

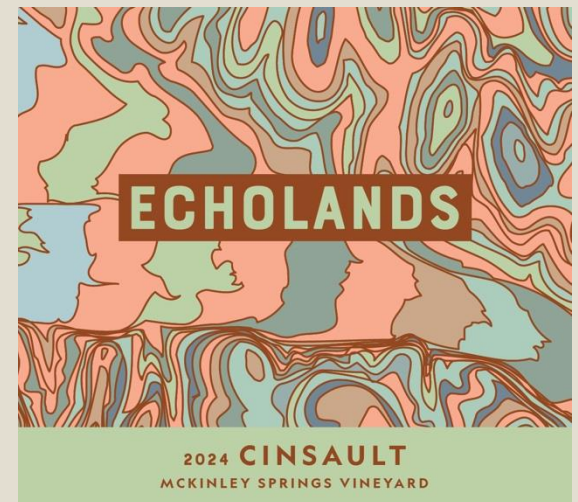
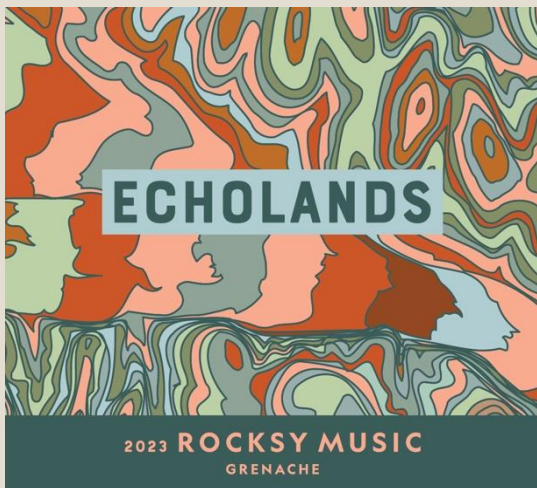
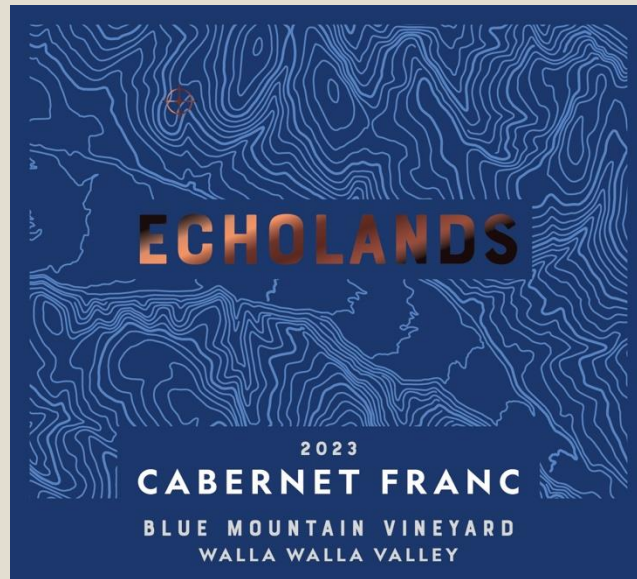


DIRECT TO CONSUMER  
WINE SYMPOSIUM

PACIFIC NORTHWEST

# Community Saves Us

Doug Frost MS, MW  
Echolands Winery



Expert Editorial, Featured, Opinion, Wine Industry Articles

## WineAmerica: Embracing the Painful Necessity of Change

© Expert Editorial March 24, 2026



By Jim Trezise



Wine is dying.

The vital signs are alarming, the symptoms are clear, the causes are serious, and the prognosis is grim.

The symptoms: Vineyards are disappearing, wineries are closing, former employees are jobless, and consumers are fleeing. The sky is falling.

AFTERNOON BRIEF NEWS  
WINE INDUSTRY NEWSLETTER  
**FREE SUBSCRIPTION**

### TRENDING THIS WEEK

The Wine Club Retention Crisis  
April 21, 2026

Before You Build the Tasting Room: What Winery Owners Should Prove First  
April 24, 2026

Columbia Distributing and Republic National Distributing Company Announce Letter of Intent  
April 27, 2026

Winegrape Growers CA Legislature to Hold First Public Hearing on American Wine Truth in Labeling Bill  
April 20, 2026

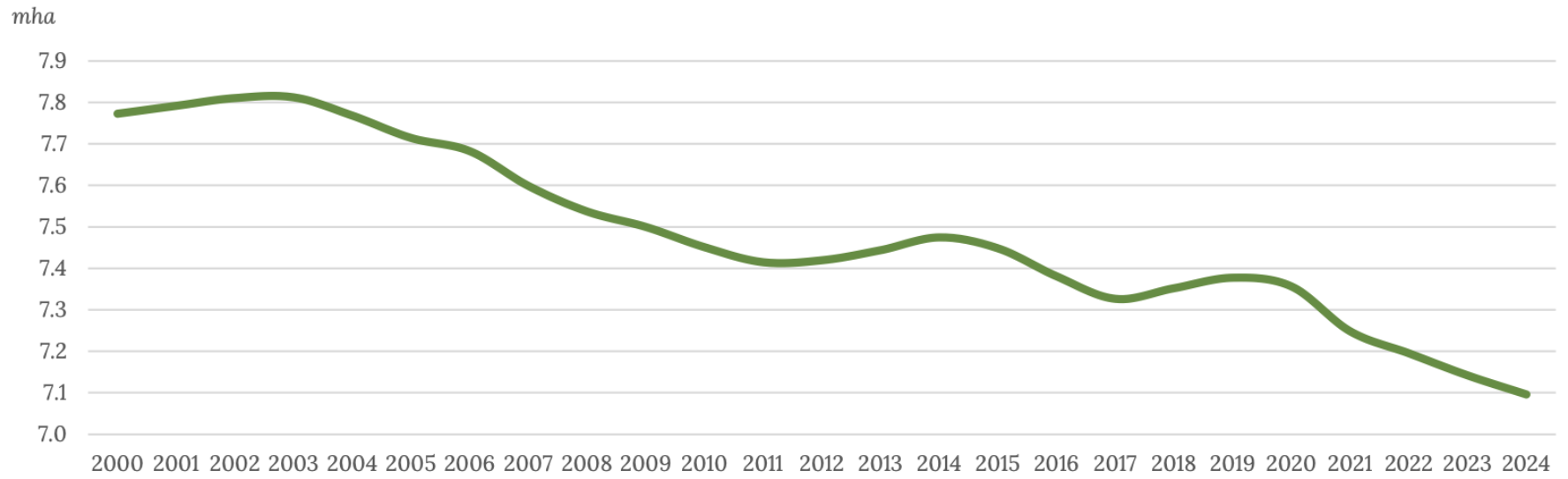
### EVENTS CALENDAR

APR 27 3:00 pm - 6:00 pm PDT  
South Willamette Winery Trade Tasting

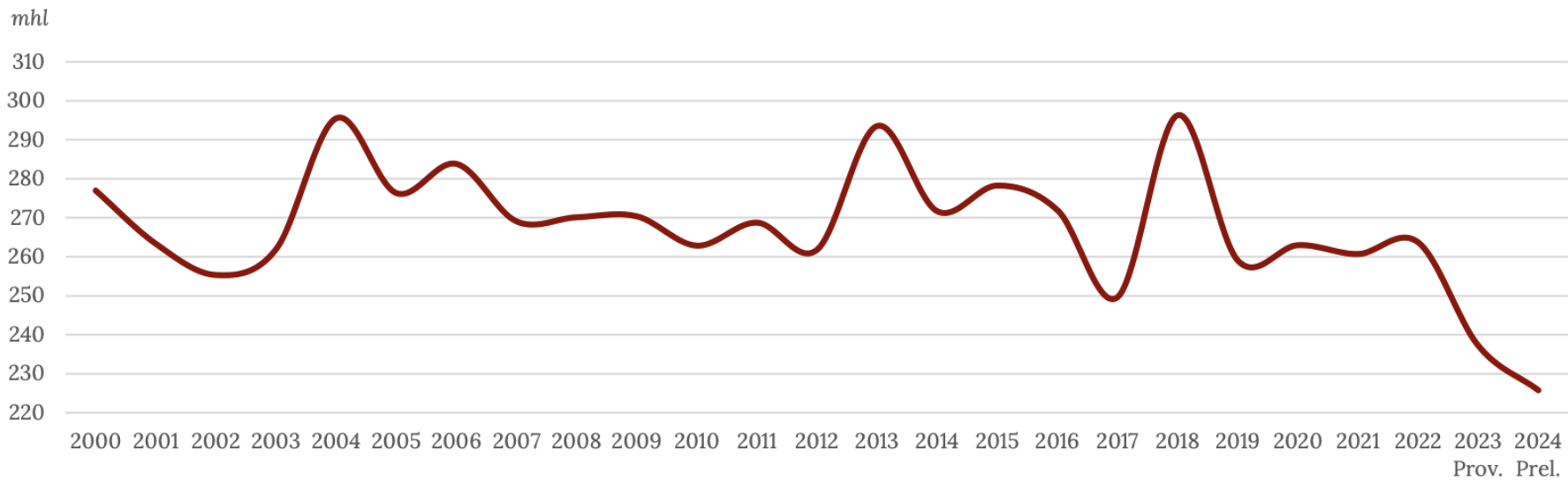


# “Wine is dying.”

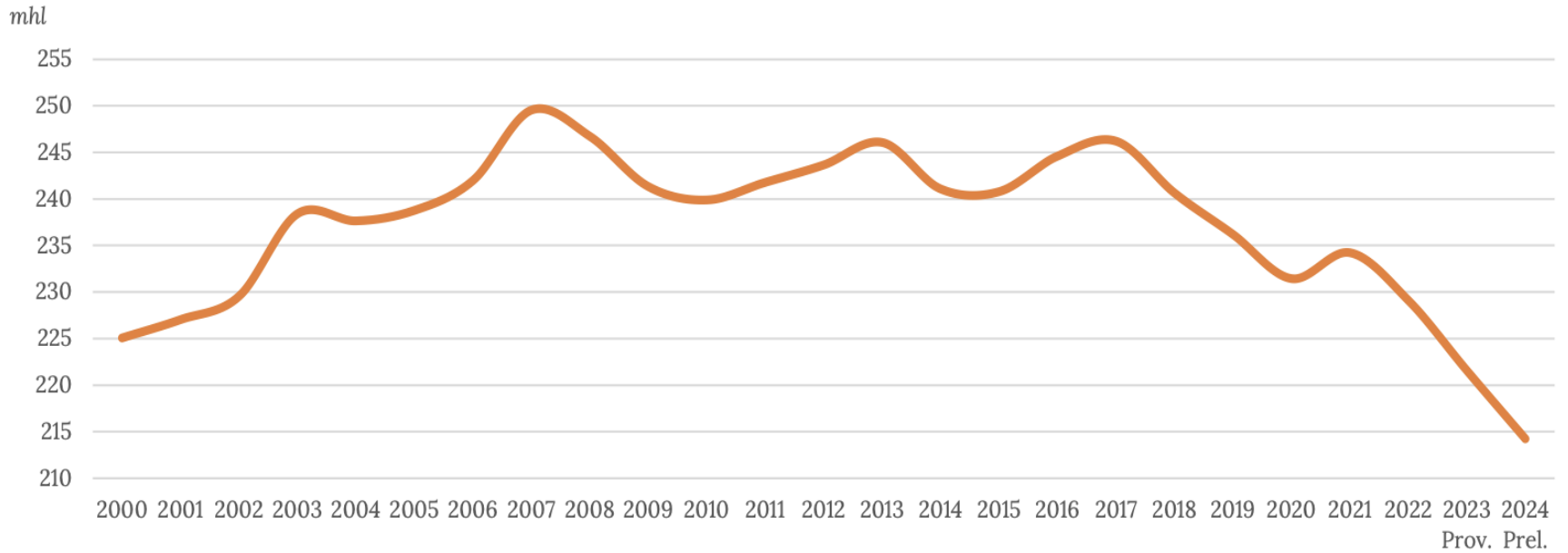
**Figure 1 • Evolution of world vineyard surface area**



