



InnoVint

TEXAS WINE & GRAPE GROWERS ASSOCIATION

INTERTWINED

2026 ANNUAL CONFERENCE & TRADE SHOW

Today's Speakers



Emma Fladeboe

Head of Sales



Tim Drake

Winemaker



Julie Herbort

COO



Kramer

DeLaurentis
*Product Development
Manager*



Agenda

1 | Insights from State of Winery Health Report

- Financial Health
- Operational Health
- Cultural Health

2 | Panel Discussion: Tips to Optimize Your Winery's Health

3 | Questions



**ARTIFICIAL INTELLIGENCE LAYER**

Efficiency gains & automations with AI

**GROW**

Manage & trend your vineyard data and growing season year-over-year

**MAKE**

Complete winemaking, cellar, and lab workflows from grape to bottle

**SUPPLY**

Case goods management across all storage locations with DTC & wholesale depletions

**COMPLIANCE**

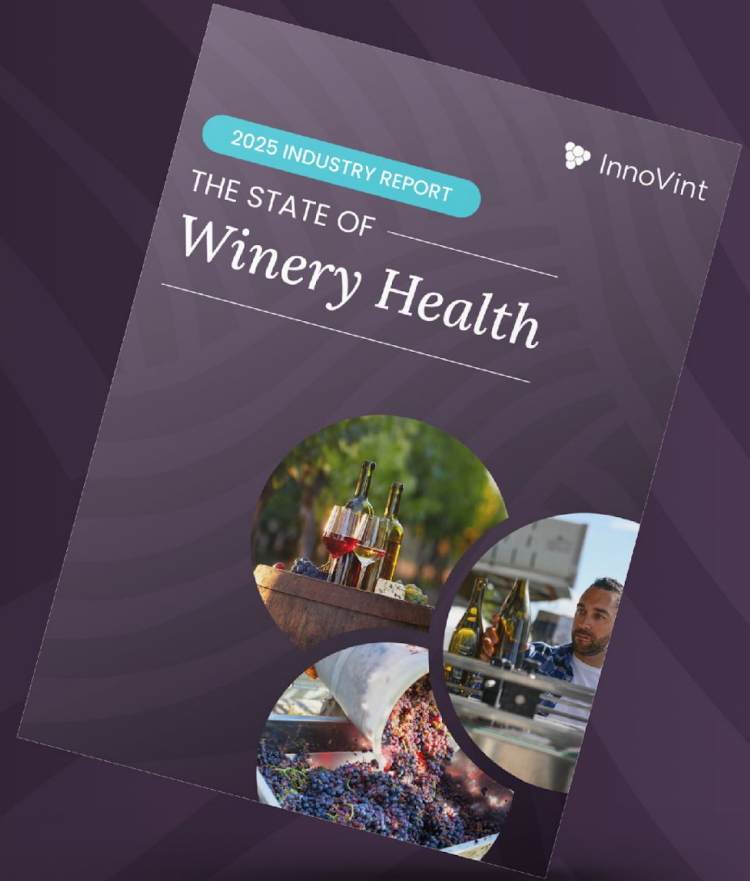
Automated 5120.17 TTB report generation with full audit trail

**FINANCE**

Accurate cost accounting for every wine you make

2025 WINE INDUSTRY BENCHMARK REPORT

State of Winery Health Report



Survey Respondent Demographics

Over 500 responses across roles, production volume, and location

Role

Owner	17%
Executive Leadership	13%
Winemaking Leadership	27%
Winemaking Staff	24%
Viticulture/Grower Relations	2%
Finance	6%
IT & Compliance	2%
Sales & Marketing	7%
Other	2%

Annual Case Production

<1,000	7%
1,000-2,499	12%
2,500-4,999	15%
5,000-9,999	14%
10,000-24,999	18%
25,000-49,999	8%
50,000-99,999	8%
100,000-249,999	5%
250,000+	10%
I don't know	3%

