InnoVint

2026 INDUSTRY REPORT

The State of Winery Health

How wineries rate the health of their businesses, and what the strongest ones do differently.

Table of Contents

HOW TO READ THIS REPORT

1 The first half of the report surfaces the key takeaways drawn from analyzing all of the survey data. It includes what the wineries that rated themselves the healthiest are doing differently than those that are struggling.

2 The second half of the report includes the full survey data, with nearly every question we asked, so you can use it to benchmark your own winery. Data is broken down by size, region, revenue, and role where applicable.

Then act on it. Unlike most industry surveys, this report includes a playbook, *Chapter Three: The Healthy Winery Playbook*, that turns the findings into concrete steps any winery can take this quarter, whatever its size, region, or budget.

FOREWORD

Note from InnoVint's Founder and CEO

Three years ago, we set out to answer a question that had no good data behind it: what does a healthy wine business actually look like? This is our third annual survey, with 541 winery professionals contributing, and the answer has come into real focus.

I won't pretend the last few years have been easy. Costs keep climbing, demand is harder to predict, and 44% of you told us that maintaining or growing sales is your single biggest worry this year. Fewer wineries rate themselves as healthy than did two years ago, and it seems that some smaller producers carry genuine fear for their business about the road ahead. Those wineries deserve to be seen clearly in this data, and they are.

At the same time, a large and resilient core of this industry is doing well. 62% of wineries are running healthy operations in 2026. Roughly seven in ten describe their culture as great or exceptional. Plenty of wineries are not just holding on, they are growing, hiring, and making some of the best wine of their lives. That deserves to be said out loud, because it rarely is.

What struck me most this year is that a winery's success has less to do with what it can't control, and more to do with what it can.

Regional trends, inventory position, and budget influenced winery health far less than I expected. What separates the wineries doing well is how they are run. They understand each wine's margin to inform pricing. Their systems talk to each other. They treat culture as an intentional part of the business rather than a nice-to-have. They stay woven into their community. Those are habits formed by focus and discipline, and any winery can start building them regardless of region or size.

That is the most hopeful thing in this report, and it is why we publish it. Benchmarks only matter if they point to something you can take real action on tomorrow.

To everyone who took the time to share their numbers, their frustrations, and their wins with us: thank you. This report exists because you were willing to be honest about how your wine business is really doing. I hope it helps you make your next decision with a little more clarity, and a lot more confidence.

Cheers!

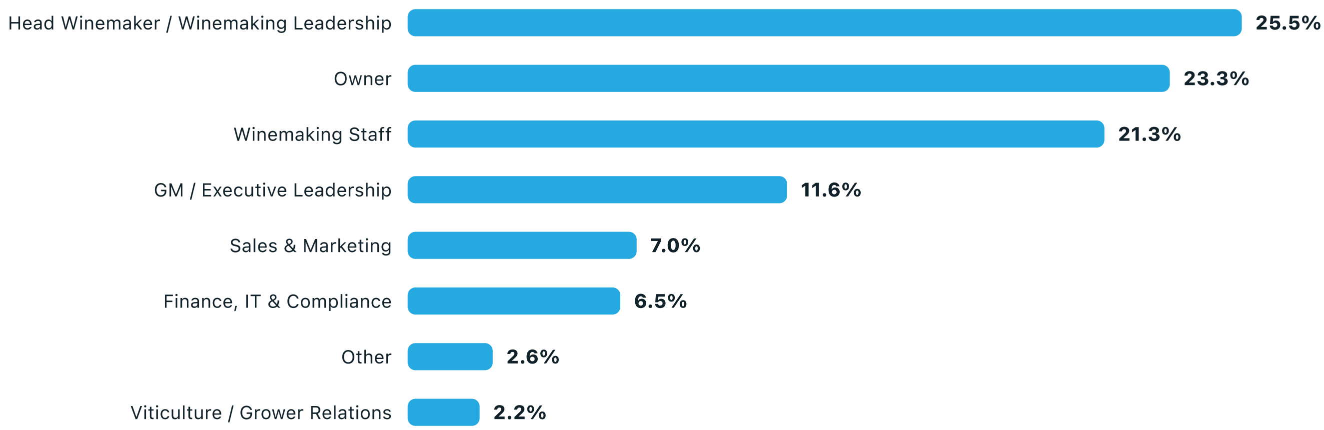
Ashley DuBois Leonard
Founder and CEO, InnoVint

WHO TOOK THE SURVEY

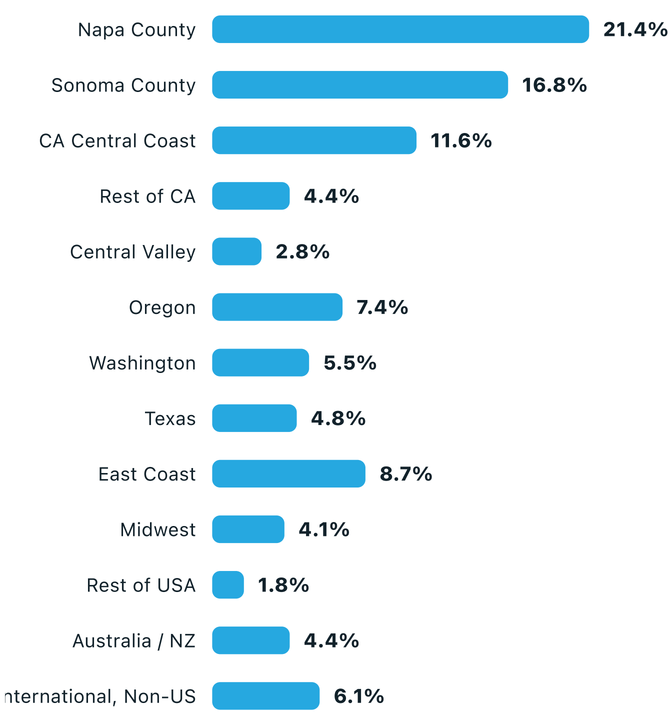
Survey Demographics

The third annual State of Winery Health survey drew 541 completed responses from winery professionals, primarily across the United States. This section describes who they are: their role at the winery, where they produce, and how much wine they make.

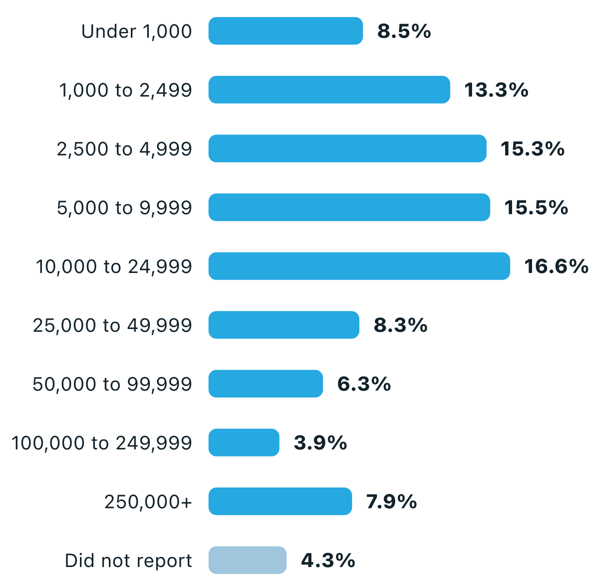
Role



Region



Annual Case Production



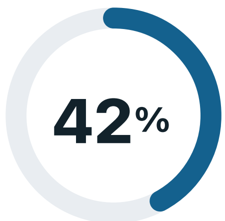
CHAPTER ONE

How Is the Wine Industry Doing?

Confidence has slipped two years running. And yet a large, resilient core of the industry is still producing good wine, running thriving businesses, and retaining good people through a hard stretch. Here is where the industry stands.

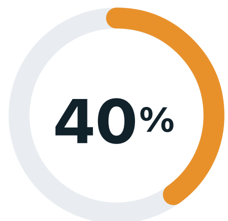
Where the Industry Stands in 2026

Business health has three dimensions, and this survey measures all of them: financial (are you making money), operational (does the winery run well), and cultural (do your people want to be there). Together they roll up into an overall read on how a winery is doing. Here is where the industry sits in 2026.



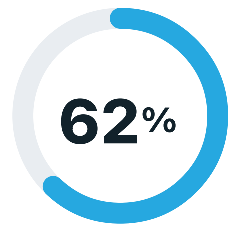
Overall health

rate it Good or Excellent



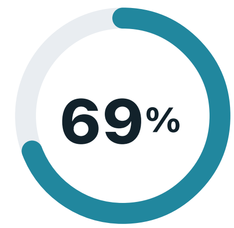
Financial health

rate it Good or Excellent



Operational health

rate it Good or Excellent

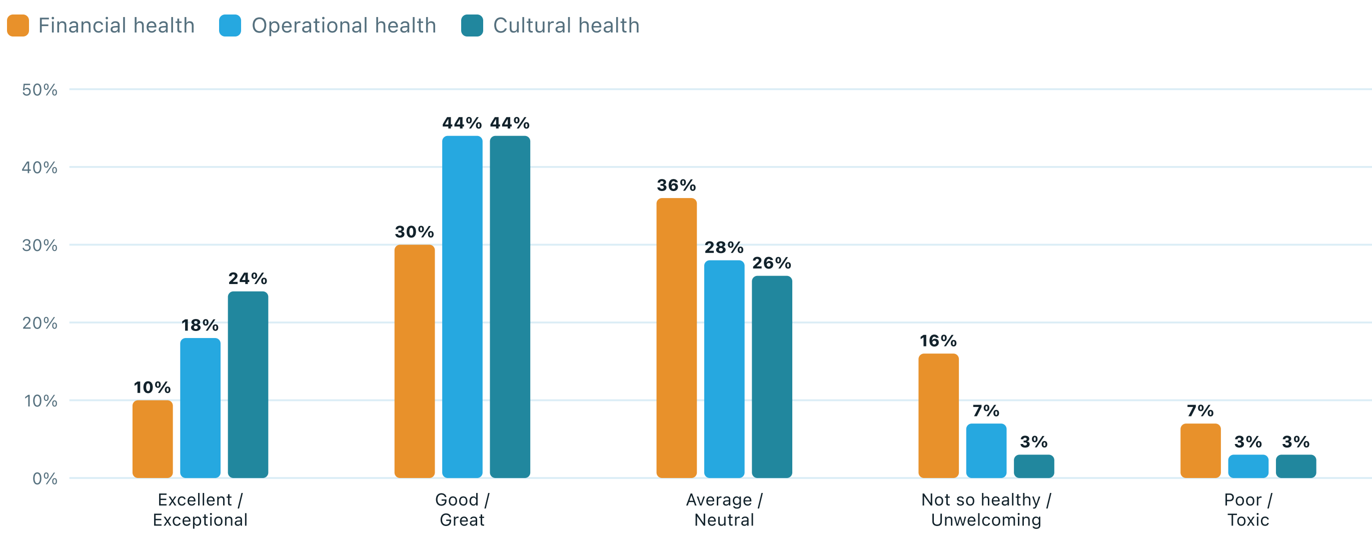


Cultural health

rate it Great or Exceptional

Most wineries are still in good shape. Culture and operations concentrate at the top of the scale, while financial health sits lower, heavier in the middle and the struggling tiers. A large, resilient core of the industry is still producing good wine, running thriving businesses, and retaining good people through a hard stretch, and plenty of wineries are genuinely thriving. Much of this report focuses on what these successful wineries are doing.

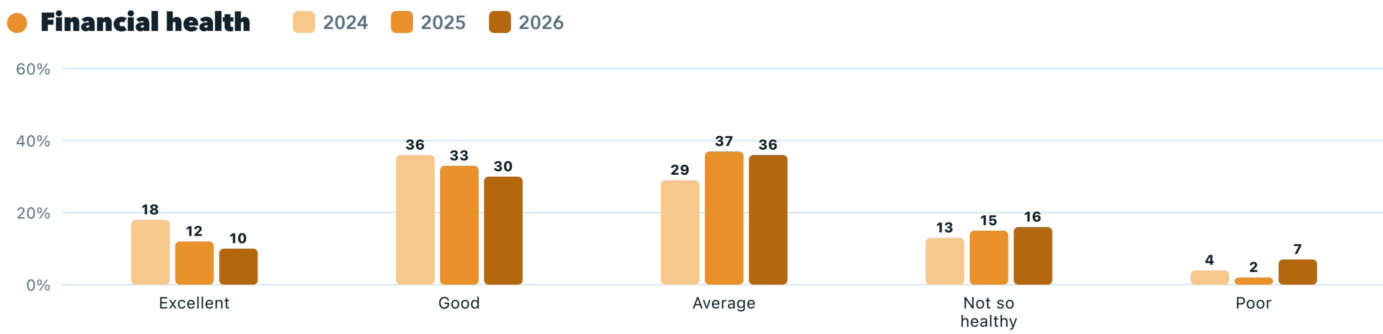
The full spread of ratings in 2026, by dimension

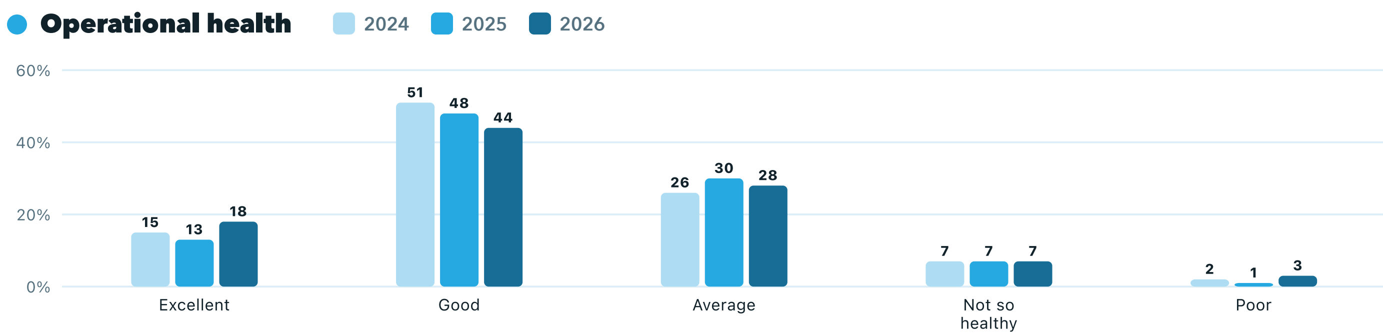


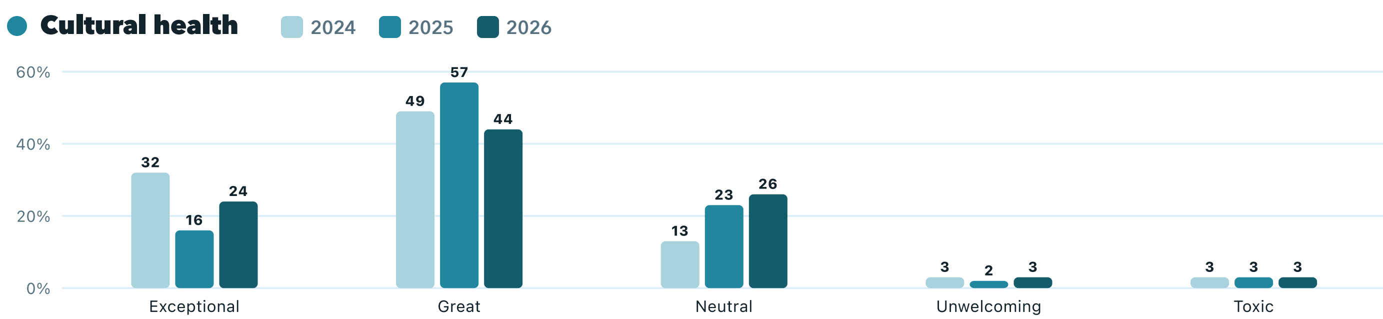
The pages that follow trace how this picture has shifted over three years, what wineries told us in their own words, and the concerns weighing on them heading into next year.

