

Winery R&D Tax Credit Prospecting Guide

Winery R&D Credit Pitch

"Quick question-has your winery ever claimed federal R&D tax credits for wine production or process improvements?" Most vineyards don't realize that fermentation trials, recipe development, irrigation systems, and even labeling tech can qualify. If you're innovating anywhere in your winemaking or operations, you're likely eligible for a sizable tax credit-possibly for the past 3 years too.

We specialize in helping wineries claim those dollars without disrupting their vintage.

Winery Call Script

Opening:

"Hi [Name], I work with wineries like yours to help recover R&D tax credits from the IRS - often tens of thousands per year. Most people don't realize winemaking qualifies, but if I could ask 3 quick questions, I can tell you if it's worth a deeper look."

Qualifying Questions:

1. Do you experiment with new blends, fermentation methods, or barrel aging techniques?
2. Have you introduced new bottling or labeling equipment, or tried to improve production efficiency?
3. Do you track climate, soil, or irrigation data to improve grape quality or yields?

If YES to any:

"Those are exactly the kinds of innovations the R&D credit was designed to reward. Most wineries are leaving real money on the table. Would you be open to a quick no-cost analysis of your potential claim?"

Winery R&D Qualifier Cheat Sheet

Potential R&D Activity	What to Look/Ask For
New wine formulations	Do you experiment with blends, yeast strains, or barrel aging?
Fermentation innovation	Have you trialed temp changes, new tanks, or secondary fermentation processes?
Vineyard optimization	Do you use data to manage irrigation, soil, pests, or harvest timing?
New equipment testing	Installed or modified any bottling, crushing, or filtering machinery?

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Sustainability efforts	Have you implemented any new water reuse or eco-friendly processes?
Packaging design	Updated your bottle, label, or closure system recently?