Location

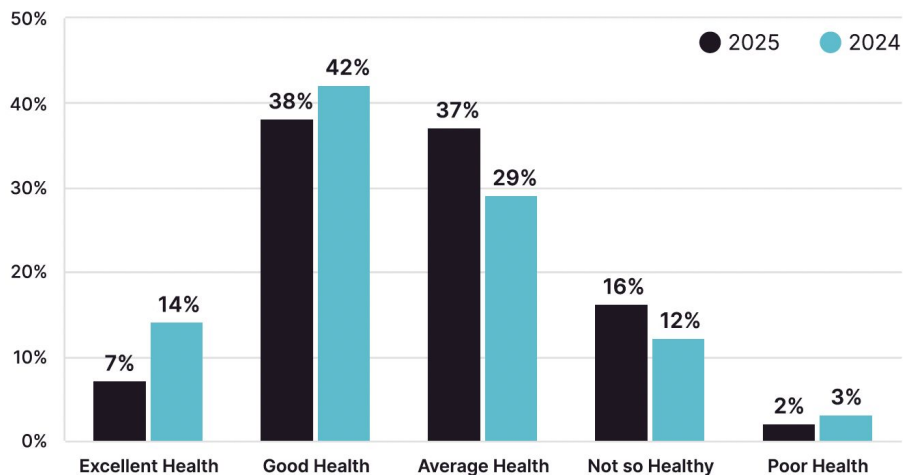
Napa County, CA	23%
Sonoma County, CA	21%
Central Coast, CA	10%
Central Valley, CA	4%
Rest of California	3%
Oregon	6%
Washington	8%
Midwest	5%
East Coast	6%
Rest of U.S.	5%
International/Non-U.S.	8%



82% of wineries report average or above business health

The bottom line: Most wineries aren't struggling, but fewer feel like they're thriving.

How Would You Rate Your Winery's Overall Business Health?



"Wine sales have been slightly lower, but we are well diversified with events, weddings, corporate events, an Inn, and more."

"Thanks to aggressively conservative cost control, we have been in the black for 5 years straight."

"We are inventory-heavy with lighter sales. The tariffs have destroyed our export markets"



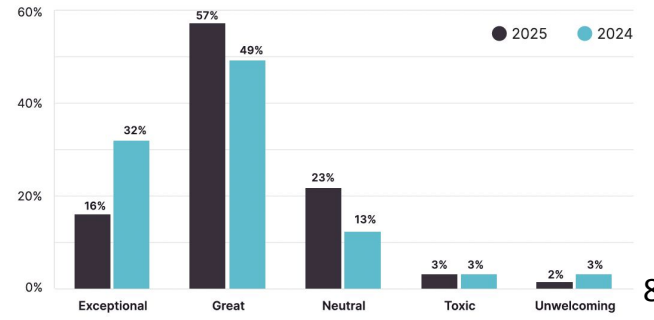
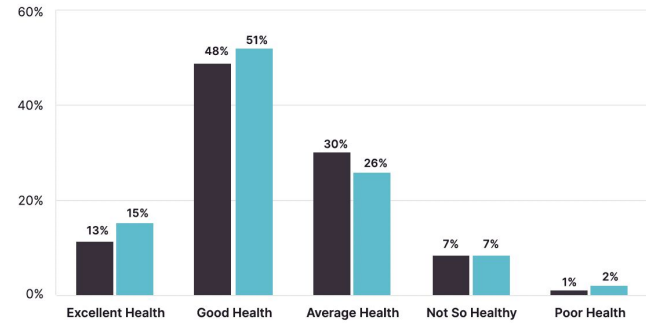
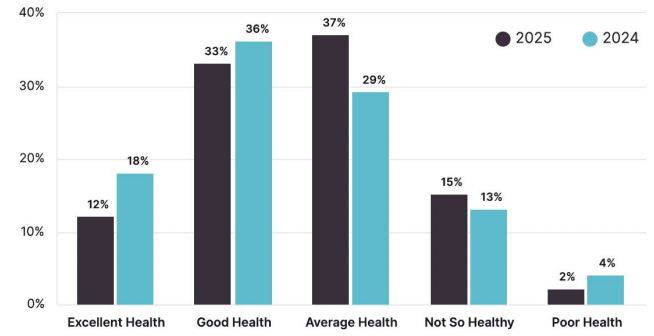
Health ratings are down *slightly* compared to 2024

The bottom line: Most wineries aren't struggling, but fewer feel like they're thriving.

Financial Health
45% rate financial health as Great or Excellent (82% average or higher)

Operational Health
62% rate operational health as Great or Excellent (91% average or higher)

Cultural Health
73% rate cultural health as Great or Exceptional (96% average or higher)