How the Industry Has Shifted Since 2024

Where the industry sits today is only part of the story. Reading each dimension across three years shows where wineries have moved on the rating scale, not just whether the topline slipped.







At the same time, confidence has slipped two years running. The percentage of wineries describing their overall business as healthy has fallen from 56% in 2024 to 45% last year to 42% today. Financial and cultural health have similarly declined. Operations held steady, the one dimension of health that didn't slip. The pressure is first showing up in wineries' finances, before impacting their day to day operations.

Who is experiencing this decline? A year ago, the softening was observed among the top wineries, as some of the highest-rated wineries slipped into neutral health ratings. This year the top wineries have remained stable, and the movement is now seen at the bottom: the share of wineries rating themselves unhealthy increased from 18% to 24%, and the share rating their financial health as poor rose from 2% to 7%. The healthy are continuing to thrive, while a smaller group is falling behind, and the steady middle in between is shrinking. The gap between the best and the rest is widening.

In Their Own Words

We asked wineries to explain the ratings they gave, in their own words. The same three dimensions of health, financial, operational, and cultural, show up again and again, from the wineries thriving to the ones under real strain.

Though sales are down 50%, I am still profitable. I manage money well and make decisions based on financials as well as advice from a trusted bookkeeper, accountant, and financial adviser.

FINANCIAL HEALTH · RATED EXCELLENT

"We have a collaborative team and strong relationships across departments, especially during harvest. Overall people enjoy working here and feel invested in the product."

CULTURAL HEALTH · RATED GREAT

"Increased investment in automation and technology has our operation able to produce more wine at the same operational overhead."

OPERATIONAL HEALTH · RATED EXCELLENT

"We are profitable and stable overall, but margins have tightened over the past couple of years due to rising production and operating costs."

FINANCIAL HEALTH · RATED GOOD

"Our core processes are solid and the team executes well, but there are still inefficiencies between departments, especially inventory tracking and forecasting."

OPERATIONAL HEALTH · RATED GOOD

"Morale is low because of the overall state of the industry."

CULTURAL HEALTH · RATED NEUTRAL

"Costs are increasing, sales are declining, wine club attrition is growing."

FINANCIAL HEALTH · RATED NOT SO HEALTHY

"Our team is too lean and we have dysfunctional leadership."

OPERATIONAL HEALTH · RATED NOT SO HEALTHY

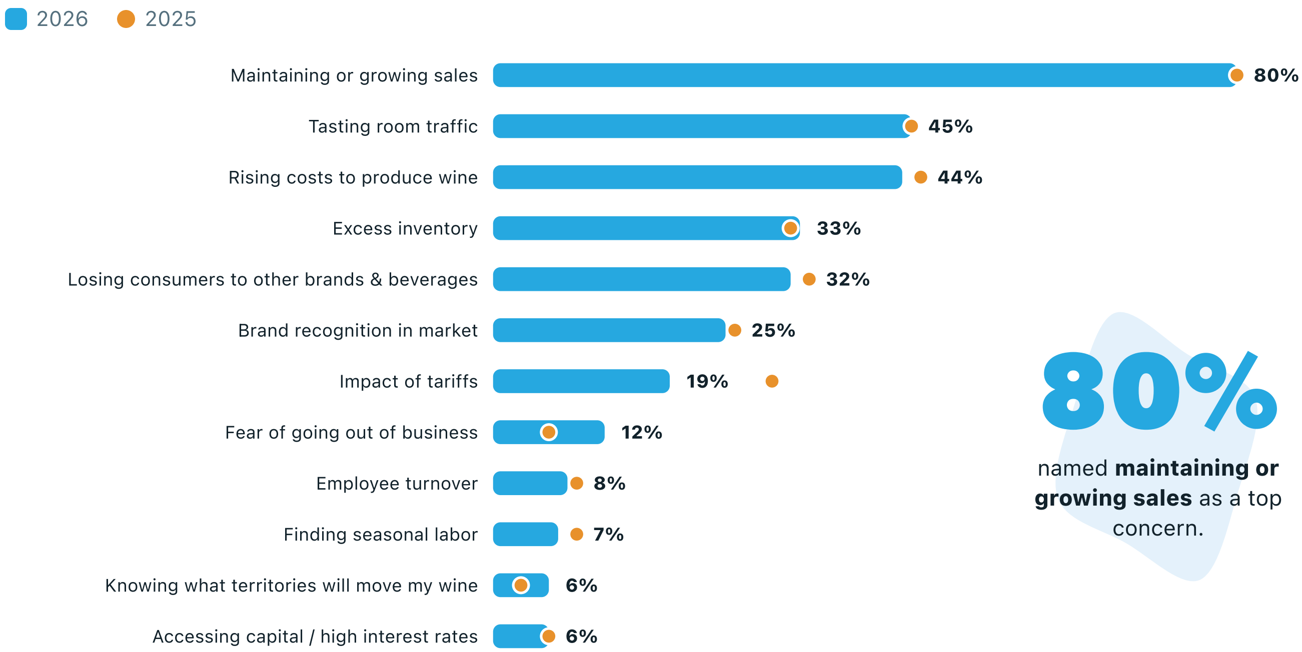
"There seems to be a disconnect between the retail staff and the production staff."

CULTURAL HEALTH · RATED NEUTRAL

Verbatim responses from the 2026 survey. All open-text responses are anonymized.

Top Concerns: What's Weighing on Wineries

Top Concerns over the next 12 months



80%

named **maintaining or growing sales** as a top concern.

Share of respondents selecting each concern among their top four. Sorted by 2026.

Ask wineries what they are worried about and one answer stands well above the rest. 80% named maintaining or growing sales as a concern, and 44% named it their single biggest worry, more than four times any other concern.

Other worries closely follow, all of which stem from this fundamental challenge. Issues such as tasting room traffic (45%), rising production costs (44%), excess inventory (33%), and losing consumers to other brands and beverages (32%) can all be traced back to the central challenge of ensuring sufficient wine sales at a healthy margin. If demand can be addressed, many of these issues would likely ease as well.

The wineries in survival mode

Fear of going out of business was cited by only 64 wineries, which places it near the bottom of the list. But of those 64, **61% named it their single biggest concern**, a concentration no other worry comes close to. When the fear of closing is present, it overshadows everything else, particularly among the smallest producers: two-thirds of these wineries make fewer than 10,000 cases a year.

What changed since 2025

Most concerns held steady year over year, with two exceptions. **Tariffs fell about 11 points**, from 30% to 19%, moving from headline concern to background noise. **Fear of going out of business rose about 6 points**, from 6% to 12%, the fastest-growing worry in the survey.

CHAPTER TWO

The 5 Habits of a Healthy Wine Business

We compared the healthiest wineries with the strugglers, and a consistent set of habits separates them, habits that matter more than size, region, or how they sell.

What a Healthy Winery Looks Like

In 2026, the healthiest wineries are set apart by **how they are run**, a handful of disciplined habits that matter more than their size, region, or how they sell. Read the numbers below as one reality: this is what a healthy winery looks like, and how far struggling wineries sit from it.

Healthy wineries · Struggling wineries

75%

rate their financial health as good or excellent.

Only **7%** of struggling wineries can say the same, the widest gap we measured.

73%

run lean and turn a profit.

More than three times the rate of struggling wineries (**21%**).

86%

rate their operations as healthy.

More than double the rate of struggling wineries (**37%**).

97%

avoid operating at a loss.

Only **59%** of struggling wineries manage to stay out of the red.

93%

have a team that's satisfied at work.

Compared with **56%** of struggling wineries.

82%

rate their company culture as positive.

Against **53%** of struggling wineries.

36%

are confident their wine is priced right.

Nearly three times the rate of struggling wineries (**13%**).

42%

actively seek out new tools.

Nearly double the rate of struggling wineries (**24%**).

78%

are integral or active in their community.

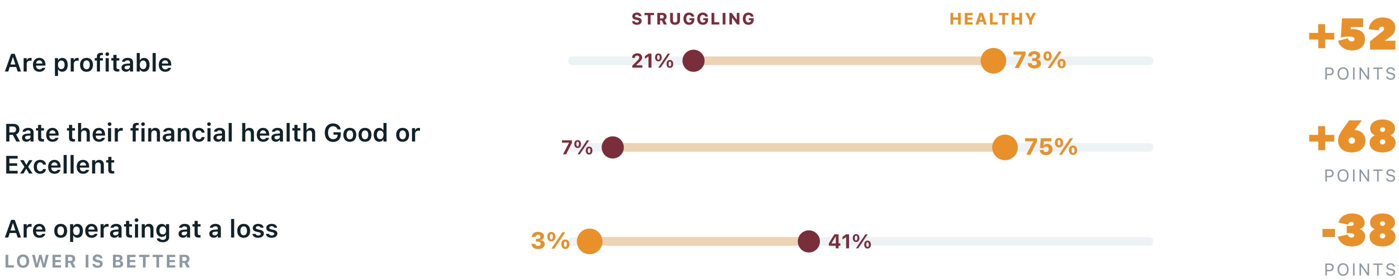
Struggling wineries trail at **64%**.

Source: InnoVint 2026 State of Winery Health Report

HABIT ONE • WHAT THE HEALTHIEST WINERIES DO DIFFERENTLY

1 They run lean and profitable

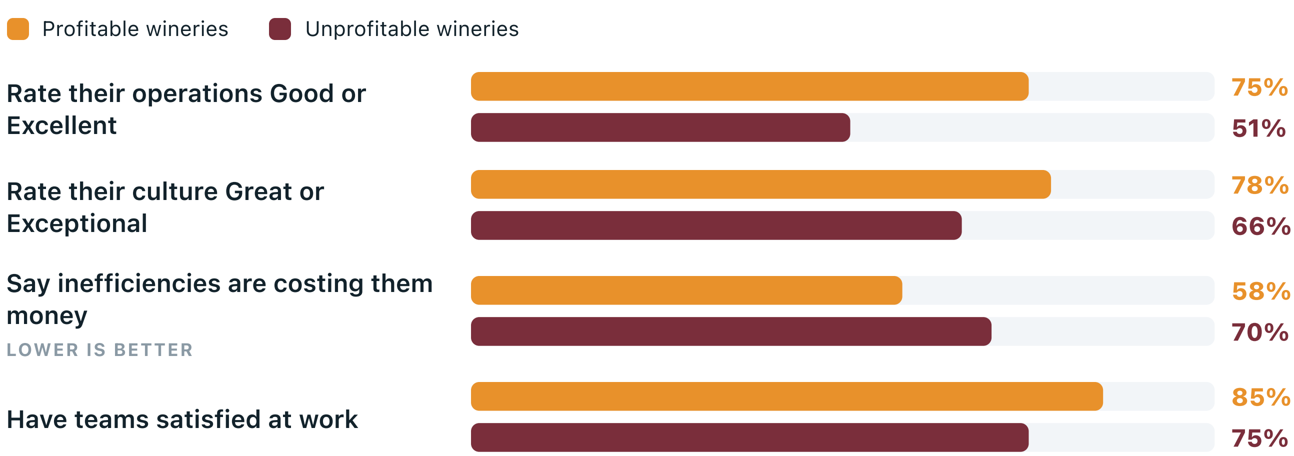
Healthy wineries turn a profit, rate their own financial health well, and stay out of the red. They get there by **running a tighter operation rather than by selling more wine**. In fact, approximately **75%** of wineries with effective operational practices turn a profit, compared to just **26%** of those facing operational challenges.



Wineries don't have to be growing to be profitable.

Wineries with flat sales are profitable nearly as often as those growing (**57%** vs **58%**). However, when sales dip, only **34%** manage to stay profitable. When asked about their success, profitable wineries emphasize the importance of operating efficiently and closely monitoring their financials rather than relying solely on favorable market conditions.

What profitable wineries do differently



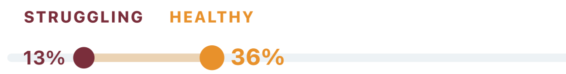
Source: InnoVint 2026 State of Winery Health Report

HABIT TWO • WHAT THE HEALTHIEST WINERIES DO DIFFERENTLY

2 They really know their numbers

Healthy wineries are **nearly three times as likely to be extremely confident their wines are priced correctly**. That confidence is built rather than innate. It comes from knowing what each bottle actually earns.

Are extremely confident their wine is priced correctly



+23
POINTS

Tracking profit per bottle is what produces the confidence, and that confidence is what turns up in the bottom line.

84% of wineries that track their profit per bottle are confident their wine is priced correctly, compared with **64%** of those that do not monitor this data.

73% of wineries confident their wines are priced right are profitable, compared with **31%** of those that are not confident.

Knowing the profit on each wine, and being disciplined about a price point's impact on margin, is one of the most effective ways to enhance the bottom line.

Most wineries still can't see profit by the bottle.

43% of the industry still sets prices and discounts without knowing the margin impact on each SKU. Even among the **75%** who are confident their pricing is right, **28%** don't know their cost to produce each wine and **37%** don't know their profit per bottle.

Asked why they cannot see profit at the SKU level, wineries point less to indifference than to systems that do not talk to each other, shared costs that resist being split by the bottle, and bookkeeping that was never set up to correctly track it.

"Certain restrictions in what I am able to do in our winery management software … not being involved in conversations about profit and loss."

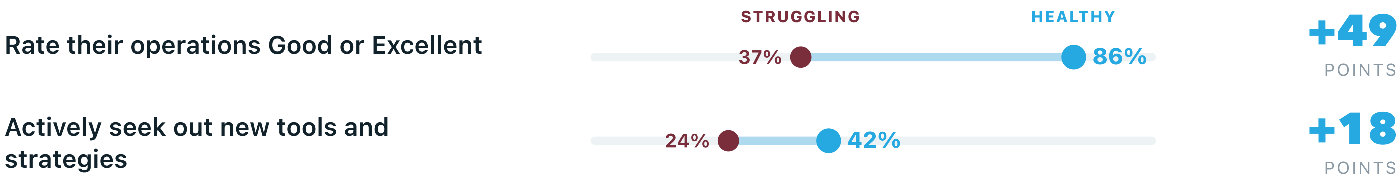
"Inability of separating vineyard costs per final SKU … so we have to lump everything together."

"We do not have real accounting, just very general numbers."

HABIT THREE • WHAT THE HEALTHIEST WINERIES DO DIFFERENTLY

3 They run tight, connected operations

Healthy wineries are **more than twice as likely to rate their operational health Good or Excellent**, and the difference reaches well beyond the cellar. They are also **nearly twice as likely to look out for new tools and strategies** to enhance operations.