**Figure 2 • Evolution of world wine production (juices and musts excluded)**



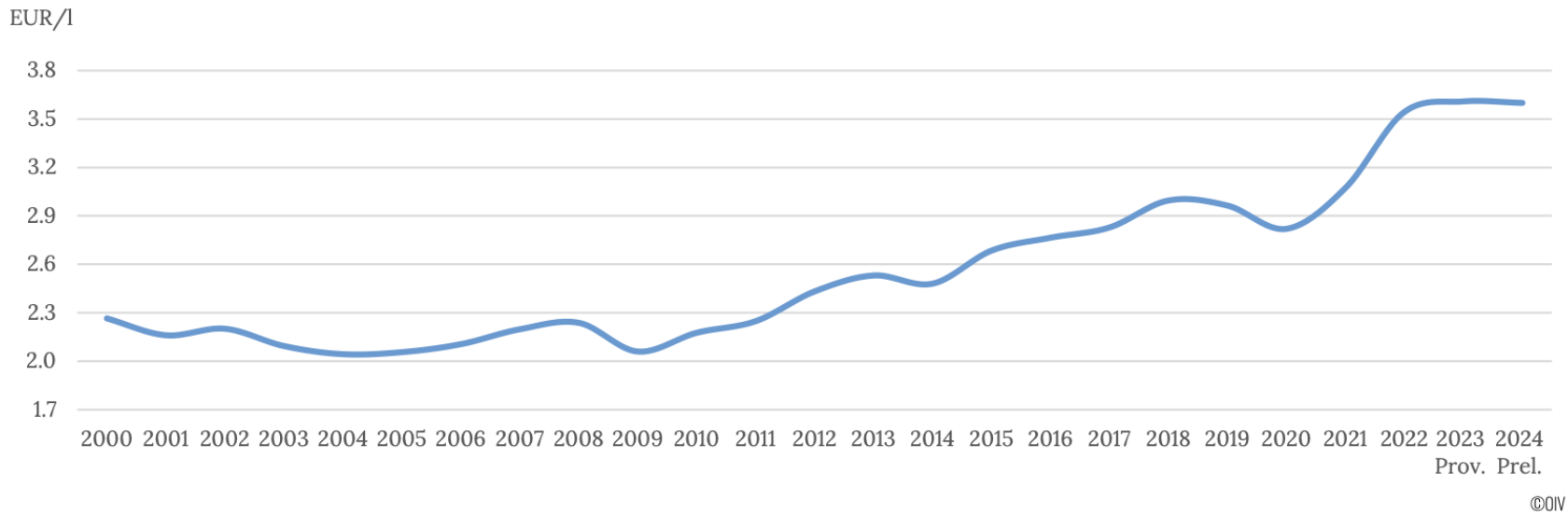
**Figure 3 • Evolution of world wine consumption**



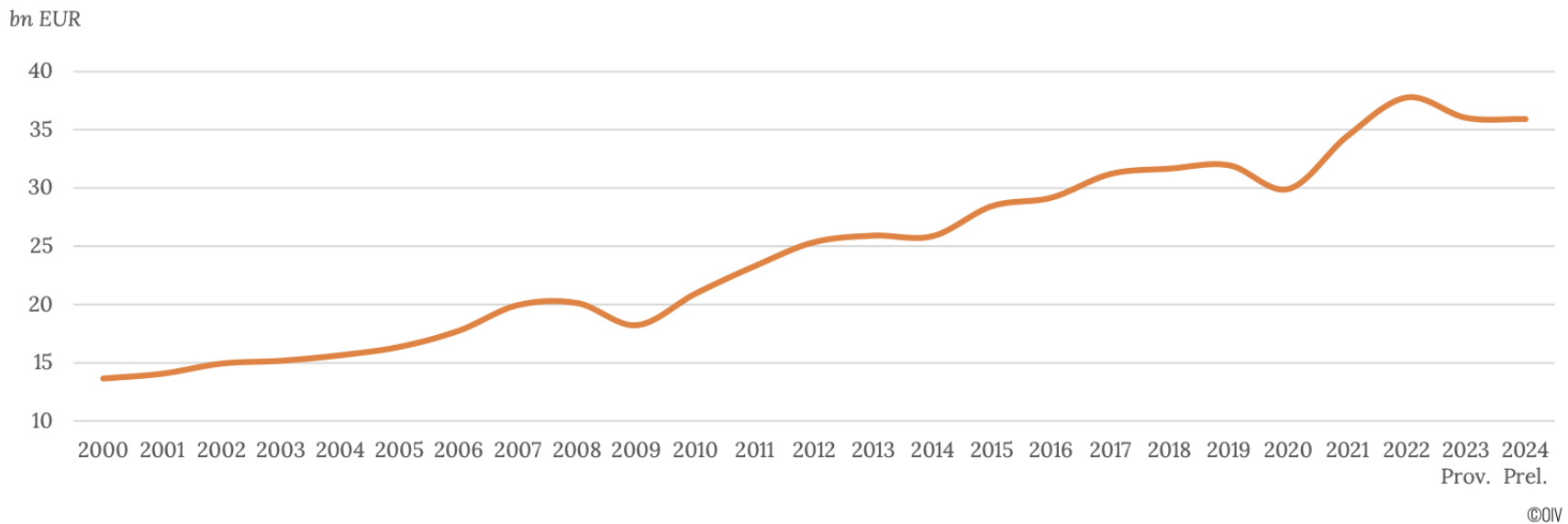
©OIV

<sup>6</sup>It usually takes about three years to have consolidated data for official statistics

**Figure 6 • Evolution of the average price of world wine exports**



**Figure 5 • Evolution of international trade in wine by value**



**Table 1 • Vineyard surface area of major vine-growing countries<sup>3</sup>**

<i>kha</i>	2019	2020	2021	2022	2023 Prov.	2024 Prel	24/23 % var.	2024 % world
Spain	966	961	963	955	945	930	-1.5%	13.1%
France	794	799	795	796	788	783	-0.7%	11.0%
China	781	766	754	758	756	753	-0.4%	10.6%
Italy	714	719	722	718	723	728	0.8%	10.3%
Türkiye	436	431	419	413	406	402	-1.0%	5.7%
USA	407	402	393	391	388	385	-0.7%	5.4%
Argentina	215	215	211	207	205	200	-2.4%	2.8%
Romania	191	190	189	188	187	187	0.1%	2.6%
India	151	161	167	175	182	185	1.8%	2.6%
Portugal	195	195	194	193	182	173	-5.1%	2.4%
Chile	210	207	182	182	172	166	-3.2%	2.3%
Australia	159	159	159	159	159	159	0.0%	2.2%
Iran	167	155	136	119	122	122	0.0%	1.7%
Uzbekistan	112	114	118	122	121	121	0.0%	1.7%
South Africa	129	128	126	124	122	120	-1.5%	1.7%
Moldova	143	140	138	122	115	115	0.0%	1.6%

**Table 2 • Wine production (juices and musts excluded) in major countries<sup>5</sup>**

<i>mhl</i>	2019	2020	2021	2022	2023 Prov.	2024 Prel	24/23 % Var.	2024 / avg. 19-23 % Var.	2024 % world
Italy	47.5	49.1	50.2	49.8	38.3	44.1	15.1%	-6.2%	19.5%
France	42.2	46.7	37.6	46.0	47.2	36.1	-23.5%	-17.9%	16.0%
Spain	33.7	40.9	35.5	36.0	28.4	31.0	9.3%	-11.1%	13.7%
USA	26.8	23.9	25.3	23.5	25.5	21.1	-17.2%	-15.5%	9.4%
Argentina	13.0	10.8	12.5	11.5	8.8	10.9	23.3%	-3.9%	4.8%
Australia	12.0	10.9	14.8	13.1	9.6	10.2	5.3%	-16.0%	4.5%
Chile	11.9	10.3	13.4	12.4	11.0	9.3	-15.6%	-21.4%	4.1%
South Africa	9.7	10.4	10.8	10.3	9.3	8.8	-5.1%	-12.6%	3.9%
Germany	8.2	8.4	8.4	8.9	8.6	7.8	-9.8%	-9.0%	3.4%
Portugal	6.5	6.4	7.4	6.8	7.5	6.9	-8.2%	-0.2%	3.1%
Russia	4.6	4.4	4.3	5.0	4.5	5.4	19.3%	17.5%	2.4%
Romania	3.8	3.8	4.5	3.8	4.6	3.7	-19.8%	-10.0%	1.6%
New Zealand	3.0	3.3	2.7	3.8	3.6	2.8	-21.2%	-13.1%	1.3%
Hungary	2.4	2.6	2.6	2.5	2.4	2.7	10.0%	7.0%	1.2%
China	7.8	6.6	5.9	4.7	3.2	2.6	-17.0%	-53.4%	1.2%

