

Vineyard business survey 2025

GREAT BRITAIN

PUBLISHED OCTOBER 2026

Executive summary

We at Strutt & Parker are passionate about wine and supporting the viticulture sector in Great Britain. It has been a privilege to work with many businesses over the past twenty years and to see the sector grow. Given that growth, and some of the challenges that we have seen recently, we carried out this survey to produce a dynamic picture of the state of the UK vineyard sector.

The survey was deliberately short and straightforward. It asked vineyard owners to think about how a range of factors impacted the performance of their businesses in 2025, the last full growing and marketing year. Their insights are fascinating, highlighting that while vineyard owners are becoming increasingly adept in the more technical aspects of winemaking, business management issues are becoming a growing challenge in the sector.

The survey underscores the importance of businesses having clear marketing and sales strategies, which drive brand awareness and create opportunities for higher margin sales.

Please do contact me or Dr Jason Beedell, our head of research, if you would like to discuss the results.



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The key findings were:



2025 was a great growing season and we are now good at growing quality fruit.



Business management is becoming more of a challenge, particularly cash flow, routes to market and wine sales. Cost are rising and there is a flight to value by consumers.



Structural factors, like storage space, winemaking and know how, do not appear to be constraints for most businesses.

With support from:



The survey

Data in this report was collected in May and June 2026 through an online survey sent to viticulture businesses throughout Great Britain. The survey asked one question – ‘Thinking about 2025, to what extent did the following factors impact the performance of your business?’. See the methodology section for more details.

We asked respondents to say whether the factors had a lesser or greater impact, or no change compared with normal.

In total, 99 vineyard owners and managers took part representing approximately 9-10% of the total number of vineyards in Great Britain, and their vineyards cover about 18% of the total area of vineyards. This means this is a large and representative sample.

This response would not have been possible without the support of Stephen Skelton MV of EnglishWine, Dr Alistair Nesbitt and Joel Jorgensen of Vinescapes, and Sam Linter of Plumpton College. They helped distribute the survey and analyse the findings with us.

The findings – a breakdown

We have put the factors we asked the vineyards about into three categories:



The growing season



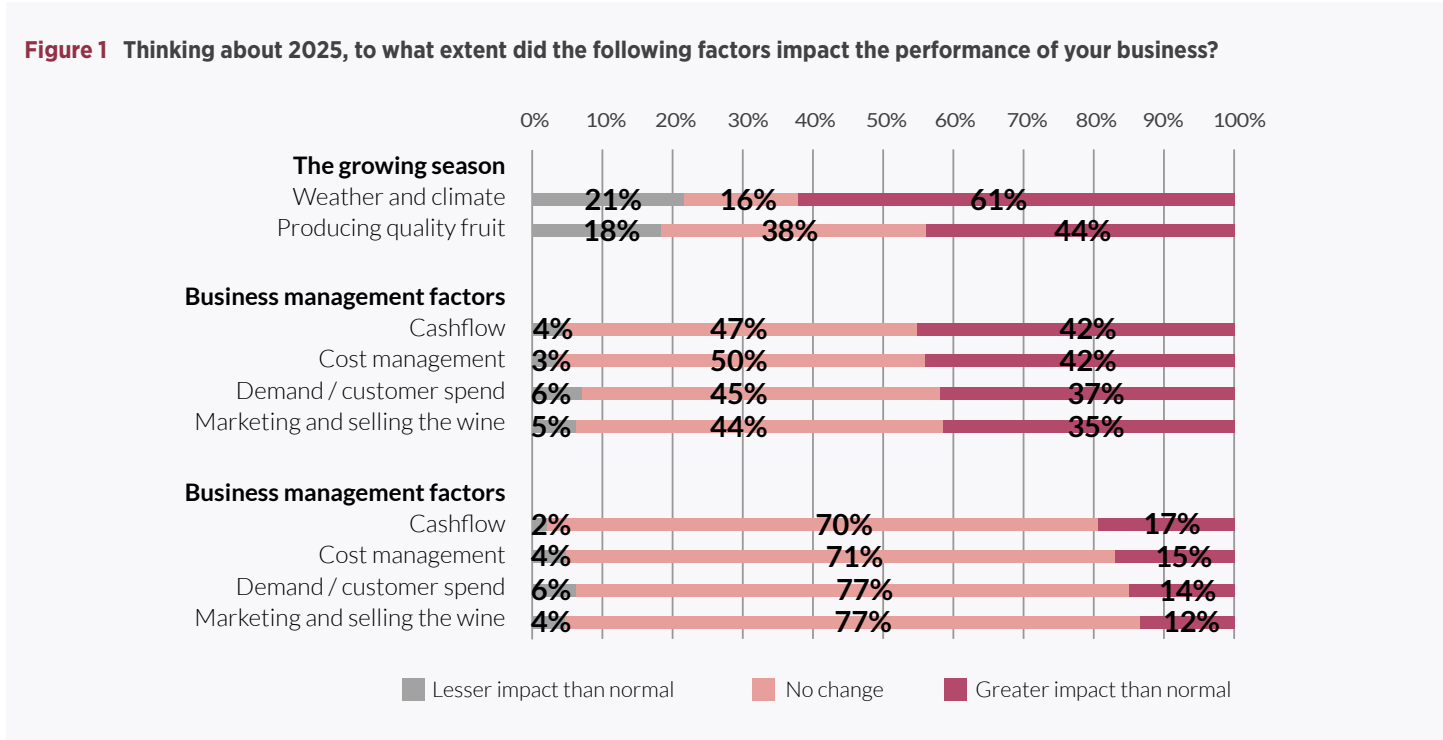
Business management factors



Factors relating to the structure of the sector

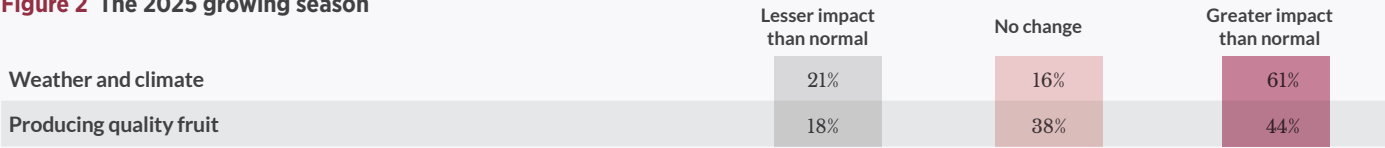
The chart and table below show, for each factor, the proportion of respondents who thought it had a greater or lesser or about the same impact on their business compared with normal.

For example, for the weather and climate, 61% said that it had a greater impact than normal. Many respondents also wrote comments in their responses. They add colour and depth to the findings and so a selection has been included in this report.



The 2025 growing season

Figure 2 The 2025 growing season



Most businesses (61%) said that the weather and climate had had a greater impact than normal - but it was a positive impact, with many saying that 2025 was a great growing year and produced high quality fruit.

Below are some of the unedited comments the respondents made:

“Great weather, so easy grape care and winemaking.
Harvest labour was not easily available.”

“The harvest was fantastic and the fruit will lead to great wines.”

“Was a challenging year where the fine weather in summer
did not persist long enough to ripen the fruit fully.”

We also discussed the responses with our partners who supported the survey and have included some of their observations as well:

“If you marked the 2025 harvest out of 10, it would be a 9 or 10.”
Stephen Skelton

“It confirms what we thought – we are getting good at growing quality fruit
and the international awards show that we are making good wines.
The challenge is being able to sell it at a competitive price point, as our costs
of production are higher than our international competitors.”
Nick Watson

Business management factors

Figure 3 Business management factors

	Lesser impact than normal	No change	Greater impact than normal
Cashflow	4%	47%	42%
Cost management	3%	50%	42%
Demand/customer spend	6%	45%	37%
Marketing and selling the wine	5%	44%	35%

A significant minority of respondents (35-42%) said that business factors had a greater impact than normal on their businesses.

42% said cashflow and cost management was having a greater impact, followed by demand/customer spend (37%) and marketing and selling the wine (35%).

Very few businesses reported positive changes for these factors - only the ones that had outdoor hospitality, which said that footfall had increased.

Below are some of the unedited comments the respondents made:

“Competitive landscape, soaring costs and largest vineyards not buying grapes due to unsold inventory.”

