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From heritage to sustainability: a systematic literature review of family wineries

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Abstract

Purpose – Family wineries are important drivers of economic development and cultural conservation, but despite the academic interest in them, a comprehensive literature review is missing. This paper aims to contribute to this gap and examine the current knowledge of family wineries to determine the main topics of the literature and the opportunities and challenges for the sustainability and competitiveness of family firms in the wine sector.

Design/methodology/approach – This research uses a bibliometric and systematic literature review (SLR) to present a broad view of the academic contributions focusing on family wineries. It reviews a sample of 94 articles identified from the Scopus and Web of Science databases and selected through rigorous inclusion and exclusion criteria. Bibliometric mapping and qualitative content analysis highlight the field's key topics and research gaps.

Findings – Family wineries are characterized by strong heritage and deep relationships, which drive brand loyalty and market differentiation. Innovation, sustainability and digital transformation offer key growth opportunities to family wineries. However, excessive family control, slow adaptation to change and succession issues may challenge their capability to pursue these opportunities. Balancing global expansion with local identity, integrating sustainable practices and maintaining strategic agility are essential for long-term resilience. Success will depend on effective governance, eco-innovation and modernization while preserving tradition.

Originality/value – This study provides the first bibliometric and SLR on family-owned wineries. It highlights key topics and identifies critical research gaps, suggesting future research directions. The findings have implications for family firms, policymakers and stakeholders.

Keywords Family business, Wineries, Cultural heritage, Sustainability, Familiness

Paper type Literature review

1. Introduction

The wine industry is a fascinating area for analyzing family businesses because of their fundamental relevance in this sector (Strickland and Ratten, 2024). In countries characterized by an ancient tradition in wine production, such as Italy, France and Spain, family businesses not only strongly contribute to regional economies but also play a key role in preserving cultural heritage and adopting sustainable practices (Vrontis *et al.*, 2016; Soler *et al.*, 2017; Broccardo and Zicari, 2020; Ferri *et al.*, 2024). Knowing the approaches these companies use to manage challenges and opportunities is crucial to explaining the factors that can help them ensure competitiveness in the context of the globalization of the market (Abella-Garcés and Ferrer, 2022; Bresciani *et al.*, 2016). Family firms in the wine sector are deeply tied to their regions of origin, and they often act as guardians of tradition while integrating modern business practices to adapt to changing market demands (Fuentes-Lombardo *et al.*, 2011; Gallucci and D'Amato, 2013). The concept of familiness (Habbershon and Williams, 1999), referring to the unique resources and capabilities derived from family involvement, explains much of their differentiation through authenticity, trust and a long-term perspective (Berndt and Meintjes, 2023; Spielmann *et al.*, 2021). However, family wine firms are not without

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challenges. The main issues include gender balance in leadership positions (Santamarina and Vizcaíno, 2021), balancing financial performance with non-economic goals (Martin-Hidalgo and Perez-Luño, 2022) and maintaining innovation without compromising their traditional values (Vrontis *et al.*, 2016). Despite the growing academic focus on family businesses and the relevance of family companies in the wine sector, a comprehensive literature review specifically targeting family wineries is missing. A literature review is helpful in mapping the most relevant topic in the literature and drawing insights about opportunities and challenges for the sustainability and competitiveness of family firms operating in the wine industry. This study addresses the literature gap by providing a bibliometric and systematic review of existing literature. Following best practices in the management literature (Kumar and Ratten, 2024), the analysis was conducted through Scopus and Web of Science databases to ensure broad and reliable coverage of the most relevant academic publications. The search resulted in the initial identification of 452 studies, which, once duplicates were eliminated, were filtered through strict inclusion and exclusion criteria, resulting in a final set of 94 articles subjected to bibliometric and content analysis. Familiness and its impact on firm performance, challenges faced by women in family wine businesses, innovation in family wine firms, economic and non-economic goals, balancing profitability with cultural and community goals, internationalization and network associations and historical and cultural heritage emerge as the main topics addressed by the literature in family firms operating in the wine industry. By mapping the key topics addressed in the literature, the study identifies and discusses the critical challenges and opportunities that shape the sustainable competitiveness of family-owned wineries. This approach allows it to outline up-to-date, state-of-the-art literature and identify future research directions, thus contributing to academic debate and offering useful insights for family winery management.

The remainder of the paper is organized as follows: Section 2 describes the research methodology; Section 3 offers a bibliometric analysis of the literature; Section 4 reviews the literature, pointing out the main topics; Section 5 discusses opportunities and threats for family wineries; and Section 6 concludes the paper by pointing out the literature gaps, directions for future research and the implications of the study.

2. Methodology

This study employs a bibliometric and systematic literature review (SLR) to examine research on family firms operating in the wine sector. By integrating these methodological approaches, the study enhances the extraction of insights from existing academic contributions, facilitating a more comprehensive understanding of the topic (Zupic and Cater, 2015). As highlighted in prior research (Rehman *et al.*, 2020), the initial phase of the bibliometric and systematic review involved identifying appropriate databases and search terms. Following established practices in management literature reviews (Kumar and Ratten, 2024), as for databases, we selected Scopus and Web of Science, two of the largest repositories of peer-reviewed academic research, to ensure broad coverage of relevant publications. Articles have been identified by combining keywords related to “family business” and its common variations alongside terms linked to the wine industry, using Boolean operators “AND” and “OR,” as indicated in Figure 1, which illustrates the article selection process. The search was conducted on the 20th of December 2024, targeting titles, abstracts and keywords to capture all potentially relevant studies. No publication date restrictions were applied to ensure a comprehensive review.

The subsequent phase involved refining the dataset through a structured selection process. To the initial pool of 452 studies, after eliminating duplicate entries, we applied a set of predefined inclusion and exclusion criteria. Only peer-reviewed journal articles written in English were included to maintain the academic rigor of the review. Grey literature, such as conference proceedings, books and book chapters, was excluded. Further filtering was applied to remove articles with titles or abstracts outside the research scope. A full-text review was