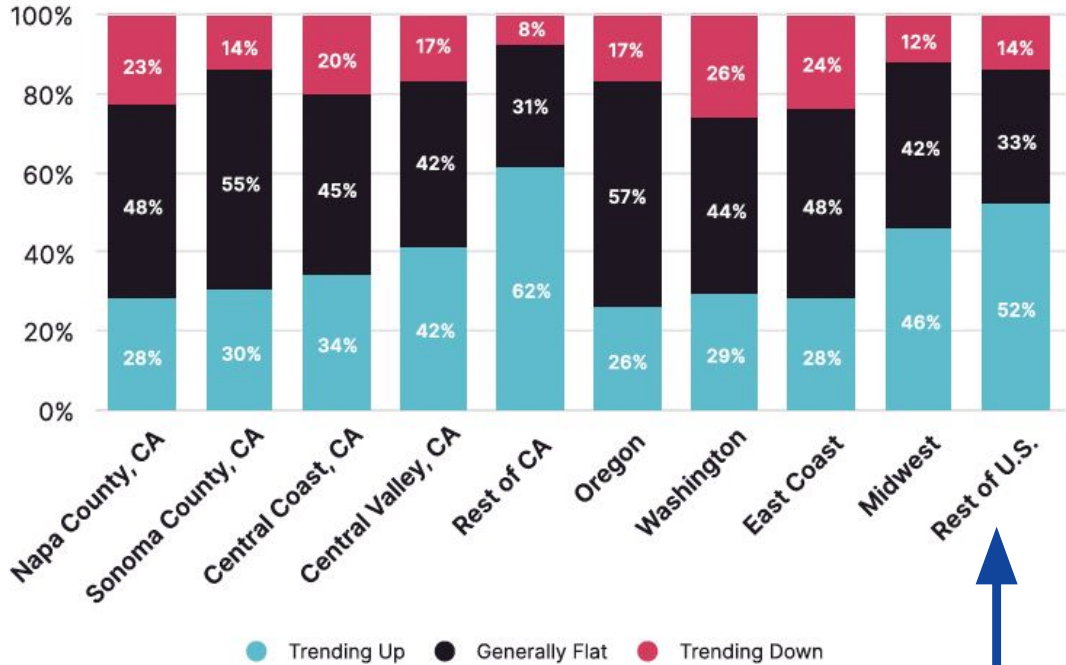


Are your winery sales trending up, down, or generally flat?

80% of wineries report that their sales are either stable or increasing!

Texas / Rest of US is the 2nd-highest region for sales growth.

Sales Trends by Region



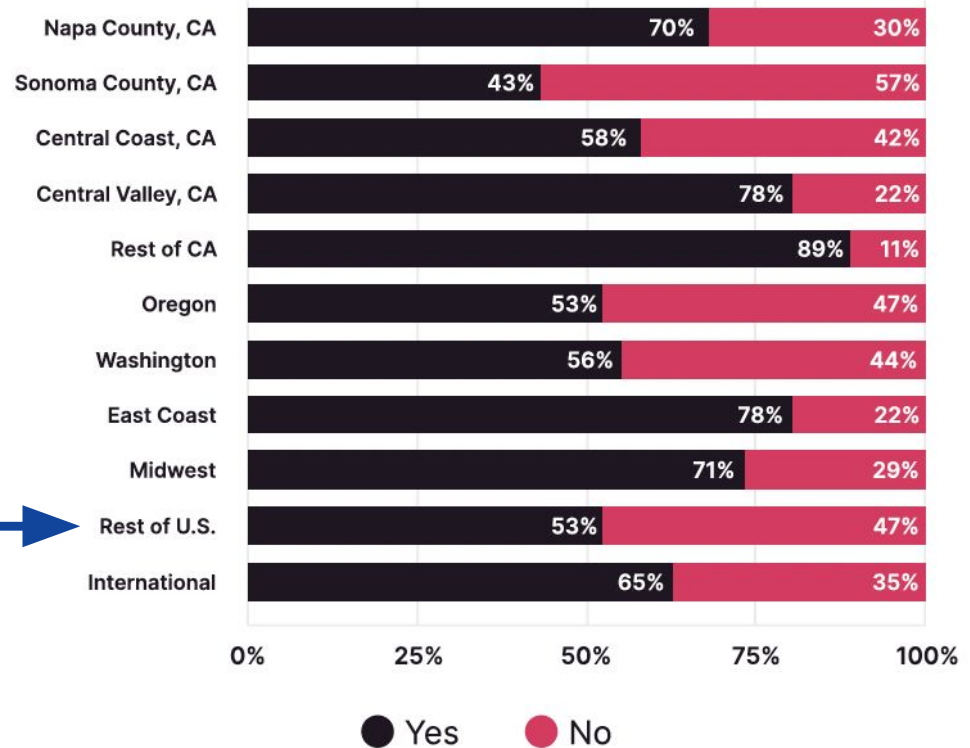
57% are in Texas



62% of wineries are currently profitable
Over half that aren't have a plan to get there in less than 2 years.

57% are in Texas

% Profitable Wineries by Region



We're still seeing challenges with profitability insights.

