

Beyond California: the viticultural mosaic of the United States

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The structuring of the viticultural system in the United States presents a complex and **varied map**, reflecting not only the country's vast geographic scale but also the diversity of climates and terroirs influencing wine production.

The latest report from **Wine Business Analytics** provides a detailed look at how this sector is structured, highlighting key data that can help to better understand the American viticultural landscape.

At the forefront, unsurprisingly, is California, dominating both in terms of the number of wineries and production volume. With 4,947 wineries, representing **42%** of the national total,

and a production in 2023 of about 280 million cases of wine (approximately 3.4 billion bottles), 86% of the total US production.

California remains the beating heart of American wine. Its influence on the market cannot be underestimated, considering also the “**historical**” importance and the reputation of regions like Napa and Sonoma in the global viticultural culture.

You may also like: [Only direct-to-consumer \(DTC\) sales are providing some relief for Californian producers.](#)

Beyond California, the distribution of wineries across the United States shows a surprising diversity. Oregon and Washington follow with respectively 897 and 872 wineries, highlighting the importance of the west coast in the country's wine landscape. However, states like Texas, New York, and Virginia demonstrate (with 521, 459, and 388 wineries respectively) that wine production is a **national affair**, with hundreds of wineries each and a significant production contributing to the diversity of American wine.

The report also reveals a variety in the structuring of winery sizes. Of the 11,654 American wineries (according to the latest census by WineBusiness Analytics in January 2024), the majority of them have a decidedly **limited production** (less than 1,000 cases a year, that is about 12,000 bottles), constituting 50% of the total. This underscores a trend towards small production, almost entirely dedicated to the domestic market and, in particular, to direct sales through wine tourism activities, of which the USA continues to represent an excellent example at a global level.

On the contrary, large wineries (more than 500,000 cases, that is over 6 million bottles) represent only **1%** of the total, although their production is crucial for the overall volume.

It is interesting to note how wineries are distributed based on the average price of a bottle. The majority are in the

price range (ex-winery) between **\$11 and \$29.99** (almost 60%), with a significant peak of wineries selling bottles between **\$20 and \$29.99** (33%). This data reflects average positioning significantly higher than what occurs in our country even in quite prestigious denominations. But it also testifies to a purchasing capacity on the part of American consumers significantly higher than the global average. Indeed, more than 30% of the wineries are positioned at prices between \$30 and \$59.99, while realities with prices over \$100 represent 2% of the American viticultural system.

In summary, the viticultural system of the United States presents itself as a rich and diversified ecosystem, where wine production ranges from small artisanal wineries to large enterprises with global distribution. The variety of climates, terroirs, and production philosophies makes American wine a **particularly interesting field of exploration** and, above all, a constant testament to the ability to relate optimally with end consumers, a factor that will be increasingly strategic in the near future.