



VINOSHIPPER[®]

CRAFT ALCOHOL PRODUCER
DIRECT SALES YEAR IN REVIEW

2022

CONTENTS

- 3 Data Source
- 4 All Cart Summary
- 5 Price Changes
- 8 State Growth
- 9 Price & Quantity Breakdown
- 11 Liters Sold by Unit Price
- 12 Demographics
- 14 Varietals



DATA SOURCE

This report is compiled from the transaction data of over 2,000 craft alcohol producers across 40+ states. The producer mix is predominantly micro to small wine, cider, and mead producers. The data in this report represents nationwide craft alcohol direct to consumer sales.

S U M M A R Y

All Cart Types

	Units	Liters	Gross Sales
All Products	-3.4%	-2.4%	5.9%
Wine & Sparkling	-2.8%	-2.9%	7.4%
Cider	-2.7%	1.9%	4.4%
Mead	-14.7%	-14.1%	-13.5%

Figure 1

P R I C E

2019-2022 Change

In 2022, across all products, gross sales increased 5.9%. Total liters fell 2.4%. And total units sold decreased 3.4%. Figure 1 splits out the headline figures by alcohol type.

In 2022, across all products, as shown in Figure 2a, gross cart value per sale increased 9.7%. Units per sale remained at 5.2. Price per liter increased 8.4%, driving the gross price per sale to \$117.62.

The largest rise in gross cart value per sale was in wine and sparkling, which increased 11.8% to \$125.18, driven mainly by an increase in the price per liter.

For both cider and mead there was a decline in units per sale. However, as depicted in Figure 2c and 2d, the increased price per liter for cider was large enough to outweigh the decline in units per sale, whereas the units per sale decline outweighed the price per liter increase for mead.

2022 reset the bar for price per liter across all products, with all three alcohol types extending to a three year high. Notably, wine and sparkling passed the \$30 threshold.

PRICE

2019-2022 Change (cont.)

	Price per Liter	Price per Sale	Units per Sale
2019	\$29.19	\$108.60	5.1
2020	\$24.85	\$102.01	5.3
2021	\$26.47	\$107.17	5.2
2022	\$ 28.70	\$117.62	5.2
Change 2021-2022	8.4%	9.7%	0.1%

Figure 2a

PRICE

2019-2022 Change (cont.)

WINE & SPARKLING		Price per Liter	Price per Sale	Units per Sale
	2019	\$29.76	\$112.14	5.1
	2020	\$26.49	\$104.82	5.4
	2021	\$28.80	\$111.95	5.2
	2022	\$31.81	\$125.18	5.2
	Change 2021-2022	10.4%	11.8%	1.3%

Figure 2b

CIDER		Price per Liter	Price per Sale	Units per Sale
	2019	\$16.98	\$61.02	4.6
	2020	\$12.42	\$64.34	4.6
	2021	\$13.14	\$66.08	4.6
	2022	\$13.47	\$66.32	4.3
	Change 2021-2022	2.5%	0.4%	-6.4%

Figure 2c

MEAD		Price per Liter	Price per Sale	Units per Sale
	2019	\$36.94	\$82.43	4.2
	2020	\$35.04	\$85.47	4.1
	2021	\$37.07	\$89.33	4.2
	2022	\$37.32	\$85.82	4.0
	Change 2021-2022	0.7%	-3.9%	-5.1%

Figure 2d

STATE GROWTH

	Change 2021 - 2022				
	Price per Liter 2021	Price per Liter 2022	Price per Liter	Liters	Revenue
CA	\$35.53	\$44.85	26.2%	-16.0%	6.0%
OR	\$34.60	\$38.54	11.4%	3.1%	14.9%
NY	\$24.42	\$26.33	7.8%	10.6%	19.2%
WA	\$33.30	\$34.55	3.7%	12.3%	16.6%
VA	\$32.52	\$33.46	2.9%	0.5%	3.4%
TN	\$23.21	\$23.75	2.4%	14.5%	17.2%
MI	\$28.03	\$28.37	1.2%	14.9%	16.3%
CO	\$30.97	\$33.68	8.7%	-15.0%	-7.6%
NC	\$25.16	\$28.42	13.0%	-10.9%	0.7%
AZ	\$35.73	\$39.41	10.3%	5.5%	16.4%