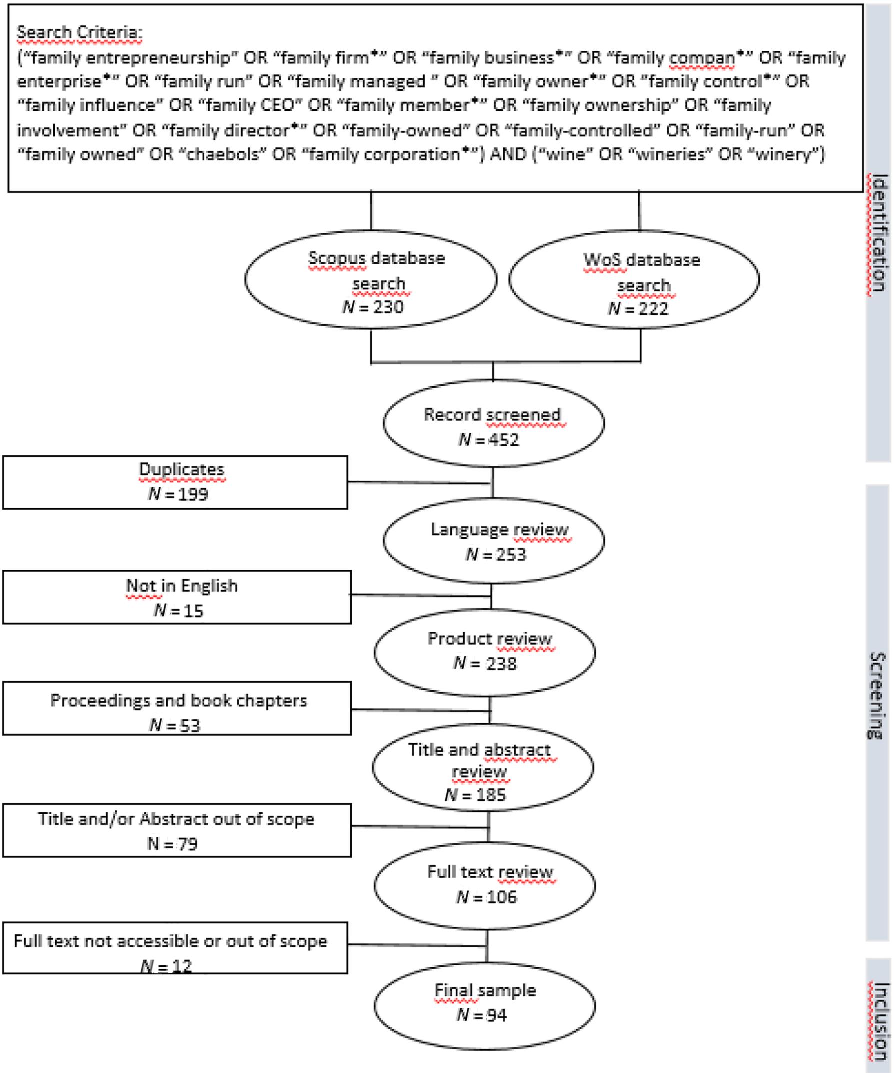

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Figure 1. The literature search and selection process

then conducted to exclude studies that remained out of scope or whose complete texts were unavailable. Following this multi-step selection process, a final set of 94 papers was identified for bibliometric and content analysis.

Additionally, we examined the reference lists of the selected studies to identify any potentially relevant articles that had been overlooked (Hollebeek *et al.*, 2023); however, no additional papers were deemed necessary for inclusion. Metadata such as authorship, publication source, citation count, year of publication and reference details were systematically extracted from the databases. Finally, we conducted a content analysis of the 94 articles, systematically collecting information on each study’s objectives, theoretical framework, aim, methodological approach, research setting and main findings.

3. Bibliometric analyses

Figure 2 illustrates the temporal evolution of scientific publications on family businesses operating in the wine sector, based on the selected sample, from the first publication in 1998–2024.

The data reveal a relatively low number of publications until the early 2000s, indicating the initial stages of academic interest in this field. A slight increase is observable around 2006, marking the beginning of a more concentrated academic focus. This trend accelerates notably after 2010, with a steady rise in publications, reaching its first significant peak in the early 2020s. The most contributions appear around 2021–2022, followed by a temporary decline. However, after this drop, there is renewed growth in scientific output from 2024 onwards. Overall, the general trend suggests a sustained and increasing scholarly engagement with family businesses in the wine sector, reflecting its growing relevance in academic discourse.

Figure 3 illustrates the research groups contributing to the academic literature on family businesses in the wine sector. The network graph represents co-authorship relationships,

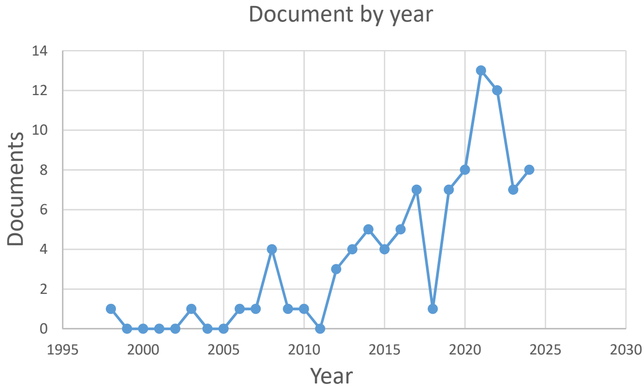

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Figure 2. Temporal evolution of scientific publications

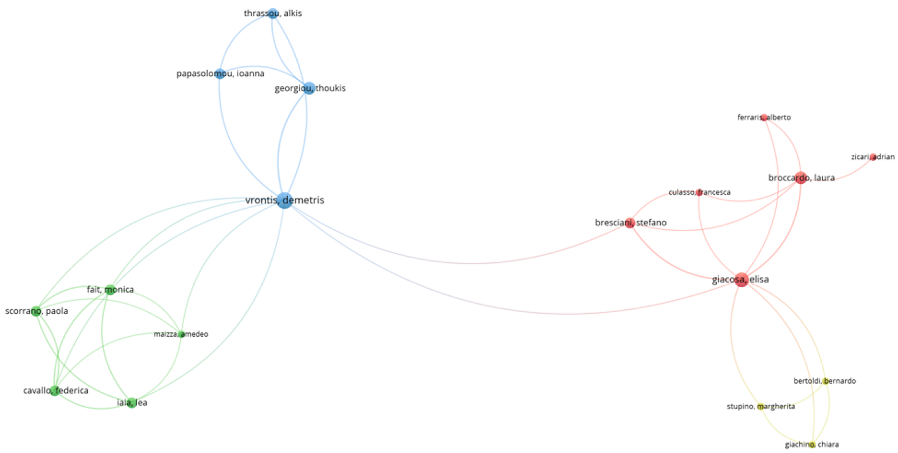

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Figure 3. The research groups

where nodes signify individual researchers and edges indicate collaborative efforts between them. The color-coded clusters reflect distinct research groups.

The structure of the network highlights three primary research clusters made up by the scholars who coauthored three out of the ten most cited papers, in terms of citations per year, reported in Table 1 (Vrontis *et al.*, 2016; Broccardo and Zicari, 2020; Iaia *et al.*, 2019).

The central and most interconnected node, *Vrontis Demetris*, links different clusters, pivotal in fostering interdisciplinary collaboration. The blue cluster represents one of the key academic groups with multiple co-authorship connections. Similarly, the green cluster suggests a research team with strong internal collaborations. The red cluster is another significant group, showing multiple interconnections. It is centered around *Giacosa Elisa*, an author presenting links with scholars from the smaller yellow sub-cluster, indicating another focused research group. The presence of inter-cluster connections suggests interdisciplinary engagement and cross-institutional collaborations. However, the network visualization of research groups reveals several structural limitations that may hinder the development of a more integrated and comprehensive body of knowledge. One of the most evident challenges is the fragmentation of research clusters. While some scholars, such as *Vrontis Demetris*, appear to act as bridging nodes, the overall structure of the network suggests that most groups operate independently, with limited cross-collaboration. This separation may restrict the exchange of ideas and methodologies, preventing the field from benefiting from interdisciplinary insights and comparative perspectives. Furthermore, the lack of extensive collaboration between clusters suggests that researchers may work in parallel rather than collectively to build a more cohesive understanding of family businesses in the wine sector. While strong internal collaboration is evident within certain groups, a more connected network would facilitate cross-national studies and enhance theoretical advancements by integrating diverse perspectives. The reliance on a few central figures, such as *Giacosa, Elisa* and *Vrontis Demetris*, further reinforces this limitation. The predominance of a small number of influential authors may create bottlenecks in knowledge dissemination, making the field more vulnerable to stagnation regarding innovative approaches and novel theoretical contributions.

Additionally, the distinct clustering of research groups with minimal interconnections may indicate a degree of geographic or institutional isolation. Scholars working on family wineries may primarily engage with colleagues from their own academic or regional networks rather than establish collaborations with researchers from different wine-producing areas. This lack of cross-regional dialog may limit the generalizability of findings, as studies remain context-specific rather than contribute to a broader, comparative framework.

