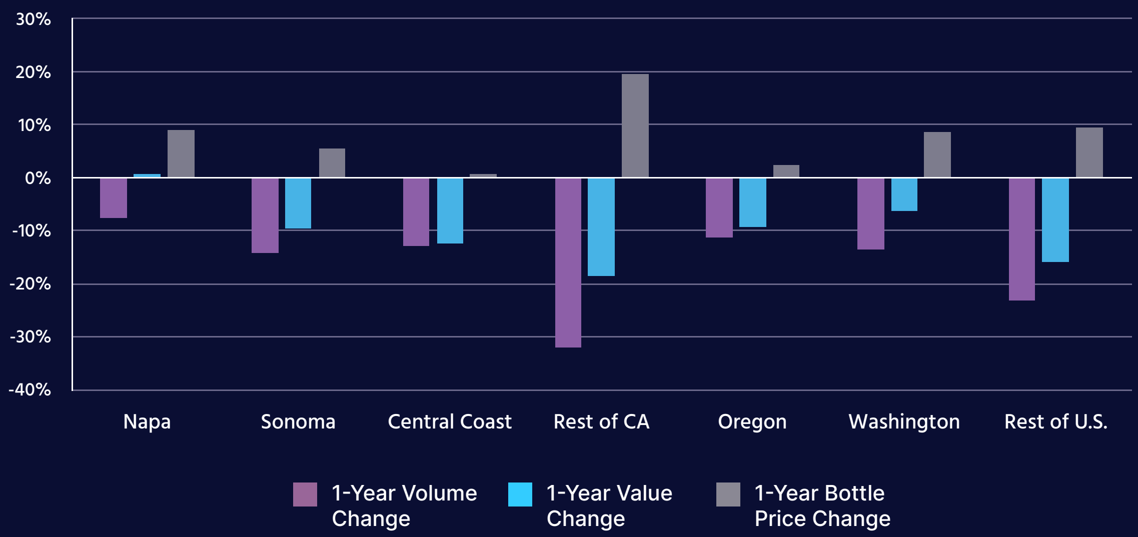
Due to the relative overachievement of Napa winery shipments in 2025, this region now represents 50% of the total value of the DtC winery shipping channel, up from 46% in 2024. This outcome was aided by significant declines in the value of shipments from Sonoma County and Central Coast wineries.

On the other end of the spectrum, value and volume of shipments from wineries in the Rest of U.S. regional category underperformed. The wineries in this region outside the West Coast saw a 23% year-over-year drop in volume of DtC shipments and a 16% decline in value of DtC shipments. This represents a reversal of their results in 2024, when this wildly diverse set of wineries bested all other regions.

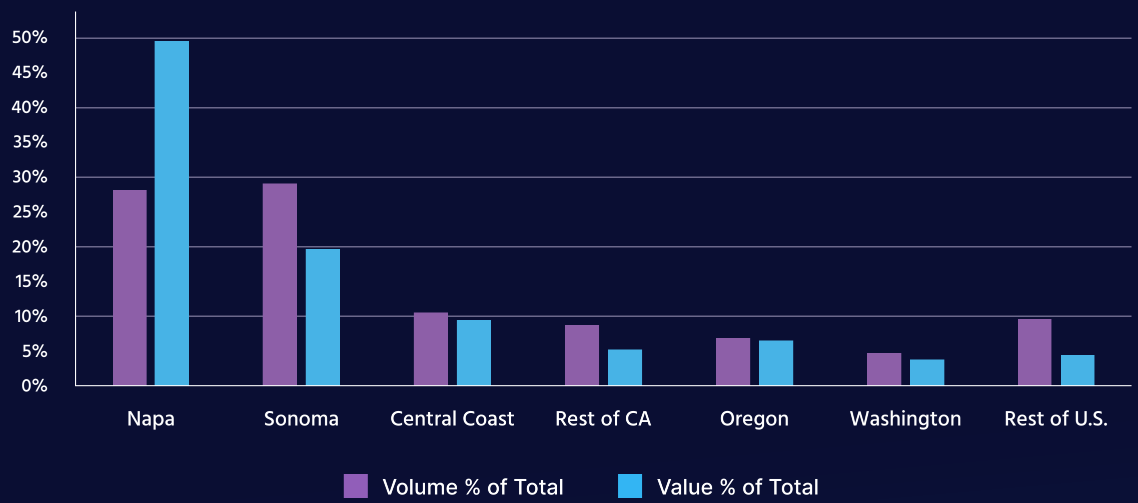
Washington State wineries outperformed the overall market, but not by considerable measure. Washington wineries saw a 6% ebb in value of DtC shipments, while volume of shipments declined by 13% in 2025, slightly better than the overall channel average.

The Rest of California region, representing California wineries located in areas outside Napa, Sonoma, and the Central Coast, demonstrated the law of demand — when prices rise, sales decline and vice versa. In 2025, the Rest of California wineries saw a 19% increase in the average price per bottle shipped over 2024 while the volume of shipments decreased 32%.

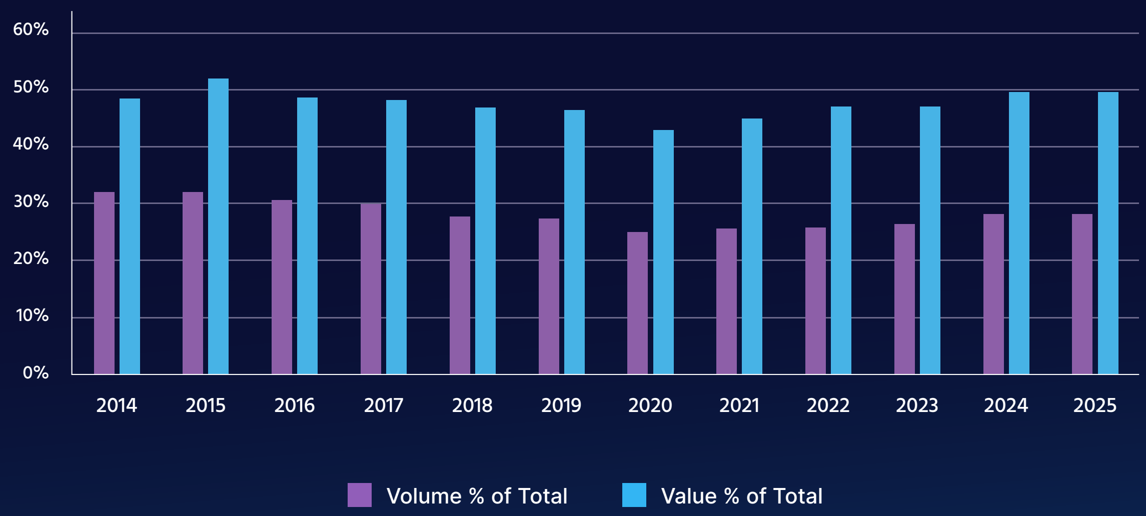
Change in Volume, Value & Price by Region



Share of Total Volume & Value by Region



Napa: Share of Volume & Value 2014-2025



Napa County

With the average price per bottle shipped reaching $99.97, up 9% over 2024, Napa wineries are on a trajectory to reach more than $100.00 per bottle. By comparison, the other six regions tracked in this report together achieved a $39.80 average price per bottle shipped in 2025. Comparing Napa to other regions highlights two distinct markets.

As noted above, Napa County outperformed other regions by adding 1% to its value of DtC shipments in 2025 and losing 8% of volume, far below the overall shipping market's 15% volume decline. Napa clearly benefited from the willingness of customers at the high end of the market to continue buying compared to those at the lower end.