**Table 3 • Wine consumption in major countries<sup>8</sup>**

mhl	2019	2020	2021	2022	2023 Prov.	2024 Prel.	24/23 % Var.	2024
USA	35.6	34.1	34.3	35.5	35.4	33.3	-5.8%	15.6%
France	24.7	23.2	24.6	24.4	23.8	23.0	-3.6%	10.7%
Italy	22.6	24.2	24.2	22.4	22.3	22.3	0.1%	10.4%
Germany	19.5	19.8	19.9	19.4	18.4	17.8	-3.0%	8.3%
UK	12.6	13.7	13.9	13.1	12.8	12.6	-1.0%	5.9%
Spain	10.2	9.2	10.3	9.6	9.8	9.9	1.2%	4.6%
Russia	8.1	7.9	8.0	8.7	7.9	8.1	2.4%	3.8%
Argentina	8.5	9.4	8.4	8.3	7.8	7.7	-1.2%	3.6%
Portugal	5.4	4.4	5.3	5.7	5.5	5.6	0.5%	2.6%
China	15.0	12.4	10.5	9.1	6.8	5.5	-19.3%	2.6%
Australia	5.8	6.0	5.6	5.4	5.5	5.3	-2.7%	2.5%
Canada	5.2	5.3	5.3	5.1	4.9	4.6	-6.4%	2.1%
South Africa	3.7	3.0	3.9	4.5	4.4	4.3	-2.8%	2.0%
Netherlands	3.5	3.7	3.7	3.6	3.5	3.2	-8.1%	1.5%
Brazil	3.6	4.1	4.1	3.6	3.5	3.1	-10.1%	1.5%

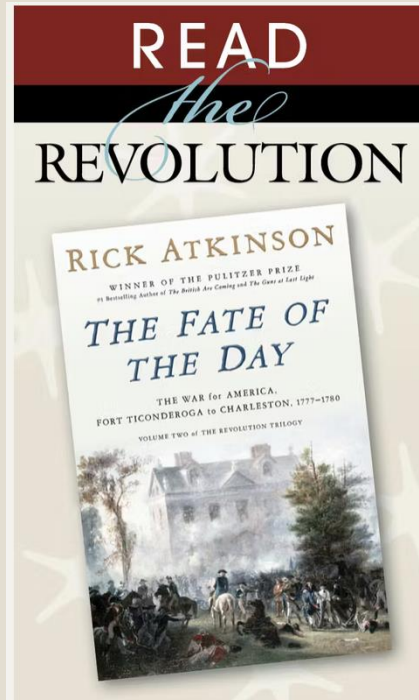
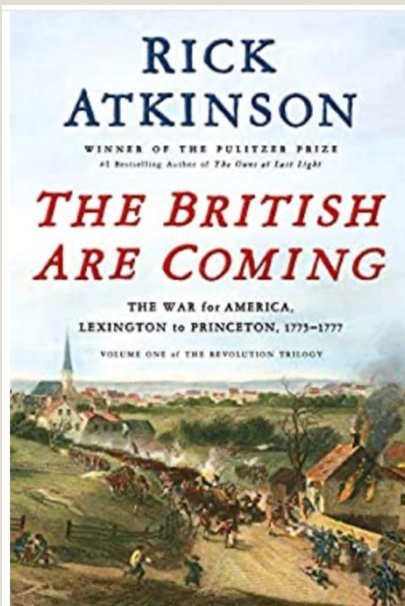


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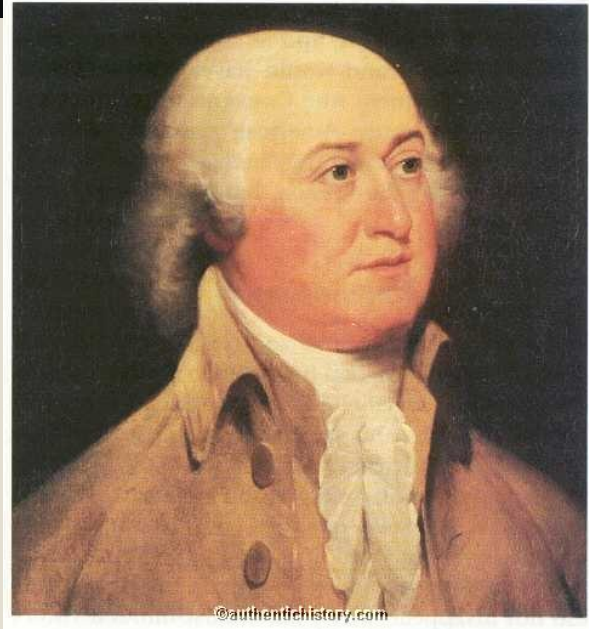
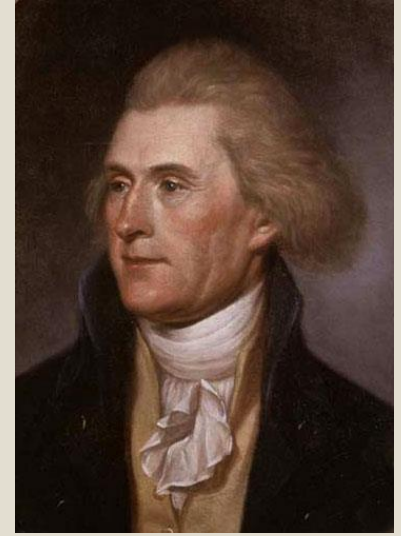


# The British Are Coming!

By Rick Atkinson



ELLIOTT O'DONOVAN



The famous, “It’s not us, it’s them!” argument...

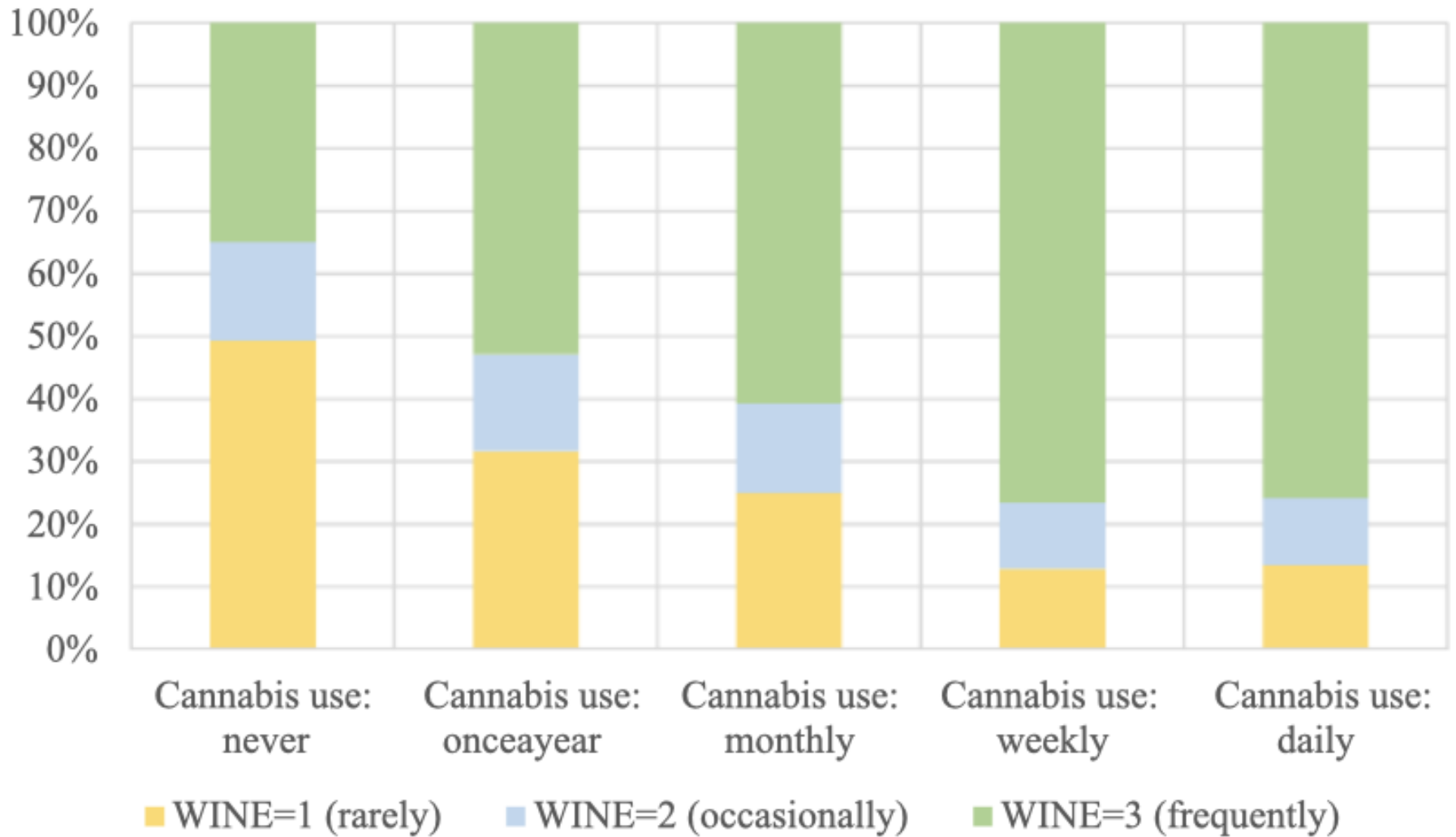


*We are not here to tell you that it is entirely without harms — what product is? Marijuana is less toxic than alcohol, less addictive, less harmful to the body, and less likely to contribute to violent or reckless behavior.*