Another potential concern is the limited integration of emerging research themes. If certain clusters remain relatively isolated, the diffusion of innovative methodologies and interdisciplinary approaches may be slower. As a result, the field risks lagging behind in addressing the evolving challenges that family-owned wineries face in a globalized and increasingly digitalized market environment.

To address these constraints, it would be advantageous to advocate for enhanced collaborative efforts among clusters, thereby facilitating co-authorship among scholars from varied academic backgrounds and institutions. Moreover, the progression of interdisciplinary research endeavors has the potential to promote the integration of knowledge obtained from management, economics and sustainability scholarship, consequently enhancing the academic dialog with a diverse array of viewpoints.

The keyword analysis (Figure 4) reveals a well-structured network of thematic clusters that encapsulate the core topics within the literature on the wine industry and family businesses. At the network's core, the "family business" cluster emerges as the most densely connected, emphasizing the central role of family firms in shaping the sector. Key terms such as family involvement, family firms and international commitment underscore these businesses' unique governance dynamics and strategic decision-making processes. However, while this cluster effectively captures the essence of family governance, its connections with sustainability and innovation remain relatively underdeveloped, suggesting an opportunity for further exploration.

Table 1. The top ten articles ranked by citation per year (CPY)

Papers	Objectives	Findings	Methods	CPY	TC
Obermayer *et al.* (2022)	To investigate how family wineries utilize social media tools and to provide a "Social media roadmap" framework for family businesses	Facebook emerged as the most popular social media platform for increasing brand awareness among wineries. Networking skills are key for family businesses to gain a competitive advantage	The study employed a qualitative research approach using an exploratory case-study method	31.33	94
Vrontis *et al.* (2016)	To analyze how tradition and innovation provide a competitive advantage in a family firm within the wine sector	Innovation and tradition are complementary and crucial for sustainable competitive advantage	The research employs a qualitative method through a single case study of Pio Cesare, a family wine business	23.44	211
Broccardo and Zicari (2020).pdf	To explore sustainability in the business models of SMEs in the Italian wine sector	Sustainability is a potential competitive advantage in business models and it can lead to innovation in business models over time	Data were analyzed using SPSS for quantitative analysis, while qualitative data were collected via Google Survey	21.2	106
Spielmann *et al.* (2021)	To uncover the relationship between corporate heritage identities and corporate heritage brands by examining how place influences marketing strategies in family-owned wineries	There is a dynamic relationship between corporate heritage identities and corporate heritage brands in wineries across different cultures. Findings indicate that place significantly influences corporate heritage identity traits and marketing strategies of wineries	The study employed a questionnaire and data collection approach to enhance methodological triangulation and construct reliability	13.75	55
Woodfield and Husted (2017)	To examine intergenerational knowledge sharing within family firms in traditional industries examining the wine sector	There is a bidirectional knowledge sharing between senior and next generations in family businesses. Next generation members contribute explicit knowledge from formal education and diverse work experiences. The senior generation's knowledge is primarily tacit	The study employed an interpretive approach, focusing on case study research	12.50	100

(*continued*)

Table 1. Continued

Papers	Objectives	Findings	Methods	CPY	TC
Bressan *et al.* (2021)	To understand how micro and small firms addressed the COVID-19 crisis and their adaptive strategies. COVID-19's implications for policy changes	The family and stakeholders are key in sustaining firms during the crisis. There are two groups of owner-managers: one favoring modern alternatives and the other adhering to traditional business models	The study employed an inductive approach. Data was gathered through online questionnaires, collecting 167 responses from Italian winery owners-managers	10.00	40
Iaia *et al.* (2019)	To identify distinctive elements of CSR communications in family businesses within the Italian wine industry	Familiness is a critical driver in the CSR communication process for family businesses. Cultural identity is based on intangible factors like tradition. Findings suggest tailored CSR communications reflecting brand specifics in the wine sector	The study employed a case study approach to identify companies practicing CSR in the Italian wine industry	9.67	58
Gallucci *et al.* (2015)	To explore how family involvement can be transformed into a dynamic capability for family wineries	Consumers perceive family firms as more trustworthy. Effective communication of family history and values positively influences purchasing behavior	Content analysis and text mining techniques were utilized	9.40	94
Strickland and Ratten (2024)	To examine continuous family succession opportunities in small-to-medium-sized wineries (SMWs) in Australia and to explore the benefits of family succession for financial sustainability and innovation	Family succession is crucial for creating relatable narratives for customers. Continuous family succession supports long-term financial sustainability and competitive advantage	The paper employed an exploratory epistemological qualitative case study approach	9.00	9
Delmas and Gergaud (2014)	To explore how transgenerational succession intentions influence eco-certification adoption among family wineries	Family business owners with succession intentions adopt longer time frames for sustainability. Eco-certification is more likely among family businesses with transgenerational intentions	Data were collected through a survey questionnaire from 281 wineries in the United States of America	8.09	89

Source(s): Authors' own work

The "wine industry" cluster focuses on the sector's economic and operational aspects, incorporating keywords such as vineyard, wineries and financial performance. While this cluster highlights the industry's economic significance, it appears somewhat detached from

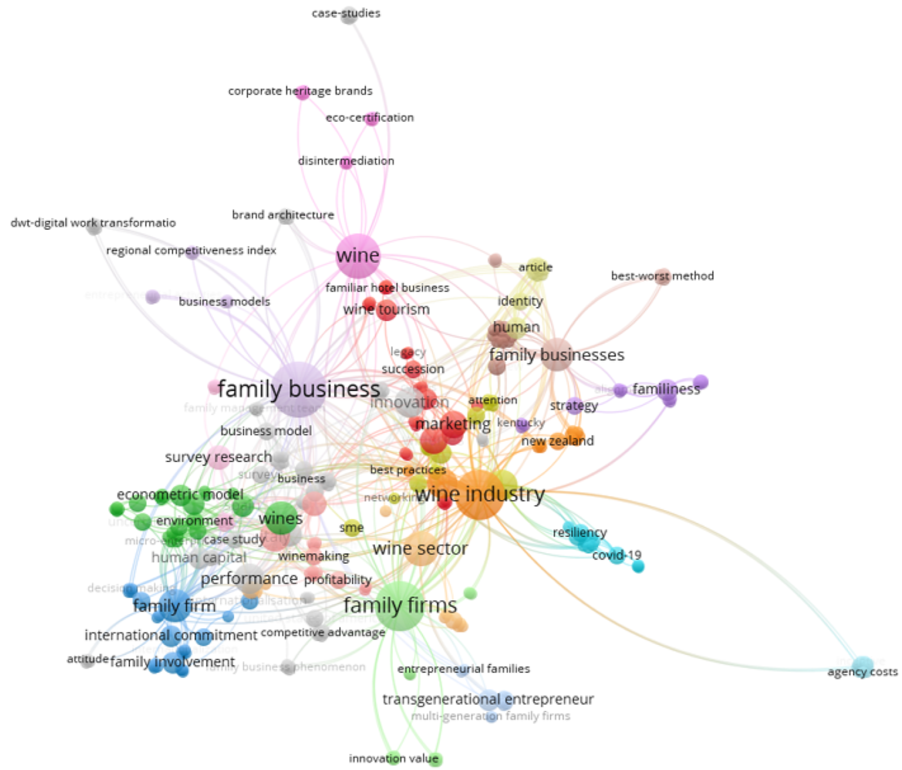

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Figure 4. Clusters emerging from the keywords analysis

sustainability-driven narratives. This gap is reflected in the peripheral positioning of the "sustainability and eco-certification" cluster. Despite the increasing importance of sustainability in business strategies, it has yet to be fully integrated in the discussion on family wineries, pointing out a promising avenue for future research.