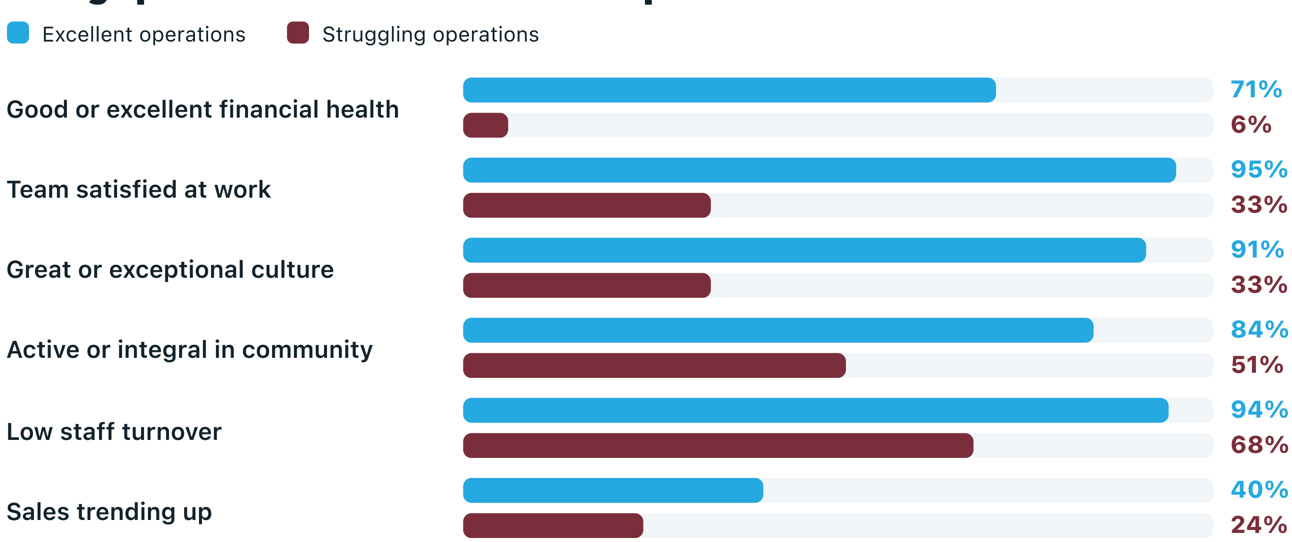


In a well-operated winery, efficiency shines. Take the systems a winery uses as an example. When they are connected, a number entered once in the cellar automatically updates everywhere it is needed, including sales, inventory, and financial records. When they are disconnected, staff waste valuable time re-entering information, and every handoff leaves room for error.

Inefficiency, like disconnected systems, is an expensive problem!

59% of wineries report that inefficiencies are costing them money, primarily because their systems are not in sync.

Strong operations lead to better business performance overall

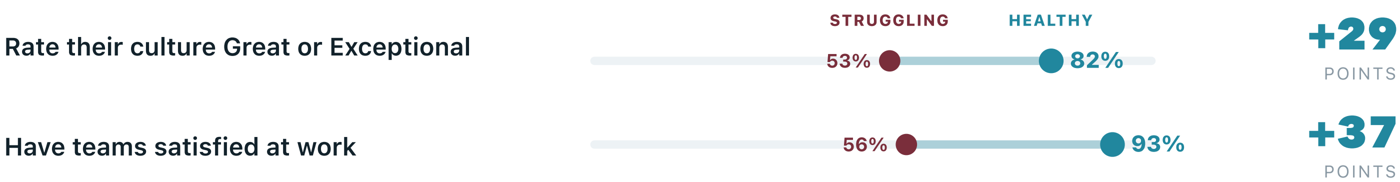


Source: InnoVint 2026 State of Winery Health Report

HABIT FOUR • WHAT THE HEALTHIEST WINERIES DO DIFFERENTLY

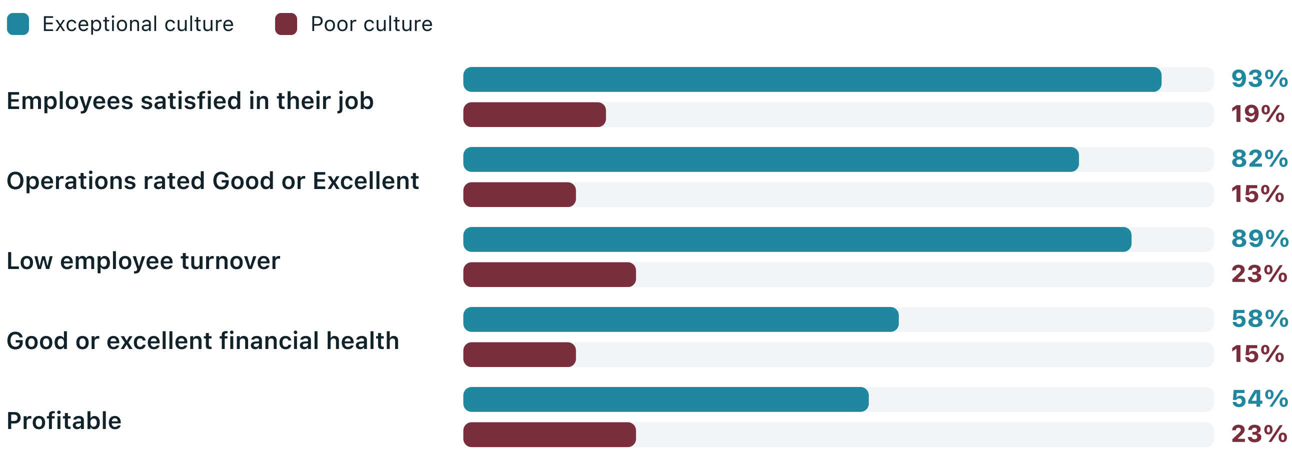
4 They intentionally invest in culture

Healthy wineries are **far more likely to describe their culture as great or exceptional**, and their **teams are far more likely to be satisfied at work**.



Workplace culture starts with how employees actually feel about their jobs. The highest-rated wineries describe collaborative teams, strong relationships across departments, and people who genuinely like the work. Where culture declines, it usually traces back to low morale, departments that operate in isolation, and poor communication.

As culture improves, so does everything else



Source: InnoVint 2026 State of Winery Health Report

A strong culture and a healthy business go hand in hand, which is why the best wineries treat culture as an integral part of running the company.

HABIT FIVE • WHAT THE HEALTHIEST WINERIES DO DIFFERENTLY

5 They are woven into their community

Belonging to the industry pays off. Wineries integral to their community are **more than twice as likely to be healthy overall** as those with minimal involvement.

Are healthy overall

+31
POINTS

Community involvement can take various forms, including participation in regional and national trade associations, attending industry events and technical groups, engaging in peer networks where insights are shared, and contributing to local efforts through nonprofits and chambers of commerce. Wineries that consistently engage in these activities tend to be healthier across the board.

53% of wineries integral to their community are in good financial shape, compared with **32%** of the minimally involved.

92% of employees at wineries deeply rooted in their communities report job satisfaction, compared with **61%** at less involved wineries.

> **The biggest advantage of being involved in the community is financial well-being**, and the positive effects extend to employees too, with a strong sense of community boosting morale.

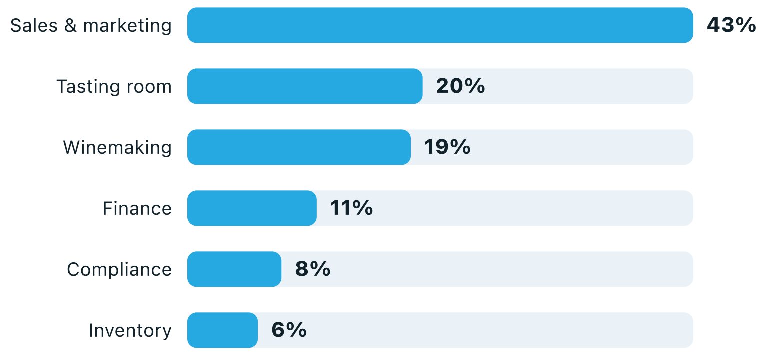
Spotlight: AI in the Winery

This year marks the first time the survey included questions about AI, giving concrete data on a trend that is just beginning to gain traction among wineries.

60%

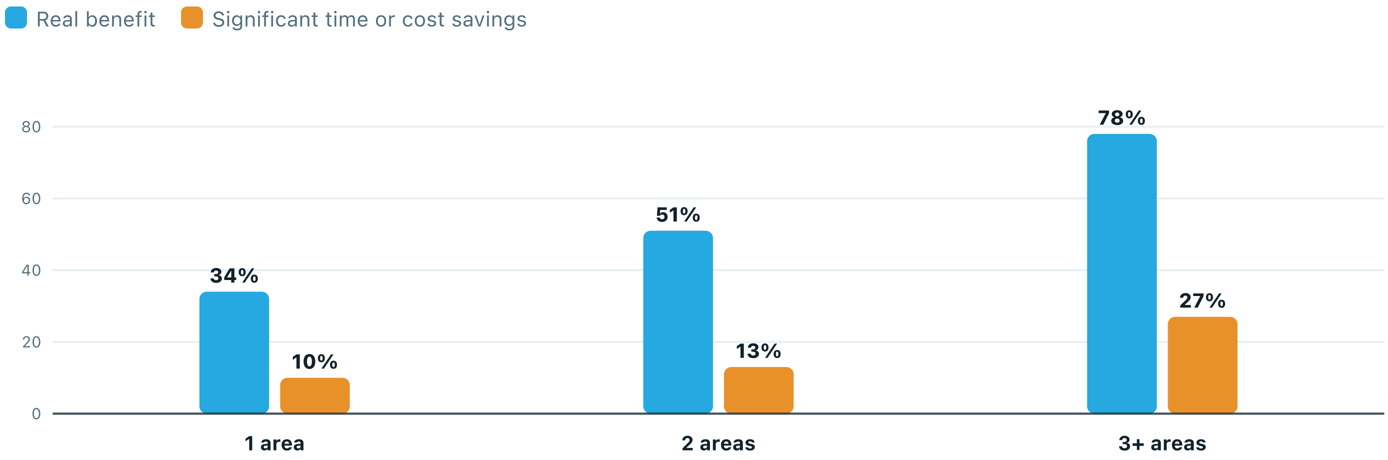
of wineries are **already using AI** in some form, clustered in one area: marketing.

Where wineries are using AI today



Most wineries that have adopted AI apply it in just one area of the business. The greatest benefits come when AI is used across multiple areas. Wineries that use AI in three or more areas report nearly three times the time and cost savings, and are more than twice as likely to see a real benefit for the business, as those using it in just one.

The payoff rises with depth of AI adoption



AI usage alone does not separate healthy wineries from struggling ones. 60% of healthy wineries use AI, compared with 56% of struggling ones, which is why AI is not one of the five key differentiators, yet. The wineries seeing real value are the ones using it in depth, and they tend to be the ones already disciplined with their data. AI helps wineries that are already operating well; it will not fix things for those that aren't.

CHAPTER THREE

The Healthy Winery Playbook

Turning Insights into Action

The healthiest wineries do ordinary things consistently, and the differences from the last section are within reach for any winery. Here is where to start across the three drivers of a healthy business: financial, operational, and cultural.

Turning Insights into Action

Reports like this only matter if they lead to action. What sets the healthiest wineries apart is how they run the business, not their size, region, or how they sell, so every move here is open to any winery. What follows are practical steps across the three drivers of overall business health, your finances, your people, and your operations. None of it takes a big operation, deep pockets, or a prime location.

FINANCIAL HEALTH

1 OF 3

Things you can do to improve your financial health.

1. **Know what each wine earns.** For each wine, compare its true cost to make against its revenue to reveal profit per SKU. Then check your pricing, discounting, and determine if your margins meet your expectations. Your most expensive wines may not be your greatest moneymakers.
2. **Bring winemaking into the financial conversation.** The cellar and other departments surface cost savings and process improvements the P&L misses.
3. **Get outside help if the books need it.** A wine-industry CFO or an experienced accountant can get you started, or keep the books clean if finance is not a full-time seat.
4. **Benchmark your margins.** Knowing your own numbers only helps once you know what good looks like for a winery your size.

TOOL

What counts as a healthy margin?

There is no one-size-fits-all answer, but these targets, developed with Erik McLaughlin of METIS, a winery mergers and acquisitions firm, work as a useful gut check.

KEY FINANCIAL PERFORMANCE INDICATOR	POOR	OKAY	GREAT
Wholesale gross margin	<40%	40%	>40%
DTC gross margin	<60%	60%	>70%
Blended gross margin (wholesale and DTC)	40%	50%	60%
Net or operating profit margin	<10%	15%	>20%

Turning Insights into Action, Continued

CULTURAL HEALTH

Things you can do to improve your cultural health.

YOUR TEAM

1 **Share the "why," not just the "what."** Remind the whole team of the mission and the strategy at your next gathering, so people can see how their work connects.

2 **Re-evaluate benefits and compensation beyond healthcare.** It goes further than medical, dental, and vision, and flexibility counts too.

3 **Measure how your team actually feels.** Do not guess at it. Run a short check-in survey on a regular cadence, and close the loop on what you learn.

TOOL **An employee check-in survey**

A starting set; adapt the wording to your team and answer each on a simple 1 to 5 agree scale.

1. I understand how my work connects to the winery's goals.
2. I feel recognized for the work I do.
3. I have the tools and information I need to do my job well.
4. Communication across departments is open and honest.
5. I can see a path to grow here.
6. I would recommend this winery as a great place to work.

YOUR COMMUNITY

1 **Join, or get more out of, a regional association.** Find a winemaking or grape-growing group in your area. If you are not a member, connect and learn how to join; if you are, pick one new way to contribute this quarter.

2 **Share the effort across the team.** Encourage every department and role to take part, not just leadership.

3 **Put your rising talent forward.** Back your most promising people for speaking opportunities, thought leadership, and focus groups, so they learn and share while raising your brand.

4 **Advocate for more than your own winery.** A rising tide raises all ships, so propose improvements for your region and your peers, and share openly where your winery is strong so others can learn from it.

5 **Build relationships with those you admire.** Learn from individuals or businesses that you aspire to be like. Connect with them meaningfully for both of you.

Turning Insights into Action, Continued

OPERATIONAL HEALTH

Things you can do to improve your operational health.

1. **Move one decision off a spreadsheet.** Pick a decision you currently make from a hand-kept spreadsheet and put it on numbers you trust from a real system. One connected handoff removes more friction than a new dashboard.

2. **Do not let your teams work in a silo.** Improve communication between finance and production, your biggest cost center, and put a standing meeting on the calendar to keep them talking.

3. **Deploy purpose-built wine software and use its depth.** Look for a system that already understands how a winery runs, then use more than the basics.

4. **Put AI to work in one more area this quarter.** Depth is where the payoff shows up, so go further with what you have rather than adding another single-use tool.

5. **Keep hunting efficiencies.** Make "how do we do this in less time with less effort?" a standing question in planning.

Want to take action but not sure where to start?

1 Start with what is in your control

You do not need a full overhaul to make progress. Pick one area where you can make a difference, whether that is a cost analysis, inventory visibility, or how your team works together.

2 Benchmark internally

Bring these numbers to your next planning meeting. Name one place your winery is already strong, and one you want to improve.

3 Choose one priority for the quarter

Write it down and revisit it when the quarter closes. Small changes are what build momentum.

THE NUMBERS

The Full Survey Data

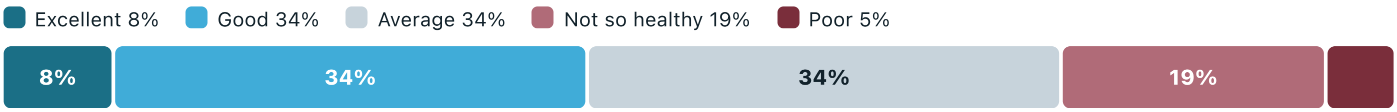
Every question in the survey, with the full distribution of responses and breakdowns by size, region, revenue, and role where they apply. Use these pages to benchmark your winery against your peers.