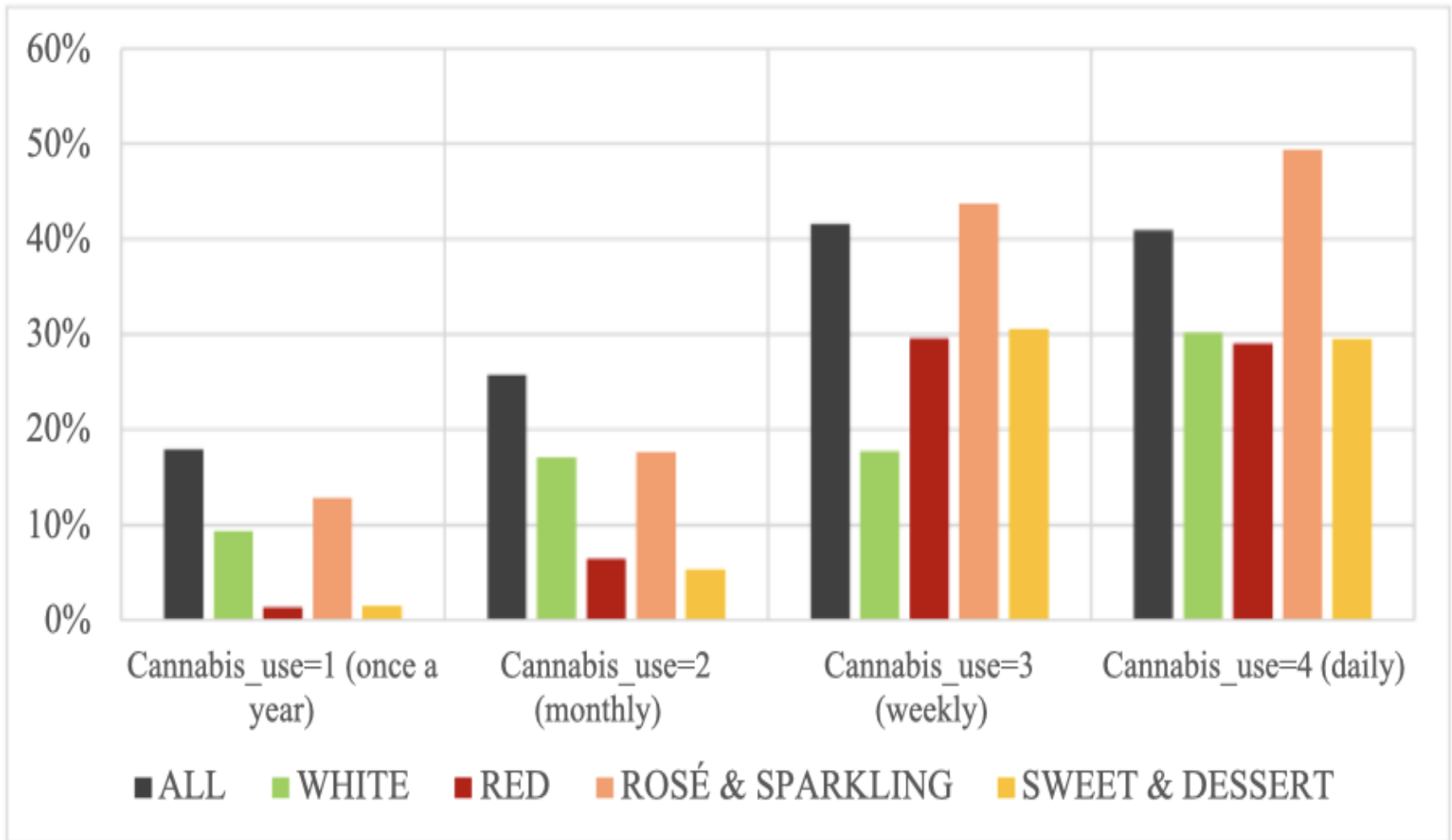
Marijuana Policy Project







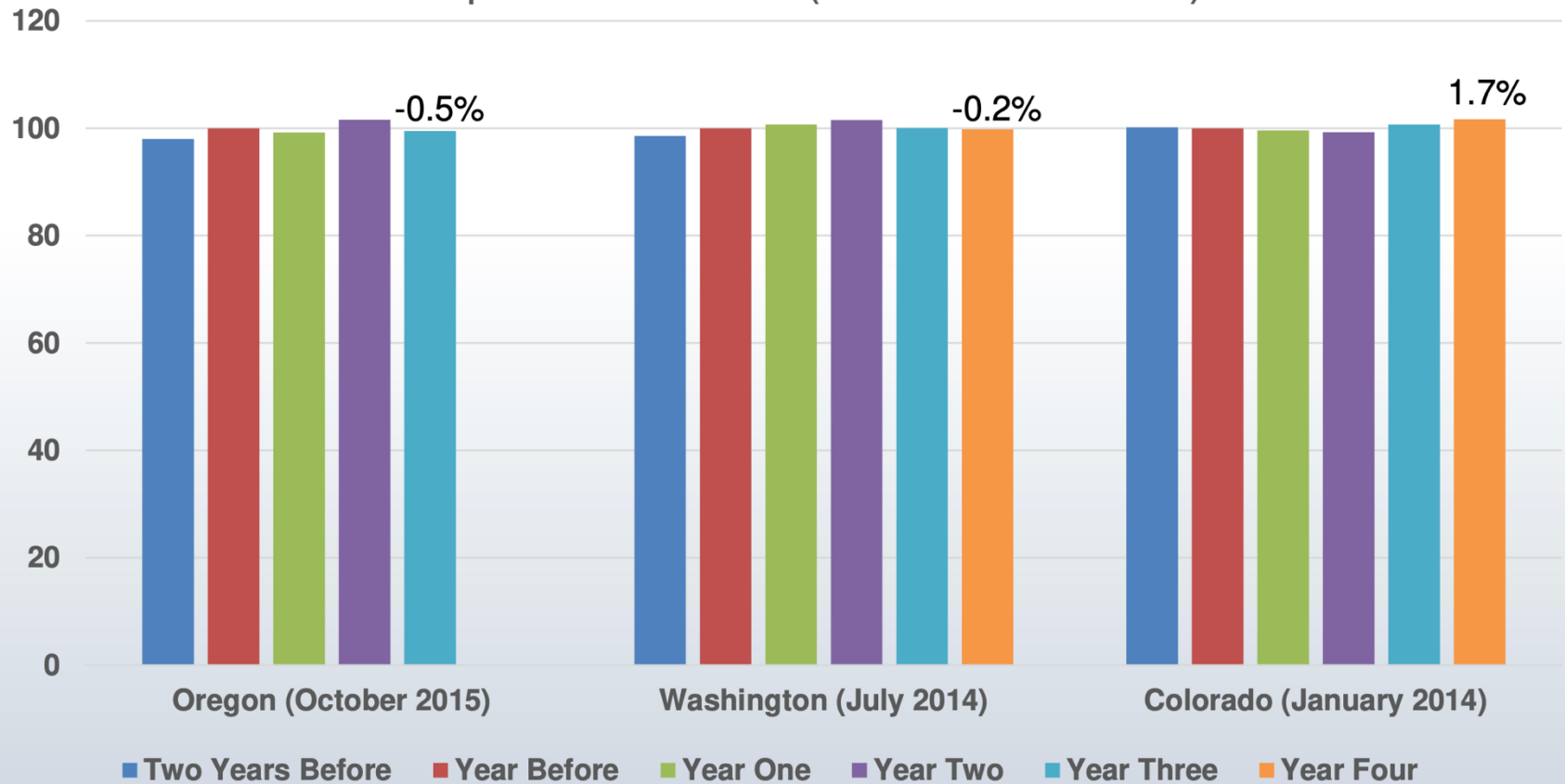
# Are you high right now?





# Total Alcohol Sales Prior To and Following Recreational Marijuana Legalization

Per Capita Sales Index (Year Before = 100)

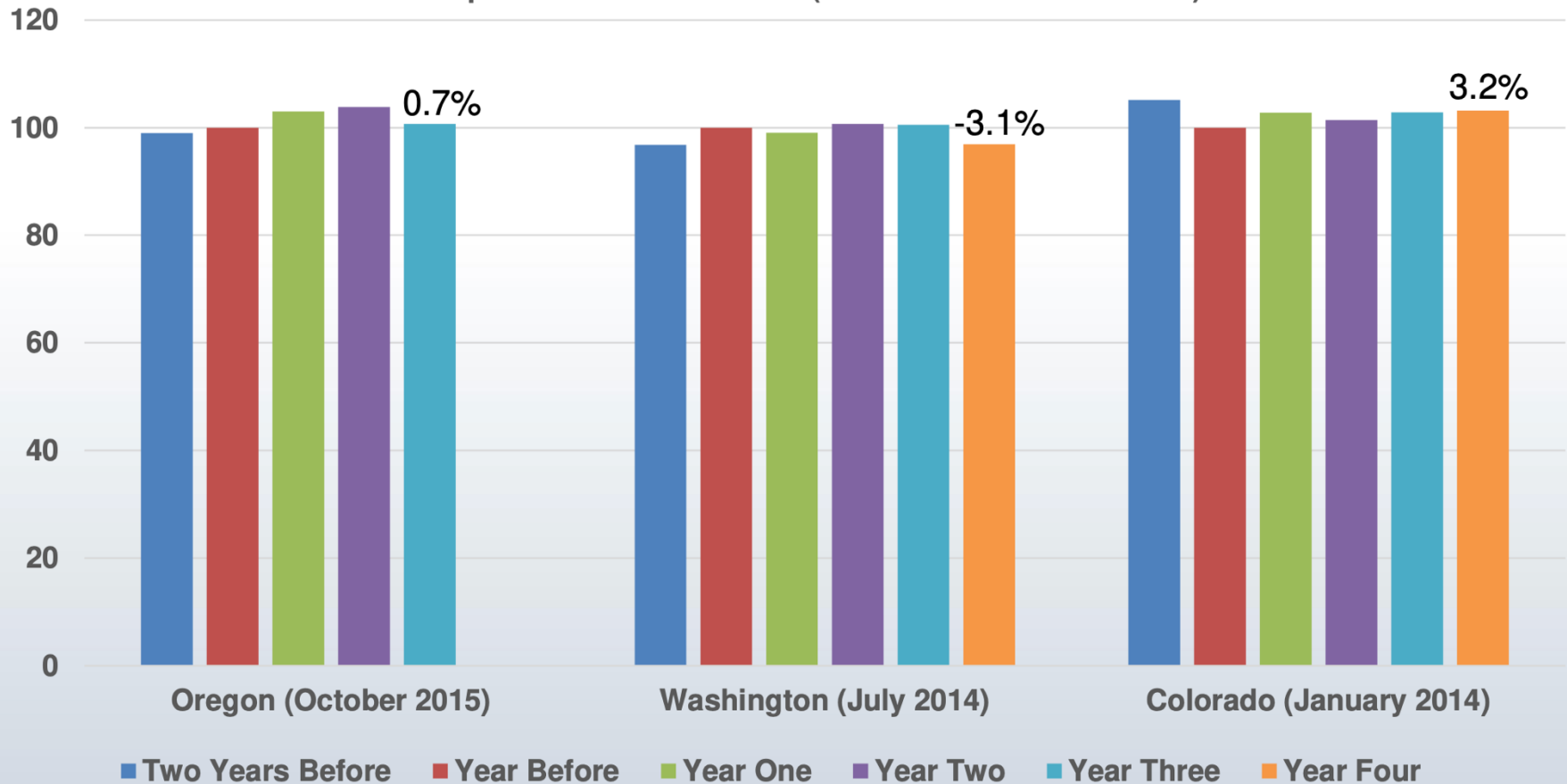


Dates in () represent date of implementation



# Wine Sales Prior To and Following Recreational Marijuana Legalization

Per Capita Sales Index (Year Before = 100)

