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Small and mid-sized Argentine wineries raised online case sales by 19.49% in 2025

The industry study found total winery e-commerce volume fell 3.21%, driven by a 10.49% drop at large producers

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Small and mid-sized Argentine wineries increased their online wine sales in 2025 even as the sector’s overall volume fell, according to an annual industry study presented on Friday, October 30, in Mendoza.

The report, released by the Observatorio Vitivinícola Argentino, the Argentine Wine Corporation, known as COVIAR, the Argentine Chamber of Electronic Commerce, or CACE, and wine-focused e-commerce agency Combinatoria, found that wineries logged 114,454 online purchase orders in 2025. That was a 9.52% decline from 2024 and represented 0.041% of all e-commerce purchases in Argentina.

Behind that overall drop, the study found a sharp split between large producers and smaller ones. Orders at large wineries fell 18.14%, while small and medium-sized wineries increased their orders by 17.14%. The same pattern appeared in sales volume. Online wine sales totaled 230,280 six-bottle cases, or 1,038,906 liters, down 3.21% from 2024. Large wineries sold 10.49% less wine online, while small and mid-sized producers raised online case sales by 19.49%.

The findings suggest smaller wineries are gaining traction in direct digital sales even as the broader online market for winery sales remains limited. For beverage companies, the data also offers a clearer benchmark for direct-to-consumer strategy, including how shipping costs and discounting can support volume growth but also weigh on margins.

The study was presented at the IDITS building in the Polo TIC technology hub in Godoy Cruz, Mendoza, before about 50 people from winery sales and digital marketing teams. The presentation included discussion by industry executives and analysts from the wine and e-commerce sectors.

According to the report, Argentina had 185 wineries with an online shopping cart in 2025 out of a potential 462 wineries that could sell wine through e-commerce. But only 62 wineries were actively receiving orders and selling online during the year, equal to 13.3% of that potential universe. Of those 62 active sellers, 30 were classified as low-volume operations, 16 as medium-volume sellers averaging about 50 cases a month, and 16 as high-volume sellers averaging more than 150 six-bottle cases a month.

Even with that activity, the online channel still represented a small part of the domestic wine business. The report said online wine sales accounted for 1.72% of total wine sales in Argentina in 2025. Within that share, 0.41 percentage points came from direct winery sales, 0.99 points from marketplaces, and 0.32 points from online wine shops.

Revenue rose in local currency but did not keep pace with inflation. Online wine sales by wineries reached 14.984 billion Argentine pesos in 2025, equal to 0.040% of total e-commerce revenue in Argentina, the study said. That was a 25% increase from 2024, below the country’s 31.5% annual inflation rate. Measured in dollars, winery online sales in the domestic market totaled US$11.33 million, down 4.27% from 2024.

Here again, the report showed a gap between large wineries and smaller producers. The seven largest wineries increased their online revenue by 8.5% in pesos, while small and mid-sized wineries raised revenue by 71.31%.

Consumers who bought directly from wineries online placed relatively large orders. The average online ticket in 2025 was 156,295 pesos, up 24.62% from 2024. The study said that was 16% higher than the overall average e-commerce ticket in Argentina, which stood at 135,518 pesos. The average online wine transaction included 12.07 bottles, or roughly two cases, with an average price of 12,949 pesos per bottle.

The report also highlighted the commercial costs wineries are absorbing to keep those sales moving. Logistics represented 16.21% of the final online sale price, including taxes. In 93.86% of transactions, wineries covered that logistics cost themselves. The average discount applied between the suggested retail price and the final billed price was 29% in 2025, using direct markdowns or coupon-based promotions.

Those figures help explain why online wine sales can expand without translating into strong profitability. For wineries and other beverage producers trying to build direct digital channels, the Argentine data points to a model in which free or subsidized shipping and heavy promotional pricing are common tools for customer acquisition and retention.

The study was the third annual edition of the industry review and was based on surveys of wineries selling through digital channels, combined with broader wine industry and national e-commerce statistics. Organizers said the project is meant to improve measurement of digital performance and support better commercial practices for wine and sparkling wine sales online.

The panel at the Mendoza event included Gerardo Biondolillo, CACE’s regional director in Cuyo; Daniel Rada, director of the Observatorio Vitivinícola Argentino; Federico Ancillai, senior e-commerce strategy analyst at Susana Balbo Wines; Emilia Amad Di Leo, who works in e-commerce operations and logistics at Susana Balbo Wines; Marianela Novello, hospitality and e-commerce manager for Argentina and the United States at Domaine Bousquet; and Fabián Berardi, head of e-commerce at Bodega Monteviejo.