Wines from Spain:

Actionable Lessons for Success in the US Market from Emerging Brand Case Studies

Prepared for Trade Commission of Spain in New York (ICEX)
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Executive Summary

Recommendations for emerging wine brands to succeed in the US

- **Invest in trade education:** sommeliers and bartenders shape what gets poured and promoted. Winning them helps win the consumer.
- **Use on-premise to drive discovery:** restaurants and bars are key discovery points, especially for premium or unfamiliar products.
- **Lead with craftsmanship and heritage:** storytelling rooted in origin, production methods, and legacy builds credibility in an industry where authenticity matters.
- **Create new use cases for familiar formats:** unlock growth by shifting how and where products are consumed, whether in packaging, functional claims, or cocktails.
- **Invest beyond product:** in addition to product quality, companies need a disciplined distribution and marketing strategy.

Recommendations common to both food and wine brands to succeed in the US

- **Challenge conventional wisdom:** contrarian ideas often bring opportunity. e.g. canned wine can be from small vineyards.
- **Do something that is novel** for your space, such as packaging, storytelling, positioning, product, or route to market.

- **Launch bullets before cannonballs:** start small; test and refine ideas, products, fit, and messaging to develop a winning formula before investing in expansion. Failing in large-scale US retail is very expensive.
- **Niche-in at the beginning:** find the group with whom your product resonates and build out from there.
- **Develop a tailored route to market:** having a product available for purchase in the US is not enough to drive sales; create granular plans by channel, by geography, and by segment.
- **Choose your partners carefully:** successful companies recognize their core competencies and choose experienced local US partners, e.g. design, importing, marketing, distribution, and brokerage.

Executive summary: wine case studies

- We prepared 8 case studies (4 wines, 2 alcohols, 1 distributor, and 1 non-alcoholic) to highlight challenges and routes to success in the US market
    - 4 of these companies are domestic and 4 are sourced abroad
- Successful products fell under three broad themes:
    - **Familiar or traditional products** that emphasize legacy and craftsmanship to engage loyal and new customers alike (e.g. Buffalo Trace, port wine)
    - **Incremental changes/innovation** to an existing product or category, to attract new audiences through fresh use occasions, lifestyle branding and innovative formats (Day Drinking, Maker Wine, Wölffer Estate, Amaro Nonino)
    - **Products novel to the US market** that win consumers by being positioned as compelling alternatives, often highlighting distinct attributes or benefits (Kysela Père et Fils Picpoul de Pinet, Three Spirit)

Familiar categories have the broadest appeal

- Familiar alcohol formats (e.g. bourbon) can scale faster due to low consumer education needs
- Novel concepts (e.g. non-alc) require significant consumer education and behavior change

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Wine case insights (1/2)

Company	Category	What they did	Insight	Origin
NONINO	Amaro	Capitalized on the trending "Paper Plane" cocktail to educate trade and drive growth and enthusiasm	Meet consumers where they are by embracing cultural moments and on-trade trends	Italy
BUFFALO TRACE	Bourbon Whiskey	Used deep heritage and scarcity-driven premiumization to position bourbon as a luxury product	Heritage and limited availability can be powerful tools to elevate traditional products	US
Day Drinking BY LITTLE BIG TOWN	Canned Wine	Made wine casual, flavorful and accessible with the backing of celebrity founders Little Big Town	Packaging, tone, and flavors can reframe category norms and unlock new use occasions	US
IVDP, IP INSTITUTO DOS VINHOS DO DOURO E DO PORTO, I.P.	Port Wine	Trade association acting to combat trends of declining market share in the US with coordinated marketing	Pooling resources in a heritage segment can amplify impact and be more efficient than working alone	Portugal

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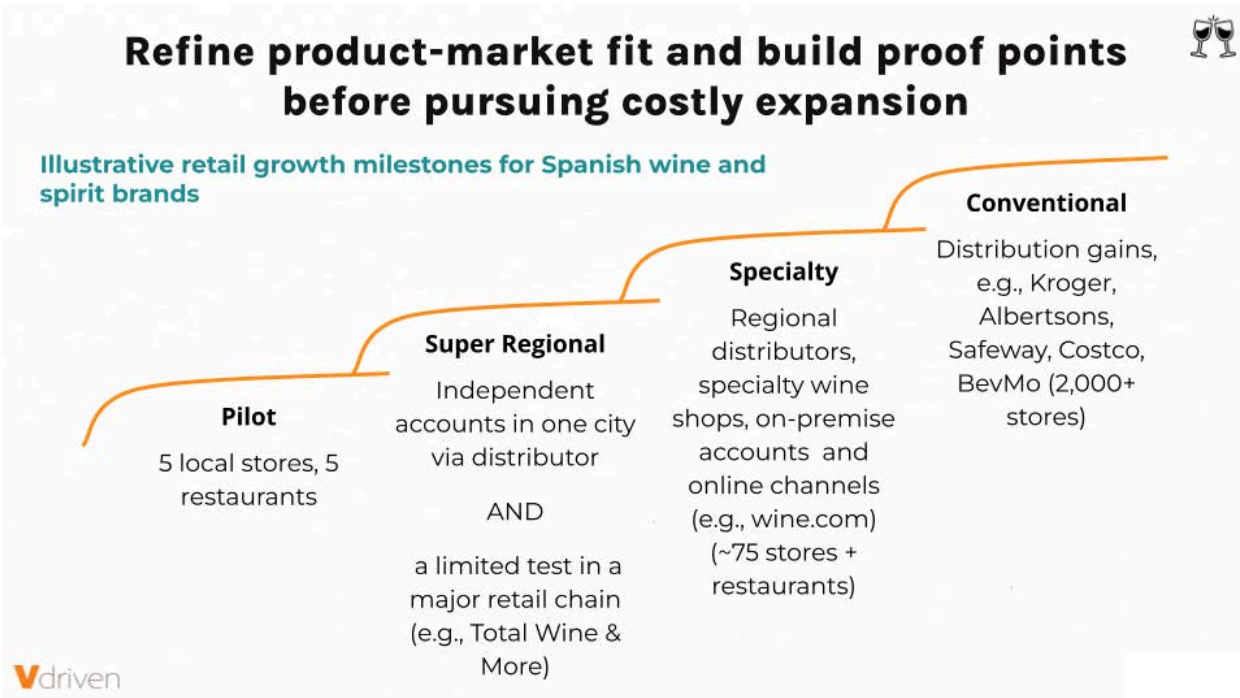
Wine case insights (2/2)