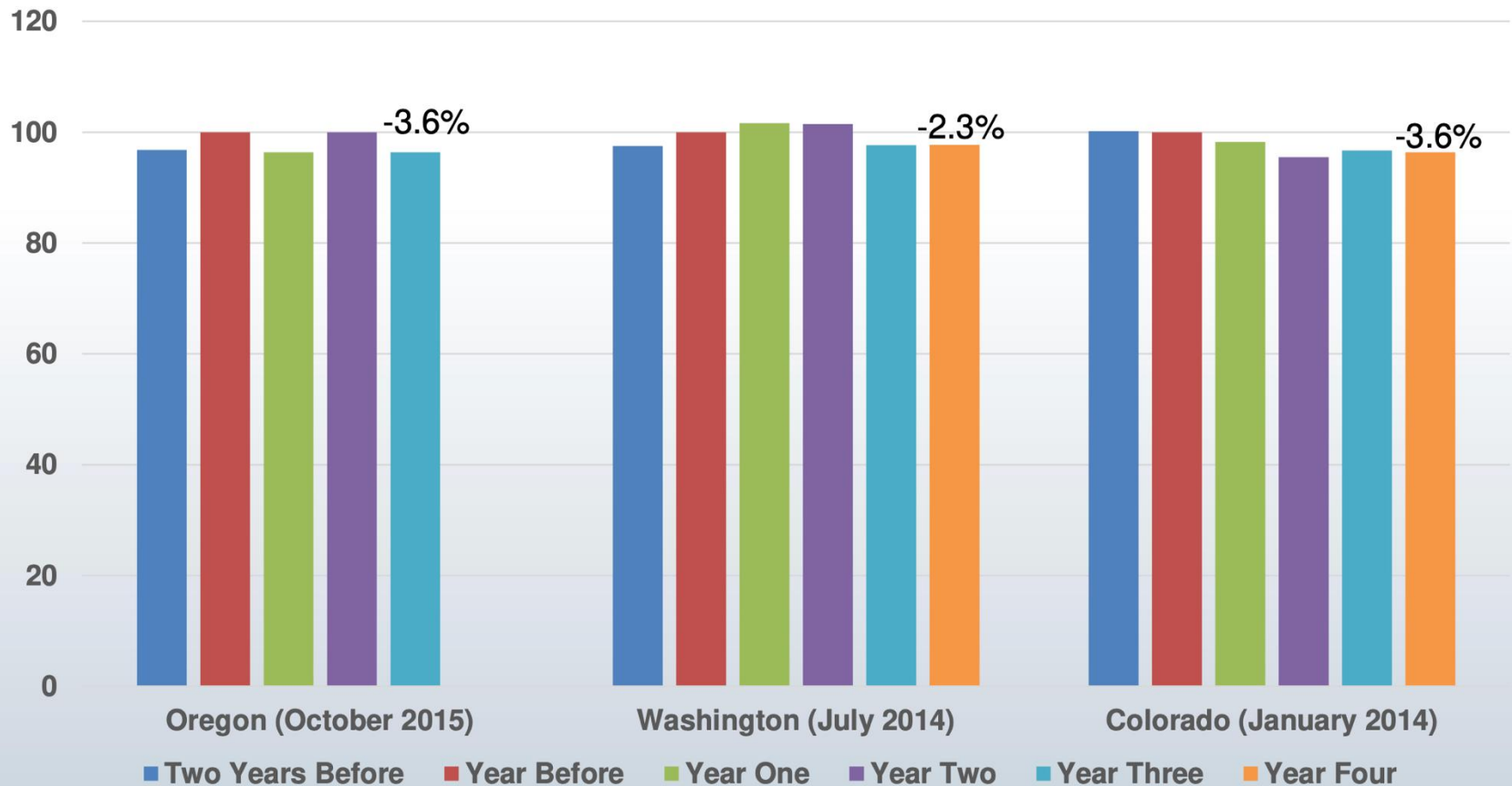


Dates in () represent date of implementation



# Beer Sales Prior To and Following Recreational Marijuana Legalization

Per Capita Sales Index (Year Before = 100)

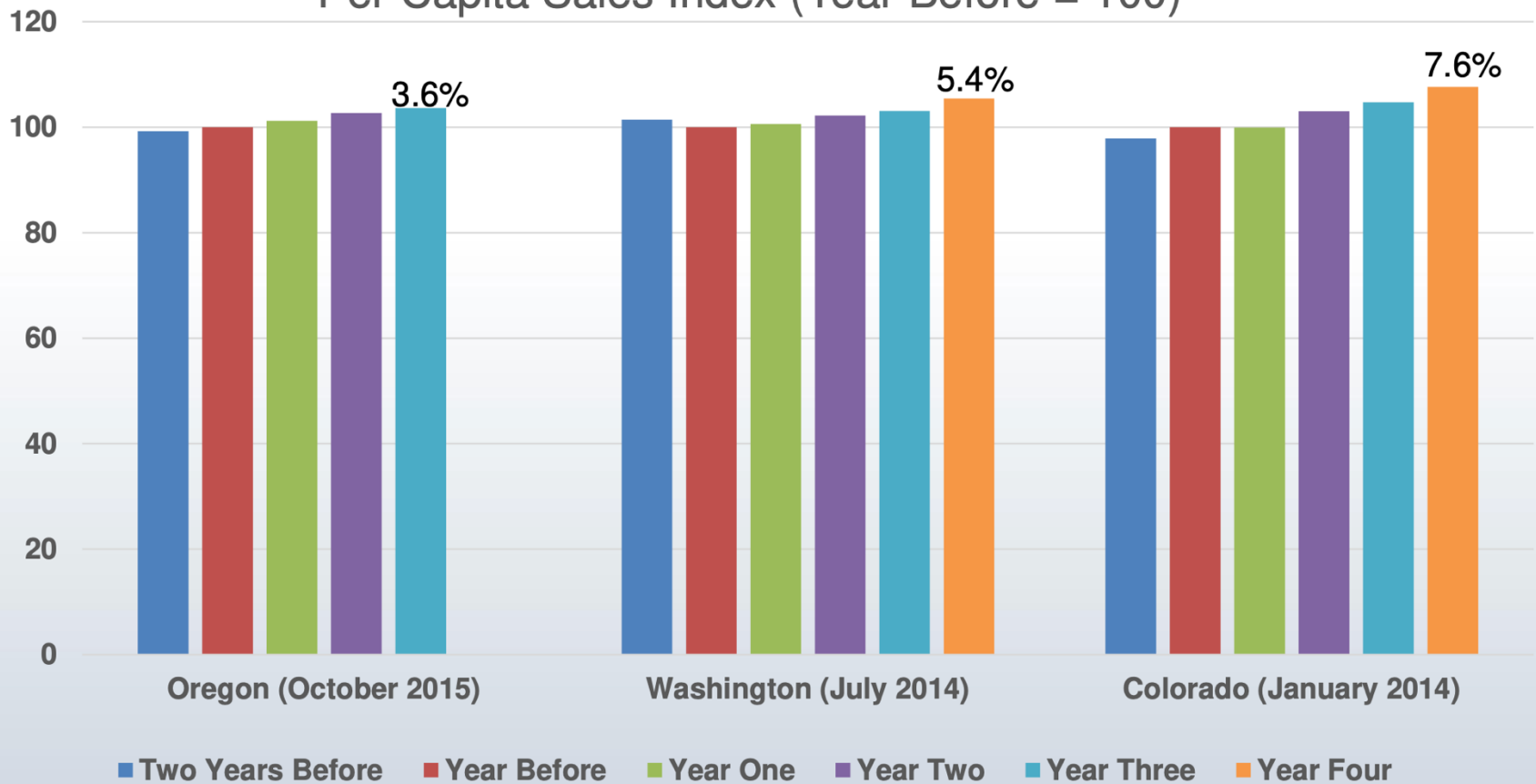


Dates in ( ) represent date of implementation



# Spirits Sales Prior To and Following Recreational Marijuana Legalization

Per Capita Sales Index (Year Before = 100)



Dates in ( ) represent date of implementation

# Some Wine Market Council data about pricing...

- More than 75 percent of wine drinkers said they are unwilling to pay more than \$16 for a glass of wine in a restaurant.
- The San Francisco Standard reported that \$24 glasses of wine have become the norm. WMC stated that only 7 percent of wine drinkers are willing to spend more than \$20 for a glass of wine. Only 15 percent are willing to spend more than \$18.
- 46 percent of wine "non-adopters" say they had a wine they didn't like more than a decade ago, and never tried another. Of that group, nearly 60 percent had that bad wine experience more than 21 years ago.
- And then there's "natural" wine...



**STAR  
WINE  
LIST**

[Guides](#)

[Events](#)

[Stories](#)

[Map](#)

[Star Wine List Of The Year](#)

[Partners](#)

[California Stars](#)

# THE GUIDE TO GREAT WINE BARS & WINE RESTAURANTS

[🔍 Search](#)

[🗺 Map](#)

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## In focus:

Places and stories that are hot right now.

# Star Wine List Observations

- These are typically wine lists by highly knowledgeable managers and/or sommeliers
- Wine lists sizes range from fewer than 100 selections to more than 3500 selections
- Many NYC, Miami or Naples lists show very high profit margins (markups of 300%+)
- NYC wine lists are changing in intriguing ways (more so than Florida wine lists)

# Star Wine List Observations

- Unless a restaurant specializes in Italian wines, the largest categories are Champagnes and Burgundy, whether red or white.
- Bordeaux is in trouble. Deep trouble.
- Napa Cabs continue to dominate in the US selections but not as much as in years previous.
- Washington wines are represented by Cayuse, and often nearly no one else.
- Oregon selections are generally strong and even growing.