Cabernet Sauvignon, Red Blend, Chardonnay, Pinot Noir, and Sauvignon Blanc make up the top five wines by value shipped from Napa wineries, representing 73% of all wines shipped in 2025. Of these five top wines, Chardonnay stood out. Chardonnay shipments achieved a 14% gain in value and a 17% increase in average price as volume dipped only 2% from 2024 levels. This suggests a healthy demand for high-end Napa Chardonnay.

Napa Cabernet Sauvignon, with an average bottle price (ABP) of $154.58, and Red Blend, with an ABP of $138.81, both exceeded the performance of the overall DtC shipping channel.

While Napa County wineries did not escape the downturn in 2025, it's clear their ultra-premium wines helped mitigate the damage. Going forward, it will be important to watch Napa DtC wine shipping for signs that a decline is spreading to the top of the market.

Total Value	$1,839,967,504
Total Volume in Cases	1,533,783
Avg. Price Per Bottle	$99.97
Value % of Total	50%
Change in Value	1%
Volume % of Total	28%
Change in Volume	-8%
Change in Avg. Price Per Bottle	9%

Sonoma County

Sonoma County is a sprawling region that includes wineries of various types and sizes, from the very large to tiny micro-wineries. As a result, this region beyond all others is the best proxy for the entire shipping channel. It's no surprise that the results for 2025 from Sonoma tracked the overall DtC shipping channel rather closely.

2025 was the fourth consecutive year that Sonoma wineries saw year-over-year declines in both volume and value of wine shipped. The region's 14% drop in volume tracked the overall DtC channel, while the 10% decline in value of shipments reflected the fact that Sonoma wineries took a smaller-than-average 5% increase in average price per bottle shipped to $38.48.

Of the top five wines shipped by Sonoma County wineries, which represent fully two-thirds of wines shipped from the region, none significantly outperformed the overall market. Pinot Noir, which represents 19% of the total volume of wine shipped, saw a 13% decline in volume and a 10% drop in the value of shipments. Notably, Sonoma Pinot Noir shipments saw only a 3% increase in the average price per bottle shipped.

The other four wines in Sonoma's top five — Cabernet Sauvignon, Chardonnay, Zinfandel, and Red Blend — all saw significant decreases in shipments. Red Blend shipment declines were particularly notable; despite seeing a 2% reduction in the average price per bottle shipped, they still experienced a 15% drop in volume and a 17% decline in the value of those shipments.

Total Value	**$732,028,256**
Total Volume in Cases	**1,585,358**
Avg. Price Per Bottle	**$38.48**
Value % of Total	**20%**
Change in Value	**-10%**
Volume % of Total	**29%**
Change in Volume	**-14%**
Change in Avg. Price Per Bottle	**5%**

California Central Coast

While 2025 was a down year for Central Coast shipping, the region is notable as one where the average price per bottle shipped remained relatively flat. However, this region saw a 13% decline in volume shipped and a notable 12% decrease in the value of shipments. Since 2019, the volume of shipments from Central Coast wineries has plummeted 29%, while the total value of shipments has dropped 7%.

The top five wines shipped from Central Coast wineries represent 69% of the region's shipments and consist of Red Blend, Pinot Noir, Cabernet Sauvignon, Other Red, and Chardonnay.

The performance of Central Coast Cabernet Sauvignon is notable. This wine, representing 11% of all shipments, thoroughly outperformed all other wines from this region as well as the overall DtC shipping channel. Despite the average bottle price for Cabernet Sauvignon increasing by 10% over 2024, the volume of shipments remained flat, and the value of shipments increased by 10%. This is an astounding success given the near-total downturn in wine shipments in 2025.

The same cannot be said for Central Coast Pinot Noir shipments in 2025. With a 7% decrease in the ABP of Pinot Noir shipped, volume dropped by 18% from 2024, and the value of shipments fell off significantly, to the tune of 23%. The value of Central Coast Pinot Noir shipments has declined 11% since 2019, the last pre-pandemic year.

Meanwhile, the region's share of both overall value and overall volume of the DtC shipping channel has remained steady at roughly 11% of both metrics since this report began tracking Central Coast shipments in 2019.

Total Value	$348,099,115
Total Volume in Cases	575,410
Avg. Price Per Bottle	$50.41
Value % of Total	9%
Change in Value	-12%
Volume % of Total	11%
Change in Volume	-13%
Change in Avg. Price Per Bottle	1%

Rest of California

Encompassing all California wineries located outside Napa County, Sonoma County, and the Central Coast, the Rest of California region suffered a drastic reduction in shipments in 2025. With a hefty 19% increase in the average bottle price shipped, volume of shipments cratered by 32%. Even with the sizable increase in prices, the value of Rest of California shipments still fell by 19% in 2025.

Since 2019, Rest of California shipments have shrunk by 15%. The region has been able to mitigate a more precipitous decline in volume by either wildly outperforming the overall DtC shipping channel or tracking the channel in the six years since 2019. Clearly, that streak ended in 2025.

The diversity of wines in this region is greater than in most of the other regions tracked in this report. As a result, the top five wines shipped add up to only a relatively modest 50% of all wines shipped. The top five wines from this region were Red Blend, Cabernet Sauvignon, Other Red, Zinfandel, and Chardonnay. All these wines saw significant drop-offs in volume in 2025, ranging from 26% for Cabernet Sauvignon to a 38% decrease in volume for Zinfandel.

Cabernet Sauvignon shipments from the Rest of California warrant attention. The average price per bottle increased by 53% over 2024, an unprecedented increase for a wine that represents 11% of the region's total shipments. This increase in the ABP of Cabernet Sauvignon shipped was accompanied by a 26% decrease in volume and a 14% increase in the value of shipments. Oddly enough, this performance represents relative strength for Cabernet Sauvignon shipments from the Rest of California region.

Total Value	**$194,548,667**
Total Volume in Cases	**471,632**
Avg. Price Per Bottle	**$34.38**
Value % of Total	**5%**
Change in Value	**-19%**
Volume % of Total	**9%**
Change in Volume	**-32%**
Change in Avg. Price Per Bottle	**19%**

Oregon

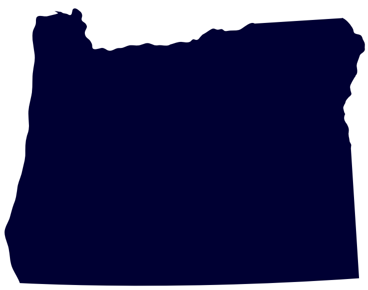
Oregon's wines trade at higher prices, and many wineries attract more well-heeled buyers. It is perhaps for this reason that Oregon DtC shipments, while still subject to a continued decline in demand, did not see quite as startling a plunge from 2024 as did other regions. In 2025, Oregon wineries' average price per bottle shipped increased by 2% over the previous year, while volume fell by 11%. The value of Oregon shipments dropped by 9%.

When it comes to the Oregon DtC shipping channel, everything is about Pinot Noir — as goes Pinot Noir, so goes the state. Pinot Noir shipments represent 57% of all Oregon winery DtC shipments and 67% of the value of shipments. At an average $62.53 per bottle shipped, Pinot Noir is outpaced only by Oregon Red Blend with its $68.38 ABP, which represents only 4% of the state's shipping volume. In 2025, Oregon Pinot Noir shipments matched or slightly outperformed the overall DtC shipping channel. The 3% increase in average price per bottle shipped in 2025 was coupled with a 12% decrease in shipments from 2024. The value of shipments shrank by 9%.

The DtC shipping performance of Oregon Pinot Noir in 2025 is a follow-on to 2024 when the category also outperformed the overall DtC Channel. This suggests that the allure of Oregon Pinot Noir might provide a modicum of resilience in an exceptionally difficult market.

Chardonnay, Rosé, Other Red, and Red Blend round out the top five wines shipped from Oregon wineries. Chardonnay, which represents 12% of all shipments, saw an unusual decrease in average price per bottle of 11%, which helped moderate the decline in volume of shipments to 7%, but led to a decline in value from 2024 of 17%.