Overall Health

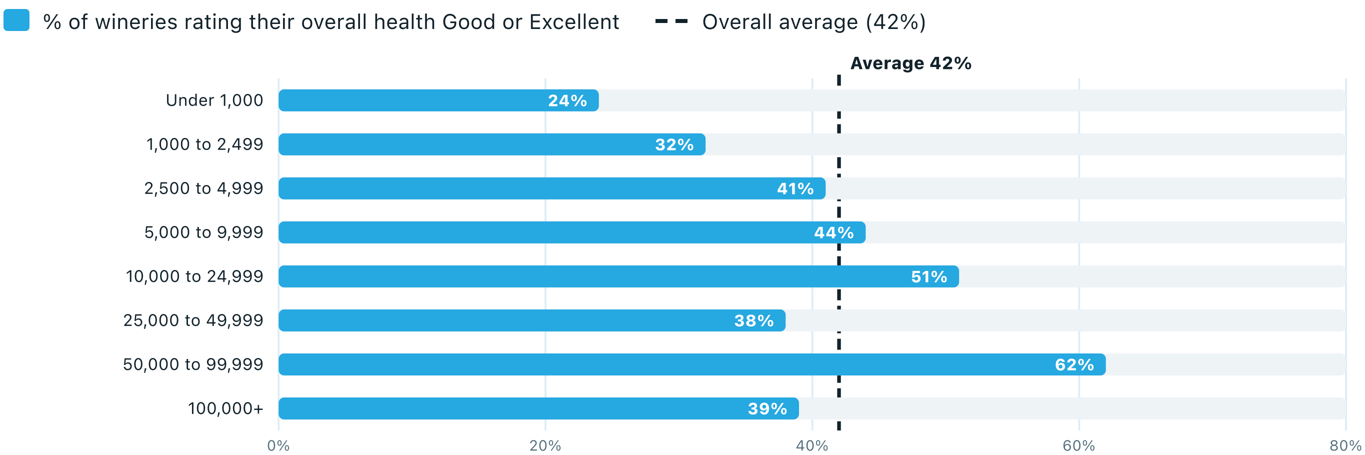
SURVEY QUESTION

How would you rate the overall business health of your winery?

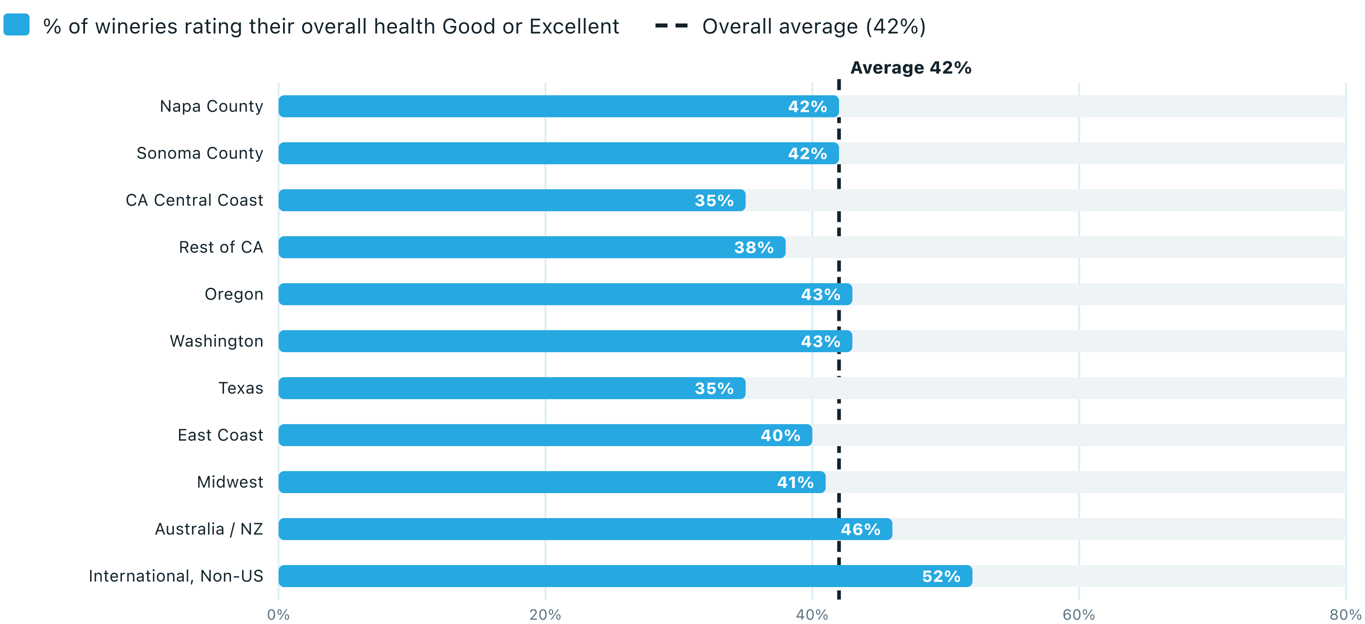
How wineries rate their overall business health, 2026



Overall Health By Annual Case Production



Overall Health By Region

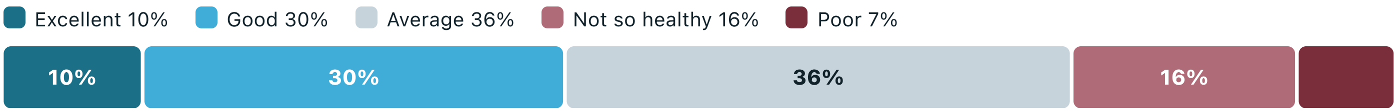


Financial Health

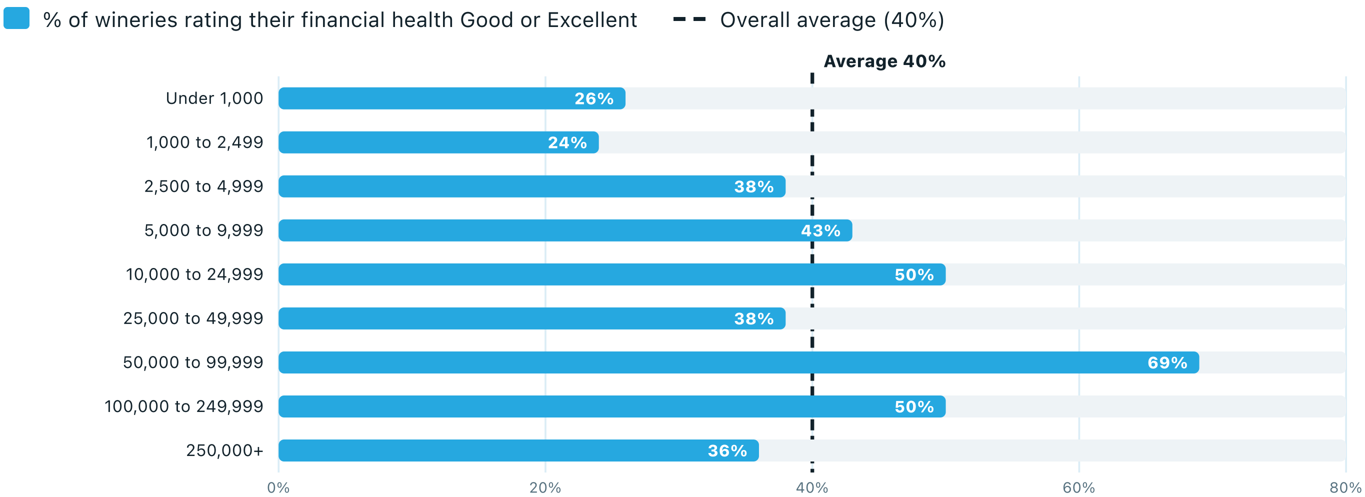
SURVEY QUESTION

How would you rate the financial health at your winery?

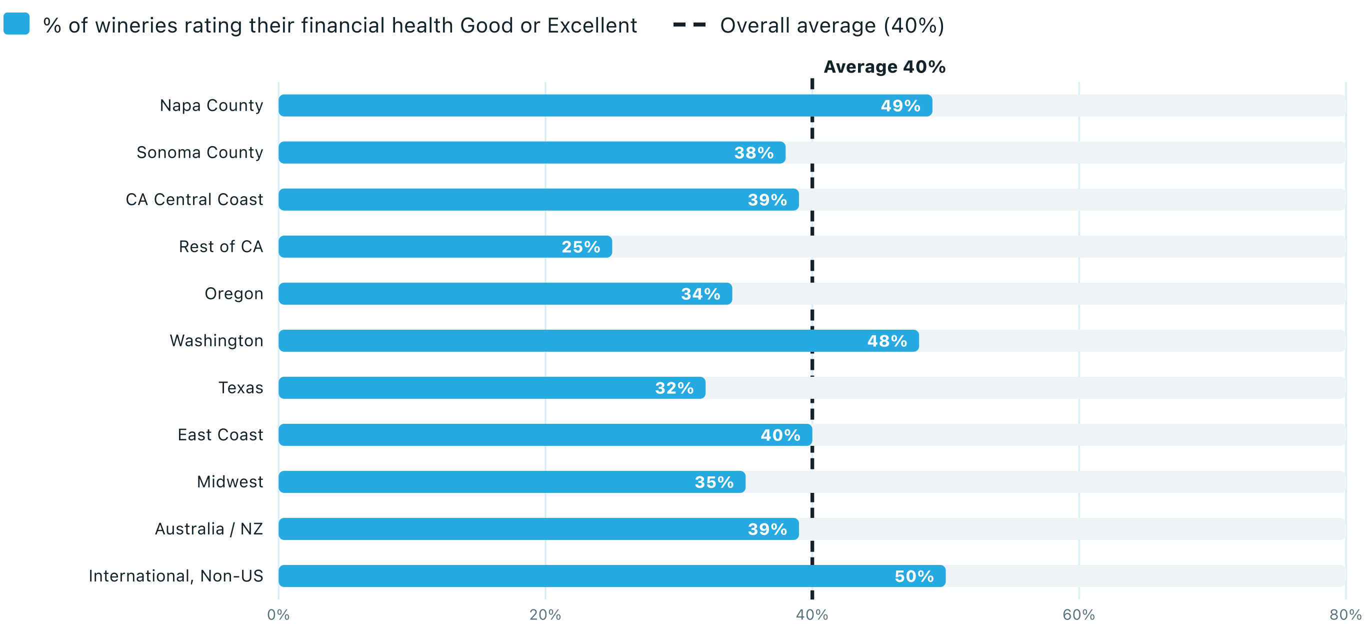
How wineries rate their financial health, 2026



Financial Health By Annual Case Production



Financial Health By Region

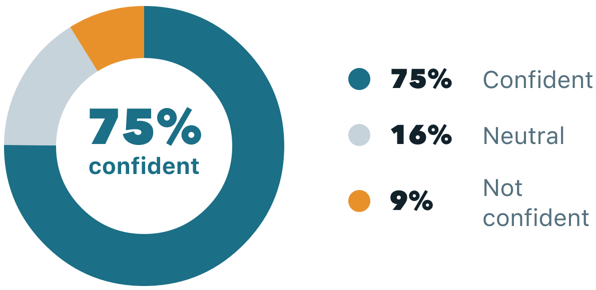


Price & Cost Visibility

SURVEY QUESTIONS

How confident are you that your wines are priced right, and do you know your cost and profit on each wine?

How confident wineries are that their wines are priced right

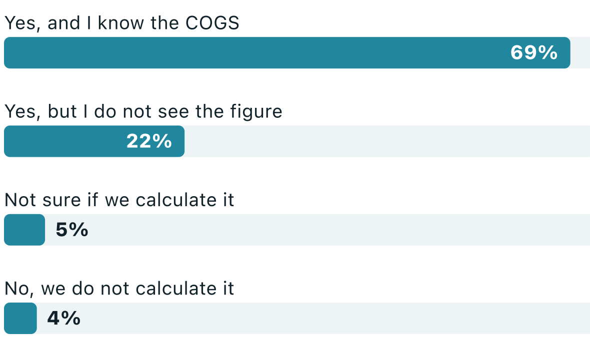


Source: InnoVint 2026 State of Winery Health Report

Most wineries know their costs and feel confident in their pricing, but true per-wine profitability still lags. 91% of wineries calculate their production costs and 75% are confident in their pricing, yet only 56% know their profit at the level of an individual wine.

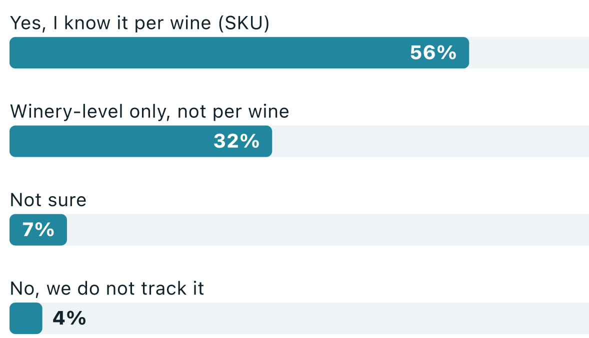
Cost and margin visibility

Do you know what it costs to make each wine?



Source: InnoVint 2026 State of Winery Health Report

Do you know your profit per wine?



Source: InnoVint 2026 State of Winery Health Report

Confidence outruns visibility

Among the 75% of wineries confident their pricing is right, a large share cannot see the margin underneath it.

37% do not know their profit per bottle

28% do not know their cost to make each wine

Sales Trends

SURVEY QUESTION

Are your winery sales trending up, generally flat, or down?

How winery sales are trending, 2026

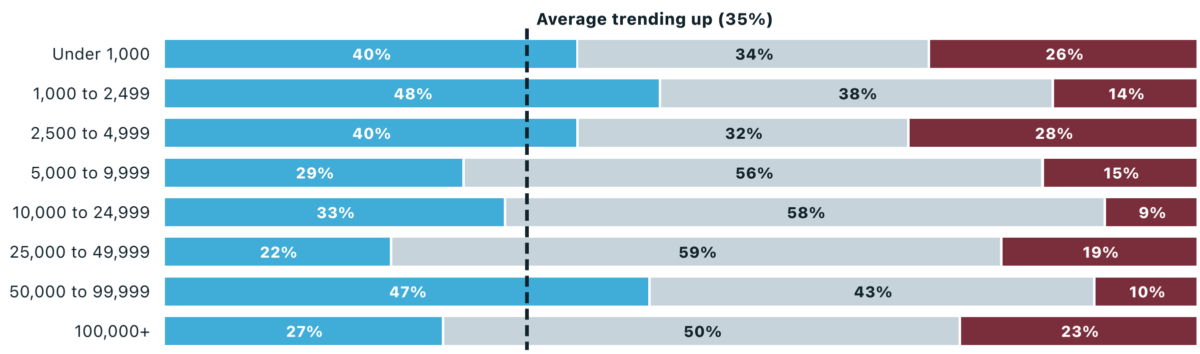
- **35%** Trending up
- **47%** Generally flat
- **18%** Trending down

82%

of wineries report their sales are **stable or growing**

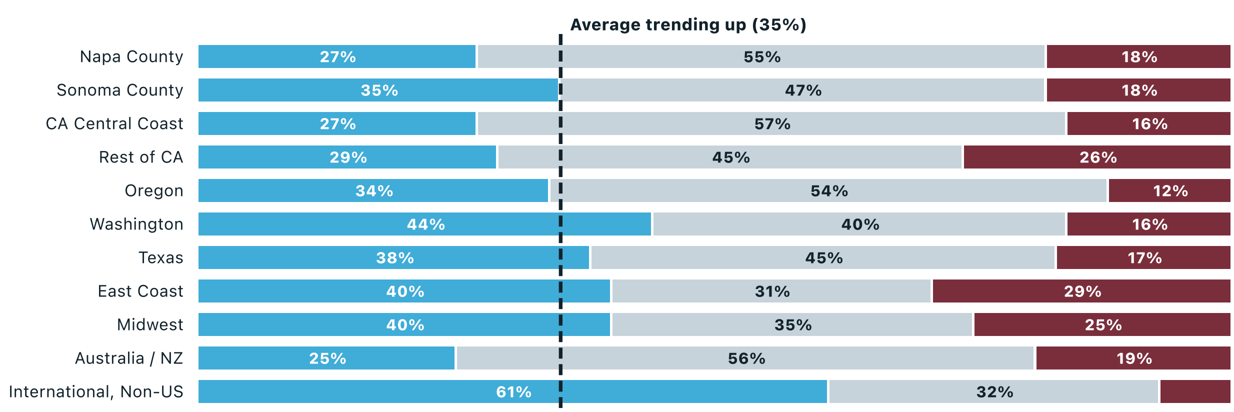
Sales Trends By Annual Case Production

Growth skews toward the smallest producers, who are the most likely to report rising sales. The largest wineries, at 100,000 cases or more, are more mixed, with 27% trending up and 23% trending down.