Figure 3

The top ten DTC producer states are shown in Figure 3. They are categorized as:

1. Gross sales held flat – NC. Gross sales were flat due to a decrease in total liters and increase in price per liter.
2. Gross sales decreased – CO. The gross sales decrease was driven by a decline in total liters outweighing the increase in price per liter.
3. Gross sales increased largely due to price - CA, OR, VA, AZ. The price per liter increase was greater than the increase in total liters. In California, the price per liter increase was large enough at 26.2% to outweigh a 16% decline in total liters.
4. Gross sales increased largely due to volume - NY, WA, TN, MI. Total liters sold was greater than the increase in price per liter.

PRICE & QUANTITY

Breakdown by Product Type & Producer State

	Cart Size (Product Only)			Order Quantity		
	Online	POS	Club	Online	POS	Club
CA	\$197.76	\$228.33	\$168.38	5.6	7.0	4.9
OR	\$179.07	\$189.19	\$198.01	6.5	7.0	6.7
VA	\$135.56	\$126.67	\$82.74	5.8	5.2	3.3
NY	\$133.90	\$134.22	\$129.39	7.0	8.2	5.6
WA	\$153.41	\$183.24	\$168.11	6.5	7.2	6.2
PA	\$108.03	\$103.74	\$84.91	7.8	8.5	4.1
NC	\$106.08	\$164.79	\$121.32	5.9	7.2	4.8
TX	\$117.68	\$101.52	\$96.64	5.7	5.2	4.5
CO	\$132.99	\$121.99	\$121.43	5.6	5.2	4.7
MI	\$114.27	\$123.49	\$100.95	6.1	6.7	4.6

Figure 4a

WINE & SPARKLING

PRICE & QUANTITY

Breakdown by Product Type & Producer State (cont.)

	Cart Size (Product Only)			Order Quantity			
	Online	POS	Club	Online	POS	Club	
C I D E R	NY	\$89.97	\$77.66	\$71.63	3.7	4.6	3.0
	CA	\$77.50	\$55.09	\$75.85	4.9	4.6	4.8
	WA	\$71.64	\$75.92	\$65.98	5.5	6.3	5.8
	PA	\$64.60	\$58.79	\$52.06	4.6	4.7	3.6
	MI	\$56.15	\$50.51	\$67.37	4.2	4.1	4.3
	VA	\$96.74	\$62.45	\$69.90	5.2	4.7	4.4
	OR	\$68.32	\$29.93	\$71.79	6.2	6.0	6.0
	CO	\$70.40	\$53.50	\$77.91	4.8	4.3	4.5
	MA	\$56.63	\$73.09	\$51.12	4.8	5.6	3.1
	NC	\$75.51	\$61.17	\$61.64	5.5	4.7	4.3

Figure 4b

	Cart Size (Product Only)			Order Quantity			
	Online	POS	Club	Online	POS	Club	
M E A D	PA	\$73.21	\$43.93	\$20.79	3.1	4.1	1.2
	NY	\$92.77	\$53.95	\$51.11	3.6	3.1	2.3
	VA	\$88.03	\$119.73	\$107.54	3.9	5.9	5.6
	WA	\$92.55	\$71.32	\$73.32	3.9	2.6	3.4
	CA	\$114.02	\$77.74	\$77.18	4.3	3.7	2.4