COGS Awareness: 90% of wineries have access to COGS data for each wine

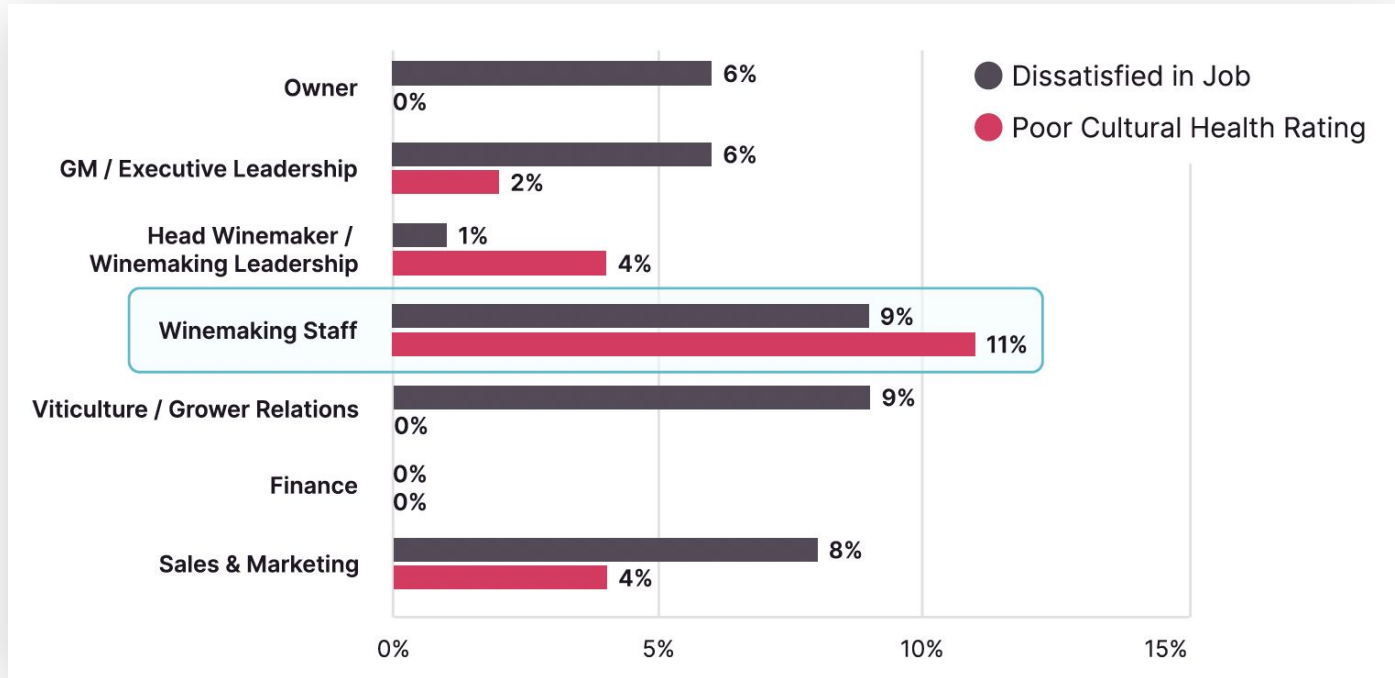
Pricing Confidence: 73% feel confident their wines are priced appropriately

Margin Knowledge: Only 38% know their exact per-product profit margins



Job Satisfaction and Culture: A Role-by-Role Look

Winemaking staff have the lowest cultural ratings and are most dissatisfied in their roles.



Community Involvement Directly Impacts Your Bottom Line

Wineries involved in the community are...



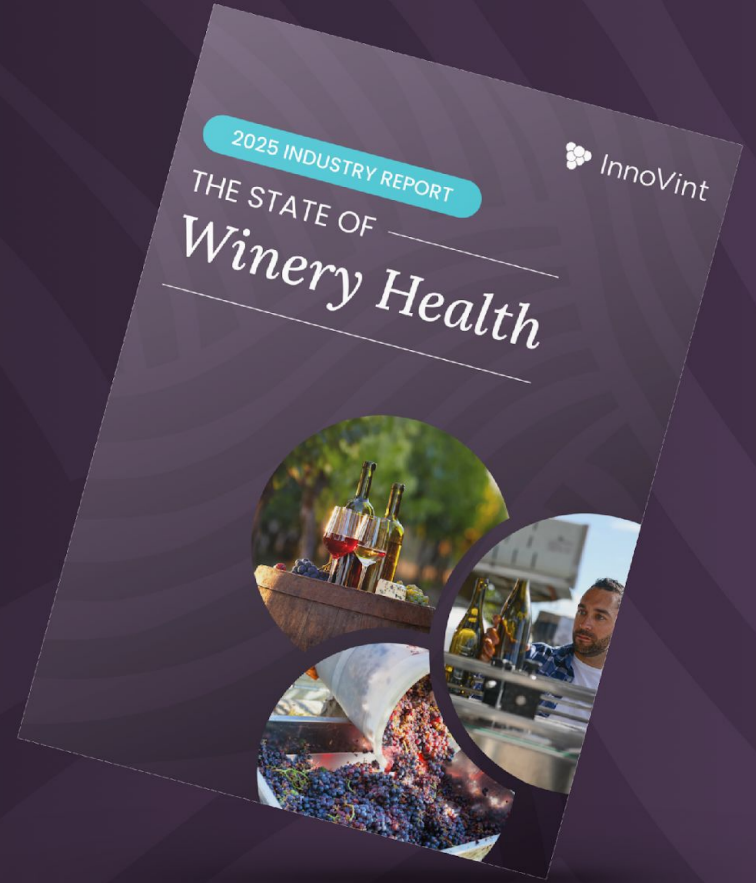
3x more likely to be profitable.