# Charlie Bird, NYC: 500-1000 selections

## White Burgundy

### Chablis

René & Vincent Dauvissat, 1er Cru La Forest MAGNUM 2015 \$775

Domaine Pinson Frères, 1er Cru Mont de Milieu 2022 \$160

### Côte de Beaune

Rémi Jobard, Sur La Velle, 1er Cru Monthélie 2022 \$225

Pierre-Yves Colin-Morey, La Comme, 1er Cru Santenay 2022 \$310

### Meursault

Henri Germain 'Chevaliers' 2022 \$295

Heitz-Lochardet 'Les Perrières' 2019 \$325

Rémi Jobard, Sous la Velle 2022 \$285

Domaine Antoine Lienhardt, Sous la Velle 2021 \$260

Domaine Dujac, 1er Cru Les Folatières MAGNUM 2017 \$850

Domaine Leflaive, 1er Cru 2017 \$750

Domaine Leflaive, 1er Cru Les Pucelles 2022 \$2250

## Chassagne-Montrachet

Pierre-Yves Colin-Morey 'Vieilles Vignes' 2022 \$300

Joseph Colin 'Hereditas' 2023 \$295

Michel Niellon 2021 \$275

Henri Germain, 1er Cru Mont Morgeot 2020 \$315

Henri Germain, 1er Cru Mont Morgeot 2022 \$355

Pierre-Yves Colin-Morey, 1er Cru Abbaye de Morgeot 2022 \$585

Bernard Moreau, 1er Cru La Maltroie 2020 \$420

## Corton-Charlemagne

Genot-Boulangier, Grand Cru MAGNUM 2020 \$1195

Coche-Dury, Grand Cru 2013 \$5995

Benjamin Leroux, Grand Cru 2020 \$980

Domaine de la Romanée-Conti, Grand Cru 2020 \$5995

## Bâtard-Montrachet

## Bâtard-Montrachet

Domaine Leflaive, Grand Cru 2020

Domaine Leflaive, Grand Cru 2022

## Chevalier-Montrachet

Domaine Leflaive, Grand Cru MAGNUM 2013

## Other White Burgundy

Boillot 'Corvée aux Moines', Bourgogne Blanc 2022

Dureuil-Janthial, Rully 2023

Pierre Girardin 'Éclat de Calcaire', Bourgogne Blanc 2023

Les Héritiers du Comte Lafon, Saint-Véran 2023

Les Héritiers du Comte Lafon, Viré-Clessé 2023

Alex Moreau, Bourgogne Blanc 2022

Leflaive & Associe, Bourgogne Blanc 2022

Pierre Morey, 1er

Roc Breia, Chardonnay, Vin de France 2022

Comtes Lafon, 1e

Comtes Lafon, 1er Cru Porusot 2013

Comtes Lafon, 1er Cru Porusot 2017

Comtes Lafon, 1er Cru Porusot 2015

Comtes Lafon, 1er Cru Porusot MAGNUM 2013

Jean-Marc Roulot, 1er Cru Clos de Bouchères MAGNUM 2014

Jean-Marc Roulot, 1er Cru Clos de Bouchères 2019

Jean-Marc Roulot, 1er Cru Clos de Bouchères 2020

Jean-Marc Roulot, 1er Cru Clos de Bouchères 2022

## Saint-Aubin

Joseph Colin, 1er Cru Sous Roche Dumay 2022

Joseph Colin, 1er Cru Sous Roche Dumay 2023

Thierry Pillot, 1er Cru Les Castets 2020

## Puligny-Montrachet

Vin Noé 'Superposition' 2021

Robert Ampeau, 1er Cru Les Combettes 1997

# Charlie Bird, NYC: 500-1000 selections

## Beaujolais

Bret Brothers, Brouilly 2019 \$120

Jean-Claude Lapalu 'La Croix des Rameaux', Brouilly MAGNUM 2021 \$195

## Other Red Burgundy

Domaine Bersan 2023 \$75

Dureuil-Janthial, Rully 2023 \$150

Dureuil-Janthial, Coteaux Bourguignons 2023 \$90

Michel Sarrazin 'Sous La Roche', Givry 2023

Bastian Wolber 'Sur Calcaire' 2022

Roc Breia, Pinot Noir, Vin de France 2022

## Rhône Valley Reds

### Côte-Rôtie

E. Guigal 'La Mouline' 1983

### Hermitage

Jean-Louis Chave 2016

Jean-Louis Chave 2019

Jean-Louis Chave 2020

31d4fd176f5b/7%23Rh%25C3%25B4ne%2520Valley%2520Reds-header1-Hermitage-

## Red Burgundy

### Côte de Nuits

Domaine Camille Thiriet 'Clos Magny', Côte de Nuits-Villages 2021

Vin Noé, Côte de Nuits-Villages 2021

### Gevrey-Chambertin

Simon Bize & Fils, Latricières-Chambertin, Grand Cru 2018

Domaine Denis Bachelet, Charmes-Chambertin, Grand Cru MAGNUM 2004

### Morey-Saint-Denis

Maxime Cheurlin Noëllat, 1er Cru Monts Luisants 2020

Maxime Cheurlin Noëllat, 1er Cru Monts Luisants 2021

Domaine Dujac, Clos de la Roche, Grand Cru 2022

Georges Roumier, Bonnes Mares, Grand Cru 2017

\$1695

Georges Roumier, Bonnes Mares, Grand Cru 2020

\$2395

Georges Roumier, Bonnes Mares, Grand Cru MAGNUM 2011

\$3000

### Vosne-Romanée

Georges Noëllat, 1er Cru Les Chaumes 2022

\$615

Liger-Belair, 1er Cru Les Petits Monts 2018

\$2995

Domaine de la Romanée-Conti, Romanée-Saint-Vivant, Grand Cru 2014

Domaine de la Romanée-Conti, Romanée-Saint-Vivant, Grand Cru 2020

Domaine de la Romanée-Conti, Romanée-Saint-Vivant, Grand Cru 2021

## Vougeot

Méo Camuzet, Clos de Vougeot Grand Cru MAGNUM 1990

## Nuits-Saint-Georges

Domaine de l'Arlot, 1er Cru Clos des Forêts Saint-Georges 2022

## Pommard

Vincent Dancer, 1er Cru Les Pézerolles 2022

Domaine de Montille, 1er Cru Les Rugiens 2005

J.V. Guillemand, 1er Cru Les Fremiers 2021

Pierre Morey, 1er Cru Les Grands Epenots 2021

## Volnay

Pierre Morey, 1er Cru Santenots 2020

Pierre Morey, 1er Cru Santenots 2021

Domaine de Montille, 1er Cru Taille Pieds 2019

Roblet-Monnot, 1er Cru Taille Pieds 2018

# Charlie Bird, NYC: 500-1000 selections

## White Wine

### Other Regions of France

#### Bordeaux

Chateau Lafleur 'Les Champs Libres' 2021

\$270

---

## Red Wine

### Other Regions in France

#### Bordeaux

Château Arcole Grand Cru, Saint-Émilion 2021

\$135

---

# Star Wine List Observations

- Is wine even natural?
- Orange Wines?
- Now the category is often called Skin Contact wines
- And it's often included with rosés...

# Silicon Valley Bank Report 2026

## Key forecast outputs

- **2025 year-end volume:** ~329 million cases (down from 335.9 million in 2024)
- **2025 year-end revenue:** ~\$74.3 billion (down from \$75.5 billion)
- **Timing of Improvement:** Declines moderating in 2026; a bumpy bottom forming in 2027–2028, followed by slow, modest growth thereafter

Rob McMillan: 2026 will mark the point in this correction where some growers and wine companies that have struggled for the past five years will publicly capitulate and exit. The press will likely focus on those specific disappointing business outcomes. While there is no way to hide from it, that will obfuscate progress from upper-quartile businesses and the improvement that I expect to see from a slowing rate of decline.

# Natural Wine?

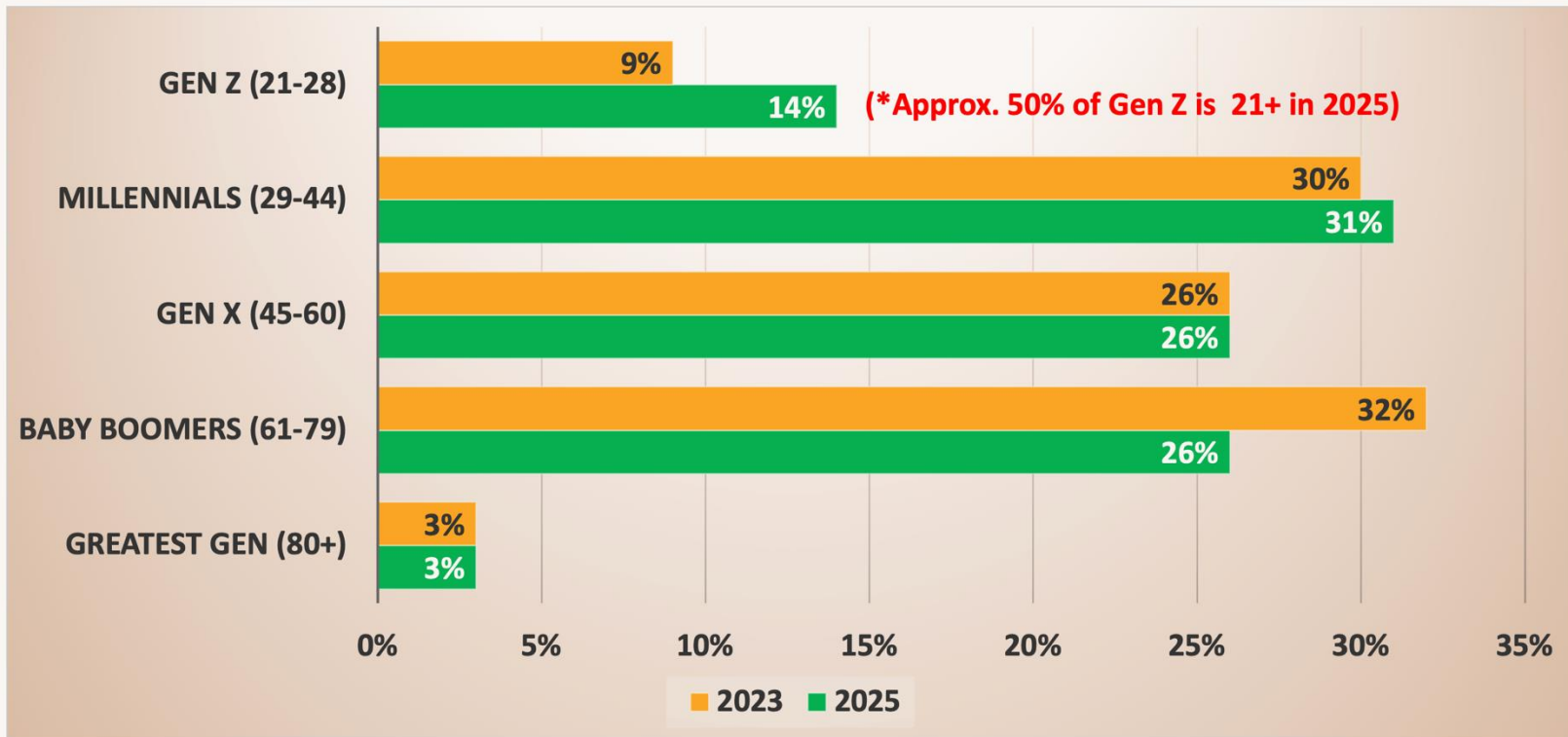


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# WINE DRINKERS BY AGE & GENERATION



## About Wine Market Council



- ❖ Established in 1996.
- ❖ Scientific non-profit (501c6); member supported.
- ❖ **MISSION:** To conduct market research on U.S. wine consumer buying habits, attitudes & trends.
- ❖ 3 to 4 new wine consumer research studies per year, worth approx. \$300,00.
- ❖ Affordable membership dues.