Company	Category	What they did	Insight	Origin
KYSELA PERE ET FILS, LTD.	White Wine	Created a category for a little known French wine, Picpoul de Pinet, by educating trade and focusing on on-premise placement	Use strategic trade placement to gain recognition and build demand	France
MAKER	Canned Wine	Repositioned canned wine as a premium, terroir-driven product amid anti-can bias	Lead with quality and transparent sourcing to address negative perceptions	US
THREE SPIRIT	Non Alc	Carved out a premium, wellness-driven niche with products crafted to mirror the moods people typically seek from alcohol	Understanding the “why” behind consumption patterns can open space for innovation	UK
WÖLFFER ESTATE	Wine	Elevated wine as a lifestyle product through aspirational branding and category expansion for a younger audience	Connecting to lifestyle and identity builds long-term brand affinity, especially among younger consumers	US

Growth Primer



Brands must have the capital required for each stage of growth

Illustrative trajectory for a Spanish wine at $20 retail/ bottle, €4 cost/bottle. Wine sold both by the glass and by case, for a volume brand.

	Pilot	Super Regional	Specialty	Conventional
Gross profit	€4,800	€48K	€120K	€180K
Gross profit per case	€16/case	€16/case	€16/case	€12/case
Cases sold	300	3K	7.5K	15K
Marketing investment	€5 per case from winery + €5 per case from importer			
Marketing	Heaviest promos, demos, PR	Heavy promos, demos, PR	Promos, PR	Promos, above the line, PR
Marketing execution	Brand-led	Brand + agency	Brand + agency	Agency-led

Vdriven Note: Estimates are indicative and can vary significantly, by sub-category and by channel


Invest in selecting partners that can help achieve your business goals
1. Selection
● Do you know other clients who have used this vendor?
● Can the vendor show a track record of other successful projects?
● Have you met the vendor in person?
● Is the vendor specialized in the specific area where you need help?
Partner feedback loop
2. Work together
● Define an initial scope of work and see how vendor performs
3. Evaluate performance
● After time has elapsed, review progress against the initial scope of work
4. Provide feedback
● Share feedback with vendor; continue if things are working well or switch if needed
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Amaro Nonino: Building a Brand Through Bartenders

COMPANY BACKGROUND & SITUATION

In 2008, Silvia Nonino, CEO of Nonino Distillatori, called her US brand director, Marco Rossi, in New York to assess a persistent obstacle: Amaro Nonino—a unique Italian herbal liqueur, beloved in Friuli, Italy—was struggling to find a foothold in the fiercely competitive and fragmented US spirits market. The amaro category had low consumer awareness outside Italian-American enclaves and craft bartending circles.

The challenge:

- Limited awareness**:** most US consumers associated “amaro” with generic after-dinner bitters or mass-market brands.
- Distribution barriers**:** many distributors lacked incentives to carry lesser known European liqueurs.
- Product positioning gap**:** mixologists recognized Amaro Nonino’s quality, but home consumers did not understand how to use it.
- Low volume: early US sales were estimated at just a few hundred cases per year in the late 2000s, limiting the brand's visibility.

AMARO NONINO SOLUTION: ON-PREMISE ACTIVATION

PRODUCT & DIFFERENTIATION

Silvia and Marco recognized that Amaro Nonino Quintessentia had key differentiators:

- Flavor profile: crafted from aged grappa and infused with Alpine herbs, citrus, and orange peel, it offered a lighter, more delicate bitterness than heavier, medicinal Amaros.
- Versatility: its balanced flavor, with a lighter profile and subtle complexity, made it ideal for both after-dinner sipping and cocktails, unlike its syrupy or overly bitter competitors.
- Craft legacy: as a family-owned business since 1897, Nonino could credibly tell a story of Italian craftsmanship and sustainable agriculture.

Silvia and Marco decided that Nonino's differentiation strategy would be to communicate its heritage and quality and position the liquor as *the* amaro for cocktail innovation, rather than just a digestif.

BRAND & POSITIONING

Silvia and Marco focused Amaro Nonino's US positioning on:

- Modern, mixology-driven sophistication.
- Direct association with the "modern classic" Paper Plane cocktail.
- An accessible premium identity: authentic yet approachable.

They partnered with bartending communities to secure Amaro Nonino's place on lists of "must-have cocktail ingredients" lists, engaged the trade with refreshed branding, updated bottle design and story-driven point-of-sale materials. and educated the trade with attractive, modern branding.

PROMOTION

The turning point came in 2008, when renowned bartender Sam Ross created the "Paper Plane" cocktail for The Violet Hour in Chicago. The drink combined bourbon, Aperol, Amaro Nonino, and lemon juice in equal parts. The Paper Plane's ease of preparation (equal-parts recipe), memorable name linked to pop culture, and perfect balance of bitterness, sweetness, and citrus, drove an organic "cult" status among bartenders. It quickly spread from Chicago to influential bars like New York's Milk & Honey, and then across the country. Silvia and Marco quickly capitalized on this by:

- Educating bartenders on how to use the Amaro Nonino in the Paper Plane and other cocktails.
- Sponsoring and appearing at cocktail festivals, showcasing new recipes featuring Nonino.
- Focusing on digital marketing, using short videos and social content to highlight recipes and tell the Paper Plane cocktail's story, eschewing traditional print.

DISTRIBUTION

Initially, Amaro Nonino was limited to Italian restaurants and high-end bars. The Paper Plane's popularity among influential bartenders changed distribution economics:

- High-velocity bars and cocktail lounges began demanding Amaro Nonino, generating pull in the on-premise channel.
- Distributors responded to rising demand especially from large cities like New York, Chicago, and San Francisco, by expanding availability.
- Once consumers tried the Paper Plane cocktail at bars, they began seeking the Amaro Nonino in retail, prompting premium liquor stores to sell it.

By 2023, Amaro Nonino was distributed in all major US spirits markets with significant penetration in both premium on-premise and off-premise accounts.