Figure 4c

LITERS SOLD

By Unit Price

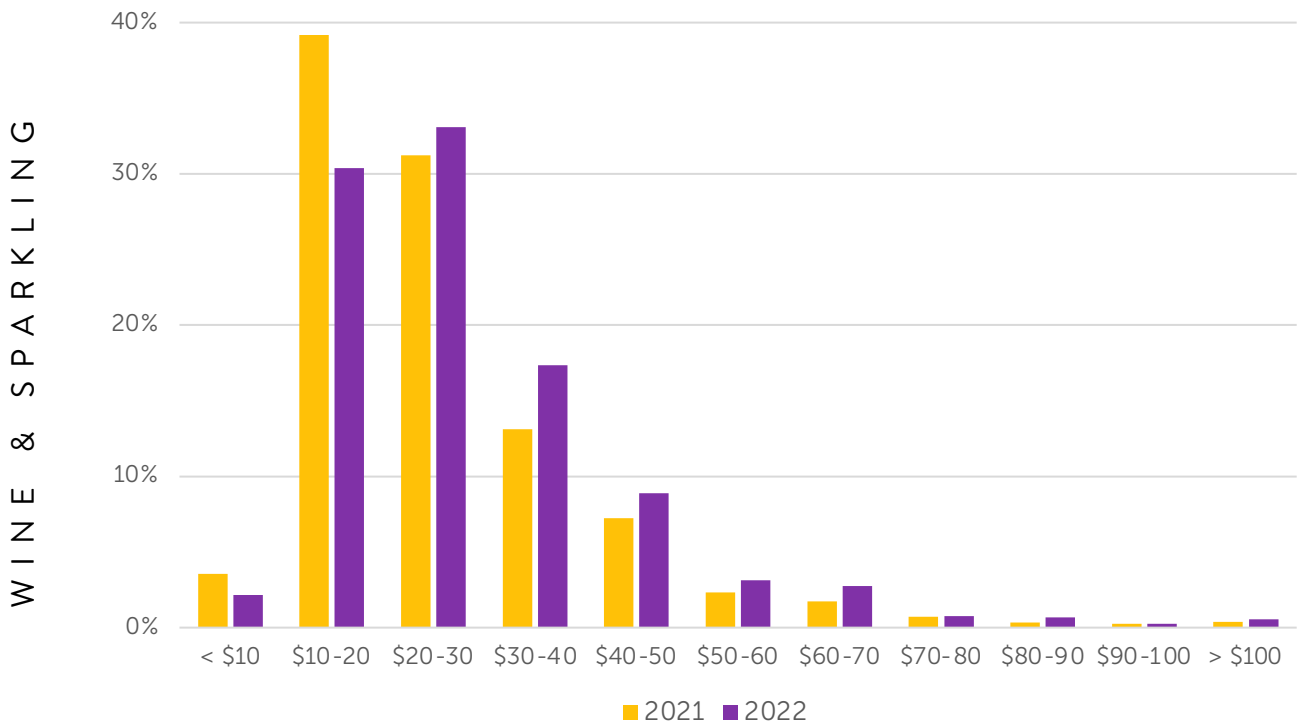