Sales Trends By Region

Momentum is strongest outside the most prominent California regions. Washington and the smaller or emerging regions show the most growth, while Napa posts the lowest growth of the major regions at 27%. The East Coast is split, with strong growth (40%) alongside the highest decline of the larger regions (29%).



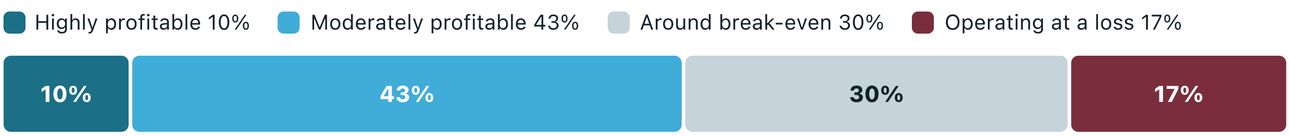
Profitability

SURVEY QUESTION

How profitable is your winery?

About half the industry is profitable, and mostly moderately so. Only 10% of wineries call themselves highly profitable, while 47% sit at break-even or below, including 17% that are operating at a loss.

How wineries describe their profitability, 2026

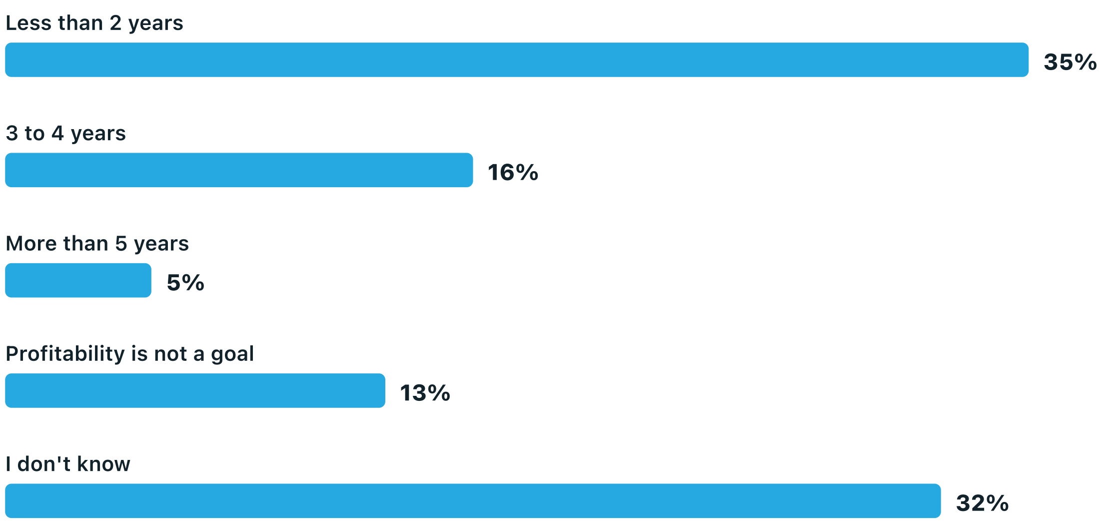


Source: InnoVint 2026 State of Winery Health Report

Profitability is elusive for many wineries, but it is not out of reach. Among those not yet in the black, most expect to get there within a few years, though nearly a third cannot yet say when they will.

Target timeline to profitability

Among wineries that are not yet profitable

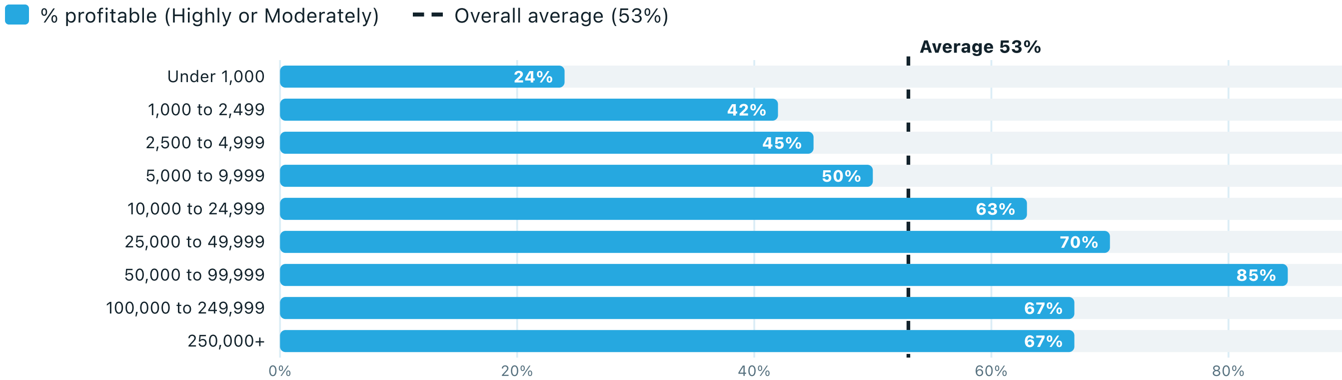


Source: InnoVint 2026 State of Winery Health Report

Profitability, By Segment

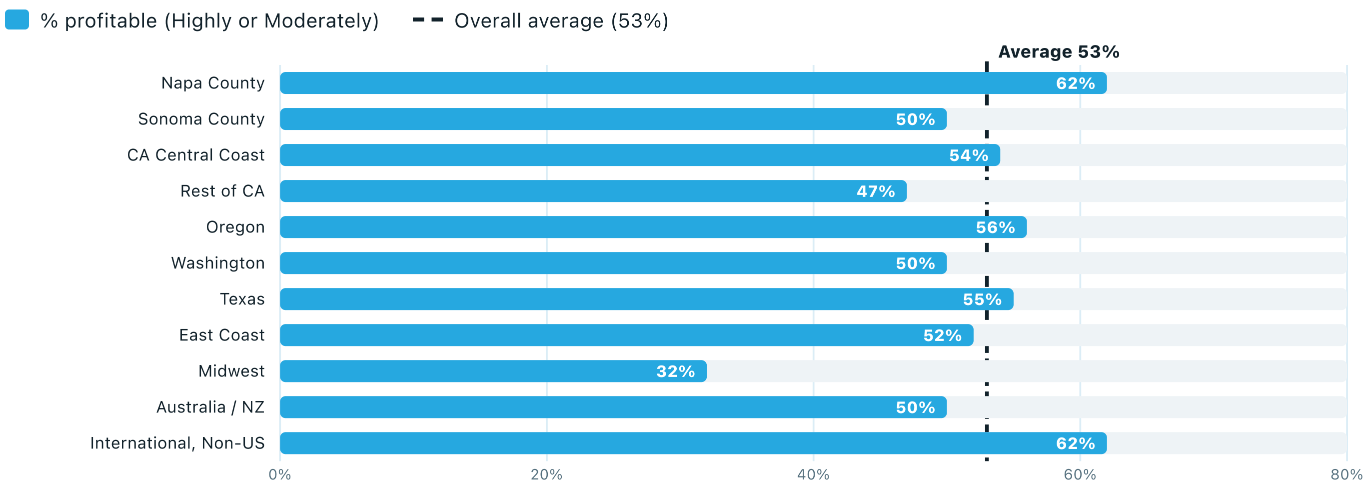
Profitability By Annual Case Production

The odds of profitability rise with scale, from 39% of wineries under 5,000 cases to 78% in the 50,000 to 249,999 band.



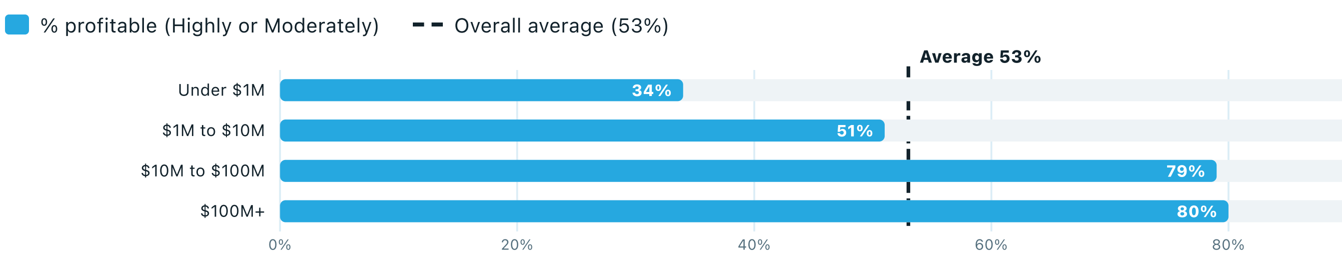
Profitability By Region

Profitability varies by region quite a bit. Considering the largest major winegrowing regions, Napa is the strongest at 62% profitable, while Sonoma and Washington are the softest at 50%.



Profitability By Revenue

Revenue is the single cleanest predictor of profitability, climbing from 34% of wineries under $1M to about 80% above $10M.



Sales Channels: DTC vs. Wholesale

SURVEY QUESTION

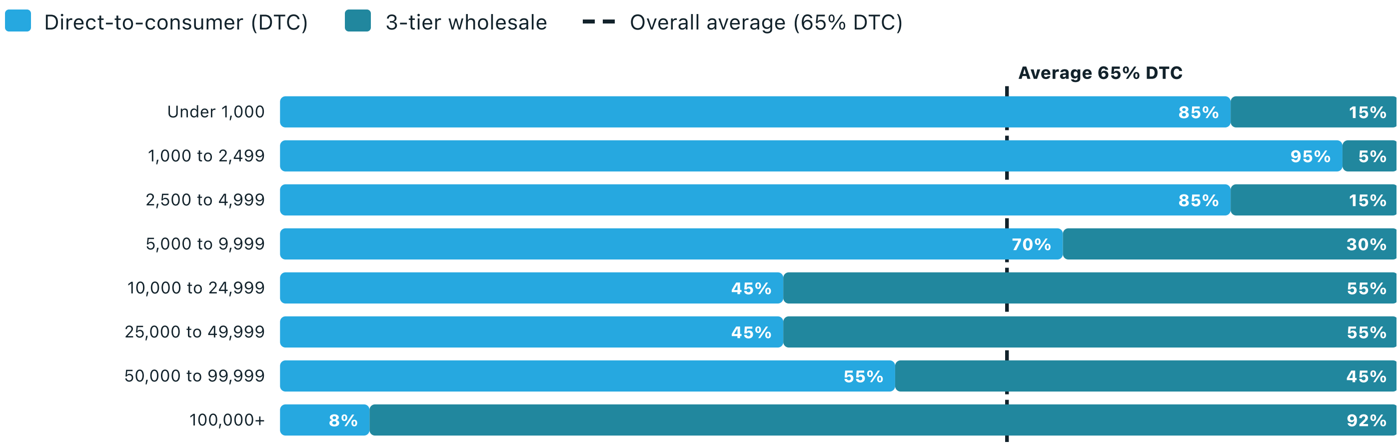
What percentage of your sales is direct-to-consumer versus 3-tier wholesale?

The typical winery's channel split, 2026

The median winery sells about two-thirds direct and one-third wholesale. That balance flips with size: small wineries live on DTC margin, and the largest producers run almost entirely on wholesale volume.

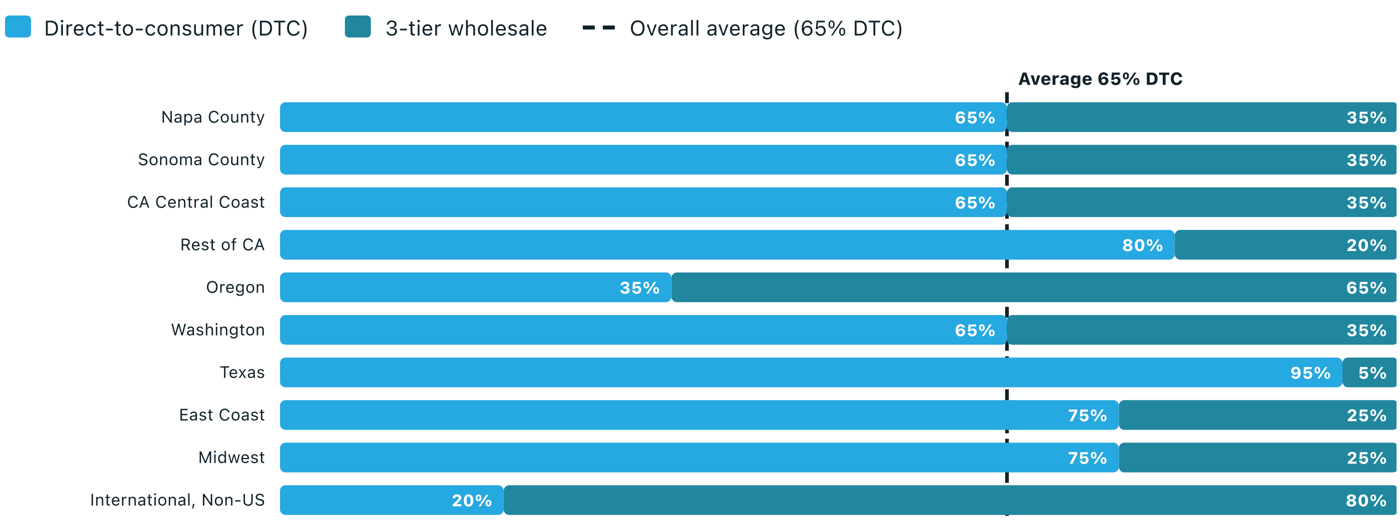
Channel Split By Annual Case Production

DTC share generally declines as production rises, and the crossover from direct-dominant to wholesale-dominant lands right around 10,000 cases.



Channel Split By Region

Region mostly reflects the size mix of its wineries. Texas and the emerging US regions lean hardest DTC, while Oregon and international markets tilt wholesale.

