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FIVE STRATEGIC RESPONSES OF GLOBAL WINE PRODUCERS TO DECLINING DEMAND

EXECUTIVE SUMMARY

Global wine markets are entering a phase of structural pressure. In most established markets, demand is declining or stagnating, while competition intensifies and cost levels remain elevated. For producers, survival is no longer guaranteed by heritage, quality, or reputation alone. Sales focus, strategic clarity, and disciplined execution are becoming decisive factors.

The ProWein Business Survey, based on 1,000 expert responses worldwide, shows a clear pattern: sales and marketing activities were the most frequently cited drivers of success in 2025, followed by portfolio adaptation and cost management. Looking ahead to 2026, producers plan to intensify brand activities, strengthen sales channels—including online—and further improve efficiency.

Behind these headline categories, five recurring strategic archetypes emerge. They represent distinct but complementary responses to declining demand and rising competition: building customer proximity systems, expanding and activating channels, adapting portfolios to new occasions, clarifying value and brand positioning, and redesigning cost structures.

These strategies differ in ambition and resource intensity, but they share one common insight: passive market participation is no longer viable. Successful producers are moving from reactive cost-cutting to proactive market shaping.

The overarching conclusion is clear: in a shrinking market, advantage does not come from producing more—it comes from selling smarter, positioning sharper, and operating leaner.

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TRANSLATING INTERPRETATION INTO STRATEGY – FIVE ARCHETYPES

1. CUSTOMER PROXIMITY ENGINE

Core idea

Make customer closeness the core growth system: experiences, repeated touchpoints, and a visible 'face' of the business.

Strategic logic

1. *Turn direct contact into a repeatable sales system through events, hospitality, and personal interaction.*
2. *Increase retention and lifetime value through structured follow-up, segmentation, and loyalty mechanisms.*
3. *Shift from transactional selling to relationship-based growth anchored in authenticity and visibility.*

Typical actions

- **a.** *Scale event formats with conversion in mind: tastings, wine walks, after-work, cellar tours, house fairs, pop-ups.*
- **b.** *Build hospitality as a sales channel: vinothek, wine bar, Buschenschank/ Heckenwirtschaft, guesthouse/hotel tie-ins, camper spots.*
- **c.** *Systemise relationship selling: personal visits and calls, trade and gastronomy partner care, staff training, joint activities with retailers.*
- **d.** *Retention mechanics: segmented news-letters, loyalty programs, reactivation offers, vouchers and mixed bundles.*

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2. CHANNEL EXPANSION AND ACTIVATION

Strategic logic

1. *Diversify routes to market to reduce dependency on single channels or buyers.*
2. *Build structured export and B2B pipelines with disciplined follow-up and professional logistics*
3. *Treat online sales and retail listings as managed channels requiring active development, not passive presence.*

Typical actions

- *Export as a managed pipeline: targeted importer outreach, market prioritisation, disciplined follow-up routines.*
- *Retail and tenders: clear entry-range offers, listing readiness, point-of-sale activation where applicable.*
- *Build B2B capability: trade assortments, wholesale ordering options (e.g., B2B shop area), dependable logistics and fulfilment.*
- *Online as a parallel route: improve web-shop usability, use performance marketing where ROI is proven, test portals for visibility.*

3. PORTFOLIO ADAPTATION AND INNOVATION

Strategic logic

1. *Align product offerings with changing consumption occasions, including low/no alcohol and RTD formats.*
2. *Strengthen entry-level and fast-moving segments while selectively premiumising where credible.*
3. *Use packaging and design to improve clarity, sustainability perception, and shelf impact.*

Typical actions

- *Low or no alcohol and reduced alcohol lines; alcohol-free Seccos; selected non-wine complements where strategic.*
- *RTD and wine mixes (e.g., Schorle formats) aimed at new occasions and younger consumers.*
- *Packaging and label work: redesigns, lighter bottles, sustainable materials, clearer shelf communication.*
- *Portfolio logic: strengthen ‘fast movers’ and entry tiers, streamline slow-moving SKUs; selective premiumisation where credible.*

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4. VALUE AND BRAND CLARITY

Strategic logic

1. *Protect key price points and avoid confusing positioning shifts in sensitive segments.*
2. *Replace broad discounting with targeted promotions and value-based bundles.*
3. *Sharpen brand communication to remain accessible, authentic, and differentiated.*

Typical actions

- *Pricing discipline: protect key price points where possible and avoid confusing price jumps in the entry tier.*
- *Smarter promotions instead of blanket discounting: bundles, thresholds (e.g., free shipping), targeted actions.*
- *Clear positioning and differentiation: sharpen the brand core, simplify communication, avoid 'elitist' messaging.*
- *Quality consistency in the segment that actually rotates; communicate authenticity and family-business credibility.*

5. EFFICIENCY AND RIGHT-SIZING

Strategic logic

1. *Redesign the cost base through mechanisation, automation, and process optimisation.*
2. *Align production capacity with realistically sellable volumes.*
3. *Focus resources on profitable SKUs and markets while reducing structural inefficiencies.*

Typical actions

- *Mechanisation and automation in vineyard, cellar, and logistics; process redesign for productivity.*
- *Cost management as a routine: procurement optimisation, energy and packaging efficiency, leaner operations.*
- *Right-size production and area: focus on what can be sold profitably in bottle; lease out or reduce uneconomic plots.*
- *Selective outsourcing and service providers where cheaper than maintaining internal capacity.*

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STRATEGIC IMPLICATIONS

The five archetypes reveal a sector in transition. Producers are no longer assuming cyclical recovery; they are adjusting to structural change. Behaviour is shifting from volume orientation toward margin discipline and customer-centricity.

Diversification is replacing dependency. Whether through export expansion, hospitality, or online channels, producers seek to reduce single-channel risk. At the same time, portfolio decisions show a pragmatic openness toward new formats and entry-level products that keep the category accessible.

Cost management is no longer purely defensive. Efficiency initiatives increasingly support strategic focus, enabling reinvestment in brand and sales activities.

Market structure is likely to polarise further: producers who actively combine sales capability, portfolio clarity, and operational discipline will gain share, while those waiting for demand recovery risk gradual erosion.

KEY TAKEAWAYS FOR DECISION-MAKERS

1. *Sales capability is now as critical as production capability.*
2. *Direct customer relationships increase resilience in declining markets.*
3. *Portfolio flexibility is essential to remain relevant across occasions and price points.*
4. *Clear, disciplined positioning outperforms unfocused discounting.*
5. *Efficiency enables strategy—it should fund growth, not just prevent losses.*
6. *In a shrinking market, strategic focus determines survival more than scale.*