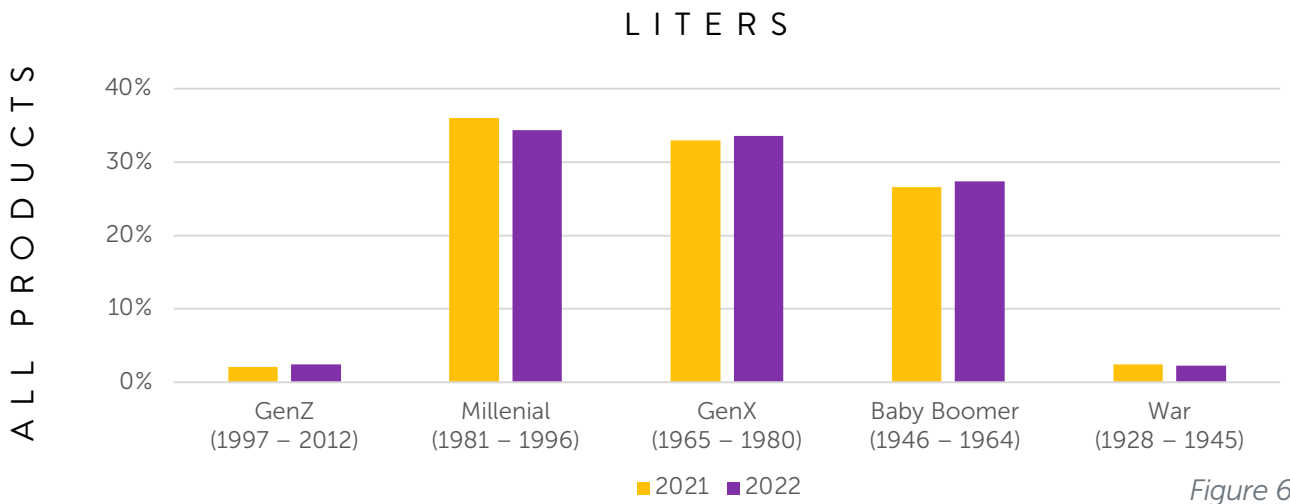
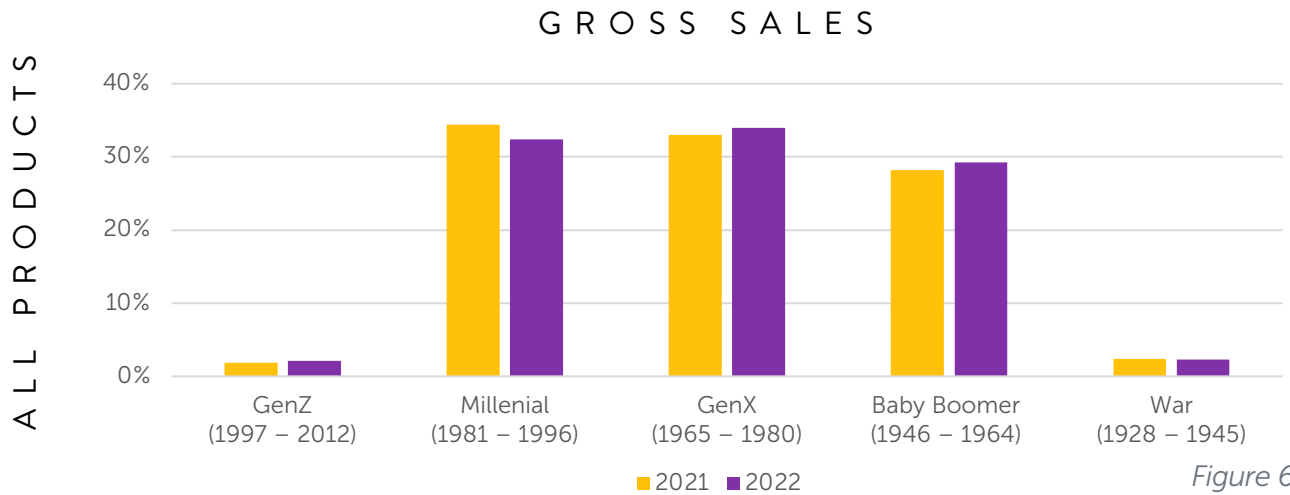