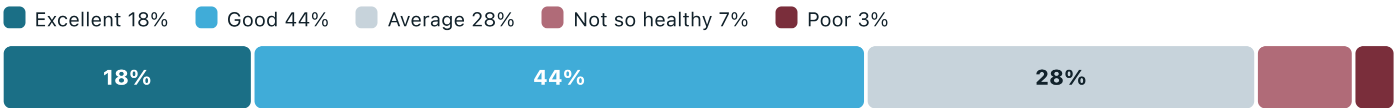


Operational Health

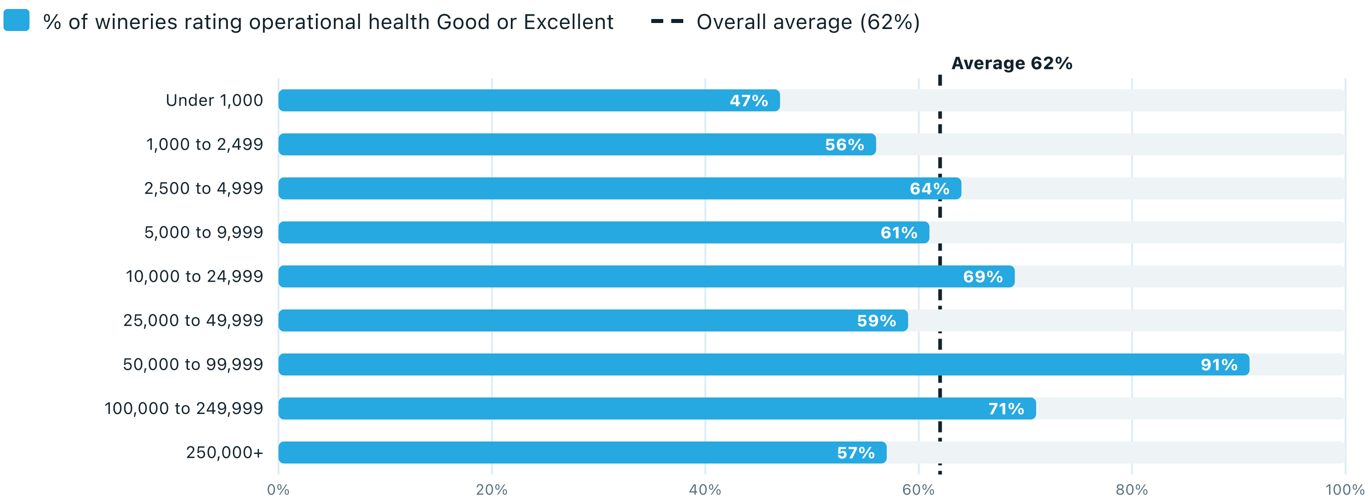
SURVEY QUESTION

How would you rate the operational health at your winery?

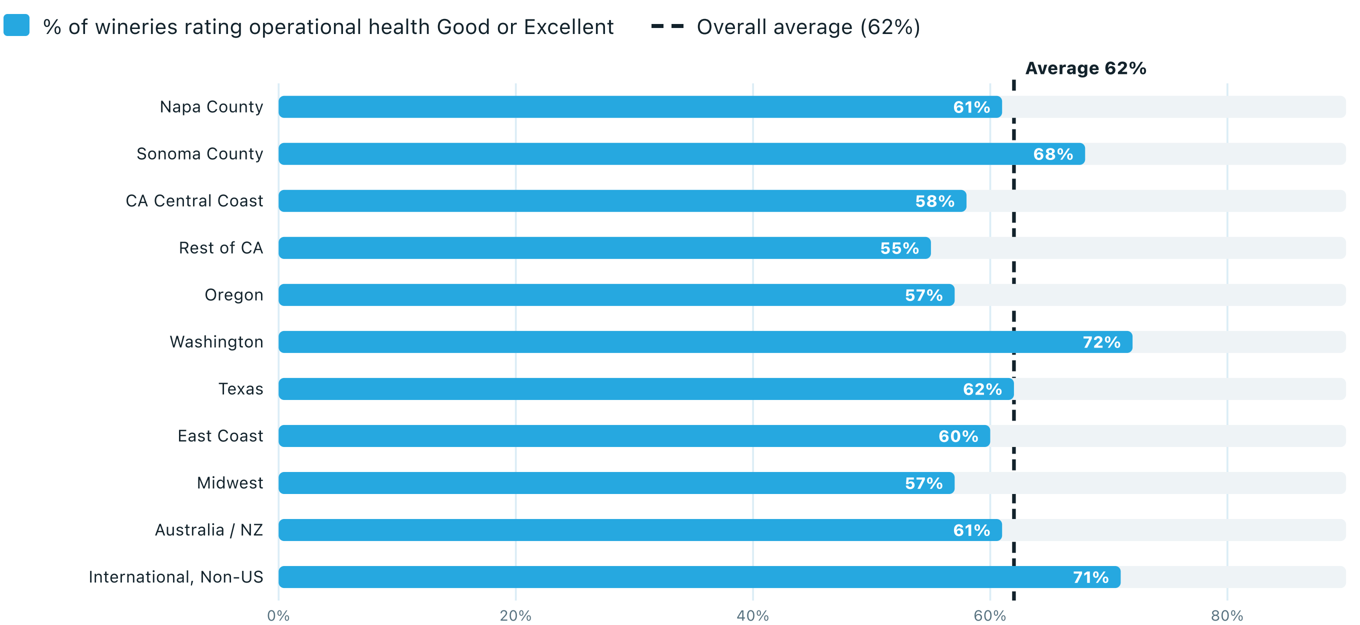
How wineries rate their operational health, 2026



Operational Health By Annual Case Production



Operational Health By Region



Efficiency & Decision-Making

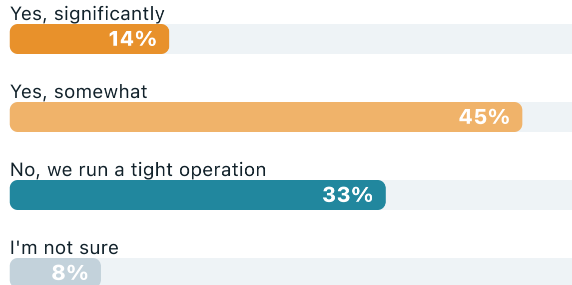
Two questions about how a winery actually runs: whether it feels its inefficiencies are costing money, and what it relies on to make operational decisions.

Inefficiencies are quietly costing wineries

59% of wineries believe operational inefficiencies are costing them money, and only a third say they run a tight operation. The culprit they name most, in their own words, is systems that do not talk to each other, which forces the same numbers to be entered by hand more than once.

> **"Our software systems don't talk to each other, so there is still a huge manual component. It makes analyzing trends difficult."**
> Winery respondent, on where the money leaks out

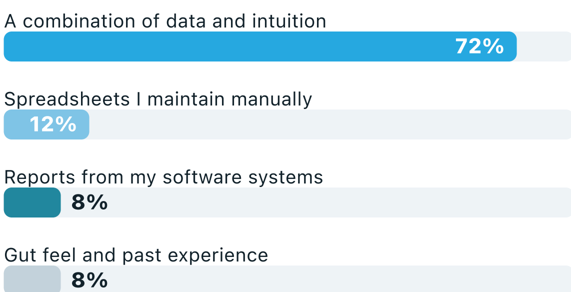
Do operational inefficiencies cost your winery money?



59% **say** inefficiencies are cutting into their bottom line

Source: InnoVint 2026 State of Winery Health Report

When making a major operational business decision, what do you primarily rely on?



Source: InnoVint 2026 State of Winery Health Report

Most decisions run on gut and spreadsheets

Most winery decision-makers reach for a mix of judgment and numbers, and very few pull from their own systems. For most wineries, the "data" in "data and intuition" is a spreadsheet kept by hand: more decision-makers lean on a manual spreadsheet (12%) than on a report from their software systems (8%). The numbers exist somewhere, but rarely in one trusted place, which is the same gap the inefficiency question points to.

Technology

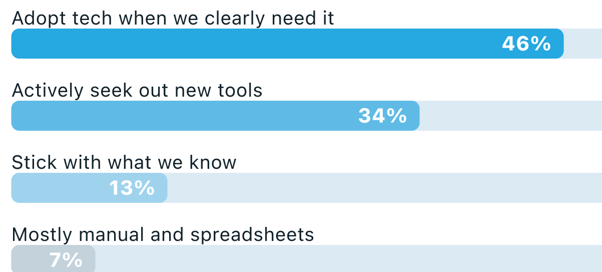
How wineries approach and use technology, and where a manual, spreadsheet-driven layer still runs underneath the stack.

Four in five wineries are open to new technology

Most are pragmatic or proactive adopters, moving on technology when the need is clear or actively seeking out new tools. About a fifth are cautious, sticking with what they know or running mostly on manual processes.

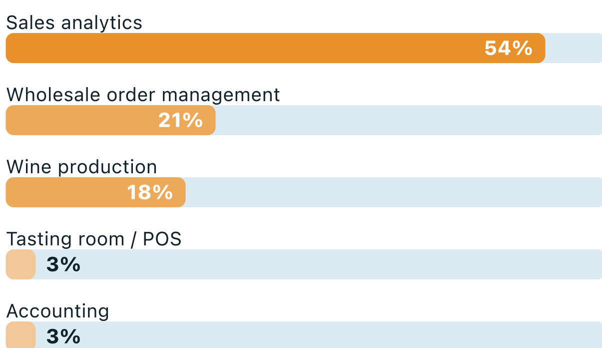
80% are pragmatic or proactive technology adopters

How would you describe your winery's approach to technology?



Source: InnoVint 2026 State of Winery Health Report

Where wineries still run on spreadsheets



Source: InnoVint 2026 State of Winery Health Report

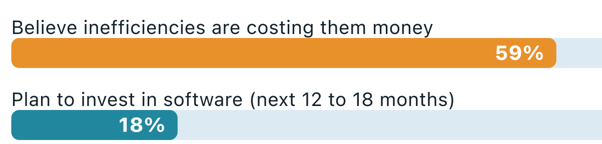
Spreadsheets remain common across the wine business

Many wineries run at least one core function in spreadsheets. Some run several, which results in a manual, disconnected layer where duplicate entry and mismatched numbers tend to live. It shows up most in sales analytics (54%), wholesale (21%), and wine production (18%).

Few wineries plan to invest in fixing inefficiencies

Far more wineries say inefficiencies are costing them money (59%) than plan to invest in software to fix it (18%).

Share of wineries that...



Source: InnoVint 2026 State of Winery Health Report

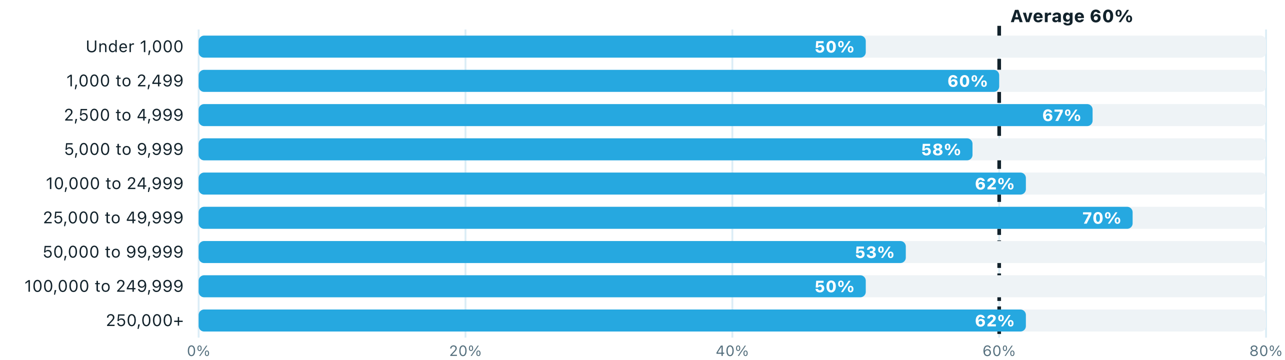
Artificial Intelligence

New this year, the survey asked wineries where they are using AI. **60% are using it somewhere,** and adoption is broad and fairly even, moving only modestly by production size, region, or revenue.

AI Usage By Annual Case Production

Adoption barely tracks with size. It runs between 50% and 70% across every production band, with no clean climb or fall as wineries get bigger. The smallest wineries, under 1,000 cases, adopt the least at 50%.

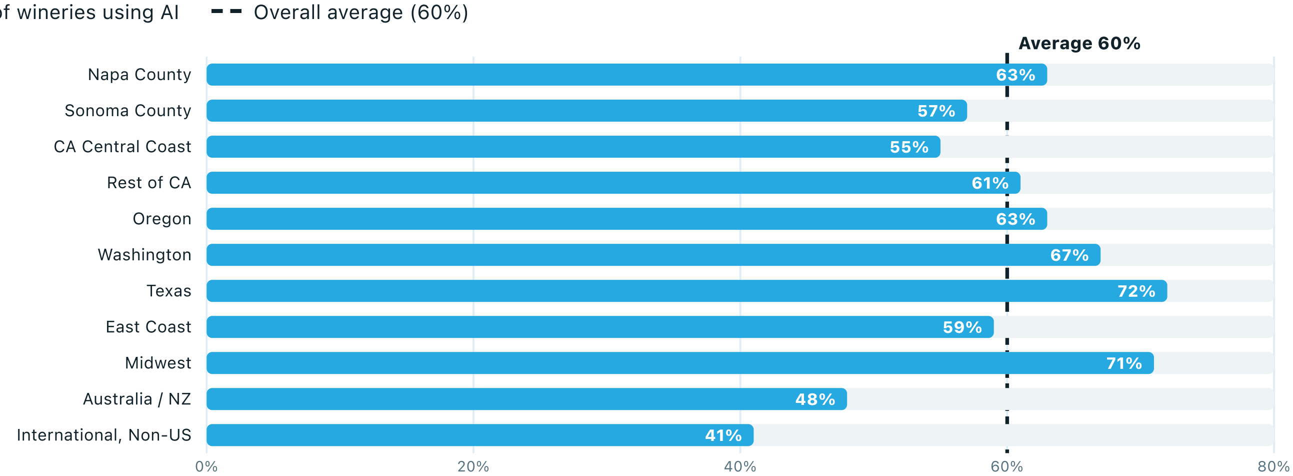
% of wineries using AI   Overall average (60%)



AI Usage By Region

AI use is fairly even across regions, running from 41% to 72% among those with a solid base. Texas (72%) and the Midwest (71%) sit on top, ahead of Napa (63%), while the international (non-US) group trails at 41%.

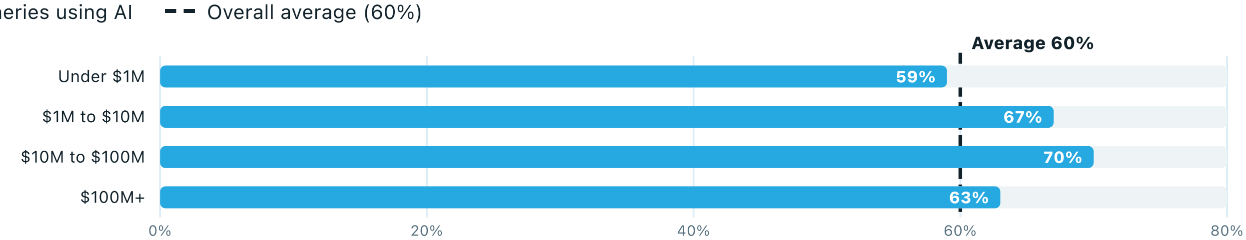
% of wineries using AI   Overall average (60%)



AI Usage By Revenue

Revenue tilts adoption a little more than size does, rising from 59% under $1M to 70% in the $10M to $100M range, then easing at the very top.