Total Value	**$239,867,590**
Total Volume in Cases	**376,616**
Avg. Price Per Bottle	**$53.08**
Value % of Total	**6%**
Change in Value	**-9%**
Volume % of Total	**7%**
Change in Volume	**-11%**
Change in Avg. Price Per Bottle	**2%**



Washington State

In the four years prior to the pandemic, Washington State wineries were riding a wave of DtC shipping expansion, surpassing the performance of the overall channel. Even during the pandemic year of 2020, when swarms of homebound drinkers entered the online market and pushed down the average price of bottles shipped, Washington wineries enjoyed increased shipments without lowering prices.

During the next three chaotic years in the DtC market, Washington wineries either matched the overall performance of the DtC channel or outperformed it. In 2024, Evergreen State wineries slightly underperformed, while in 2025, they returned to overperforming. While Washington State, like all regions, has succumbed to the realignment in the wine market, its wineries appear to possess ongoing resilience and increasing interest among consumers using the DtC shipping channel.

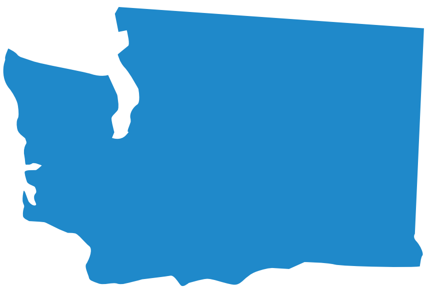
Last year, Washington State wineries saw a 13% decline in volume of wine shipped, while their average price per bottle shipped increased by 8% from 2024 to $45.89.

Total Value	**$162,268,485**
Total Volume in Cases	**294,685**
Avg. Price Per Bottle	**$45.89**
Value % of Total	**4%**
Change in Value	**-6%**
Volume % of Total	**5%**
Change in Volume	**-13%**
Change in Avg. Price Per Bottle	**8%**

The value of shipments contracted by 6%. While certainly disappointing, it is a slight outperformance. Today, Washington State wineries ship the least amount of wine by both volume and value among the regions tracked in this report.

Washington State is defined by its Red Blend and Cabernet Sauvignon, which together represent nearly 46% of all DtC shipments and individually about 23% and 22%, respectively, of the volume of shipments. The two wines saw their average price per bottle shipped increase by about 11% and 12%, respectively. Together, the volume of shipments of these two wines decreased by 13% while their value of shipments declined by nearly 4%.

Other Red, Merlot, and Syrah make up the rest of the top five wines shipped by volume. Other Red had a solid year with price, volume, and value essentially flat from 2024. However, Merlot and Syrah shipments dragged down the state's numbers with 17% and 21% declines, respectively, in the volume of wines shipped.



Rest of United States

After outperforming the overall DtC shipping channel the past two years, shipments from the diverse set of wineries in the Rest of U.S. category fell off considerably in 2025. While the 9% increase in average price per bottle shipped from these wineries approximated the overall channel, the 23% decrease in volume of wine shipped and 16% drop in the value of shipments represent a significant decline in demand from 2024.

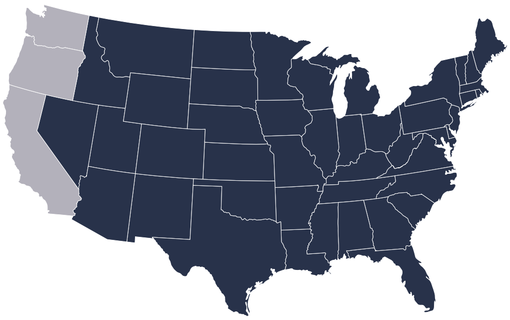
This is not an insignificant collection of wineries, but instead represents all wineries located outside the West Coast, including those from Texas, New York, Virginia, Michigan, Arizona, and elsewhere. Together, they account for 11% of all DtC-shipped wines, though their lower-than-average price per bottle shipped kept them at 5% of the total value of all wines shipped.

The diversity of wines produced at these wineries is impressive, as indicated by the top five most-shipped wines: Red Blend, Other Red, Riesling, Other White, and Other. A number of hybrids and uncommon varieties are cultivated by wineries in this category.

Shipments of Red Blend indicate the overall difficulty these wineries faced in 2025. The volume of Red Blend shipped, representing 17% of all wines shipped from the region, declined by 45% in 2025, while the value of wines shipped fell 34%, all with a 19% increase in the average price per bottle shipped.

On the other side of the ledger, Riesling shipments, representing 9% of the total volume of wine shipped from the Rest of U.S. region, wildly outperformed. Riesling shipments saw 6% growth in volume and a 12% climb in the value of shipments, all while increasing their average price per bottle shipped to $22.99, a 6% step up over 2024.

Total Value	**$188,332,956**
Total Volume in Cases	**600,576**
Avg. Price Per Bottle	**$26.13**
Value % of Total	**5%**
Change in Value	**-16%**
Volume % of Total	**11%**
Change in Volume	**-23%**
Change in Avg. Price Per Bottle	**9%**



2025

Analysis by Winery Production Size

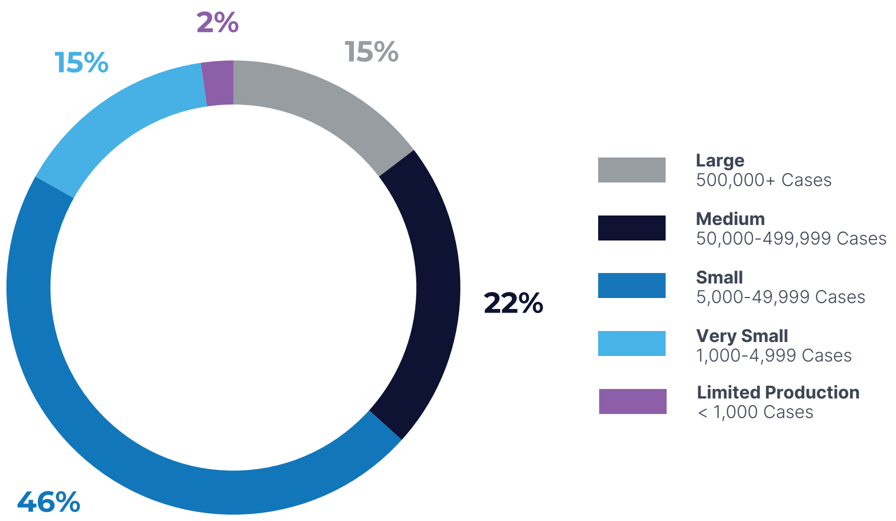
Consumers who purchase lower-priced wines have for three years now retreated from the DtC channel at a faster pace than other purchasers. This trend is once again exemplified by the largest production wineries, with their lower average prices, seeing the greatest decreases in volumes of wine shipped DtC. In general in 2025, the larger the winery production size, the lower the average price per bottle shipped, which corresponded to a larger decrease in volumes of wines shipped.

Care should be taken not to label this trend as premiumization, since that characterization implies buyers are trading up to higher-priced wines. Rather, higher-priced wines — and the smaller-sized wineries that tend to produce more of them — are capturing a larger percentage of the DtC shipping channel because fewer lower-priced wines are being shipped. “Mix-shift” is a more accurate term for what is currently happening in the DtC shipping channel. The change in the mix of wines being shipped, combined with inflation and attempts to recoup increased shipping costs, is shifting the average price per bottle shipped upward.