“Easy weather for viticulture, increasing costs and shortage of harvest labour. Wine sales have held up but required more effort.”

“General supply chain costs due to fuel and NI [National Insurance Contributions].”

“Great growing year producing nice fruit. Challenging market for wine. Less interest in buying local versus the cheapest.”

“It is harder to market our produce due to the level of wine duty and VAT payable reducing competitiveness over imported wines. It is harder to get cost effective labour in the UK.”

“Sales were and remain very difficult and there is real pricing pressure and consumers are definitely being more choosy and knowledgeable re English wines and the brands.”

“The demand for wine seemed to reduce a bit in the year which caused us to look at social media and differential pricing.”

“We found the wine sales market quite a challenge with low price ‘dumping’ of foreign wines at retail outlets affecting our sales.”

The following are our expert panel's observations:

“We have to go for producing top quality wine, at the best prices we can get.”

Stephen Skelton

“We are also seeing some cash flow challenges on the ground. One business we know, that has had 10 years of great production, is shrinking the vineyard by grubbing some vines, as they can't sell all their grapes, and it will be a better business model for them.”

Joel Jorgensen

“Many of the comments are not as negative as I had expected. My advice is that businesses need to be clear what their routes to market are, at the beginning of the enterprise. I focus on three questions. What are you going to produce, so what varieties? Where are you going to sell it? Who is going to do the selling, as you will need a proper salesperson who knows the market?

Stephen Skelton

“A lot of being successful is about wine tourism and getting footfall. One vineyard I know gets over 7,000 visitors. They have to buy in fruit as they can't produce enough to meet their demand.”

Joel Jorgensen

“It feels like, as viticulturalists, we are comfortable with how to grow grapes and produce wine, but less action is being taken to address selling and marketing”.

Nick Watson

“Wine tourism is the key to selling a percentage of production of own made wines in a commercially sustainable way. Until we can reduce our production costs, and subsequent price points to be more competitive, I believe this is vital for success”.

Sam Linter

Factors relating to the structure of the sector

Figure 4 Factors relating to the structure of the sector

	Lesser impact than normal	No change	Greater impact than normal
Storage space, in tanks or for bottled wine	2%	70%	17%
Winemaking	4%	71%	15%
Know how/knowledge	6%	77%	14%
Labour availability	4%	77%	12%

Most said that there was no change in the effect of storage space, winemaking, know how / knowledge and the availability of labour on their businesses.

However, a minority (12-17%) reported increasing challenges, including getting skilled workers, particularly for harvest, at affordable prices.

Storage space, in tanks or for bottled wine, does not appear to be an issue, but some businesses reported challenges in finding local winemakers or getting winemakers to produce all the styles they would like.

Below are some of the unedited comments the respondents made:

“Harvest labour was not easily available.”

“Over production and declining consumption. This combined with increased costs, labour shortages of skilled workers at affordable prices and unabated planting is going to see a lot of old established estates exit the industry. The future looks very gloomy.”

“The great summer weather made our outdoor hospitality more successful. Cost issue arise as with paying for staff and of course upward pressure on costs.”

The following are our expert panel's observations:

“Thinking about joint marketing and production has been around for years, but we in the UK are not co-operative focused. In Nova Scotia, Tidal Bay is an enterprise where the producers meet and state what they think they can produce.

The wine is individually produced, bottled and sold but is marketed under the Tidal Bay brand. It is produced to a tight taste pattern. It has created a middle-priced £9-10 bottle of still wine, in a Bordeaux bottle with a screw cap. This feels like a way of producing still wine that the UK industry could look to. The cost of contract wine making is quite high in the UK and it feels like we could get a reasonable price from retailers if they were offered an approach like this. It does not feel like we can get growing costs down very much, yields are limited but we could get wine production costs down to a reasonable level.”

Stephen Skelton

“Growing costs do not differ much between a poor and good producer – it’s down to the yield you are dividing the costs by. We need to get better at growing more grapes and losing fewer.”

Joel Jorgensen

“We need to look at yields. Plumpton has started to do some research on this. There are significant variations between producers and this presents an opportunity.”

Sam Linter

“I can see more businesses consolidating their growing and focusing on their tourism and marketing elements”

Nick Watson

The respondents

The respondents represent approximately **9-10% of the total number of vineyards in the UK**, ranging between **5 - 17% coverage per region**.