The "familiness" cluster provides a theoretical perspective on the distinctive advantages that family involvement brings to business performance. Keywords such as innovation value and carbon emissions management suggest a link between families and modern business imperatives. However, its relative isolation from other clusters indicates the need for further investigation into how families foster digital transformation and innovative business models, particularly in response to evolving market demands.

The "tourism and branding" cluster underscores the strategic importance of leveraging cultural heritage and storytelling to enhance market positioning. Keywords such as wine tourism, corporate heritage brands and brand heritage identity highlight the growing role of enotourism in reinforcing authenticity and consumer engagement. Although this cluster aligns with contemporary market trends, it could benefit from deeper integration with digital branding strategies, which play an increasingly vital role in consumer engagement and international market expansion.

The "international business and networks" cluster highlights the role of relational social capital in supporting internationalization efforts. Keywords such as networks, transaction costs and international commitment emphasize the strategic relationships family wineries establish to expand their global presence. However, the weak connections between this cluster and those focused on innovation and digital transformation suggest a gap in understanding how family firms can scale effectively while preserving their identity and competitive advantage.

Smaller, peripheral clusters, such as those related to gender dynamics and agency costs, represent less explored areas within the literature. The relatively weak representation of gender-related keywords suggests that the role of women in family wine businesses remains a secondary focus despite its increasing relevance in practice. Similarly, terms related to digital transformation appear to be disconnected from the central themes, indicating further research opportunities in these emerging areas.

4. Literature review results

The literature review highlights the main topics addressed by the literature on family firms operating in the wine industry: familiness and its impact on firm performance, challenges faced by women in family wine businesses, innovation in family wine firms, economic and non-economic goals, balancing profitability with cultural and community goals, internationalization and network associations and historical and cultural significances.

4.1 Familiness and its impact on firm performance

Literature often links the concept of familiness, defined as the unique bundle of resources and capabilities derived from the involvement of family members in the business (Habbershon and Williams, 1999), to the competitive advantage of family-owned wineries (Di Toma *et al*., 2012). Family wineries leverage their heritage and identity to create distinctive brands that resonate with customers, building loyalty and trust. Familiness strengthens the ability to communicate authenticity, which is highly valued in the wine industry (Berndt and Meintjes, 2023). Conz and Magnani (2019) highlight how long-established family wineries effectively integrate their heritage into brand identity, using storytelling to reinforce perceptions of authenticity and quality. Intergenerational succession in family wineries reinforces brand identity and strategic continuity, ensuring resilience over time (Karofsky, 2003; Jaskiewicz *et al*., 2015). Evidence shows trust and reciprocity between family wineries and stakeholders foster collaboration and operational resilience (Bresciani *et al*., 2016). Family wineries use their place-based heritage as a foundation for strong corporate branding, effectively differentiating themselves in competitive markets (Spielmann *et al*., 2021). They leverage their history and values to build strong brand identities, which enhance customer loyalty (Gallucci *et al*., 2015). In particular, they underline their family roots into corporate narratives, using storytelling to engage consumers and reinforce perceptions of quality and authenticity (Spielmann *et al*., 2021). Dufour and Steane (2010) further illustrate this dynamic through the case of Casella Wines, which successfully leveraged familiness and strategic branding to achieve international recognition. This approach aligns with consumers' increasing preference for products with unique and meaningful origins.

Family companies leverage relational capital across generations to enhance performance, particularly in sectors like wineries where long-term relationships are critical (Fernandez-Olmos and Malorgio, 2020). Family firms' relational and social capital enhances their ability to develop partnerships with distributors and suppliers, which is crucial in globalized markets (Fernandez-Olmos *et al*., 2021) and is a key survival factor during crises (Bressan *et al.*, 2021). Moreover, structured human resource (HR) practices in family wineries enhance operational efficiency and long-term performance, strengthening their competitive advantage (Kidwell and Fish, 2007). This capital is built on trust and shared values, allowing family firms to sustain long-term relationships and contribute to competitive advantage.

Abella-Garcés and Ferrer (2022) find that high levels of family involvement positively influence strategic decision-making, albeit with a preference for conservative approaches. However, the influence of familiness is not uniformly positive. Excessive family involvement in management can result in slower decision-making processes (Fernandez-Olmos and

Malorgio, 2020) and hinder strategic responsiveness (Köhr *et al*., 2019), which is key in contexts that require rapid adaptation, such as international markets or periods of economic uncertainty. Georgiou and Vrontis (2013) caution that excessive reliance on family-driven decision-making may reduce strategic agility, particularly in highly competitive environments. They suggest that balancing family influence and professional management is crucial for optimizing the benefits of familiness. Thach and Kidwell (2009) consistently emphasize that wineries with well-defined HR and governance structures manage familiness more effectively, leading to greater financial sustainability. Pacheco (2019) finds that family wineries with balanced governance structures achieve better financial outcomes than those dominated by family members. The relationship between familiness and financial performance is complex. Gallucci and D'Amato (2013) identify a U-shaped relationship between family involvement and firm revenue, noting that moderate family involvement yields optimal performance. Excessive involvement can lead to inefficiencies, while minimal involvement may weaken the firm's unique identity.

4.2 Challenges faced by women in family wine businesses

The involvement of women in family-owned wine companies constitutes a subject of considerable scholarly and practical significance, particularly given that these organizations frequently function within conventional and patriarchal socio-cultural paradigms. Women's engagement in family wineries has progressed; however, entrenched systemic obstacles and gender-specific norms persistently influence their leadership roles and overall contributions. Contemporary research has concentrated on the nuances of gender within family companies, underscoring both the ongoing challenges and the potential avenues for transformation. Family wine companies are frequently situated within patriarchal cultural environments that reinforce conventional gender roles, thereby restricting women's access to leadership and decision-making roles. Berndt and Meintjes (2023) assert that patriarchal ideologies in family firms sustain these disparities, obstructing women's progression to leadership roles. These norms are further entrenched in regions where winemaking is considered male-dominated, creating additional barriers for women seeking to redefine their roles.

Gallucci and D'Amato (2013) highlight how patriarchal structures in Italian family wineries marginalize women's contributions, particularly in decision-making and governance. However, women's roles are evolving where younger generations challenge traditional norms. In regions such as Spain, Santamarina and Vizcaino (2021) emphasize that while women are increasingly recognized for their contributions to branding and operational success, they often struggle with visibility in leadership roles. Consistently, Bessière (2014), by examining the wine industry in France, shows that women's labor remains largely invisible in formal ownership structures, limiting their influence within family wine businesses. D'Amato (2017) points out that women often inherit leadership roles within family firms, but their impact on firm performance can vary depending on the level of family control. In highly family-controlled firms, women's involvement can mitigate traditional biases and foster inclusivity. Jones and Talbott (2022) explored the overlooked roles of women in historical wine-trading networks, emphasizing their autonomous contributions despite operating under patriarchal constraints. These historical legacies of exclusion persist in modern contexts, where the lack of formal support structures and mentorship opportunities often undermines women's leadership potential. Nevertheless, women leverage their unique perspectives to differentiate products, and their influence in shaping branding strategies within family wineries is growing (Faraoni *et al*., 2020). However, these contributions often go unrecognized, reflecting broader systemic issues in how leadership and success are perceived within the industry.