OUTCOMES & KEY TAKEAWAYS

QUANTITATIVE SUCCESS

- Amaro Nonino sales have tripled in the U.S. in the past 5 years.[1].
- As the Paper Plane gained in popularity, one distributor reported that 64% of its Amaro Nonino sales were on-premise.[2].

INSIGHTS LEARNED

- On-premise activation is crucial for new or niche brands: bartender enthusiasm can drive broader adoption and demand.
- Versatility matters: a lighter, more approachable product (not too bitter or too syrupy) broadens appeal.
- Signature cocktails can be transformative; the Paper Plane, which was easily replicable by bartenders, propelled Nonino from obscurity to ubiquity.
- Storytelling and authenticity matter: modern consumers, especially of cocktails, want to connect to heritage and craft as much as flavor.

[1] https://www.pennlive.com/food/2024/03/among-female-led-liqueur-producers-none-stand-taller-than-this-italian-distiller.html
[2] https://www.marketwatchmag.com/bitter-liqueurs-janfeb-2015/

Buffalo Trace: Heritage-Driven Growth Through Premiumization

COMPANY BACKGROUND & SITUATION

Buffalo Trace Distillery is one of the oldest continuously operating distilleries in the United States, tracing its heritage to the late 1700s, when pioneers were drawn to Kentucky for its fertile land and abundant limestone-filtered water. Over the centuries, the distillery survived wars, Prohibition, fires, floods, economic downturns, and competition from both domestic and international producers.

But by the late 20th century and early 2000s, Buffalo Trace faced significant challenges that threatened its position in the highly competitive US spirits market:

- Aging infrastructure and limited warehousing capacity restricted growth and impacted margins.
- The bourbon category itself was struggling, perceived primarily as a commodity or low-value spirit by consumers, particularly among younger and urban drinkers.
- The US market was increasingly favoring premium spirits like single malt Scotch, with American whiskey often lagging behind in perceived quality and prestige.
- Buffalo Trace needed to find a way to both preserve its storied heritage and compete in an evolving market.

BUFFALO TRACE SOLUTION: STORYTELLING, MODERNIZING OPERATIONS, AND SPECIAL RELEASES

PRODUCT & DIFFERENTIATION

Buffalo Trace developed a strategy anchored in premiumization and authentic storytelling to set itself apart:

- Introduced a portfolio spanning everyday bourbon (Buffalo Trace Bourbon) to super-premium and collectible releases, such as Eagle Rare, George T. Stagg, Blanton's Single Barrel (the world's first single-barrel bourbon) and Pappy Van Winkle's Family Reserve (the "Holy Grail" of bourbons).
- Focused on quality, heritage, and craftsmanship: emphasizing traditional production methods (such as copper stills and century-old fermentation tanks) and age statements.
- Created "Bottled-in-Bond" status as a guarantee of authenticity fostered by E.H. Taylor Jr., an industry pioneer at Buffalo Trace.
- Carefully balanced limited releases and allocated products to drive demand and cultivate a perception of exclusivity and desirability.
- Developed premium packaging for special releases (wax seals, unique bottle designs).

BRAND & POSITIONING

Buffalo Trace's core branding tactic was premiumization:

- Positioned itself not just as a bourbon, but as a luxury American whiskey, with taste, history, and scarcity as key differentiators.
- The lure of its limited editions created a "halo" effect on the core line, elevating the perceived value of the Buffalo Trace name as a whole.
- Emphasized American heritage and family-ownership as a point of distinction from multinational conglomerates.
- The brand's narrative consistently highlighted overcoming adversity (e.g. floods, fires, and economic downturns) and uncompromising quality.

PROMOTION

Buffalo Trace used a nuanced promotional approach:

- Heritage storytelling: distillery tours, marketing materials, and digital campaigns highlighted the distillery's resilience and legacy.
- Education-focused marketing: consumer tastings, masterclass events, and virtual experiences positioned the brand as both authentic and approachable.
- Scarcity-driven demand: cultivated mystique around rare and limited-edition bourbons to generate word-of-mouth and media buzz.
- Awards and accolades: aggressively sought and promoted international spirits awards to reinforce the brand's premium positioning.
- Targeted trade influence: engaged bartenders and influencers to drive visibility and mentions in high-end hospitality venues.
- Capital investment as branding: highlighted restoration of historic rickhouses(used for aging spirits) and facility upgrades to reinforce commitment to tradition and craft.

DISTRIBUTION

Meeting surging demand required Buffalo Trace to dramatically upgrade its distribution and logistics:

- Implemented automated warehousing with a new 83,000 square foot facility, streamlining inventory management and improving fulfillment rates.
- Enhanced fulfillment efficiency: automated Storage and Retrieval Systems (AS/RS) reduced labor costs, inventory damage, and operational bottlenecks during peak seasons.
- Adopted First In, First Out (FIFO) inventory strategies to ensure consistency in aging and quality.
- Maintained allocation strategies for high-demand releases, funneling limited products to select retailers and restaurants to maximize visibility and benefit from scarcity.

OUTCOMES & KEY TAKEAWAYS

Buffalo Trace's approach generated exceptional growth and industry-leading prestige:

- In the early 2000s, Buffalo Trace sold approximately 100,000 cases per year; today, that figure has risen to well above one million cases annually—a tenfold increase, with the flagship brand regularly cited among America's fastest-growing premium bourbons [estimate based on industry data; figures may vary year by year].
- Allocated, high-end releases such as Pappy Van Winkle sell out immediately, often fetching thousands of dollars per bottle on the secondary market.
- Buffalo Trace has won every major spirits award, cementing its reputation as the benchmark for quality bourbon.
- Buffalo Trace's distillery in Kentucky became a major tourist destination, drawing over 300,000 visitors annually.

INSIGHTS LEARNED

- Premiumization works: elevate core products with halo limited releases, strong origin stories, and controlled scarcity.
- Invest in authentic storytelling: highlight brand history and craft credentials in every consumer touchpoint.
- Modernize operations to match demand: efficient warehousing and distribution are critical as demand expands.
- Brand exclusivity can drive demand: controlled allocations and visible awards can transform perception from commodity to coveted.
- Consistent brand messaging: stay true to core values—quality, heritage, and authenticity.