They represent approximately **18% of the total area of vineyards in the UK**, ranging between **8 - 25% coverage per region**.

The respondents' businesses cover **20-31% of the total area of vineyards in three of the four largest wine regions (South East, East and West)**. There is lower coverage of Wessex (8%), the third largest wine region.

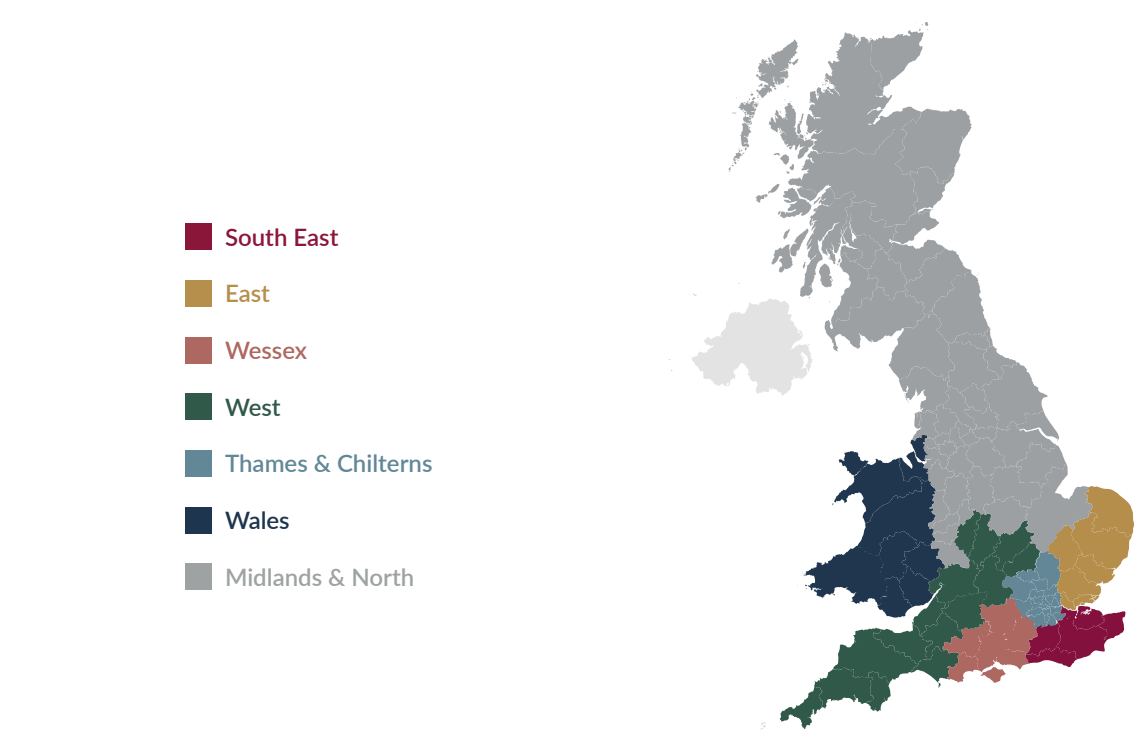
Over **90% of the respondents** categorised their vineyards as commercial. There was a slightly lower proportion of the vineyards under **2 ha (79%)**, while **100%** of the vineyards over 5ha said they were commercial.

54% said they grow grapes to make into wine, **6%** grow grapes to sell and the remaining **40%** do both.

A third of the vineyards have their own winery (**32%**), with half of the largest vineyards (**10ha or more**) having their own.

Around half use a contract winemaker.

Wine regions



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Methodology
Data in this report was collected in May and June 2026 through an online survey sent to viticulture businesses throughout Great Britain. The survey asked one question – “Thinking about 2025, to what extent did the following factors impact the performance of your business?”, with the factors being: producing quality fruit; weather and climate; labour availability; winemaking; storage space, in tanks or for bottled wine; marketing and selling the wine; demand/customer spend; cashflow; cost management; know how/knowledge. Questions were also asked about: the region of the vineyard and its area; whether it is a commercial vineyard and whether it grows grapes for sale, to make into wine or both; and whether the business has its own winery.

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