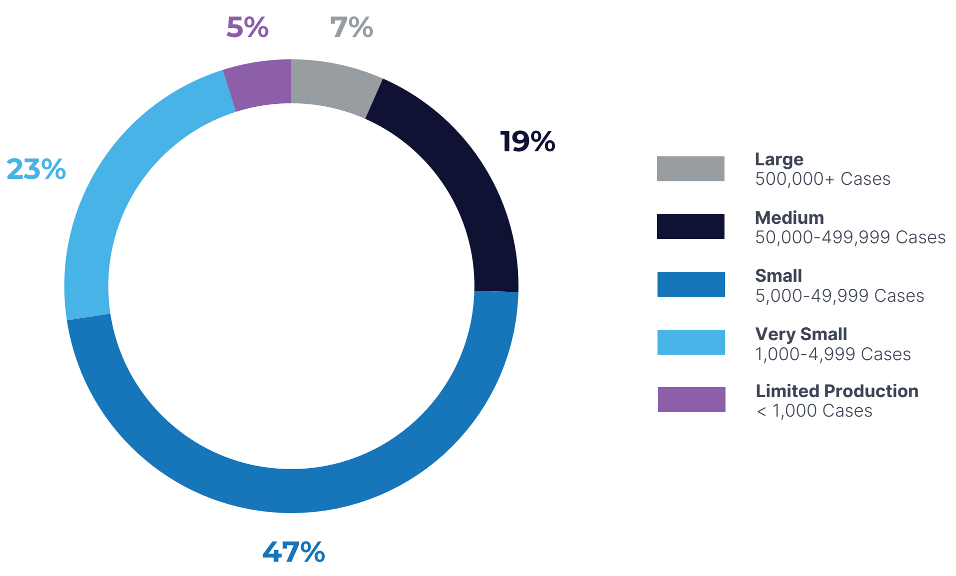
In 2025, wineries in the large production category saw the average price per bottle shipped increase by 14% from 2024 and experienced a 23% decrease in volume of shipments. Meanwhile, the smallest production size wineries, the limited production category, increased their average price per bottle shipped by a similar 15%. However, this category saw only a 5% diminishment in volume of shipments from 2024.

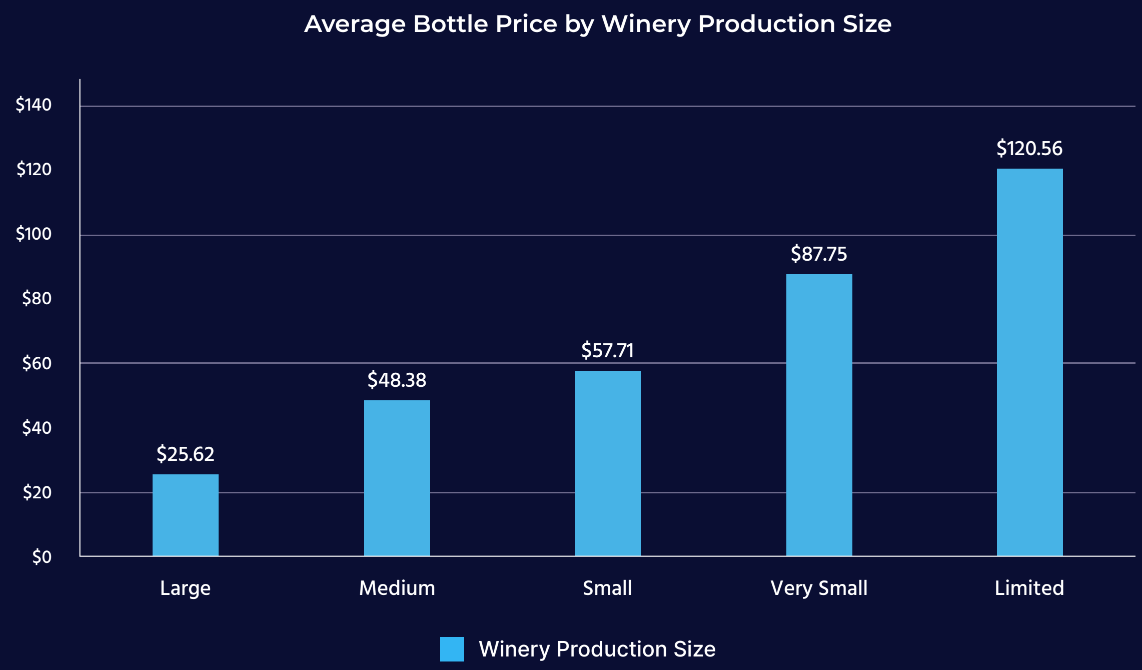
Buyers of higher-priced wines are receiving fewer shipments, though the decline is far less severe than the drop affecting larger wineries with their lower-priced wines.

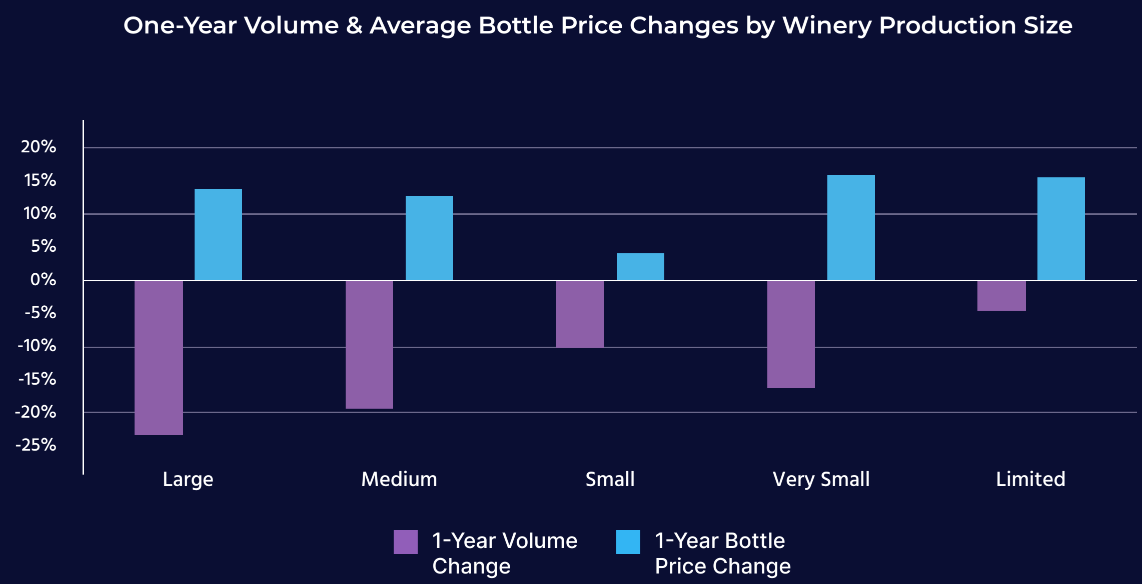
Share of Volume by Winery Production Size



Share of Value by Winery Production Size




Average Bottle Price by Winery Production Size
$140
$120
$100
$80
$60
$40
$20
$0
$25.62
$48.38
$57.71
$87.75
$120.56
Large
Medium
Small
Very Small
Limited
Winery Production Size


One-Year Volume & Average Bottle Price Changes by Winery Production Size
20%
15%
10%
5%
0%
-5%
-10%
-15%
-20%
-25%
Large
Medium
Small
Very Small
Limited
1-Year Volume Change
1-Year Bottle Price Change

Large Winery Size

(500,000 or more cases produced annually)

The share of the total volume of wine DtC-shipped by the largest wineries has fallen from 19% in 2022 to 15% in 2025 as buyers of lower-priced wines have retreated from the DtC shipping channel. Notably, in that same period, these wineries have increased their average price per bottle shipped by 45% as inflation has taken its toll and shipments of these wineries' lower-priced wines have lost buyers.

In 2025, these wineries, which operate primarily in the three-tier channel, decreased their volume of shipments by 23% on a 14% increase in average price per bottle shipped to $25.62. The value of these shipments declined by 13%. This represents a significant underperformance versus the overall channel for the third year in a row.