Despite the challenges, there is evidence of successful cases of female transgenerational entrepreneurship. The case of Casa Ermelinda Freitas demonstrates that women in family wine businesses can challenge prevailing gender biases, becoming active agents of transformation (Williams and Carvalho, 2020).

Women are increasingly making strategic contributions to family wine firms, particularly in sustainability and innovation (Ferri *et al.*, 2024). This growing involvement in sustainability reflects a shift in how women's contributions are valued, particularly as the industry faces mounting environmental and social pressures.

Evidence shows that women's roles in sustainability initiatives, such as organic farming and ethical labor practices, are becoming more prominent in traditional wine regions, positioning women as key drivers of long-term resilience and community engagement (Gilinsky *et al.*, 2015). Literature also emphasizes the potential of targeted policies and training programs to empower women in family wine businesses. These initiatives help address systemic barriers and foster greater organizational adaptability (Igreja *et al.*, 2022).

Nevertheless, there is evidence of shifts within the wine industry slowly reshaping gender dynamics in family firms, aligning women's roles with evolving societal expectations and breaking down traditional gender barriers (Pinna, 2023; Williams and Carvalho, 2020). Santamarina and Vizcaíno (2021) argue that promoting gender inclusivity in leadership roles can lead to more innovative and resilient family firms. This perspective is supported by initiatives in regions like New Zealand, where gender-inclusive policies have encouraged greater participation of women in family wineries (Kariyapperuma and Collins, 2021).

Literature calls for targeted interventions for overcoming female challenges in the wine industry, such as developing formal mentorship and leadership training programs to empower women and prepare them for decision-making roles (Igreja *et al.*, 2022). According to literature, fostering cultural shifts, challenging patriarchal norms and promoting inclusive governance structures in family wine firms are equally critical to harnessing the full potential of the female workforce (Berndt and Meintjes, 2023).

4.3 Innovation in family wine firms

Innovation is both a challenge and a necessity for family wineries, requiring a delicate balance between tradition and modernity (Braun *et al.*, 2016). Nevertheless, family firms often leverage their heritage as a foundation for innovative practices (Woodfield and Husted, 2017). The transfer of tacit knowledge across generations, as Chirico (2008) describes, enhances innovation capabilities and ensures the firm's sustainability. This intergenerational knowledge sharing allows family wineries to combine traditional practices with modern techniques, a critical factor in maintaining relevance in a dynamic market. Woodfield and Husted (2017) consistently analyze the New Zealand wine industry, showing how bidirectional knowledge exchange between generations fosters innovation, enabling family firms to remain competitive. Giacomarra *et al.* (2021) further show that family wineries strategically integrate internal and external R&D efforts to optimize innovation, balancing tradition with new technological advancements.

Gusenbauer *et al.* (2023) argue that family firms can use mature knowledge resources in innovation processes compared to non-family counterparts. Nevertheless, innovation efforts may face resistance in cases where traditional values dominate, particularly in adopting digital technologies or sustainable practices (Costa *et al.*, 2023). Gimenez-Fernandez *et al.* (2021) point out that aligning new practices with heritage storytelling, authenticity and community involvement allows family businesses to innovate effectively in highly traditional sectors such as wine. Paunovic *et al.* (2022) add that the ability to adapt technology to existing organizational routines supports the successful adoption of innovations in family wineries. Gilinsky *et al.* (2008) point out that regional and cultural differences influence family wineries' openness to change and adoption of new market-oriented practices. Sustainability is a relevant driver for innovation in family firms. There is evidence that family wineries adopting proactive sustainability measures, such as environmental management systems, enhance resilience to environmental and market challenges (Müller and Randolph, 2024). Clear environmental strategies not only improve operational efficiency but also serve as a source of differentiation in competitive markets (Atkin *et al.*, 2012). Park *et al.* (2008) point out that environmental innovation promotes environmentally friendly and sustainable products, thus meeting changing consumer preferences.

Evidence suggests that intra-family succession supports effective eco-innovation (Ferri *et al*., 2024). Strickland and Ratten (2024) consistently emphasize the role of generational transitions in driving marketing innovation, mainly through sustainable branding and consumer-centric approaches. Digital transformation presents another critical opportunity for innovation in family firms. Resource constraints and conservative cultures often slow the adoption of digital technologies (Costa *et al*., 2023). However, family wineries that embrace Industry 4.0 technologies, such as smart grape-harvesting systems, achieve notable productivity gains (Dressler and Paunovic, 2021). Moreover, digital engagement is crucial in expanding market reach and enhancing consumer engagement through enotourism (Soler *et al*., 2017; Grechi *et al*., 2024). Digital strategies, mainly through websites and social media platforms, can amplify brand identity and foster long-term customer relationships. For instance, Iaia *et al*. (2017) highlight how Italian family wineries strategically employ web communication and digital marketing to create connections with stakeholders, communicate their sustainability engagement and strengthen market positioning. Obermayer *et al*. (2022) further emphasize that social media practices enhance digital transformation. They play a pivotal role in innovation by enabling wineries to interact directly with consumers, build relational capital and co-create brand value. Evidence shows that Spanish wineries integrate digital marketing with sustainable business models, blending ecological, social and economic goals (López-Nicolás *et al*., 2021).

4.4 Economic and non-economic goals

Family wineries balance profitability with non-economic values such as passion and the pleasure of living in contact with nature (Dominici *et al*., 2019), particularly with socio-emotional values such as heritage preservation, sustainability and community engagement (Combs *et al*., 2023). Socio-emotional wealth (SEW) constitutes a crucial element of family firm orientation. It encapsulates the non-monetary advantages that family constituents acquire through their engagement in the firm (Gómez-Mejía *et al*., 2007). The SEW confers upon family-owned wineries a level of resilience that enables their proficient management of market fluctuations. However, as Vajdovich *et al*. (2022) pointed out, the prioritization of SEW can sometimes lead to resistance to change, particularly when it conflicts with business objectives such as expansion or diversification. These challenges are often exacerbated by a lack of formal governance structures. Consistently, Curtis and Slocum (2021) show that during the COVID-19 crisis, SEW fostered resilience and adaptability of family wineries, but it also led some firms to prioritize legacy preservation over necessary business transformations.

Martin-Hidalgo and Perez-Luño (2022) emphasize that family wineries often prioritize SEW over immediate financial gains, focusing on preserving the family's legacy and values, enhancing customer loyalty and strengthening community ties. Consistently, Bresciani *et al*. (2016) and Browne *et al*. (2021) point out that family-owned wineries incorporate family narratives and cultural identity into their branding. In doing so, they strengthen customer loyalty. Similarly, Riot *et al*. (2024) emphasize that family wineries like Taittinger align their operations with long-term goals, such as environmental stewardship and cultural preservation. This alignment underscores the significance of legacy and identity, which often outweigh purely financial considerations. Fuentes-Lombardo *et al*. (2023) add that SEW objectives more effectively direct family firms' internationalization process than strategic and economic motivations.

Vrontis *et al*. (2016) note that Italian family wineries use SEW as a foundation for embedding environmental and social objectives into their business models. This dual focus enhances their competitive advantage and positions them as custodians of regional identity. Iaia *et al*. (2019) find that Italian family wineries effectively align the SEW with corporate social responsibility strategies to create lasting relationships with stakeholders, and Delmas and Gergaud (2014) highlight the importance of long-term sustainability commitments. Biswas and O'Grady (2016) emphasize how integrating sustainability into operational processes and environmental reporting mechanisms enhances both internal decision-making and external stakeholder trust, ensuring resilience and competitiveness.