Day Drinking by Little Big Town: Format and Flavor Innovation Meets Celebrity Branding

COMPANY BACKGROUND & SITUATION

Little Big Town, a Grammy Award-winning country music group, ventured into the wine business by launching its own wine brand, first with 4 Cellars (a collaboration with Browne Family Vineyards) and then with Day Drinking by Little Big Town, a line of canned wines targeting a broad, younger, and more casual audience. Despite musical fame providing an initial marketing springboard, the US wine market posed significant challenges:

- Saturated market: the wine segment is crowded with established brands and craft newcomers.
- Changing consumer habits: millennials and Gen Z showed shifting preferences, favoring convenience and flavor innovation over traditional bottled wine experiences.
- Category growth: the canned wine segment was growing, but competition for attention on store shelves was intense, demanding clear differentiation.

The core challenge for Little Big Town's wine company was to carve out a unique position that combined celebrity appeal with real consumer value, moving beyond the perception of being just another "celebrity wine".

DAY DRINKING SOLUTION: MAKE WINE CASUAL, FLAVORABLE, AND ACCESSIBLE

PRODUCT & DIFFERENTIATION

To address the market's challenges, Day Drinking by Little Big Town differentiated itself primarily through:

- Flavors: emphasized flavored and approachable wine styles that appeal to entry-level wine drinkers and those seeking variety. The lineup includes Watermelon Rosé, Rosé Bubbles, Southern Peach, Black Cherry, and the newer Pontoon Punch—each gluten-free and crafted without artificial flavors or colors.
- Format innovation: 375 ml cans make wine portable, convenient, and easy for casual or outdoor occasions—a direct hit with tailgates, festivals, and poolside gatherings.
- Price point: each can is priced at $6.99, accessible enough for broad, impulse purchases, but still positioned as premium within the canned category.
- Celebrity-backed authenticity: the band's genuine involvement in product development and marketing translated as authentic, further distinguishing the brand from other celebrity-endorsed products.

BRAND & POSITIONING

The brand's identity is rooted in celebration, fun, and accessibility, underscoring Little Big Town's ethos:

- Emotional connection: "Day Drinking" evokes joyful, carefree moments, seamlessly tying the identity of the wine with the cultural associations of daytime relaxation and music enjoyment.
- Distinctive packaging: bright, pop-art inspired packaging stands out on shelves and signals a break from conventional wine branding.
- Lifestyle focus: appealing equally to wine drinkers and non-traditional wine consumers (i.e. beer and seltzer fans looking for an approachable, flavorful alternative).
- Celebrity AND product integrity: communicates that this is more than a vanity project; band members are publicly hands-on in all aspects from wine selection to branding.
- Positioning tagline: "a delicious and refreshing canned wine…born out of the band's passion for celebrating life and its special moments with wine."

PROMOTION

- Personal branding: the band integrated "Day Drinking" into its on-stage identity and music, fostering organic awareness among fans.
- Social media and engagement: capitalized on the band members' avid social following, sharing behind-the-scenes glimpses and personal stories about wine-making and enjoyment. Built cross-promotional campaigns tied to new music releases.
- Event marketing: focused on music festivals, concerts, and country lifestyle events—natural fits for portable, flavor-forward wine in cans.

- Media partnerships: received significant PR coverage due to the crossover of pop culture and wine industry news.
- Retail demos: conducted tastings and special appearances with fans at select retailers in conjunction with band tours, connecting directly with target consumers.

DISTRIBUTION

- E-commerce: capitalized on direct-to-consumer channels and wine-specific online platforms.
- Event-driven placement: ensured presence at live events, music festivals, and venues, aligning with the brand's image and use case.
- Regional launch strategy: piloted in key US states with strong country music fan-bases and high outdoor/social event participation before expanding nationally.
- Retail chain focus: once in retail, rapidly pushed into large grocery and convenience retailers, where canned wine experience the highest velocity.

OUTCOMES & KEY TAKEAWAYS

By using both product innovation and authentic promotion, Little Big Town's wine brand has achieved standout success in a crowded segment:

- Fastest growing 375 ml can wine brand in the US out of the top 10 brands, within less than a year of launch.[1]
- Second largest flavored canned wine brand: flavored wine cans now comprise 35% of the canned wine category, indicating significant category growth and successful positioning.[1]
- Case growth: while initial launch case volumes are not publicly specified, Day Drinking's rapid ascent to a "top 10" position in canned wines suggests early sales likely numbered in the low thousands of cases and grew to tens of thousands (industry benchmarks indicate a "top 10" canned wine brand would exceed 50,000 to 100,000 cases annually as of 2021).[1]

INSIGHTS LEARNED

- Solve for usage occasions: products that make wine relevant and convenient for new occasions (concerts, outdoors, casual get-togethers) can capture new drinkers.
- Lean into authenticity: celebrity alone isn't enough—ongoing, public involvement by founders or endorsers boosts credibility.
- Differentiate with flavor and format: innovation in format (can, flavor, smaller size) can command shelf space and consumer trial more quickly than traditional bottlings.
- Target and expand: pilot launches in core demographic markets before expanding to ensure fast feedback and momentum.

[1]
https://www.littlebigtown.com/day-drinking-little-big-town-hits-high-note-can-wine-category/

Instituto dos Vinhos do Douro e do Porto: Re-Positioning Traditional Port in the US Market

COMPANY BACKGROUND & SITUATION

In the spring of 2021, the Instituto dos Vinhos do Douro e do Porto (IVDP), a government-chartered authority that certifies port wines, was confronted with a worrisome trend: after several years of steady export growth, port wine shipments from the Duoro Valley were falling. In 2020 alone, the volume of port wines from Duoro Valley declined 7.9%, and average price declined 8.4%.[1]

The Institute faced pressing questions: what factors were driving this reversal in export fortunes? How should port wine producers adapt to the shifting demands of consumers, mounting international competition, and changing trade patterns post-COVID? And most critically, how could IVDP revitalize port wine's relevance—particularly in a complex market like the US—to ensure the future competitiveness of the port wine sector?

IVDP SOLUTION: COLLABORATIVE MARKETING, PRODUCT INNOVATION, AND HERITAGE STORYTELLING

PRODUCT & DIFFERENTIATION

The Institute pressed its members to consider diversifying their product lines and production methods, with a focus on three themes:

- Premiumization: single-vineyard, vintage, and aged categories to appeal to collectors and connoisseurs.
- Sustainability: the adoption of organic and sustainable production methods to appeal to eco-conscious buyers.
- Product diversity: expansion into white, rosé, and ready-to-serve (RTS) formats to broaden the consumer base.