Total Value	**$244,710,569**	Change in Value	**-13%**
Total Volume in Cases	**795,874**	Volume % of Total	**15%**
Avg. Price Per Bottle	**$25.62**	Change in Volume	**-23%**
Value % of Total	**7%**	Change in Avg. Price Per Bottle	**14%**

Medium Winery Size

(50,000 - 499,999 cases produced annually)

Medium-sized wineries are a highly diverse set, with some distributing primarily through wholesalers and others highly invested in the DtC shipping channel. Because this category includes many producers selling lower-priced wines, the overall performance has been grim. 2025 is the third year in a row that this production category has seen drops in volume and value of shipments and has underperformed the overall channel.

With a 13% increase in the average price per bottle shipped from 2024, medium-sized wineries experienced a 19% decrease in volume of DtC shipments, leading to a 9% drop in the value of shipments for the category. Since 2020, these wineries' DtC shipments have seen a 46% increase in the average price of a bottle shipped.

Total Value	**$696,741,695**	Change in Value	**-9%**
Total Volume in Cases	**1,200,156**	Volume % of Total	**22%**
Avg. Price Per Bottle	**$48.38**	Change in Volume	**-19%**
Value % of Total	**19%**	Change in Avg. Price Per Bottle	**13%**

Small Winery Size

(5,000 - 49,999 cases produced annually)

The majority of wineries in the U.S. are small, family-owned operations that rely extensively on direct-to-consumer sales and shipping. The small production category is the sweet spot for DtC shipments, indicated by the fact that in 2025, just under 50% of all shipments originated from wineries within this production category. Since 2022, the share of total volume of shipments these wineries are responsible for has risen from 42% to 46%.

In 2025, these wineries slightly outperformed the overall channel yet still lost ground. The category's volume of DtC shipments declined by 10% from 2024 and the value of shipments fell 6% on a modest 4% increase in average price per bottle shipped.

Total Value	**$1,748,307,109**
Total Volume in Cases	**2,524,678**
Avg. Price Per Bottle	**$57.71**
Value % of Total	**47%**

Change in Value	**-6%**
Volume % of Total	**46%**
Change in Volume	**-10%**
Change in Avg. Price Per Bottle	**4%**

Very Small Winery Size

(1,000 - 4,999 cases produced annually)

Very small wineries rely heavily on DtC sales and shipping. While responsible for only 15% of the total volume of shipments in 2025, they reaped 23% of the total value of all shipments. This is due to the higher prices their wines command. As with the past two years when the DtC shipping channel faced challenging conditions, these very small wineries' performance again slightly outpaced the overall channel in 2025.

While the volume of shipments from very small wineries fell 16% from 2024, the value of their shipments slackened by only 3%. This came on a 16% increase in average price per bottle shipped. Again, this better-than-average performance by the very small production category of wineries is due to higher-end buyers pulling back at a slower pace than buyers at the low end of the channel.

Total Value	**$833,982,604**
Total Volume in Cases	**791,989**
Avg. Price Per Bottle	**$87.75**
Value % of Total	**23%**

Change in Value	**-3%**
Volume % of Total	**15%**
Change in Volume	**-16%**
Change in Avg. Price Per Bottle	**16%**

Limited Production Winery Size

(Up to 999 cases produced annually)

Roughly half of all the wineries in the United States produce fewer than 1,000 cases of wine annually and fall into the limited production category. Collectively, they generate only 2% of the overall volume of DtC shipments. However, they bring in 5% of the value of all shipments. These wineries are almost entirely dependent on DtC sales, whether shipped or carried out from their wineries.

With their higher average price per bottle shipped — $120.56 — you would expect the limited production size wineries to outperform the overall market, and they did though not without some travail. The category saw a 5% decline in volume on a 15% climb in average price per bottle shipped, leading to a 10% increase in the value of shipments. For those seeking positive signs in the DtC shipping channel, the performance of these smallest wineries offers a faint glimmer.

Total Value	**$181,370,595**
Total Volume in Cases	**125,363**
Avg. Price Per Bottle	**$120.56**
Value % of Total	**5%**

Change in Value	**10%**
Volume % of Total	**2%**
Change in Volume	**-5%**
Change in Avg. Price Per Bottle	**15%**

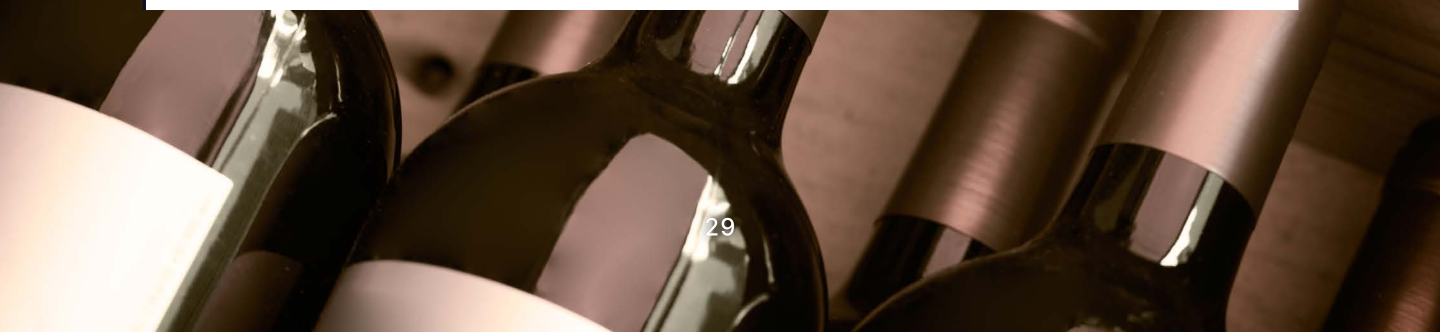
2025 Analysis by Varietal

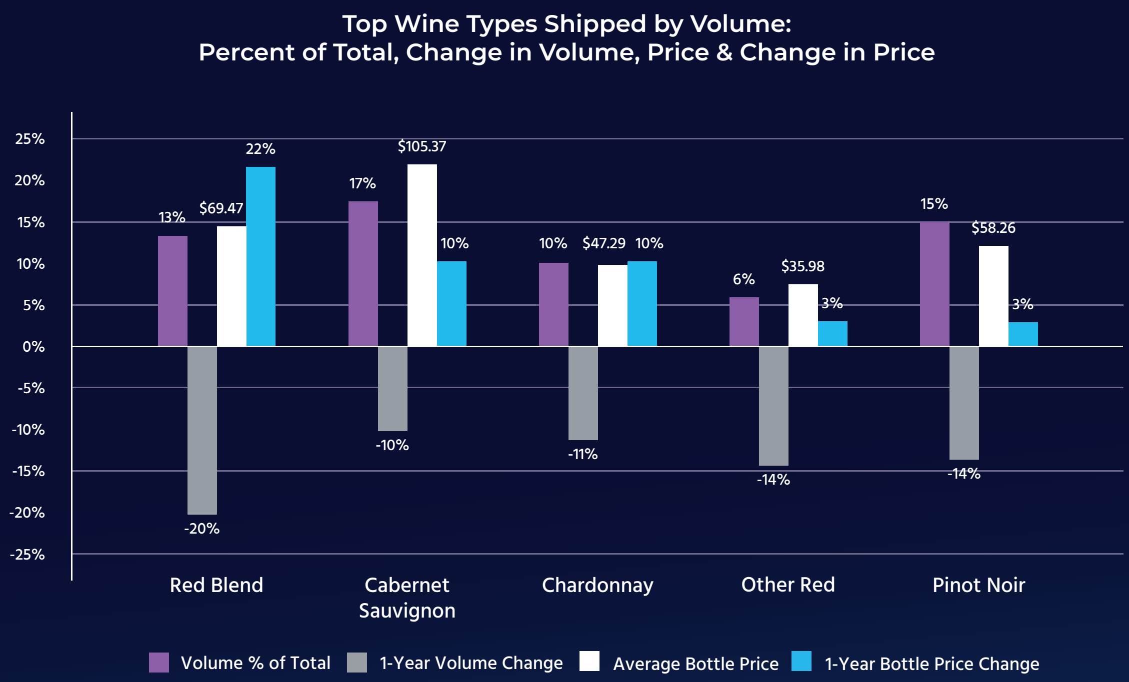
Over 60% of the entire volume of the DtC shipping channel is accounted for by shipments of Cabernet Sauvignon, Pinot Noir, Red Blend, Chardonnay, and Other Red. None of these wines evaded the continued downturn in the DtC channel. In fact, of the 20 different wine categories tracked in this report, not one escaped a decline in volume of shipments and only one, the Other wine category, recorded an increase in value of shipments (+29%), primarily due to a 40% increase in average price per bottle shipped. (The Other wine category includes, but is not limited to, native and European varieties such as Symphony, Muscadine, Albariño, Frontenoc, and Carignan.)