3x more likely to report increasing sales.

2025 WINE INDUSTRY BENCHMARK REPORT

State of Winery Health Report





Panel Discussion

Tips to Optimize Your Winery's
Financial, Operational, and Cultural Health



Trusted Financial Partners



Benchmarking Financial Health

Key Performance Indicator	Poor	Okay	Great
Wholesale Gross Margin	<40%	40%	>50%
DTC Gross Margin	<60%	60%	>70%
Blended Gross Margin (Wholesale + DTC)	40%	50%	60%
Operating Profit Margin	<10%	15%	>20%
EBITDA	<10%	20%	>30%
Months Bottled Inventory on Hand	>18	14-18	<14

Modern Winery Technology Landscape

Vineyard Tracking to Consumer Insights

Vineyard Tracking



Production Management



DTC / Sales Analytics



Finance

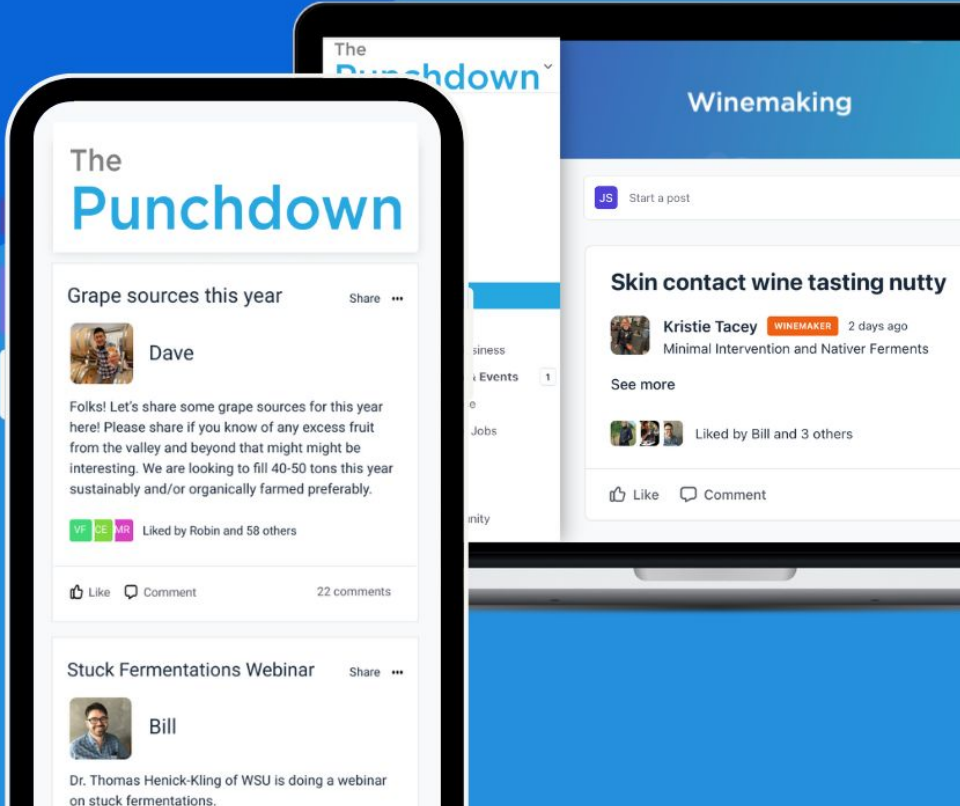


Winemaking Community

The Punchdown



innovint.us/join-the-punchdown



Questions?





Thank you!

Learn more at innovint.us