POSITIONING

The Institute is working to unite member wineries, tourism boards, industry partners, and government agencies in joint marketing, modern product promotion, export strategies, advocacy, and research initiatives to enhance the global profile, market presence, and sustainability of port wine.

- Joint marketing campaigns: the Institute works with member wineries and regional tourism boards to launch unified marketing campaigns. These campaigns highlight the qualities of port wine, promote vineyard tourism, and emphasize Duoro Valley's UNESCO World Heritage designation. By pooling resources, members achieve a broader reach than individual wineries could alone.
- Industry partnerships: alliances with Portugal wine associations and counterpart organizations in neighboring countries,such as Spain and France. These partnerships focus on sharing best practices, co-hosting wine festivals, and organizing joint trade missions to target export markets more effectively.
- Collaborative export strategies: the Institute coordinates export efforts, negotiating as a group with distributors and importers in key global markets. This unified approach improves bargaining power, reduces costs, and ensures a consistent market presence abroad.
- Cross-sector collaboration: recognizing the value of wine tourism, the Institute collaborates with the US government, cultural organizations, and travel agencies. Initiatives include developing wine trails, organizing regional festivals, and integrating port wine experiences into broader Spain and Portugal tourism packages.
- Advocacy and lobbying: the IVDP joined forces with EU trade representatives to protect the port designation of origin in the US and to clarify labeling requirements. Special attention was placed on ensuring the authenticity of port in competitive retail and on-premise environments.
- Research and development: member wineries pool funds to support research projects focused on sustainable viticulture, new varietals, and innovative production techniques.

This collaborative R&D helps the entire sector adapt to changing consumer preferences and environmental challenges.

PROMOTION

The Institute partners with US importers, sommeliers, bartenders, and mixologists to re-position port as a versatile cocktail ingredient beyond its traditional after-dinner use.

- Experiential tastings: cocktail masterclasses and pairing events showcase versatility and encourage trial.
- Cocktail use: drinks like the Port & Tonic, Port Lemonade, and Bar Drake Manhattan modernize port's image and expand consumption occasions, drawing in younger and cocktail curious consumers and demystifying the category, encouraging more frequent and versatile use.
- Influencer & sommelier advocacy: hospitality professionals champion port in contemporary settings from wine bars to top lounges and mixology programs.
- Social media campaigns: encouraging brands to focus on storytelling, drinking occasions, and #portcocktails, promoting lifestyle imagery to build new associations.
- Trade education: retail staff and bartenders learn about port's mixability and food-pairing potential, making them effective category ambassadors.

DISTRIBUTION

Because of the Institute's efforts, port wine has continued to strengthen and broaden its distribution channels.

- Channel expansion: growth through premium off-premise retail (wine shops, grocery chains) and upscale on-premise venues.
- Digital and DTC growth: online wine platforms and DTC (direct-to-consumer) models have made port more accessible, particularly to curious younger buyers.
- On-premise strategy: the rise in port-based cocktail placements in bars and restaurants brings new relevance and introduces the product to new audiences.

OUTCOMES & KEY TAKEAWAYS

By encouraging collective action, the Instituto dos Vinhos do Douro e do Porto is fostering unity and resilience within the port industry. Its collaborative efforts support market adoption, drive product and marketing innovation, and help the long-term success of port wine in the US.

- Globally, the port wine market is projected to grow at a robust CAGR of 8.5% from 2025 to 2035; the US is outpacing this at ~9.0% CAGR.[2]
- However, port is losing market share within the broader US wine and fortified wine category, as total wine consumption and categories like vermouth, flavored wines, and ready-to-drink formats grow even faster.
- In 2024, port accounted for under 3% of the global wine market volume.[2]

INSIGHTS LEARNED

- Nominal growth alone is not market share: even top-line category growth may mask a relative decline if other segments accelerate faster and take share.
- Innovation matters: new usage occasions (i.e. cocktails) and products (e.g. white and rosé port) can drive relevance.
- Education and trade support remain critical to win new consumers and convince gatekeepers across distribution.
- Brand repositioning—from tradition-bound to mixable and modern—can revitalize heritage categories, but requires sustained investment in both product and messaging.
- Collaborate to grow the category: strategic alliances with other producers, tourism boards, and trade partners can amplify reach, pool resources, and reshape consumer perception at scale.

[1] https://winesofportugal.com/documents/139/Press_Kit_VINIPORTUGAL_2020_Final_EN_Dez_2021_01.pdf
[2] https://www.futuremarketinsights.com/reports/port-wine-market

Kysela Père et Fils Picpoul De Pinet: Introducing an Unknown French Varietal to US shelves

COMPANY BACKGROUND & SITUATION

In 1994, Fran Kysela—a Master Sommelier with extensive industry experience—founded Kysela Père et Fils, a boutique wine import company with a bold mission: to introduce American consumers and the trade to high-quality, lesser-known European wines, particularly from underrepresented French regions. At the time, US wine preferences were largely dominated by familiar varietals such as Chardonnay and Merlot, and most French imports centered on marquee appellations like Bordeaux and Burgundy. Seeking to diversify the American palate, Kysela turned to Picpoul de Pinet, a crisp, citrusy white wine from the Languedoc that was virtually unknown in the United States.

In order for Kysela to become successful, he needed to overcome the following challenges:

- Limited awareness: the varietal had limited awareness among consumers and restaurants, a hard-to-pronounce name, and a lack of existing demand in the market.
- No distribution: Kysela needed to carve out space in a saturated and conservatively skewed wine landscape.
- High up-front costs: it is risky to import a large volume of a wine with no established market. The company's first shipment consisted of 850 cases of Picpoul de Pinet—a significant commitment at the time.[1]

KYSELA PÈRE ET FILS SOLUTION: FOCUSED ON-PREMISE PLACEMENT AND TRADE EDUCATION

PRODUCT & DIFFERENTIATION

- Varietal authenticity: 100% Picpoul grape from established Mediterranean vineyards between the coastal garrigue and the Thau lagoon, benefiting from cooling sea breezes and yielding naturally fresh, saline, and food-friendly flavors with a zesty acidity, perfect for seafood.
- Packaging: iconic fluted green bottle, unique on shelves and wine lists, reinforcing the wine's distinctive regional identity.
- Quality promise: clean, balanced, fruit-driven, and varietally precise—delivering pleasure, typicity, and, at around $11.99 retail, value for restaurants and consumers alike.