Of the most commonly shipped wines, Red Blend stands out. Representing 13% of the total volume of shipments, Red Blend lost 20% of its volume from 2024. This, along with a 22% increase in the average price per bottle shipped, resulted in a 3% decrease in year-over-year value of Red Blend shipments. Declines in Red Blend shipments accounted for 19% of the overall drop in DtC shipping volume in 2025.

While patterns are difficult to discern from examining DtC shipments of specific wines, it is notable that many less expensive wines suffered the greatest declines in volume. Moscato, Pinot Gris, and White Blend, all having among the lowest average prices per bottle shipped, each lost 30% of their volume from 2024. Of the wines tracked with average prices per bottle shipped below $35.00, only two declined by less than 14% of volume from the previous year.

At the same time, there were significant decreases in volume and value recorded among more expensive wine types. For example, Red Blend, with an ABP of $69.47, witnessed a 20% drop in volume; Merlot, at $48.29 average bottle price shipped, saw a 16% decline in volume. In sum, while certain elements of the DtC wine market and certain product types were hit hardest, none escaped the downturn.




Top Wine Types Shipped by Volume:
Percent of Total, Change in Volume, Price & Change in Price
25%
20%
15%
10%
5%
0%
-5%
-10%
-15%
-20%
-25%
13%
$69.47
22%
-20%
17%
$105.37
10%
-10%
10%
$47.29
10%
-11%
6%
$35.98
3%
-14%
15%
$58.26
3%
-14%
Red Blend
Cabernet Sauvignon
Chardonnay
Other Red
Pinot Noir
Volume % of Total
1-Year Volume Change
Average Bottle Price
1-Year Bottle Price Change

2025 Analysis by Destination of Shipments

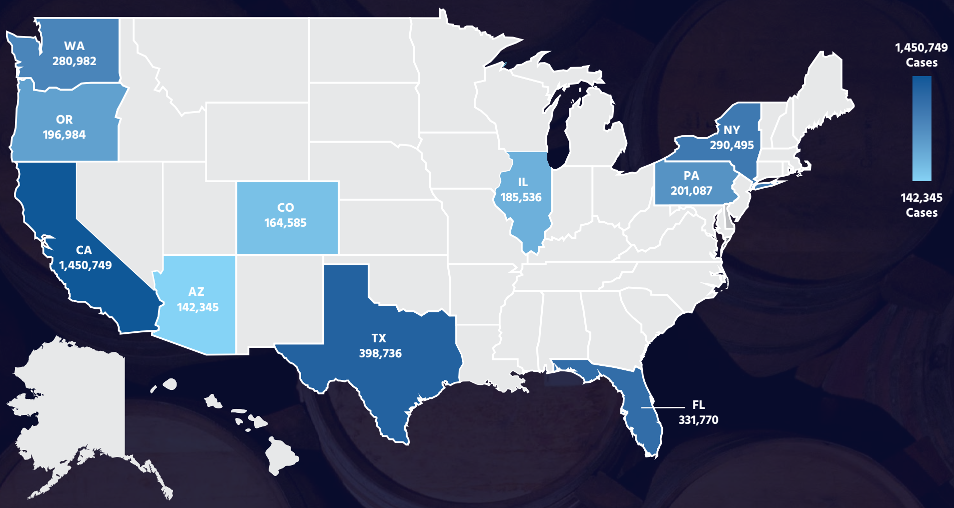
Looking at the 2025 DtC wine shipping landscape by the destination of shipments, one development stands out above all: California's drag on shipments. In 2025, the total volume of wine shipped DtC to California residents decreased by 19% from 2024, an underperformance of the entire DtC channel. The value of those shipments also fell by 13%. This amounts to roughly $142 million in lost shipments to California, representing 62% of the total drop in DtC shipping value in 2025. What's notable here is that California, as a destination for wine shipments, represents 27% of the total DtC channel.

Making sense of the precipitous drop in wine shipments to California residents is complex. In addition to overall slowing wine purchases, tasting room visits contribute. Californians make up most visitors, and though they buy in person, they frequently opt for shipping. According to Community Benchmark, visits to the state's wineries in 2025 declined in fairly sharp measure. Fewer visits to tasting rooms means fewer wine club memberships, which will in turn result in reduced shipments.

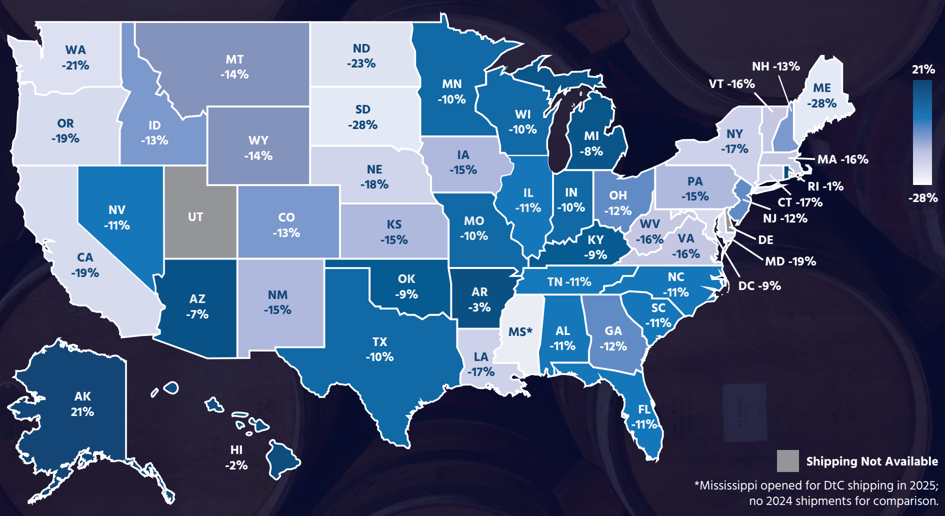
Only one state showed a year-over-year increase in the volume of shipments to their residents. Alaska saw a 21% gain over 2024; however, this is almost surely a predictable rebound from the previous year, which saw a 50% decline in shipments to the state's residents due to a revamp in Juneau's DtC licensing scheme. In July 2025, Mississippi opened for direct wine shipments; in that partial year of shipping, fewer than 1,000 cases reached the state's consumers. Rhode Island residents, who are required to first visit a winery before receiving a shipment of wine, saw a mere 1% decline in the volume of shipments from 2024.