4.5 Balancing profitability with cultural and community goals

Economic performance remains a critical goal for family firms, but it is often pursued along with broader societal and cultural objectives. Martin-Hidalgo and Perez-Luño (2022) emphasize that Spanish family wineries prioritize long-term stability and cultural preservation over immediate financial gains, reflecting a commitment to fostering deep community ties and maintaining regional traditions, which are integral to the identity of these businesses. Furthermore, Fuentes-Lombardo *et al.* (2023) argue that the involvement of multiple generations better balances the pursuit of economic stability and the preservation of cultural values. Consistently, Alonso (2012) highlights how family wineries in the southern United States of America promote local wine production not only for profit but also to sustain regional economies and preserve viticulture heritage.

Kariyapperuma and Collins (2021), exploring the New Zealand wine industry, note that family-owned wineries integrate sustainability into their economic strategies, balancing profitability and environmental stewardship. Sustainable production practices, combined with investments in local development projects, further strengthen this balance by fostering mutual benefits between the winery and its surrounding communities (Capolupo *et al.*, 2024). Consistently, Camilleri (2008) shows how Yalumba, Australia's oldest family-owned winery, integrates sustainability into its core business model, ensuring long-term financial viability while minimizing environmental impact and reinforcing community engagement. Arcese *et al.* (2017) further illustrate how Italian wineries implement social life cycle assessment frameworks to measure and enhance their socio-economic contributions. This approach aligns with Maumbe and Brown's (2013) findings that local wine production initiatives can create significant opportunities for rural development and economic diversification, contributing to regional prosperity and resilience by leveraging local knowledge and networks. Conz *et al.* (2024) further point out that resilience in family wineries is rooted in their ability to balance tradition with adaptive business strategies, allowing them to preserve long-term cultural and financial stability.

There is also evidence that family wineries often prioritize ethical practices, such as fair labor conditions and community development, as part of their socio-economic impact (Vajdovich *et al.*, 2022). These practices align with their non-economic goals and enhance their reputation and consumer trust. Curtis and Slocum (2022) further demonstrate how family wineries, particularly in rural areas, have reinforced their community engagement and local economic contributions as a means of resilience in response to economic shocks such as the COVID-19 pandemic. Bagnato *et al.* (2024) argue that this dual focus on profitability and non-economic goals allows family firms to become pillars of regional growth, with sustainable business strategies that support local employment, tourism and community development.

Pacheco (2022) illustrates how Portuguese family wineries prioritize regional development alongside financial outcomes. This dual focus is evident in their investments in local communities, cultural projects and environmental sustainability, which enhance their socio-economic impact. Similarly, Müller and Randolph (2024) highlight that family wineries often reinvest profits into sustainability initiatives, aligning financial performance with broader societal goals.

4.6 Internationalization and network associations

Internationalization represents a crucial growth avenue for family wineries, but it poses significant challenges, particularly in preserving their authentic identity while adapting to global markets. To address these challenges, family wineries often leverage their networks and relational social capital, which are pivotal in facilitating successful expansion. For example, collaborative networks allow wineries to pool resources and navigate the complexities of foreign markets, as demonstrated by the case of Spanish family wineries (Abella-Garcés and Ferrer, 2022). Institutional networks also support internationalization by easing access to export channels and reducing transaction costs (Fernandez-Olmos *et al.*, 2021). Establishing long-term relationships with key stakeholders, built on trust and mutual understanding, is another valuable strategy that enables family wineries to remain competitive and resilient in international markets (Cano-Rubio *et al.*, 2017; Georgiou *et al.*, 2023), particularly when facing external uncertainty (Duarte Alonso *et al.*, 2019). The level of family involvement influences internationalization strategies, with firms balancing tradition and innovation to enhance global competitiveness (Cano-Rubio *et al.*, 2021). Moreover, branding strategies tailored to international consumers play a key role in mitigating market entry risks while maintaining the authenticity of family wine firms (Cano-Rubio *et al.*, 2022).

Crick and Crick (2021) further outline that coopetition enhances the ability of family wineries to expand internationally. By forming alliances with local and foreign producers, wineries can access broader distribution channels and leverage shared resources while preserving their brand identity. Kidwell *et al.* (2020) emphasize the role of human capital in family wineries' internationalization, showing that well-developed leadership and expertise are key characteristics for better addressing foreign markets.

In this context, branding plays a central role in differentiating family wineries. Pavel and Nistorescu (2014) emphasize that those adopting export-driven strategies can benefit significantly from incorporating local authenticity into their brand narratives, which helps them stand out in highly competitive global markets. However, balancing this local identity with global market demands is not without difficulties. Digital branding strategies, as seen in Italian family wineries, have proven effective in maintaining cultural heritage while expanding their reach (Faraoni *et al.*, 2020). However, as Pacheco (2017) observes, governance-related constraints, such as high ownership concentration, can limit the degree to which wineries successfully internationalize, highlighting the need for more flexible governance structures. Casprini *et al.* (2016) illustrate how business model choices in family wineries impact internationalization, with firms adopting hybrid models that blend traditional values with modern market strategies. Moreover, cultural narratives and regional identity serve as valuable assets, reinforcing authenticity and uniqueness on the global stage and acting as key differentiators in the wine sector (Cadot, 2015).

Family wineries often adopt cautious internationalization strategies to overcome these obstacles, including cooperation agreements and strategic partnerships, which foster knowledge sharing and mitigate risks (Sanchez-Famoso *et al.*, 2019; Steen and Welch, 2006). Beverland and Bretherton (1998) highlight that strategic adaptation in the international wine market requires balancing family control with professionalization, allowing wineries to scale while maintaining their core identity. Nonetheless, the challenge of balancing global expansion with the preservation of local authenticity remains significant. This tension is particularly evident in Hungarian and Italian family wineries, where the demands of global markets frequently conflict with the need to maintain traditional practices and identity (Vajdovich *et al.*, 2022; Vrontis *et al.*, 2016).

4.7 Historical and cultural legacy

Family wineries serve as custodians of historical and cultural legacies, intertwining the preservation of tradition with market demands (Andreini *et al.*, 2020). Often rooted in multigenerational ownership, these firms are uniquely positioned to sustain practices that reflect their cultural and geographical heritage while simultaneously adapting to evolving consumer expectations. This dual role allows family wineries to foster deep connections with local communities and global audiences and maintain cultural identity (Bressan *et al.*, 2022).

A significant aspect of their cultural stewardship is how family wineries incorporate heritage into their branding strategies. Family wineries leverage their cultural and familial heritage to create distinct branding strategies. Santamarina and Vizcaíno (2021) highlight that Spanish family wineries integrate local traditions and historical narratives into their marketing campaigns. This strategy communicates a sense of authenticity to consumers and enhances brand equity. Storytelling in family wineries is critical in reinforcing cultural identity, as narratives centered on tradition, craftsmanship and family legacy enhance consumer engagement and brand loyalty (Canziani *et al.*, 2020). Family wineries increasingly use enotourism to showcase their cultural heritage and create immersive experiences that deepen consumer engagement and foster long-term loyalty (Grechi *et al.*, 2024). Canovi and Lyon (2020) further illustrate how agritourism diversification in Italian family wineries strengthens their heritage branding by offering experiential connections between consumers and the winery's history. Kladou *et al.* (2020) emphasize that brand heritage in wineries is a key factor in shaping consumer perceptions, with well-structured branding strategies reinforcing authenticity and quality perceptions in both domestic and international markets. Family wineries align their corporate identity with the notion of place, emphasizing history, tradition and regional identity (Spielmann *et al.*, 2021). This approach enables wineries to differentiate themselves in increasingly competitive markets as they meet the expectations of consumers who seek authenticity and connection. It also contributes to the preservation of cultural values embedded in their products.