# U.S. ADULT SEGMENTATION

## CORE DRINKERS =

Drink wine at least once a week or more

## MARGINAL DRINKERS =

Drink wine less than once a week but more often than every 2-3 months

## INFREQUENT =

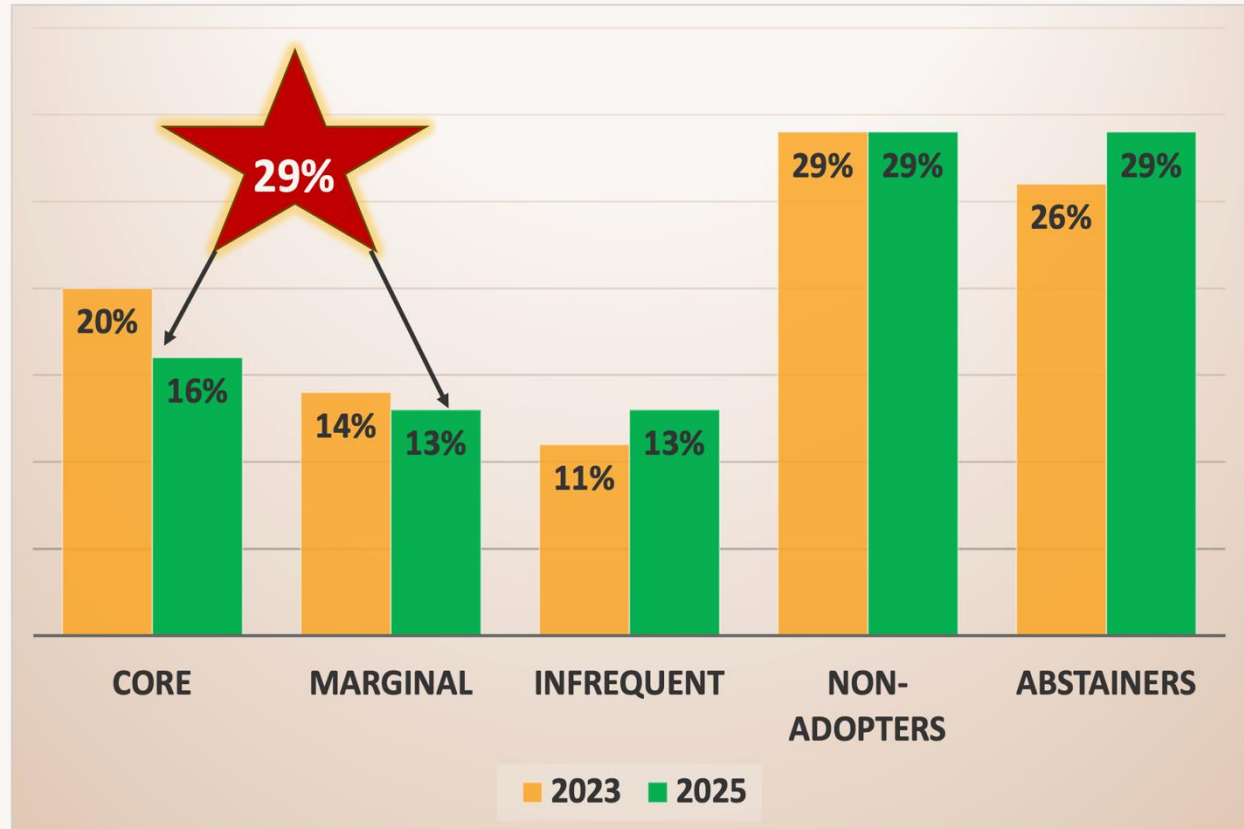
Drink alcohol less than once a quarter

## NON-ADOPTERS =

Drink beer & spirits, but little or no wine

## ABSTAINER =

Does not drink alcohol



# Who Buys Wine?

- Black consumers, who comprise 13 % of the US population, buy 12.2 percent of wines.
- Asians make up 6 percent of the US population and buy 5.6 percent of wines.
- Latino/a consumers are 16 percent of the population; they buy 18.5 percent of wines.
- White people make up 62 percent of the population but buy only 60 percent of wines.

# Who Buys \$100+ Wines?

- Gen Xers - 34%
- Millennials – 32%
- Boomers – 18%
- About 43% of luxury wine consumers are women (in 2023 it was only 34%)

# Who Buys \$100+ Wines?

- Black and Asian consumers, who comprise 19% of the US population, buy 15% of \$100-plus wines.
- Asians make up 5.6% of the US population and buy 8% of \$100-plus wines.
- Latino/a consumers are 16% of the population; they buy 18% of \$100-plus wines.
- White people make up 62% of the population but buy only 56% of \$100-plus wines.

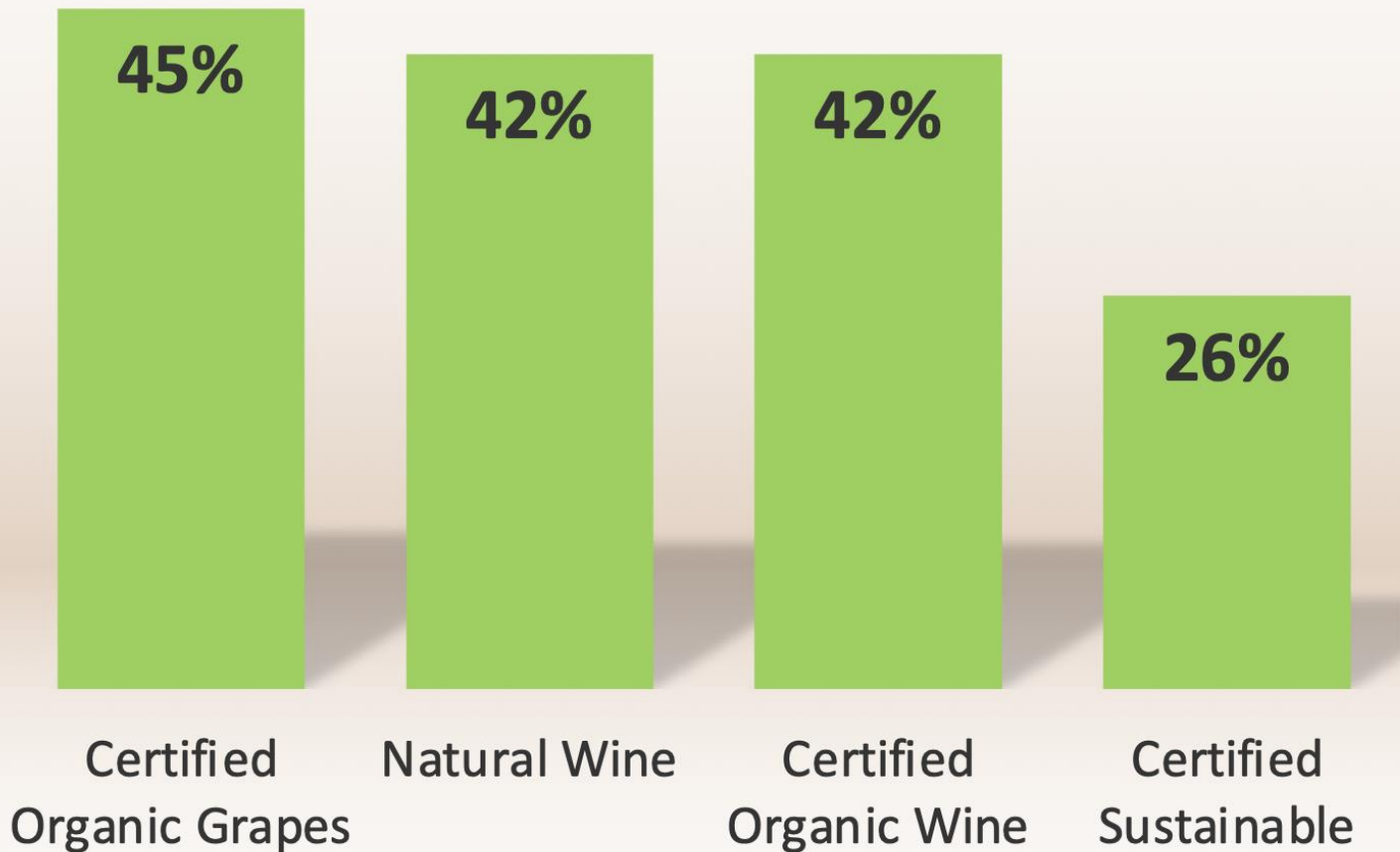
# Is wine healthy? Is alcohol healthy?

- People who have recently changed the type or amount of alcohol they drink to improve mood, sleep, or energy...
- 24% of Gen Z
- 21% of Millennials
- 11% of Gen X
- 5% of Boomers.

# How are people deciding if alcohol is or isn't healthy?

- Just 12% of those under 45 had read about studies of negative impact of alcohol on health
- 22% had changed alcohol consumption to improve mood, sleep or energy
- Even more were reducing consumption of sugar, additives and processed foods.
- 27% of all Americans consumers in the WMC study reported changing their diet to reduce sugar
- 20% said they reduced or avoided additives or processed food/drinks.

To what extent do you think certain types of wine are healthier or better for you personally than typical or conventional wines?