Figure 5

In 2022, across the wine and sparkling alcohol type, the \$20 - \$30 category was the most popular product price category, at 33% of all liters sold, up from 31% in 2021. The largest decline in total share of liters was in the \$10 - \$20 category. 90% of total liters sold was between the price of \$10 to \$50 per unit, down from 91% in 2021.

DEMOGRAPHICS

By Generation



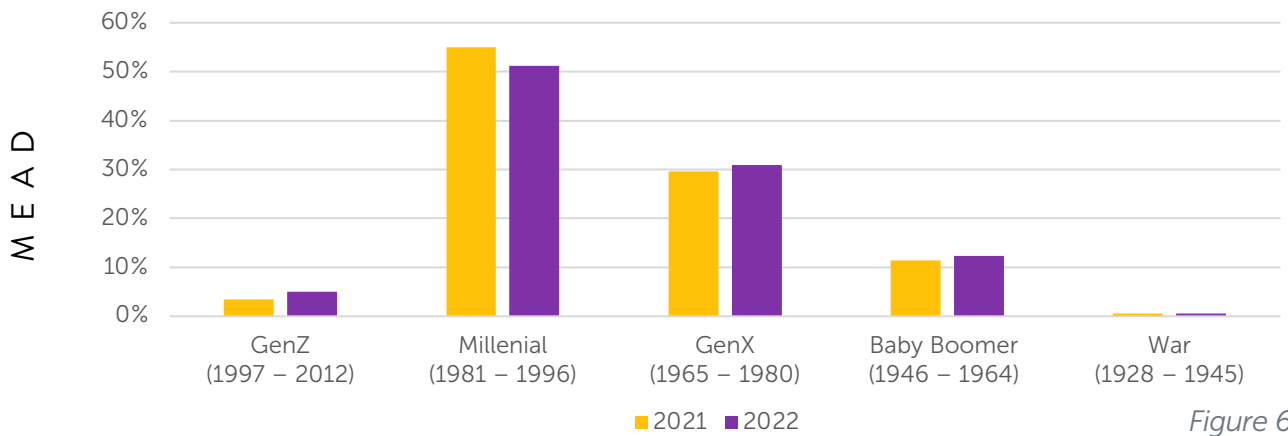
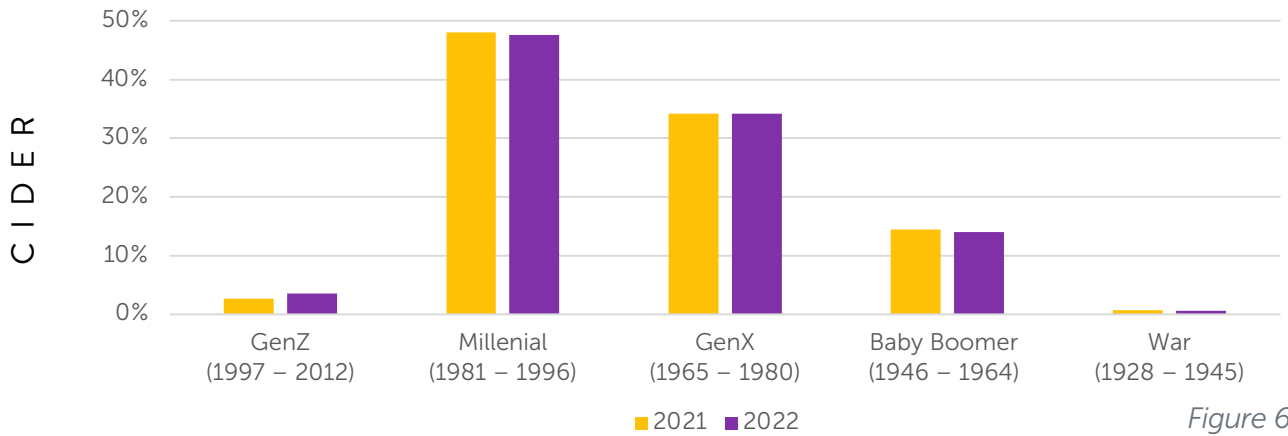
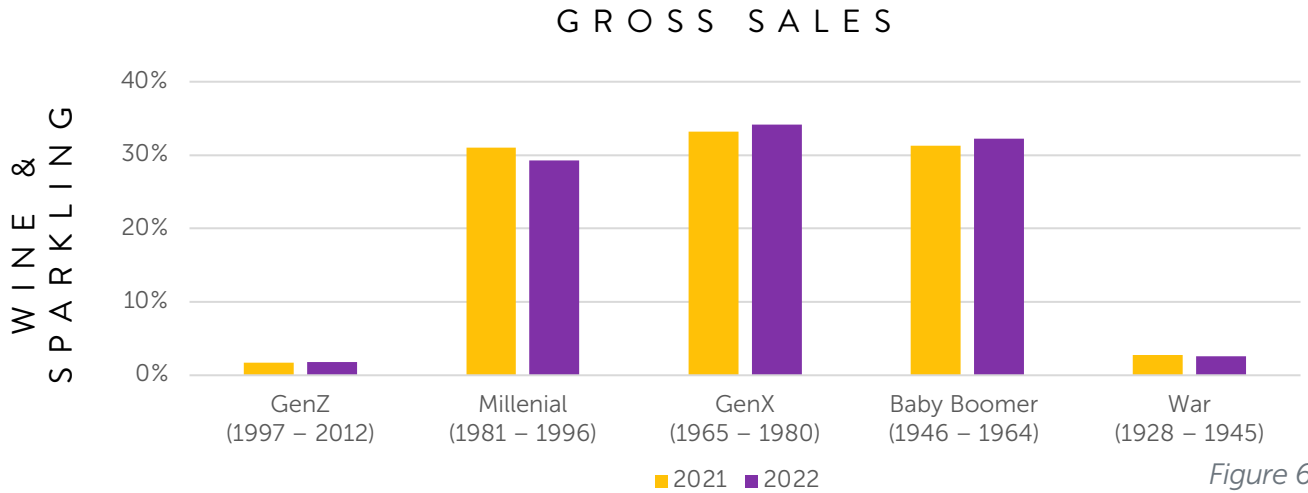
In 2022, Baby Boomers and GenXers increased their share of gross sales.