Nevertheless, Gilinsky *et al.* (2015) note that family wineries must strategically invest in sustainability and modern practices, ensuring their historical values are preserved while adapting to contemporary needs. Comparisons between Old World and New World wineries further highlight the universal importance of heritage in the wine industry. While European wineries often benefit from centuries of tradition, New World wineries actively construct heritage identities to establish authenticity (Spielmann *et al.*, 2021; Giacosa *et al.*, 2014). This dynamic demonstrates that cultural stewardship is a shared priority, regardless of geographic origin, underscoring the global relevance of family wineries as custodians of heritage.

The strategic use of heritage in marketing further enhances the role of family wineries. Narratives concerning heritage and tradition personify brands and foster customer loyalty (Strickland *et al.*, 2013). These stories build authenticity and underline the winery's role in preserving a legacy transcending commercial activity. Family succession is critical in this process, ensuring the transmission of knowledge, values and practices across generations (Strickland and Ratten, 2024). This intergenerational continuity strengthens the resilience and sustainability of these cultural repositories.

Gallucci and D'Amato (2013) highlight how Italian family wineries leverage their heritage to reinforce market positioning, while Spielmann *et al.* (2022) demonstrate how such branding signals authenticity and quality to international consumers. This emphasis on heritage is further enriched by enotourism, which integrates elements like art, gastronomy and wine to showcase regional identities and promote economic growth (Grechi *et al.*, 2024; Monti and Salvemini, 2014).

Williams and Carvalho (2020) use the example of Casa Ermelinda Freitas to illustrate how personal and regional stories enhance branding efforts. This integration of history and culture differentiates family wineries from competitors and ensures the intergenerational transmission of values. Gusenbauer *et al.* (2023) consistently emphasize the importance of traditional knowledge in creating value, and Vajdovich *et al.* (2022) highlight the role of family wineries in safeguarding cultural continuity through their winemaking practices.

5. Discussion: opportunities and threats for family wineries

Family-owned wineries hold a distinctive role within the global wine sector, wherein their profoundly ingrained cultural heritage, robust relational networks and socio-emotional capital provide considerable advantages while concurrently subjecting them to considerable challenges. A particularly advantageous prospect for family wineries resides in their capacity to exploit familiness to establish robust brand identities predicated on authenticity and heritage. Their proficiency in articulating tradition, regional identity and unique narratives enables them to forge emotional connections with consumers, who are increasingly inclined to prefer products with significant origins (Spielmann *et al.*, 2021). This capacity to differentiate itself through storytelling and place-based branding fosters customer loyalty and commands premium pricing in niche markets (Gallucci *et al.*, 2015). Moreover, the close relationships with stakeholders, such as suppliers, distributors and local communities, enhanced by trust and reciprocity, provide family wineries with a competitive edge in globalized markets (Fernandez-Olmos *et al.*, 2021). The relational networks cultivate enduring collaborations and foster resilience, which can be instrumental for market entry and adaptation in international contexts (Abella-Garcés and Ferrer, 2022).

Moreover, the viticulture sector provides substantial opportunities for innovation, essential in an industry marked by evolving consumer preferences, environmental challenges and technological progress. Due to their intergenerational transmission of implicit knowledge, family companies inherently possess a competitive edge in integrating traditional practices with contemporary methodologies (Chirico, 2008). Specifically, eco-innovation emerges as a significant avenue as environmental sustainability becomes prominent across various sectors.

One of the most promising opportunities for family wineries lies in adopting digital marketing practices, which allow them to create emotional connections with consumers by leveraging their cultural narratives. However, as Obermayer *et al.* (2022) and Kohr *et al.* (2018) highlight, cultural barriers related to tradition and limited resources often slow the adoption of new digital technologies. This duality reflects the broader challenge of balancing tradition with innovation, as family wineries must adapt their organizational cultures to embrace technological advancements without losing their unique heritage.

Women's growing leadership roles in family wineries also emerge as drivers of sustainability (Galbreath and Tisch, 2020), innovation (Ferri *et al.*, 2024) and proactive resilience (Casprini *et al.*, 2023). Family business research highlights that gender diversity in leadership enhances environmental performance (Gavana *et al.*, 2024) as well as environmental disclosure and eco-friendly initiatives (Ramos *et al.*, 2024). Therefore, female involvement in leadership can support the family wineries in aligning with evolving societal demands by emphasizing ethical practices, organic farming and sustainable branding, enhancing their long-term market position and reputation. Beyond sustainability, women's involvement in decision-making processes is an opportunity for enhancing innovation and competitiveness. Indeed, studies indicate that female-led family firms demonstrate greater proactiveness and autonomy in entrepreneurship. Women's characteristics strengthen their ability to adapt to market changes and integrate forward-thinking business strategies (Domańska *et al.*, 2024). They can also leverage adaptability, product sensitivity and networking strategies (Duarte Alonso *et al.*, 2021). The case of Casa Ermelinda Freitas represents a concrete example of successful transgenerational female entrepreneurship, overcoming gender barriers, adopting innovative winemaking techniques and leading the company to significant international expansion (Williams and Carvalho, 2020). Moreover, women in family businesses can support continuity and resilience. Their ability to nurture strong networks and leverage cooperative strategies is exemplified by the case of *D'Uva Portugal Wine Girls*, where female entrepreneurs use collaboration and collective branding to gain market recognition and differentiation (Santos *et al.*, 2019). This evidence highlights the importance of women as agents of transformation, capable of reinforcing the strategic agility of family firms (Cruz *et al.*, 2024).

Nevertheless, cultural norms may play a crucial role in shaping the operational strategies of family wineries, particularly in regions where patriarchal structures persist. In traditional wine-producing countries such as Italy, France and Spain, gender dynamics influence succession planning, leadership opportunities and decision-making processes (Santamarina and Vizcaíno, 2021; Gallucci and D'Amato, 2013). Patriarchal values often restrict women's access to leadership roles, reinforcing conservative governance structures and slowing down strategic transformations (Berndt and Meintjes, 2023). Consequently, family wineries in these regions might face difficulties in integrating innovation and sustainability practices at the same pace as their counterparts in more gender-inclusive contexts.

Internationalization further represents a critical avenue for growth. While family wineries often prioritize maintaining local authenticity, their participation in networks and cooperative agreements facilitates international expansion (Sanchez-Famoso *et al.*, 2019). Digital tools like digital marketing and e-commerce allow these firms to reach global consumers (Faraoni *et al.*, 2020). Enotourism also offers unique growth potential by providing immersive consumer experiences that showcase the winery's heritage and foster brand loyalty (Grechi *et al.*, 2024). As international markets increasingly seek authentic, high-quality products, family wineries that strategically balance local authenticity and global market adaptation can achieve sustained growth.

However, these opportunities are counterbalanced by substantial threats, primarily stemming from the characteristics of family firms' strengths. Excessive family involvement can lead to inefficiencies and resistance to change, particularly when conservative decision-making limits the adoption of new technologies and innovative practices (Fernandez-Olmos and Malorgio, 2020). Studies highlight that family-driven governance structures, while beneficial for maintaining identity and SEW, can also hinder strategic agility and adaptation to dynamic markets (Georgiou and Vrontis, 2013). The U-shaped relationship between family involvement and performance, identified by Gallucci and D'Amato (2013), underscores the importance of balancing family control and professional management.

