



STATE OF THE INDUSTRY

JANNA HOWLEY, EXECUTIVE DIRECTOR

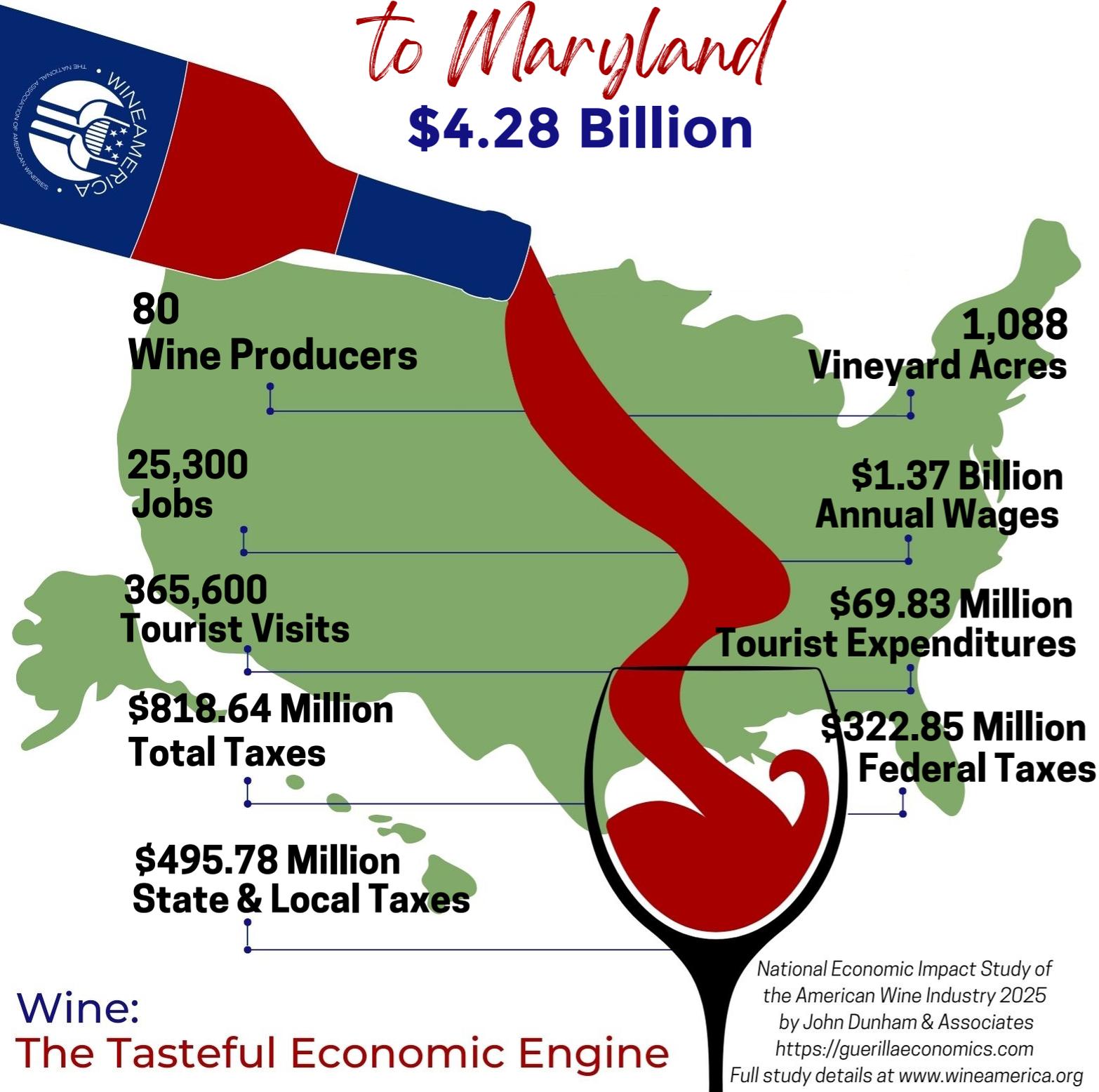
2025 NATIONAL ECONOMIC IMPACT STUDY

WINEAMERICA, THE NATIONAL ASSOCIATION OF AMERICAN WINERIES



*What's Wine Worth
to Maryland*

\$4.28 Billion



WINERIES ARE...

- Creators of Maryland jobs
 - agriculture
 - manufacturing
 - hospitality
 - sales
- Generators of state/local tax revenue + payroll spending
- Anchors of local manufacturing and main-street supply chains
- Drivers of tourism and 'overnight' spending (tasting trails + events)
- Community gathering places that activate rural + urban communities

Wine:
The Tasteful Economic Engine

*National Economic Impact Study of
the American Wine Industry 2025
by John Dunham & Associates
<https://guerillaeconomics.com>
Full study details at www.wineamerica.org*

CHALLENGES:

- Declining alcohol consumption
- Neo-prohibitionist movement and public health
- WHO "No safe level"
- GLP-1s
- Increased cannabis availability
- Expanded offerings across alcohol categories
- More NA brands
- Huge increase in type and quality of NA products: sodas, juices, teas, waters
- Convincing stores/restaurants of the quality of East Coast wine
- Bringing more consumers to East Coast wine
- Festival oversaturation + declining attendance





GENERATIONAL SHIFTS

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- Elder Gen X + Baby Boomers close to retiring or retired:
 - health, wellness
 - price sensitive
- Millennials:
 - raising families
 - price sensitive
 - largest cohort of alcohol consumers at this point in time
- Gen Z:
 - straddling the legal drinking age (12-27)
 - very curious
 - 50% non-white
 - 69 million overall

WHAT ARE THE CURRENT CONSUMER DRIVERS?

1. Drinking ACROSS beverage alcohol and beverage aisle
2. Importance of multi-cultural/diverse segments
3. Flavor forward, and cultural nuances
4. Convenience seeking: what / where / how they buy
5. Wellness driven for "me" and "we"
 1. Social moderation / healthier lifestyles
 2. Sustainability / planetary health
6. Seek transparency
7. Alignment to brands' purpose and values
8. Authentic, authentic, authentic
9. Seeking experiences
10. Open to experimentation
11. Approachability: don't gatekeeper or intimidate



HOW YOU CAN HELP...

↓ barriers for establishing and expanding winery operations

↑ tourism marketing partnerships at county and state levels

😊 protect state producers' ability to compete in an evolving retail environment

🤖 modernize regulations to reflect today's marketplace (w/o reducing safety)



The marketplace is shifting and wineries MUST adapt

The three tier system laws were drafted after Prohibition; small scale wine production wasn't even a consideration at that time

When we advocate for change, it's about staying viable and keeping Maryland-made businesses open



QUESTIONS?



ALWAYS FEEL FREE TO REACH OUT TO INFO@MARYLANDWINE.COM