% of wineries using AI   Overall average (60%)



Cultural Health

SURVEY QUESTION

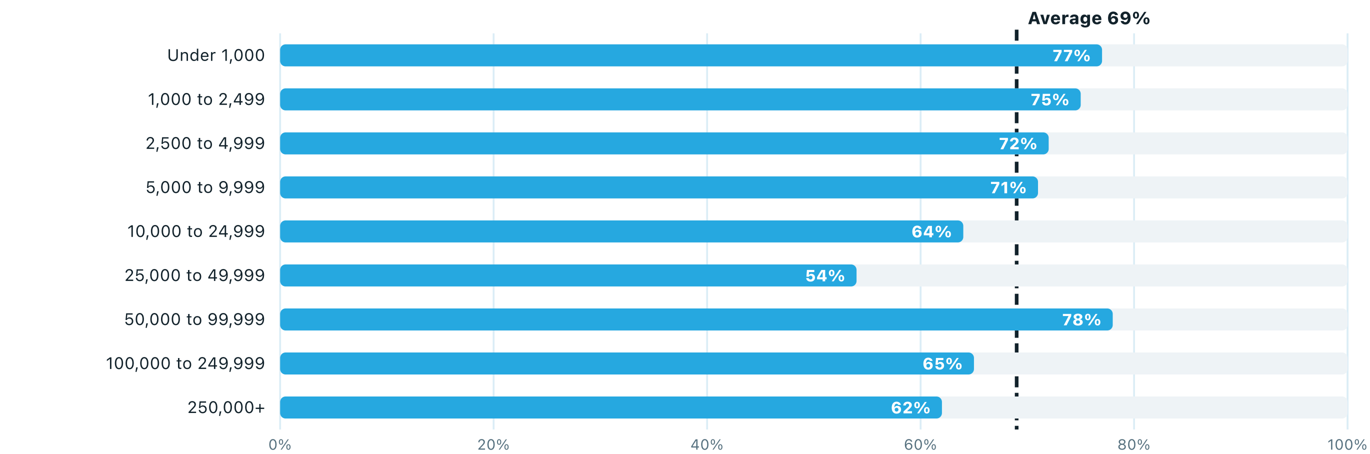
How would you rate the company culture at your winery?

How wineries rate their company culture, 2026

Exceptional 24% · Great 44% · Neutral 26% · Unwelcoming 3% · Toxic 3%

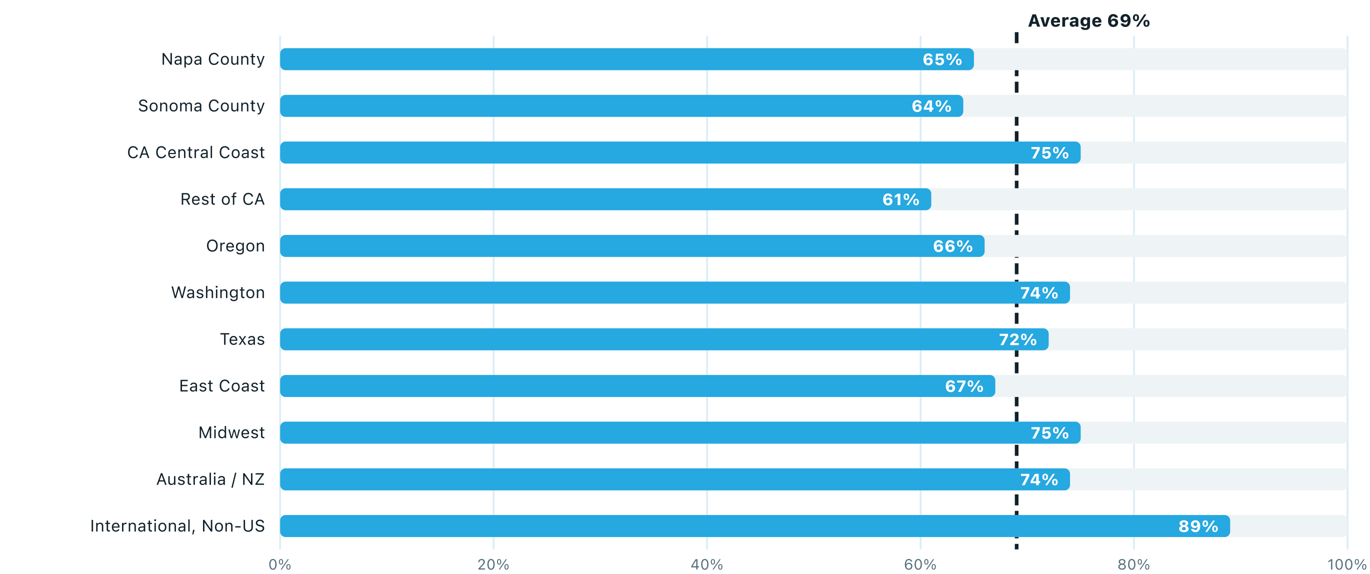
Cultural Health By Annual Case Production

% of wineries rating their culture Great or Exceptional · Overall average (69%)



Cultural Health By Region

% of wineries rating their culture Great or Exceptional · Overall average (69%)

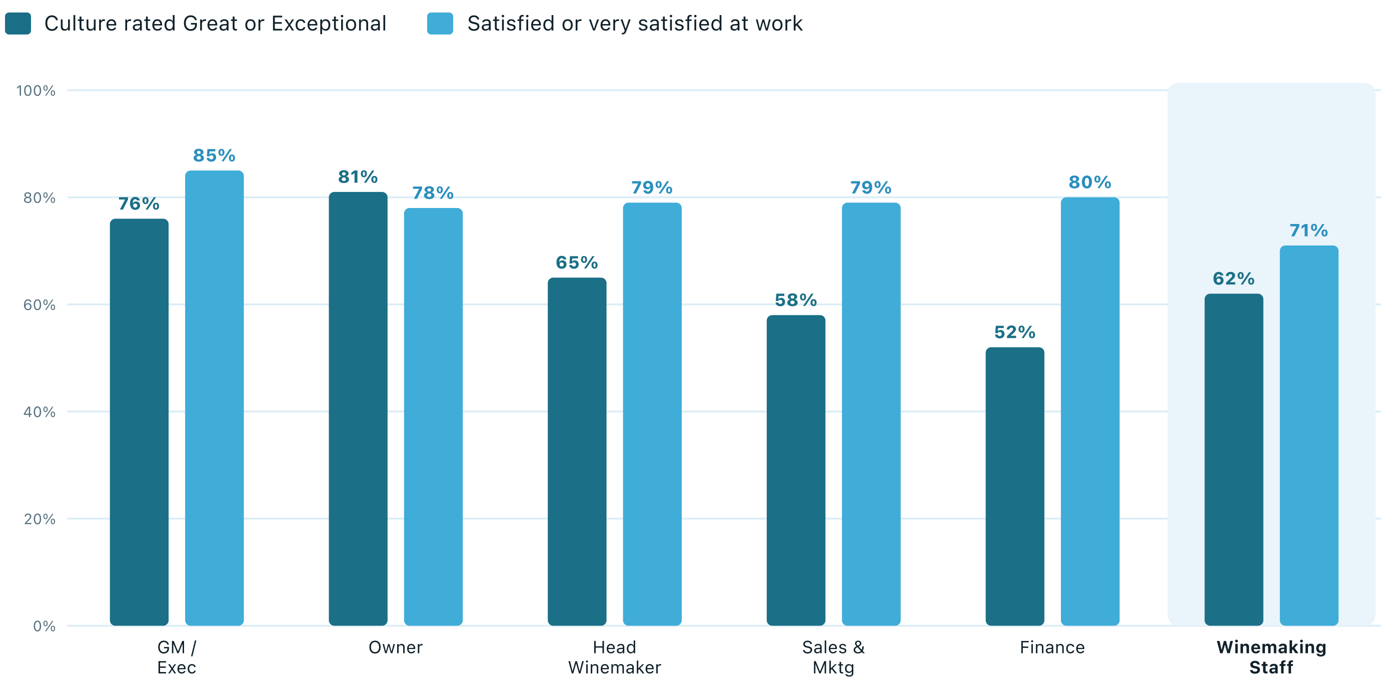


THE TEAM, BY ROLE

The Production Floor Is the Soft Spot

Winery work is broadly well liked, but satisfaction thins out toward the bottom of the org chart. **Winemaking staff are the least satisfied of any role, 71% against 85% for GMs and executives**, and the most likely to sit on the fence, with a fifth landing at neither satisfied nor dissatisfied. Culture tilts the same way: they rate it below the leadership above them, **62% Great or Exceptional against 81% of owners**.

Culture and Job Satisfaction, by Role



71%

of winemaking staff are satisfied at work, the lowest of any role (mean 3.89 out of 5).

21%

sit on the fence, neither satisfied nor dissatisfied, the highest share of any role.

14 pts

satisfaction gap from the top of the org chart (85%) down to the cellar floor (71%).

In Their Own Words

Winemaking staff on promotion, staffing, and being left out of the loop.

> "There is no room for promotion because no one is leaving; the job market is very sluggish right now."
> — Winemaking Staff

> "As a whole it is great. In my department, not so great."
> — Winemaking Staff

> "Wine production is siloed, not communicated with, and treated differently than sales/hospitality."
> — Winemaking Staff

> "Understaffed and overworked."
> — Winemaking Staff

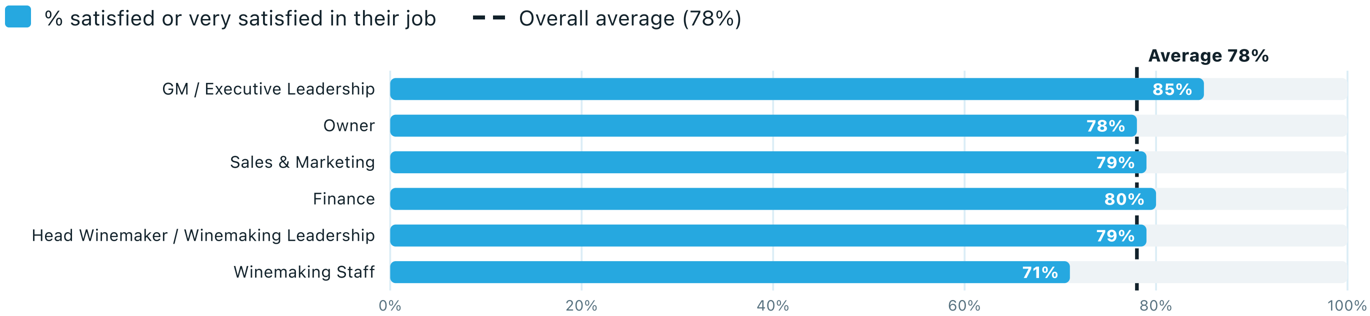
Job Satisfaction

SURVEY QUESTION

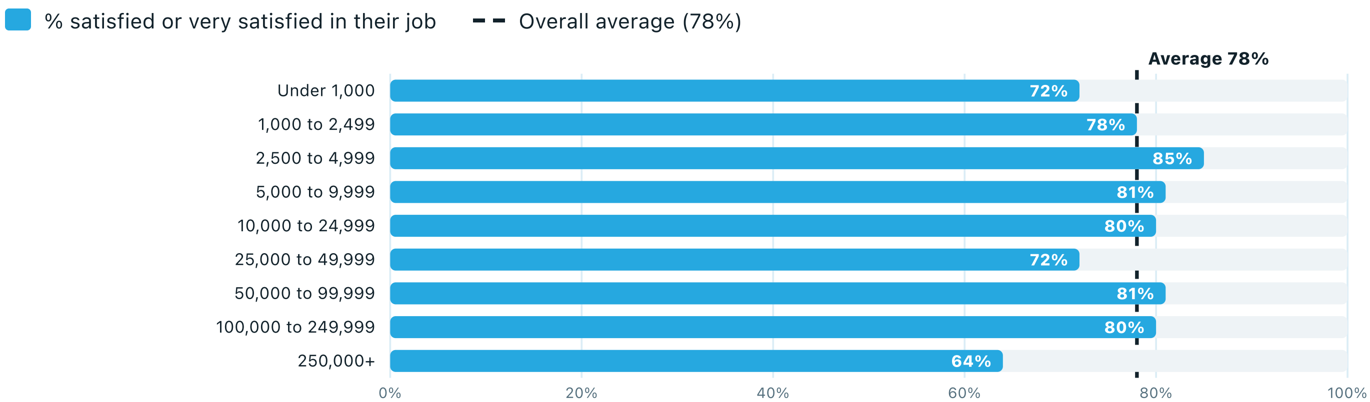
How happy are you in your job?

How happy winery professionals are in their jobs, 2026

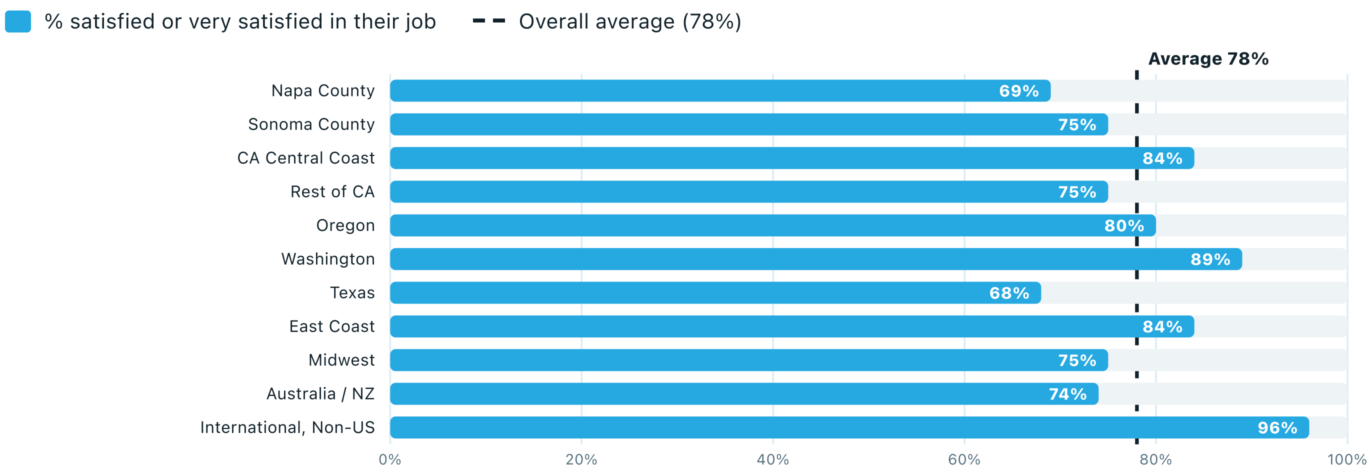
Job Satisfaction By Role



Job Satisfaction By Annual Case Production



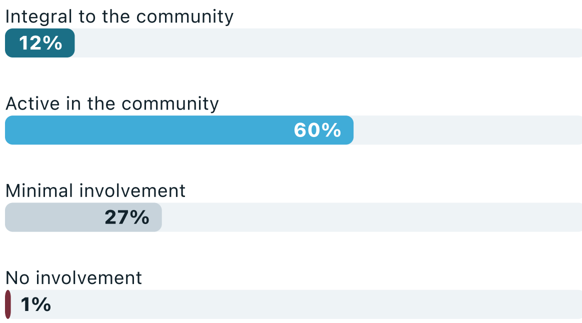
Job Satisfaction By Region



Community Involvement

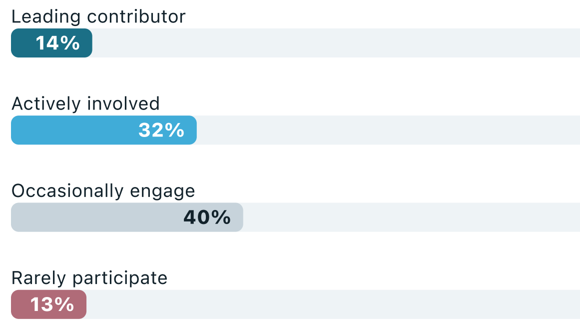
About 7 in 10 wineries call themselves active or integral, but personal engagement runs more tepid. Community presence tends to rest on one or two people, usually the owner: 80% of owners say their winery is active or integral, against 68% of winemaking staff.