PROMOTION

- Focused placements in top restaurants: Rather than chasing distant prestige accounts, Kysela started with one of the nation's most acclaimed restaurants near his home —The Inn at Little Washington (three Michelin stars). By building deep relationships through tastings, trainings, and persistence, he positioned Picpoul de Pinet as an ideal pairing wine, especially for seafood-driven menus. Early placement at The Inn at Little Washington helped establish Picpoul and confer credibility to grow from there.
- Trade education: hosted tastings, provided technical sheets, and trained restaurant staff on pronunciation, origin, and pairing possibilities.
- Storytelling: shared the wine's French heritage and the importer's dedication to artisanal production, building emotional engagement with trade partners.

DISTRIBUTION

- From a two-person operation making deliveries in an old apple truck, Kysela grew to a company with over 50 employees and a national distribution network.
- Strategic expansion: initially concentrated on the East Coast but eventually achieved nationwide coverage through direct relationships and partnerships with distributors.

OUTCOMES & KEY TAKEAWAYS

GROWTH METRICS

- Initial import: 850 cases[1]

- Current scale: now dominates the US import market for this varietal, importing 85% of all Picpoul de Pinet brought into the US—thousands of cases annually[1]. (Exact current volume is not known, but implies more than tenfold growth).

INSIGHTS LEARNED

- Niche focus pays off: championing a high-quality, underrepresented wine can drive market creation and category leadership.
- Trade relationships matter: personal connections and consistent value delivery built trust with restaurants, which in turn educated consumers and drove demand. Kysela's reputation led to loyalty and growth via word-of-mouth.
- Education fuels adoption: hands-on training and storytelling overcame the barrier of an unknown name and grape.
- Distinctive packaging and authenticity: the unique Picpoul bottle and focus on typicity created instant differentiation on crowded wine lists.

[1] https://www.kysela.com/images/announcements/somm_journal_june_july.pdf

Maker Wine: Championing Independent Producers and Fighting Bias

COMPANY BACKGROUND & SITUATION

In 2020, Sarah Hoffman, Kendra Kawala, and Zoe Victor—the founders of Maker Wine—gathered at Stanford Business school, faced with a pivotal decision about the company's future strategy. Their mission: to challenge deeply rooted perceptions about wine, democratize access for small producers struggling with distribution barriers, and capture the attention of a younger generation as traditional wine consumers aged and overall industry growth slowed.

Key challenges:

- Widespread consumer skepticism about the quality of canned wine, often perceived as inferior to bottled counterparts.
- Difficulties faced by small, independent wineries in reaching consumers due to restrictive alcohol laws and dominance of major distributors.
- The need to appeal to new, younger demographics as traditional wine consumer segments aged and overall wine industry growth slowed.

MAKER WINE SOLUTION: AUTHENTIC STORYTELLING TO ELEVATE CANNED WINE

PRODUCT & DIFFERENTIATION

Maker Wine's core differentiation comes from a unique combination of premium quality, sustainability, and storytelling focused on diversity and craftsmanship:

- Premium, terroir-driven wines: Maker offers dry wines from lesser-known and classic varietals, all crafted by independent, award-winning winemakers.
- Eco-friendly packaging: instead of glass bottles, Maker uses digitally printed, 100% recyclable cans, and partners with US-based wineries to minimize transport and carbon footprint. Cans began their rise in popularity and acceptance in the US in 2003 with the launch of Coppola's Sofia Minis sparkling wine.
- Customer and industry panels: new wines are rigorously vetted by both consumer "Can Club" panels and industry experts—ensuring only highly rated selections make it to market.

BRAND & POSITIONING

Maker Wine has established itself as:

- A disruptor brand: the highest-rated canned wine in the US, Maker is often cited for "reimagining" how premium wine can be delivered and enjoyed, especially by younger and more diverse drinkers.
- A champion of inclusion & diversity: nearly every can spotlights a different independent producer, often from underrepresented backgrounds, connecting conscientious consumers with authentic makers.
- Sustainability leader: Maker's environmentally conscious practices appeal to eco-minded consumers and position the brand as a progressive category leader.
- Award-winning quality: accolades from major competitions and favorable reviews in outlets like Wine Spectator reinforce the brand's promise of excellence.

Sophisticated, yet approachable: its message is "premium wine sans the snobbery," combining quality with a welcoming, friendly tone that invites all demographics.

PROMOTION

- Transparency & storytelling: Maker's website, direct email campaigns, and QR codes on each can to detail the provenance and origin stories of wines and winemakers differentiate Maker as an authentic, values-driven brand.
- Industry validation: by collecting awards at major wine competitions, Maker uses third-party validation to shift perceptions about canned wine quality.

- Educational content: Maker publishes interviews, tasting guides, and features on wine regions and varietals, aiming to demystify wine and invite new consumers into the category.
- Sampling & Can Club: Maker's Can Club gives loyal customers access to new releases and the opportunity to participate in blind tastings, driving word-of-mouth and community around the product.

DISTRIBUTION

- Direct-to-consumer model: Maker ships wine directly to consumers, overcoming the restrictive three-tier distribution system that typically limits small producers.
- Online sales: customers purchase via Maker's website, where they can read about individual wines and winemakers, order mixed packs, and sign up for subscriptions.
- Strategic partnerships: Maker partners with select airlines (its first-ever airline placement in 2025), which expands reach and visibility in unique, high-traffic environments.
- Sustainable logistics: the domestic, farm-to-can model reduces transport emissions and supports local economies.

OUTCOMES & KEY TAKEAWAYS

Public information on Maker Wine's precise case sales at launch and current case sales is limited. However, key financial and growth metrics allow for reasonable inferences about Maker Wine's trajectory:

- Current revenue and employee base: As of 2025, Maker Wine's annual revenue is estimated at $3.6 million, with a team of 27 employees, reflecting a 23% year-over-year increase in staff.[1]
- The average wholesale price for canned premium wines ranges from $60 to $110 per 24-can case (equivalent to about 2 cases of standard bottles). Even at a conservative estimate of $70 per case, $3.6 million in annual revenue would translate to over 50,000 cases per year (using $70/case as a proxy), though the actual mix could vary.