Overall, the top five destinations for wine shipments remained unchanged in 2025 compared to 2024. California is the overwhelming top destination for shipments, holding on to 27% of total volume, down from 28% in 2024. Texas continues as the second most common destination for shipments at 7% of total volume. Florida is third with 6% of all shipments, and residents in Washington State and New York each receive 5% of all DtC shipments. All the top five states saw decreases in the volume of shipments, while only Florida saw an increase in the value of shipments (+8%), due to a considerable 21% increase in the average price per bottle shipped into the state.

Total Volume of Shipments, Top 10 States



One-Year Volume Change by State



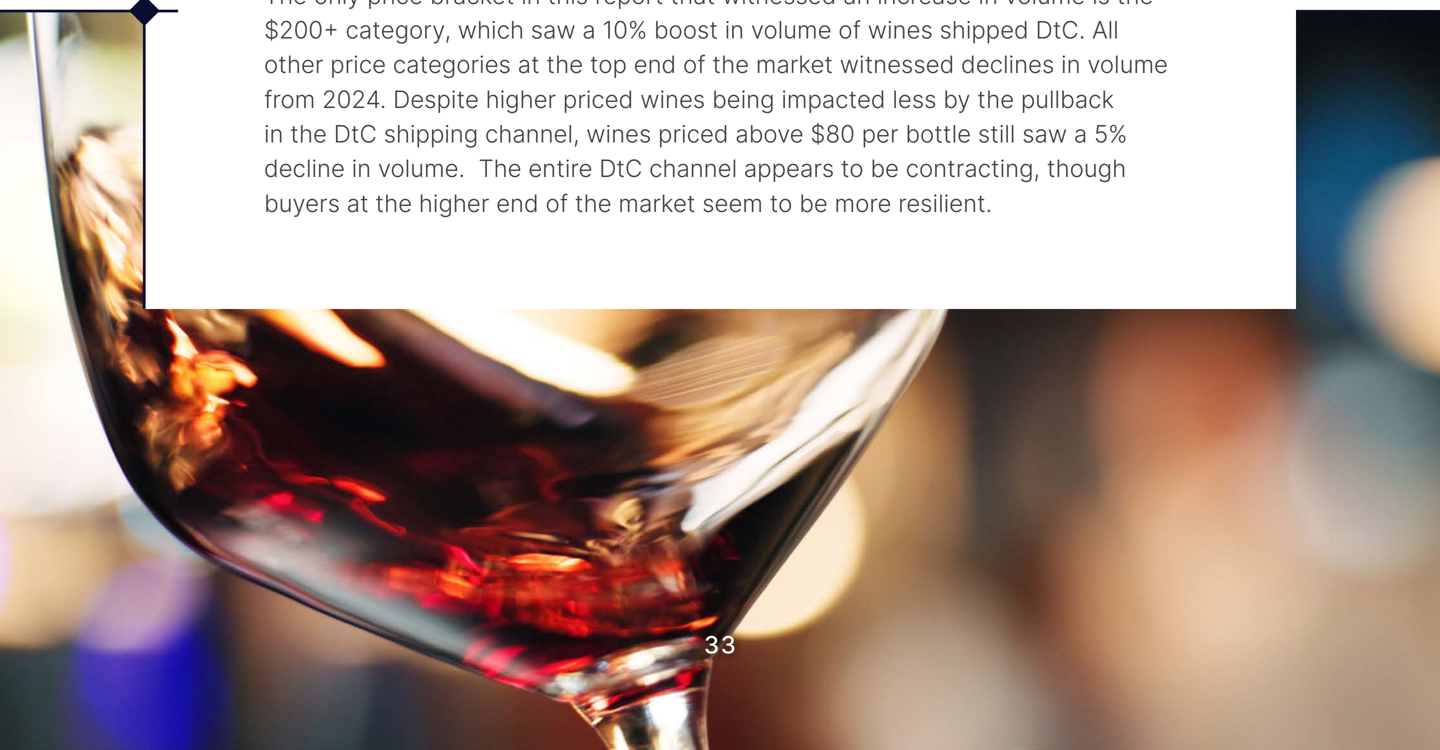
2025 Analysis by Price

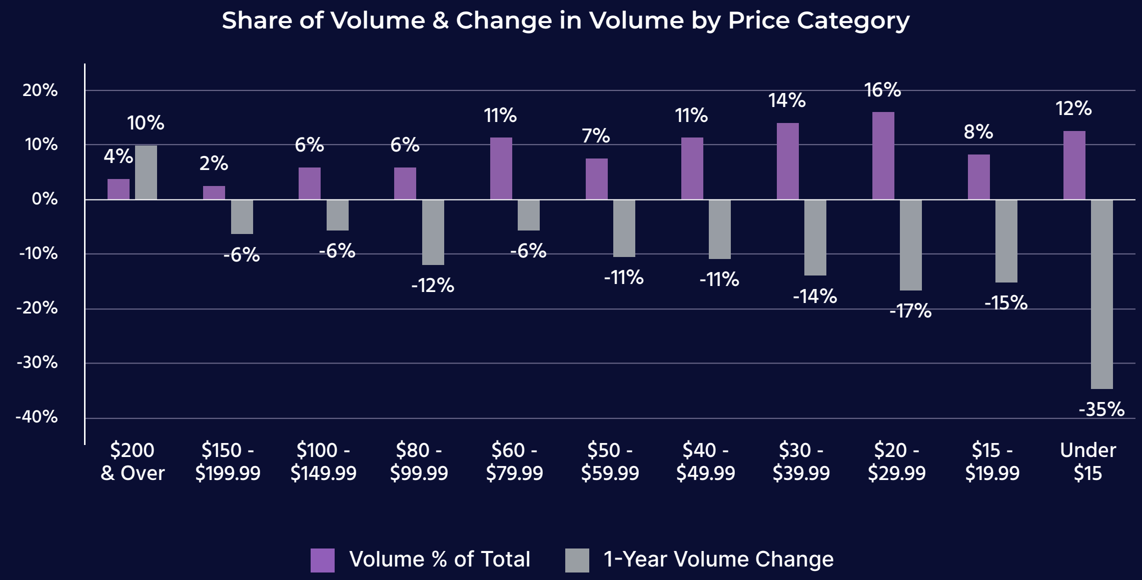
Examining 2025 DtC shipments by wine price category is extraordinarily revealing. The correlation is near perfect: the less expensive the wine, the greater the drop in volume and value of wine shipments.

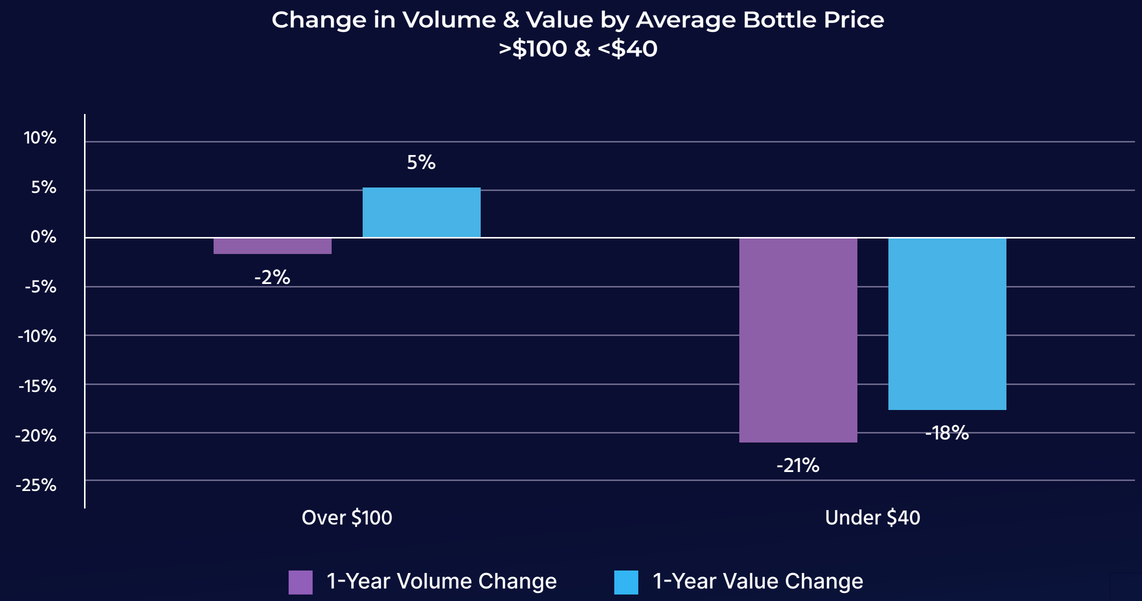
The lowest price category within the DtC channel saw a significant reduction in volume of shipments in 2025: down 35% from 2024. For a decade, the under $15 category of wines has been the volume leader in this report. As consumers who purchased these wines dropped out of the DtC market in 2025, these wines are no longer the most shipped. That honor now goes to the $20-$30 price category, a dramatic shift.