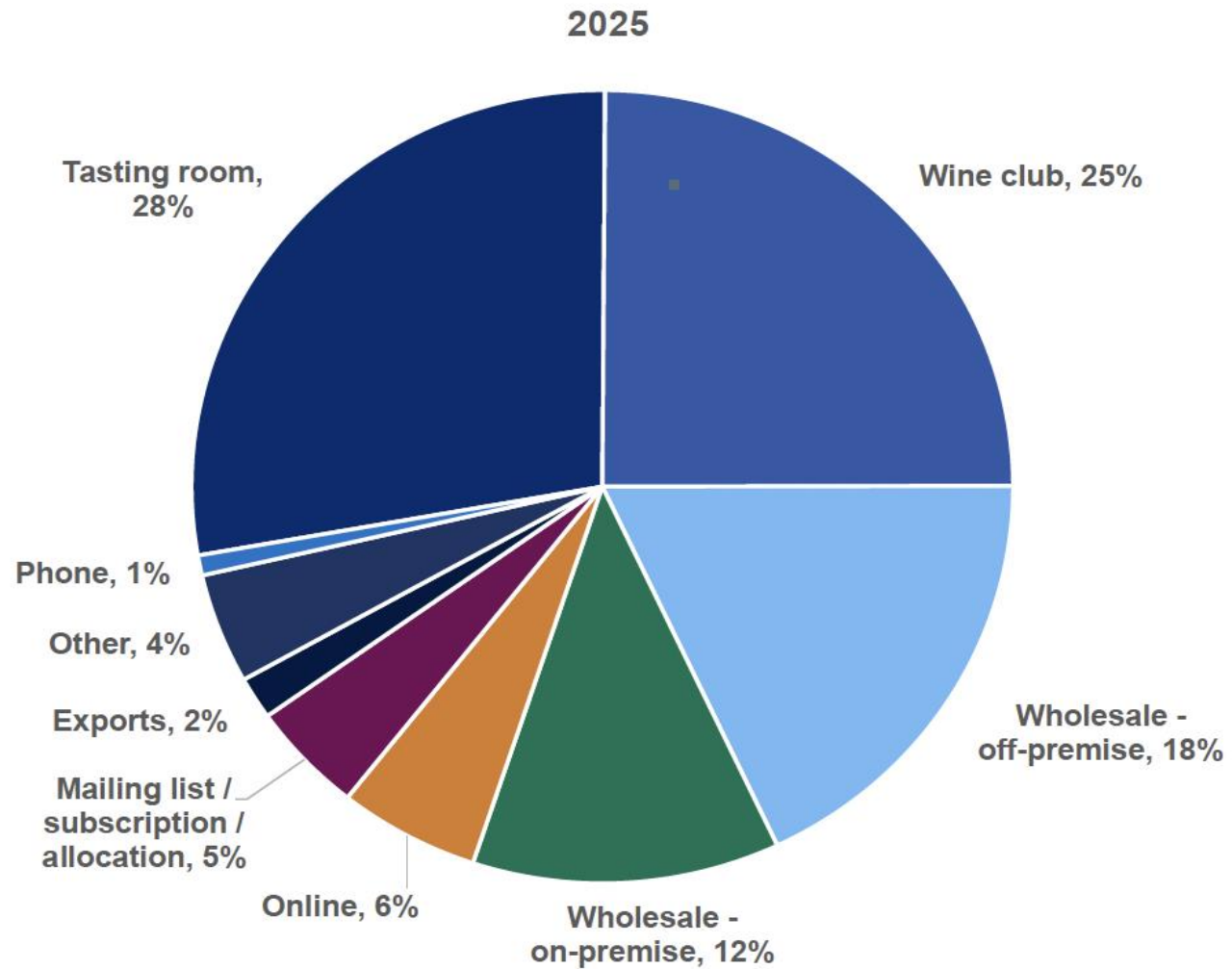
Wine  
Market  
Council,  
2026

# Liz Thach MW, President of Wine Market Council

“Many consumers believe wine has high sugar or unnecessary additives. If we want to keep these younger generations engaged, we need to provide accurate information and increase transparency.”

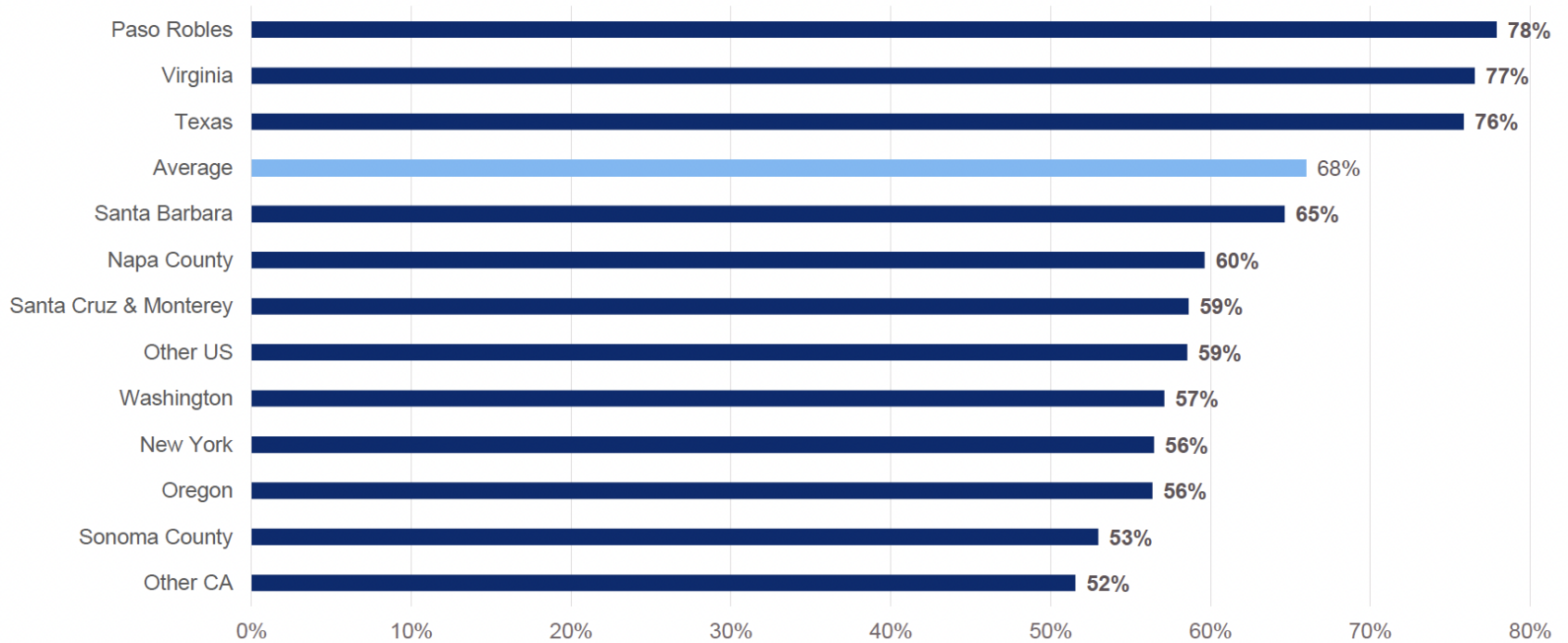
47% of consumers believe that wine is high in sugar

## Sales channel mix: DTC is still the margin engine



**Source:** SVB State of the U.S. Wine Industry Survey

## Percent of revenue from DTC sales by region



# Rob McMillan: Silicon Valley Bank

“DTC tactics need to evolve from the overreliance on hospitality and experience at the winery, to an expanded view of DTC that meets the consumer where they live.”



"Doug likely knows as much as anyone in the world about how to make, market, serve and identify wines."

—USA Today



"Doug is a great educator because he makes learning fun and entertaining."  
—Doug Shultz, Shultz Vineyards



Doug is one of only three people worldwide to have both the Master Sommelier and Master of Wine designation and he's just wild about wines from Rioja. He knows that Rioja is a great combination of our great taste with what you eat. Doug agrees that Rioja is "crazy good" and he should know. You can learn more at [riojawine.com](http://riojawine.com)

VIBRANT RIOJA crazy good



Why do  
people  
drink wine?



# Taggart Vineyard



# Reviews

Caprio Cellars

1

Caprio Cellars (Owner)  
6 months ago

Thanks Danielle!  
You were super to host and we hope to see you when you are next in Walla Walla!

andrew counts  
8 reviews

5 stars 2 months ago

Such a great first visit! Tess was so awesome. She took great care of us and was very knowledgeable about wine in general as well as the history of Caprio. This winery and wine stem from a strong family history and that was very cool to ... [More](#)

1

Stevie Howard  
Local Guide · 128 reviews · 41 photos

5 stars 10 months ago

Incredible wine tasting experience. The wine was excellent, the complimentary paired plates were almost even better, but the two together were out of this world. Lovely estate and beautiful, private sitting areas in which to enjoy all of ... [More](#)



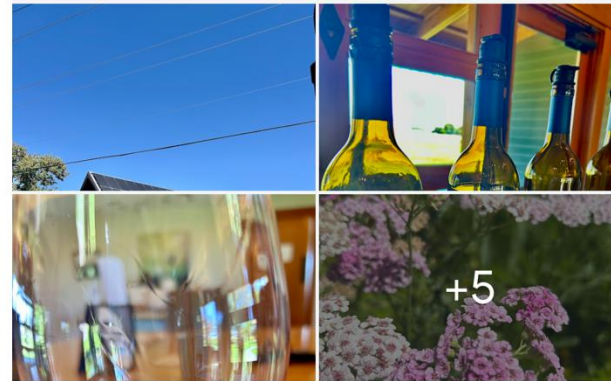
# Reviews

Woodward Canyon Winery

Kathy Redwine  
Local Guide · 84 reviews · 448 photos

5 stars 8 months ago

Made a quick stop on our way home to visit this winery. Great wines- so many bold reds! Beautiful place and Cory was super nice and informative. Thank you! 🥰🚗👏🍷🍷 ... [More](#)



Press and hold to react

Woodward Canyon Winery (Owner)  
8 months ago

Kathy, Thank you so much for stopping by on your way home! We're so glad you enjoyed our bold red wines and found the winery beautiful. Cory will be thrilled to hear your kind words. We hope you'll visit us again soon! Cheers!

JoAn Shults  
8 reviews · 4 photos

# Reviews

Caprio Cellars



**Dawn Walp**

Local Guide · 19 reviews · 8 photos

★★★★★ 6 months ago

What a beautiful winery. The greeting was so welcoming with a nice sip of bubbly! The tasting was fabulous! Exquisite wines and the pairings were scrumptious! Olivia was such a wonderful host, so kind and knowledgeable. We enjoyed our ... [More](#)



Press and hold to react



**Caprio Cellars (Owner)**

3 months ago

Thank you for your Review!  
Come back soon!



**Ritisha Daryani**

3 reviews · 2 photos

★★★★★ a month ago



**Wendi Thomas**

Local Guide · 9 reviews · 1 photo

★★★★★ 3 years ago

We visited this past week and had a lovely time. The weather was so warm that we sat inside to experience the wonderful food creations of Chefs Ian Williams and Kyle Daniel. Our tasting room guide Linda Moran made the experience extraordinary. Needless to say we came home with several bottles from the day's tasting. It is no wonder that there is a waiting list to join the win club!

Press and hold to react

[More reviews >](#)

# Reviews

Caprio Cellars



Local Guide · 13 reviews · 14 photos

★★★★★ 6 months ago

What a great experience we had at Caprio Cellars! We were greeted by Sarah with a friendly and sincere approach. She was very knowledgeable about the wines, vineyard history, and the appetizer food pairings that were served with the wine ... [More](#)



Press and hold to react



**Caprio Cellars (Owner)**

6 months ago

Wow! Thank you for such a detailed review. Your appreciation of what we are doing here is such a joy!



**Dawn Walp**

Local Guide · 19 reviews · 8 photos

★★★★★ 6 months ago

# Blue Mountains