INSIGHTS LEARNED

- Lead with authenticity and storytelling: consumers increasingly want to connect with the people and stories behind a wine, not just the product itself. Maker's approach of highlighting diverse, independent winemakers on every can, sharing their stories through packaging and digital channels, transformed the customer experience and built emotional loyalty.
- Build community and engagement through customization: Maker shifted from a typical subscription model to one focused on community, content, and personalization through its Can Club, yielding an 80%+ subscriber retention rate and 300% YoY revenue growth.[2]
- Use quality validation to overcome skepticism: Maker entered top-tier competitions and published results to challenge "can bias," ultimately winning the highest-rated canned

red and white wines in the US Third-party accolades directly countered consumer quality concerns.

- Focus on partnering with like-minded producers: rather than white labeling or mass sourcing, Maker built long-term relationships with small, high-quality producers who shared their values, ensuring both authenticity and supply chain integrity.

[1] https://growjo.com/company/Maker_Wine
[2]
https://www.chordcommerce.com/blog/how-chord-helped-maker-wine-create-a-one-of-a-kind-subscription-experience-and-change-their-business-for-good

Three Spirit: Functional, Alcohol-Free Spirits Redefining Social Rituals

COMPANY BACKGROUND & SITUATION

Founded in 2018 in London by Dash Lilley, Tatiana Mercer, and Meeta Gournay, Three Spirit has emerged as a pioneer in the burgeoning non-alcoholic functional beverage market. The company's mission was to reinvent the social drinking experience by offering botanical, alcohol-free elixirs that deliver both complexity and functional benefits usually missing from traditional zero-proof alternatives. After a successful launch in the UK, Three Spirit entered the US market in January 2021, facing several challenges:

- Market entry barriers: the US marketplace is vast, fragmented, and highly competitive, dominated by major alcoholic and increasingly non-alcoholic players.
- Consumer awareness: most US consumers were unfamiliar with sophisticated, functional non-alcoholic spirits and accustomed to sweet, simple alternatives.
- Distribution complexity: the three-tier alcohol distribution system and the rise of dedicated non-alc retailers created a complex channel landscape.

Despite these hurdles, the demand for "mindful drinking" and alcohol alternatives was accelerating post-2020, presenting Three Spirit with a window for rapid growth if it could stand out.

THREE SPIRIT SOLUTION: FUNCTIONAL DIFFERENTIATION AND PREMIUM CUES

PRODUCT & DIFFERENTIATION

Three Spirit defined itself with plant-powered, functional drinks that seek to replicate both the complexity and the ritual of traditional spirits—without alcohol.

Key product differentiation strategies included:

- Functional benefits: each elixir is crafted with botanicals selected for mood enhancement, energy, or relaxation, developed by plant scientists and bartenders. This "functional" positioning set Three Spirit apart from standard non-alcoholic brands focused only on taste.
- Sophisticated flavor profiles: Three Spirit's blends target adults who want a sensory experience similar to fine spirits and cocktails, not just fruit juices or sodas.
- Product range: rather than a single "spirit," Three Spirit offers a line (e.g. "Livener," "Nightcap," and "Social Elixir"), each tailored to a different social mood or occasion.
- Clean label: natural ingredients, no artificial flavors, and a wellness slant to align with consumer health trends.

BRAND & POSITIONING

Three Spirit positioned itself distinctly:

- Not as replacement, but as a new ritual: instead of copying existing spirits, Three Spirit's brand message is about "the space between drinking and not drinking"—sophistication, ritual, and connection minus alcohol.
- Premium, wellness-driven identity: packaging, naming, language, and partnerships all reflect a high-quality, plant-forward ethos akin to premium craft spirits.

Community and education: focus is on building a community that values conscious socializing and inclusivity rather than abstinence or moral messaging.

PROMOTION

To overcome low initial awareness and educate consumers, Three Spirit implemented a multi-pronged marketing strategy:

- Content and community building: by partnering with mixologists, hosting tasting events, and collaborating on recipes, the company introduced consumers and bartenders to complex non-alc cocktails.
- Digital outreach: revamped email campaigns with lush imagery, targeted content, and automated flows drove a 1.7x increase in revenue in the first month and 2x in the following month, accounting for 16% of online store revenue.[1]
- Influencer and PR: collaborations with bar culture advocates, wellness influencers, and non-alc retailers helped normalize non-alc options in social settings.

DISTRIBUTION

Three Spirit navigated US distribution challenges through both traditional and innovative channels:

- Direct-to-Consumer (DTC): online sales allowed access to consumers nationwide, crucial during pandemic-related bar and retail closures.
- Specialty retail expansion: partnered with rapidly growing non-alcoholic retailers such as Boisson and Spirited Away, gaining premium shelf space that traditional liquor channels didn't offer.
- Selective on-premise placement: trendsetting bars and restaurants invested in sober-curious options.
- National retail reach at Total Wine & More: Three Spirit products are sold in over 100 Total Wine & More stores across 25 states, marking a significant national retail partnership that dramatically increases Three Spirit's visibility and access to mainstream US consumers. The Total Wine partnership affirms consumer demand for premium non-alcoholic options in traditional alcohol retail environments and underscores Three Spirit's appeal beyond niche audiences.

This multi-channel footprint allowed Three Spirit to scale in cities across the country—as non-alc retail and DTC became new "third-tier" alcohol channels.

OUTCOMES & KEY TAKEAWAYS

- 11x sales growth: since US launch in January 2021, Three Spirit reported an 11x growth in domestic US sales through August 2021.[2] While absolute case numbers are not disclosed, this suggests rapid scaling from initial small-volume imports to significant US presence.
- Revamped DTC campaigns yielded a 1.7x increase in revenue in the first month and 2x the following month.[1]
- Online store revenue driven by automated flows climbed to 16%, indicating effective digital engagement.[1]
- Presence in fast-growing non-alc beverage retailers, once a rarity but common across major US cities, signaling successful market entry.

INSIGHTS LEARNED

- Functional differentiation matters: adding unique, wellness-focused benefits to products can set brands apart in crowded low/no-alcohol categories.
- Channel innovation pays: direct-to-consumer and specialty retail channels are critical for educating and converting new customer segments, especially in highly regulated categories.
- Targeted promotion: personalization and targeted messaging in email and social media can quickly drive engagement and conversion, especially with lean teams.