Succession planning represents another significant threat, as family wineries often struggle to achieve smooth generational transitions due to emotional conflicts, unclear governance structures or a lack of formal succession mechanisms (Vajdovich *et al.*, 2022). Without proper planning, preserving the legacy and values that constitute their competitive advantage may be jeopardized. In addition, patriarchal cultural norms can exacerbate succession challenges by limiting women's participation in leadership roles, thus undermining the potential benefits of inclusive governance and diversity (Berndt and Meintjes, 2023).

Market competition and globalization further present threats, especially when balancing authenticity with scalability. Maintaining local identity while meeting the demands of international consumers can be complex and overly cautious approaches to expansion can result in missed opportunities (Pacheco, 2017). Resource constraints, particularly for smaller family wineries, may slow digital transformation efforts, leaving them vulnerable to more agile, tech-savvy competitors (Costa *et al.*, 2023). Moreover, family wineries that fail to adopt proactive sustainability measures risk falling behind competitors who position themselves as eco-friendly market leaders.

Despite these challenges, targeted interventions – such as formal mentorship programs, leadership training, and inclusive governance structures – offer promising solutions (Igreja *et al.*, 2022). Embracing external expertise and diversifying leadership to include women and non-family members can mitigate the adverse effects of excessive family involvement. Similarly, family wineries that adopt flexible governance structures and invest in sustainable business models will be better positioned to navigate market fluctuations and environmental challenges (Müller and Randolph, 2024).

6. Conclusion

This study provides an SLR of family companies operating in the wine industry. It points out that family wineries are at a strategic crossroads where their unique blend of tradition and innovation provides substantial growth opportunities. However, achieving long-term success requires addressing inherent threats through balanced governance, proactive succession planning, and strategic adaptation to technological and environmental changes. By leveraging their cultural heritage while embracing change, family firms can preserve their legacy and thrive in the competitive global wine market. This research makes several contributions to the literature. We offer a detailed mapping of key topics from the literature, as well as opportunities and challenges that family wineries face in globalization and the transition to sustainable business models. This study contributes to the broader academic discourse on family businesses by expanding the understanding of familiness (Habbershon and Williams, 1999) as a competitive advantage for wineries (Berndt and Meintjes, 2023) and a key element in their transition to sustainable business models (Ferri *et al.*, 2024). We also contribute to the literature by highlighting the theoretical and methodological gaps in family winery research and suggesting avenues for future studies.

6.1 Literature gaps and future research

The SLR highlights several theoretical and methodological gaps within the literature on family-owned wineries, which limit the generalizability of findings, their practical applicability and overall theoretical advancement. One significant limitation is the geographic concentration of studies in Old World wine regions, particularly Italy, France and Spain (Vrontis *et al.*, 2016; Broccardo and Zicari, 2020; Spielmann *et al.*, 2021). Comparative analyses involving New World wineries and emerging wine regions remain scarce. Literature suggests that family businesses are more sensitive to external contextual factors than non-family firms in meeting the requirements of external stakeholders (Ge and Micelotta, 2019), and some institutional aspects differently impact family and non-family firms' social performance (Gavana *et al.*, 2023). The institutional contextual factors emerge as a source of heterogeneity within family firms' social performance (Labelle *et al.*, 2018) and internationalization strategies (González and González-Galindo, 2022). There is also evidence that cultural aspects, such as a country's degree of masculinity, moderate the effect of gender diversity on family firms' financial performance (Tao-Schuchardt and Kammerlander, 2024). Therefore, it could be of interest to deepen how contextual factors, such as local institutional frameworks, cultural norms, and market dynamics, influence family governance, sustainability practices, and performance outcomes. A large-scale quantitative comparative study within the theoretical framework of institutional theory could provide a richer understanding of how institutional contexts shape family wineries' organizational behaviors and outcomes.

RQ1. How do regional and institutional contexts shape family wineries' sustainability and financial performance?

Literature has explored the role of women in family-owned wineries. However, there is still a need for research assessing the impact of gender-inclusive governance on wineries' innovation capacity and sustainable behavior. While qualitative studies have highlighted women's barriers to leadership, empirical evidence on how female leadership influences business resilience and, in particular, sustainability strategies remains scarce.

RQ2. How does gender-inclusive governance in family wineries affect sustainability strategies?

While succession and governance challenges are well-documented, limited research examines the effectiveness of hybrid governance models – structures that combine family leadership with external managerial expertise. Investigating how these models enhance strategic agility and decision-making, especially in wineries undergoing international expansion or digital transformation, could provide valuable managerial insights.

RQ3. How do hybrid governance structures in family wineries contribute to strategic agility, decision-making and international growth?

From the methodological point of view, most studies rely on qualitative approaches (Woodfield and Husted, 2017; Vrontis *et al.*, 2016). These methods, on the one hand, provide rich, context-specific insights; on the other hand, their findings are characterized by limited generalizability and do not capture the development of causal relationships. Large-scale quantitative research helps detect causal relationships between governance attributes, such as board and chief executive officer characteristics, and financial and non-financial performance, including sustainability and SEW.

RQ4. How do governance attributes affect family wineries' financial and non-financial performance?

While intergenerational succession has been widely studied, limited research exists on how digital tools can enhance knowledge transfer between generations in family wineries. Investigating how digital archives, artificial intelligence (AI)-driven decision-making tools and virtual reality training methods can facilitate the transmission of tacit knowledge from senior family members to younger successors would provide valuable insights.

RQ5. How can digital tools and AI-driven platforms enhance intergenerational knowledge transfer in family wineries?

6.2 Implications

The findings of this study have important implications for family wineries, their various stakeholders and regulators. The study reveals that family wineries struggle with integrating innovation and preserving their cultural identity. In this case, the facilitation of knowledge transfer between generations is crucial because it allows the young generation to develop on the previous knowledge and incorporate new business ideas. This study also highlights that family firms should incorporate environmental goals into their overall strategies by using eco-innovation and green production to stand out in the market. Thus, family wineries will comply with the regulations and appeal to the target audience concerned about the environment. This paper finds that family wineries' relational social capital is an asset that leads to long-term relationships of mutual value. Cooperation with local people and industry partners in developing regional competitiveness is important. Family businesses are valuable assets to local communities through employment, wine tourism and the protection of culture. This means that local communities and family wineries should be considered as natural partners, for example, in the ecotourism and regional development initiatives. Policymakers and regulators will benefit from the study as it highlights the importance of creating an environment that allows family wineries to grow and sustain themselves. Developing policies that encourage sustainability and digitalization is essential to the sector's growth. Pragmatic incentives such as tax breaks, monetary subsidies and grants to promote environmentally friendly practices and new technologies enhance the sector's resilience. Moreover, policymakers should consider creating certification schemes and protective policies that encourage wineries' eco-friendly performance while protecting the financial burdens of compliance costs on family-owned small- to medium-sized wineries. However, most family wineries face the problem of limited resources as they consider adopting innovations. Therefore, the policy should focus on enhancing the availability of digital tools and training programs relevant to family-owned businesses. Another critical area where policy interventions can be most effective is succession planning. Due to the transition difficulties between generations, organized programs with advisory services, mentoring and governance training would be helpful. Advisory services and structured succession planning programs can assist these businesses in their transitions and help them maintain their cultural legacy while encouraging innovation from one generation to the next.

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