The majority of gross sales, 96%, are still concentrated amongst Millennials, GenXers, and Baby Boomers, no change from 2021.

Millennials' share of total liters fell from 2021 to 2022 but they remained the largest volume (in liters) purchaser of alcohol direct to consumer.

DEMOGRAPHICS

Gross Sales by Generation & Product Type



VARIETALS

Ranked by Gross Sales

ALL PRODUCTS

	Varietal Type	Varietal Name	Price per Liter 2022	Price per Liter 2021	2021 Rank
1	Red	Pinot Noir	\$43.91	\$41.90	4
2	Cider	Apple	\$14.22	\$13.65	1
3	Red	Red Blend	\$33.73	\$31.64	3
4	Red	Cabernet Sauvignon	\$48.61	\$45.81	2
5	White	Chardonnay	\$32.66	\$29.21	6
6	Rosé	Rosé	\$25.51	\$20.54	5
7	White	Riesling	\$26.95	\$25.05	9
8	White	White Blend	\$23.78	\$22.55	8
9	Red	Syrah / Shiraz	\$41.91	\$39.07	10
10	Mead	Melomel	\$41.19	\$44.72	7
11	Red	Cabernet Franc	\$37.43	\$34.02	12
12	Red	Merlot	\$36.19	\$29.25	11
13	Sparkling	White	\$33.41	\$28.81	16
14	Red	Red Table Wine	\$29.92	\$25.00	19
15	White	Sauvignon Blanc	\$29.53	\$26.99	15
16	Red	Zinfandel	\$37.47	\$35.47	21
17	White	Pinot Gris/Grigio	\$24.76	\$24.51	13
18	Fruit	Other	\$17.40	\$15.33	14
19	Red	Malbec	\$39.50	\$32.62	23
20	Mead	Honey	\$32.66	\$29.61	17

Figure 7

VARIETALS

Ranked by Gross Sales (cont.)

Self-reported varietals by the producer across all product types.

Pinot Noir climbed to the top of the ranks in 2022, ranked by gross sales, helped along by an increase in price per liter.

Rosé had one of the largest jumps in price per liter as more upmarket Rosés hit the market. Similarly, Merlot saw its price per liter ease.

*Melomel is a term for the combination of fruit and mead.

VINOSHIPPER®

LEARN MORE

vinoshipper.com

FOLLOW UP QUESTIONS?

pr@vinoshipper.com

PRODUCT QUESTIONS?

customerservice@vinoshipper.com

LINKED IN

linkedin.com/company/vinoshipper

INSTAGRAM

[@vinoshipper](https://www.instagram.com/vinoshipper)

