

The United States, top wine market with prohibition-era rules: time for change

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The American wine market remains constrained by the antiquated Three-Tier System, a post-Prohibition regulatory structure that mandates intermediaries and inflates costs. Recent surveys show that over half of US industry operators now demand reform, specifically the right to self-distribute. For Italian exporters, dismantling this bureaucratic barrier is vital to ensuring competitiveness and direct access to modern consumers.

The United States is the world's largest consumer of wine, with over 33 million hectoliters per year. Yet, despite this enormous potential, the American market remains rigidly trapped in a distribution system nearly a century old: the

“Three-Tier System,” a direct legacy of the post-Prohibition period. Under this model, producers can only sell to wholesalers, who in turn can only sell to retailers. No direct sales, no flexibility: a mechanism that forces every bottle to pass through an intermediary, inflating costs and reducing commercial freedom.

The survey shaking the industry

This rigid commercial constraint is disliked not only by countries exporting wine to the USA (Italy first and foremost) but also by Americans themselves. In his recent article “Survey Says... No More Three-Tier System” (Fermentation, October 24, 2025), Tom Wark, among the most authoritative voices in the American wine business, released the results of a survey involving over 200 industry operators.

The verdict is clear: more than 50% believe the most urgent reform is to allow producers to self-distribute their wines, both within and outside their own state. This stance amounts to an indictment against the three-tier system, defined by Wark as “the heartbeat of a now-sick system.”

An anomaly that heavily damages Italian wine

For Italian wine, which finds its primary export market in the United States, these rules represent a structural barrier as heavy as the tariffs introduced by Donald Trump, which already impact the competitiveness of European products. In a context where e-commerce and direct sales are now the norm, **forcing producers to depend on a network of local distributors means limiting business freedom and obstructing access for small and medium producers—the very ones who embody the richness of Italian wine.**

Signs of change (but too slow)

Some American states have begun to chip away at the distributors' monopoly: Washington, Iowa, Oregon, and Illinois have introduced exceptions allowing producers to sell directly to retailers, albeit with heavy limitations. However, as Wark points out, only 14 out of 50 states allow a form of—often partial—self-distribution, and almost always with punitive constraints: quantitative limits, logistical restrictions, and oppressive bureaucracy.

An opportunity for Italy: Allying for reform

The battle to liberalize wine distribution in the United States does not only concern the American industry. It is also a strategic issue for European wine, and particularly for Italian wine, which exports about 2 billion euros per year to the USA. Supporting the demands for reform put forward by US operators themselves means favoring a more open, competitive, and transparent market, capable of valuing quality rather than just the contractual strength of large distribution groups.

Overcoming the past to free the future of wine

Regulations born in the 1930s to curb Prohibition abuses today represent an economic distortion that penalizes producers and consumers. As Tom Wark emphasizes, “the mandate of the middleman must end: it is an unjustified constraint in a modern economy.” For Italy, which focuses on authenticity, territories, and small producers, the liberalization of the American market is not just a commercial matter: it is the condition for remaining a protagonist on the global wine stage. We may be dreamers for imagining a free wine market in the USA, but if one is not visionary in times like these, there is a risk of remaining forever entangled in rules

written over a century ago.

Key points

1. The **Three-Tier System acts as a rigid commercial barrier**, forcing every bottle through mandatory intermediaries and increasing final costs.
2. A recent survey reveals that 50% of American operators demand the right to self-distribute their products across states.
3. For Italian wine, these regulations represent a structural obstacle as damaging as international trade tariffs and protectionist duties.
4. Only 14 US states allow partial self-distribution, often hindered by punitive bureaucracy and strict quantitative limitations for producers.
5. Modernizing US distribution is essential to protect small and medium producers who prioritize authenticity over corporate distribution power.