[1] https://www.bsandco.us/case-studies/three-spirit
[2]
https://www.bevnet.com/spirits/2021/spirits-news-three-spirit-lands-seed-investment-diageo-goes-deeper-into-tequila/

Wölffer Estate: Lifestyle Branding to Elevate a Regional Winery

COMPANY BACKGROUND & SITUATION

In 1988, Wölffer Estate Vineyard opened its doors in the Hamptons, Long Island, quickly establishing itself as a family-owned winery celebrated for its scenic beauty and European-style wines. While Wölffer became a sought-after local destination, the estate faced daunting challenges in the broader US wine market, which was dominated by large California producers and established European imports. New York wineries like Wölffer struggled with perceptions of lower quality and limited recognition.

As consumer tastes rapidly evolved—demanding not just quality and innovation but products aligned with wellness and lifestyle trends—Wölffer's modest production focus on the local market came into question. The leadership now faced a pivotal decision: how could Wölffer overcome regional barriers and changing preferences to build a brand with broader national appeal while remaining true to its unique identity?

WÖLFFER ESTATE SOLUTION: PRODUCT EXPANSION AND LIFESTYLE BRANDING

PRODUCT & DIFFERENTIATION

Wölffer Estate's differentiation strategy centered on product innovation, style, and quality:

- Signature rosé: Wölffer's Provençal-style rosé—crisp, pale, and elegant—became its flagship, capitalizing on the nationwide "rosé all day" trend. The estate now produces eight different rosés, making it a category leader.
- Non-alcoholic innovation: spotting early consumer interest in wellness and moderation, Wölffer launched sophisticated, alcohol-free wine alternatives before the US market caught on. The "Spring in a Bottle" non-alcoholic sparkling rosé (launched in 2021) and Blanc de Blancs variants are made with German-grown grapes, blending authenticity with global trends.
- Beyond wine: the estate extended its portfolio into European-style ciders and spirits, catering to diverse palates and use occasions.
- Quality focus: relentless emphasis on wine quality, blending Old World techniques with New World innovation, has earned consistently strong reviews from both consumers and critics.
- International expansion: Facing limited room to grow with only 175 acres in Long Island, Wölffer chose to expand abroad rather than in California, where high costs, labor challenges, and suboptimal conditions for rosé posed barriers. The estate acquired 200 acres in Mendoza, Argentina and 2.5 acres in Mallorca, Spain, while also partnering with growers across 1,750 acres in Provence, France under the oversight of its winemaker, Roman Roth. Each region is marketed as distinctive and boutique — e.g. *Summer in a Bottle Côtes de Provence Rosé* versus *Summer in a Bottle Long Island Rosé — ensuring global growth while protecting brand integrity.*

BRAND & POSITIONING

Wölffer Estate carved out a distinctive position by combining:

- Hamptons luxury & accessibility: the brand resonates with consumers seeking an "aspirational lifestyle" experience, yet products remain approachable in price and style.
- Trend leadership: first-mover advantages in American rosé and non-alcoholic categories gave Wölffer national buzz and media attention.
- Broad relevance: the range found its niche with traditional wine lovers, then capitalized on its alcoholic wine brand recognition to expand into non-alcoholic products that appealed to consumers looking for wellness and moderation.
- Iconic packaging: Wölffer wrapped its bottles in an elegant floral pattern from neck to foot; this distinct innovation became a social media favorite and desired item for trend-setters.

PROMOTION

Wölffer's promotional approach has been both modern and lifestyle-oriented:

- Aspirational branding: the estate's Hamptons location is a symbol of luxury and leisure. Wölffer wines frequently appear in social media posts tagged from celebrity parties, beach outings, and influencer events, making the brand highly Instagrammable.
- Emphasis on visuals: elegant bottle designs and photogenic labels have helped drive social media sharing and consumer trial.

- Event marketing: private events, wine dinners, and collaborations in the music and fashion space have attracted influencers and tastemakers to the estate.
- Wellness messaging: the non-alcoholic wine line is marketed as a sophisticated choice for health-conscious consumers, avoiding the sugary, childlike aesthetic of legacy non-alc wines.

DISTRIBUTION

- Diverse channel penetration: early investment in wine clubs, e-commerce, and estate experiences built loyal customer relationships and recurring revenue.
- National distribution: the brand expanded beyond Long Island, building relationships with premium accounts in urban centers such as New York City, Los Angeles, and Miami, and appearing on wine lists at trendy restaurants and bars.
- Product diversification: ciders, spirits, and non-alcoholic beverages enabled Wölffer to enter grocery, specialty retail, and alternative beverage outlets traditionally closed to traditional wineries.

OUTCOMES & KEY TAKEAWAYS

Wölffer Estate's strategic bets have delivered tangible results:

- Growth: the company has scaled from a small local winery to producing over 175,000 cases of wine annually and distributing nationally, alongside 100,000 cases of cider and a growing range of spirits.[1]
- Diverse revenue: now, more than 100,000 cases of cider and significant volumes of spirits complement the wine portfolio, with an estimated annual revenue between $7.5 million[2] and $20.7 million.[3]
- Product leadership: Wölffer's rosés have achieved cult status, and its non-alcoholic "Spring in a Bottle" is consistently lauded as a category leader by both media and consumers.
- Market impact: the brand currently embodies the "Hamptons summer" lifestyle nationally, influencing consumer perceptions about what a New York wine can be.

INSIGHTS LEARNED

- Focus on category trends and anticipate shifts in consumer behavior (e.g. wellness and moderation).
- Develop distinct product styles and extend into adjacent categories (rosé, cider, non-alcoholic drinks).
- Build an aspirational lifestyle brand with strong visual and experiential appeal—become Instagrammable.
- Use distribution smartly: start local and DTC, then expand to premium national accounts as the brand's reputation grows.

- Balance tradition and innovation—commit to quality, but be willing to take risks ahead of the market.

[1]
https://www.forbes.com/sites/lizthach/2023/08/08/how-long-island-winery-wlffer-estate-stays-abreast-of-wine-trends/
[2] https://growjo.com/company/Wölffer_Estate_Vineyard
[3] https://www.zoominfo.com/c/wölffer-estate/87703586