The trend of fewer lower-priced wines being shipped DtC has been in place since 2021. In fact, since 2020, the volume of under $15 wines shipped has plummeted by 67%. Meanwhile, wines priced under $30 saw a 23% decline from 2024, while the under $40 categories lost volume from 2024 by 21%. This does not appear to be a matter of consumers trading up to more expensive wines or what is often referred to as premiumization. Rather — as seen in both the on- and off-premise — it looks very much like fewer buyers at the lower price points.

The only price bracket in this report that witnessed an increase in volume is the $200+ category, which saw a 10% boost in volume of wines shipped DtC. All other price categories at the top end of the market witnessed declines in volume from 2024. Despite higher priced wines being impacted less by the pullback in the DtC shipping channel, wines priced above $80 per bottle still saw a 5% decline in volume. The entire DtC channel appears to be contracting, though buyers at the higher end of the market seem to be more resilient.




Share of Volume & Change in Volume by Price Category
20%
10%
0%
-10%
-20%
-30%
-40%
4%
10%
2%
-6%
6%
-6%
6%
-12%
11%
-6%
7%
-11%
11%
-11%
14%
-14%
16%
-17%
8%
-15%
12%
-35%
$200 & Over
$150 - $199.99
$100 - $149.99
$80 - $99.99
$60 - $79.99
$50 - $59.99
$40 - $49.99
$30 - $39.99
$20 - $29.99
$15 - $19.99
Under $15
Volume % of Total
1-Year Volume Change


Change in Volume & Value by Average Bottle Price
>$100 & <$40
10%
5%
0%
-5%
-10%
-15%
-20%
-25%
-2%
5%
-21%
-18%
Over $100
Under $40
1-Year Volume Change
1-Year Value Change

Conclusions and Forecasts

The direct-to-consumer shipping channel is suffering a structural decline, and it is evident now that it has been for the past four years. Early on in this period, this downturn could be attributed to the aftermath of the Covid pandemic. That event no longer explains the current moment, just as it can't explain the overall decline in the U.S. wine market.

Fewer consumers are receiving wine shipments from U.S. wineries. No element of the industry has escaped the impact of this reality. While buyers of lower-priced wines have retreated in greater numbers, the high end of the DtC shipping channel has also suffered.

The reasons for the decline in wine sales and subsequent shipments of wine are myriad and have been documented by numerous sources: an aging Baby Boomer generation exiting the market; an anti-alcohol movement successfully positioning alcohol consumption as not just unhealthy but also the urgent concern of policymakers; reduced consumption due to increasing use of GLP-1 drugs that inhibit the appetite for alcohol; social isolation trends blamed on addiction to screens; other beverages competing with wine; cannabis use replacing alcohol use; and, importantly, stagnant if not decreasing consumer confidence pegged to issues of inflation and affordability.

What's significant about these factors depressing wine purchases is that there is very little the industry can do or is willing to do to push back against them. Alas, there is scant evidence that any of these factors is waning — at least yet.

History tells us that negative economic factors weighing on consumers can and will be reversed. To overcome the decline in consumer confidence, a few things must occur. Inflation, while far lower than it was, needs to reach and remain in the 2%-3% range. Consumer wages need to continue to persist above the rate of inflation and even further outpace inflation rates. Unemployment needs to stay low as job growth increases. Levels of household debt need to be reduced or at least remain steady. If all or a combination of these factors were achieved, we expect discretionary spending to increase, and with it, the purchase of wine.

But while these economic conditions in the United States are not in the control of the wine industry, one thing is: Wineries can focus intently on bringing more people into tasting rooms. Increasing visitation is the single most important outcome a DtC-focused winery can work toward in order to thrive during this downturn and subsequent recovery. With tasting room visits come purchases and wine club memberships, the foundation of the DtC shipping channel.

With the above comments in mind, we offer the following forecasts for the 2026 direct-to-consumer wine shipping channel:

1. Continued First Half Declines

We expect year-over-year declines to continue at least in the first half of 2026 and quite possibly through the end of 2026. Assuming positive economic impact from the incremental decrease in interest rates and assuming stability in the economy, we believe the second half of 2026 may see months with smaller year-over-year decreases, if not growth in certain months.

2. No or Insignificant Growth from Additional States Allowing Shipments

Today, only one state strictly prohibits DtC wine shipments: Utah. Delaware finally will open for DtC shipments in August 2026, though we expect only an incremental increase in shipments due to the change in Delaware law.

3. Potential Tariff Relief

Even before the Supreme Court's decision on the constitutionality of the Trump Administration's tariffs, we witnessed a willingness by the administration to selectively pull back on this policy. If tariffs begin to play a smaller role in U.S. economic policy, we expect this to have a positive impact on the economy and possibly DtC wine shipping.

4. Continued Cultural and Political Headwinds

Several states, including Florida, are poised to consider ballot initiatives legalizing recreational cannabis use, while other states are seeing support for legalization. We expect any legalization of cannabis to have a small but meaningful impact on wine sales and DtC shipping. Additionally, despite the recently released Dietary Guidelines not promoting a "no safe level of alcohol consumption" stance, we also expect the anti-alcohol movement to aggressively promote its views and call for restrictions on sales and marketing, which could depress demand.

Methodology

This report is an annual collaboration between Sovos ShipCompliant and WineBusiness Analytics. It analyzes anonymized, detailed shipment data from more than 1,300 U.S. wineries' monthly shipments to consumers each month. Each shipment is edited for submission for governmental tax and reporting requirements. Additionally, elements such as varietal are validated by standardized tables.

The data is submitted to a proprietary model that applies weighting to ensure that aggregated transactions reflect winery size, location, and average bottle price. The model is built on a database of 11,165 wineries updated monthly by WineBusiness Analytics. This database is a near census of U.S. wineries (>99%). The model incorporates recognized statistical techniques to identify outliers and data anomalies.

Data Specifications

Number of shipments annually:	27+ million
Wineries reporting:	1,300+
Winery database:	11,165

Bonded and virtual wineries are included in the report; wines sold and shipped through online retailers, flash resellers, and affinity clubs are not.

Definitions

A Bonded winery is licensed by the Alcohol and Tobacco Tax and Trade Bureau (TTB); additional bonded locations of a winery, such as storage facilities under the same management, are not counted. Virtual wineries have a unique physical location (which may be another entity's winery), produce one or more brands, and have their own winemaker and management (these may be shared with other entities). A shipment is defined as a specific wine shipped to a specific consumer. Multiple products to the same location are counted as multiple shipments.

Projection Model

The model is stratified by size (cases produced), location, and average bottle price. The model accurately projects this very large sample to all wineries in the United States.

Acknowledgements

The 2026 Direct-to-Consumer Wine Shipping Report is a collaboration between Sovos ShipCompliant and WineBusiness Analytics.

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