How involved is your winery in its community?



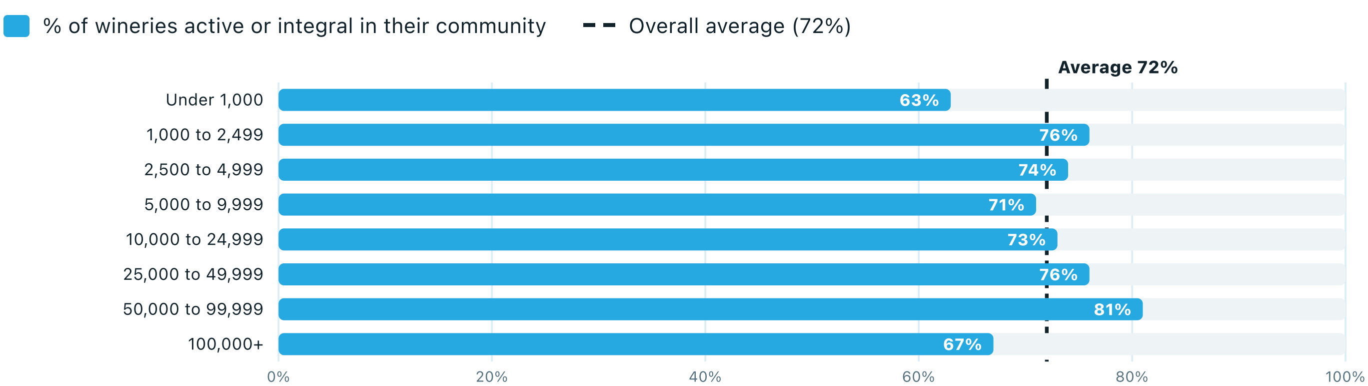
Source: InnoVint 2026 State of Winery Health Report

How involved in the community are you personally?

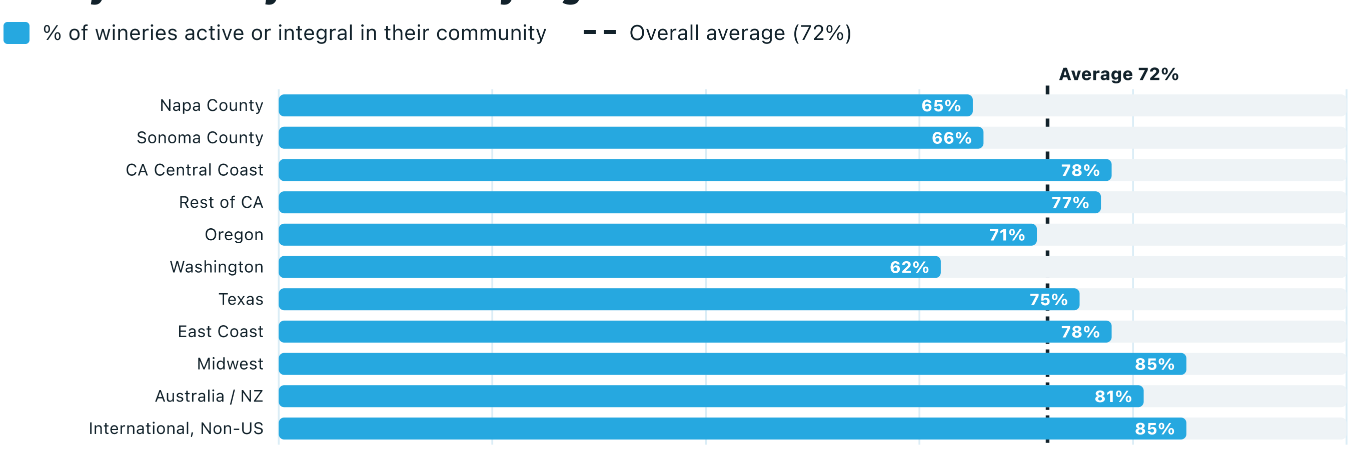


Source: InnoVint 2026 State of Winery Health Report

Winery Community Involvement By Annual Case Production



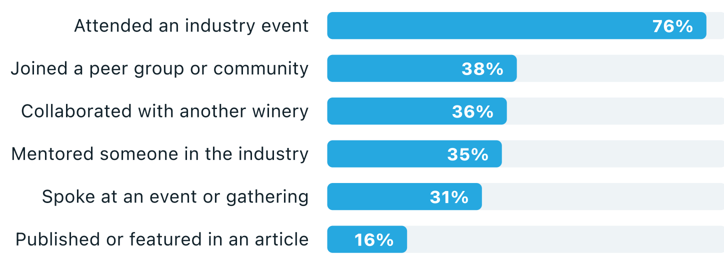
Winery Community Involvement By Region



Community Involvement, Continued

What wineries actually do in their community, who does the work, and how involvement connects to how healthy a winery is.

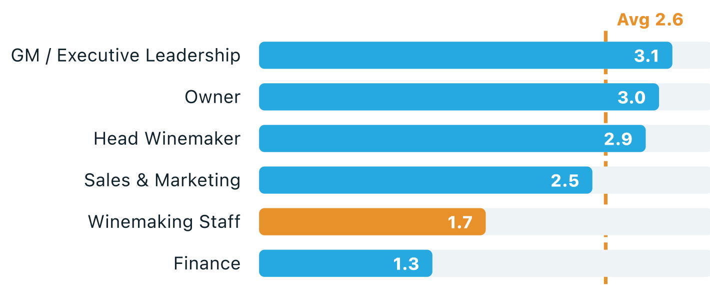
Community activities in the last 12 months



Involvement is broad but shallow. Showing up is nearly universal, but the things that build real standing, speaking and publishing, drop off sharply.

The work falls to leadership

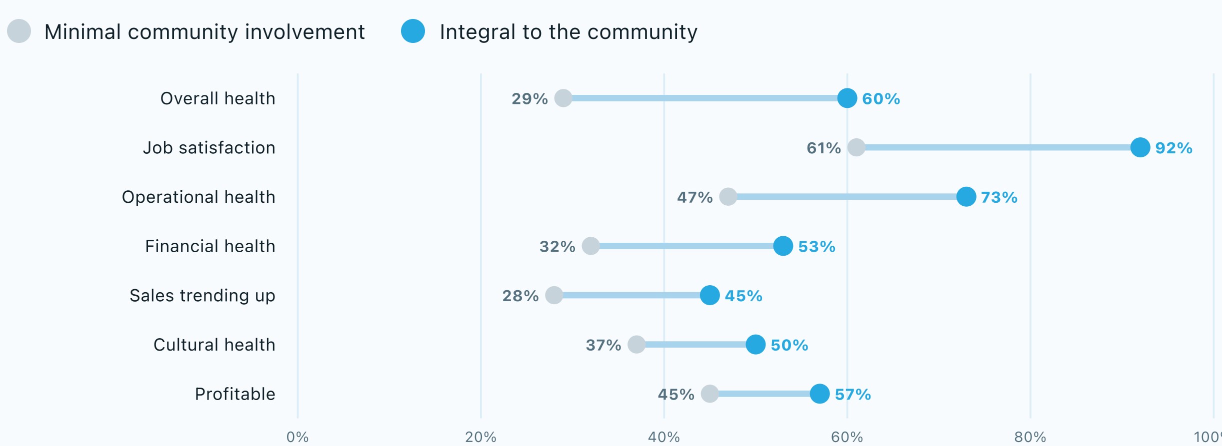
Average community activities per person, past 12 months



Owners, GMs, and head winemakers each do about three community activities a year. Winemaking staff do fewer than two, and are the least likely to speak, publish, or collaborate.

Community involvement tracks with health

Wineries integral to their community rate themselves higher on every outcome, dramatically so on overall health and job satisfaction. It is the winery being woven in as a business that moves the numbers.



The Punchdown POWERED BY InnoVint

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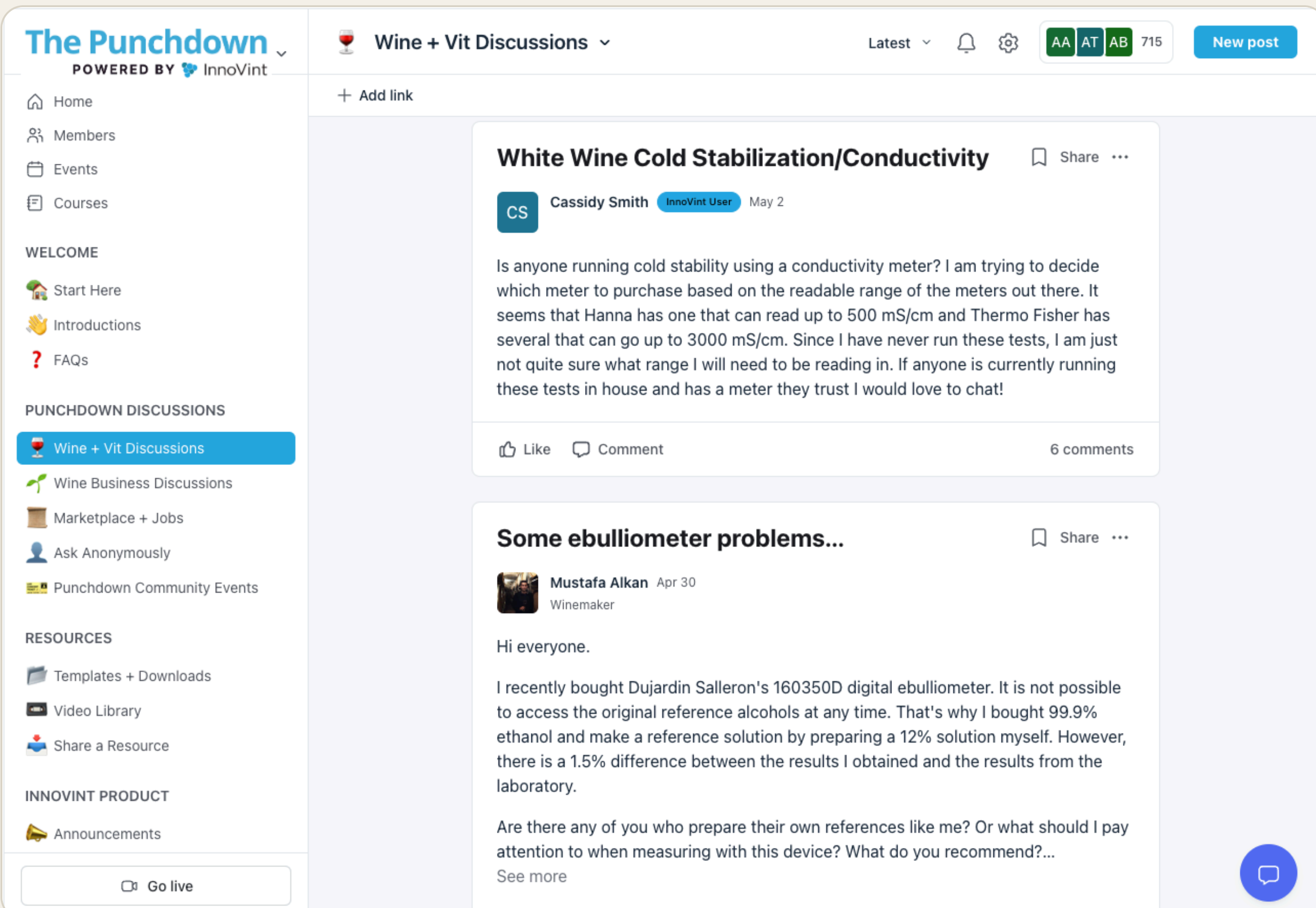

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Downloadable tools, structured courses, and video recordings, with new resources every month.

Connection

Exclusive in-person and virtual events, active discussion channels, and a growing professional network.

Exchange

Buy, sell, and trade winemaking materials. Hire talent and find new opportunities in the industry.

Product

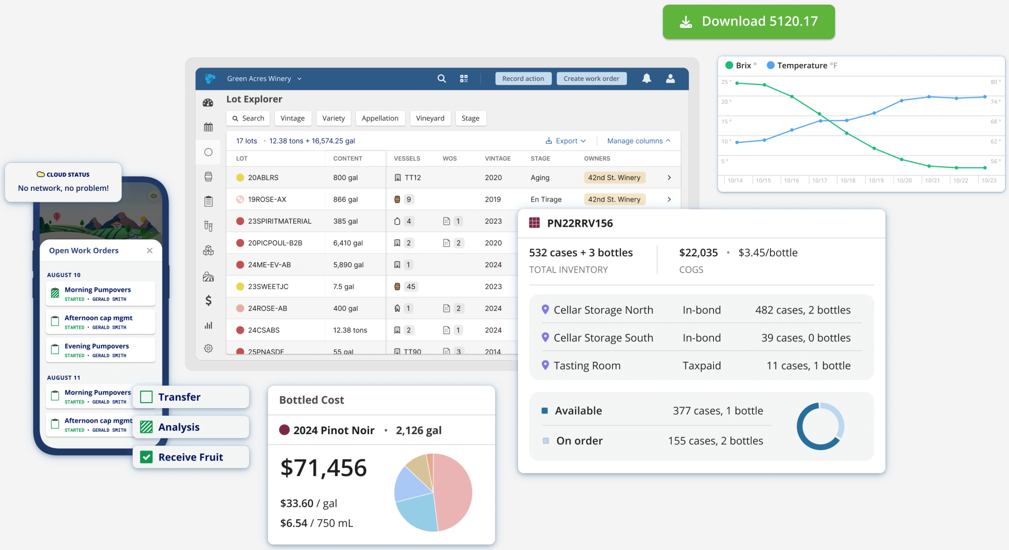
A dedicated channel to swap tips with other InnoVint users and hear about new releases first.

InnoVint

A Healthier Winery Starts Here

The wineries in this report that rate themselves healthiest share a pattern: **connected systems, a clear view of what every wine costs, and modern tools doing the heavy lifting.** That is exactly what InnoVint is built for.

Request a Demo



InnoVint is your winery operating system: the software that runs your entire operation, from grape to bottle, in one place. See it in action at **innovint.us**.

GROW

Vineyard Tracking

Keep an eye on the vineyard all season, manage grape contracts, and plan a smoother harvest.

MAKE

Wine Production

Manage every step in the cellar, from the first pick to the finished bottle.

SUPPLY

Inventory Management

Always know how much wine you have, and where, at any moment.

FINANCE

Cost Accounting

See what each wine really costs to make, so you can price it with confidence.

★★★★★

"We've realized a return on investment in our first year, replaced 12+ spreadsheets, and saved $7,500 with InnoVint."

Wynne Sargeant
Winemaker, Brave & Maiden

★★★★★

"Inventory management used to take about 10 hours a month. Now it's down to one hour."

Larry Harris
Owner, Bayernmoor Cellars

★★★★★

"InnoVint is powerful. From data to phenology tracking and vineyard contracts, it's all really easy to find."

Megan Gunderson
VP Winemaking, HALL Napa Valley

InnoVint

2026 INDUSTRY REPORT

The State of Winery Health