UNIVERSITY OF OREGON

Overview of the 2025 Vineyard and Winery Census Methods
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As part of its research mandate, the Oregon Wine Board (OWB) commissions an annual Oregon Vineyard and Winery Census. These studies were historically (from the early 1980s until 2011) conducted by the U.S. Department of Agriculture. Between 2012 and 2016, the Southern Oregon University Research Center (SOURCE) produced the Census. Since 2017, the Oregon Wine Board has contracted the University of Oregon's Institute for Policy Research and Engagement (IPRE) to prepare the Census.

Intent of this Paper

The purpose of this overview is to provide readers who desire more information about the data collection and statistical modeling procedures used to compile the annual Oregon Vineyard and Winery Census with a general overview. The intent is not to provide a detailed description of all the methods and assumptions used to develop the Census; rather we aim to answer a few basic questions that we commonly receive regarding the Census. The overview assumes some level of knowledge about data collection and statistical modeling.

Data Collection

This project attempts to collect data from all wineries and wine grape producers in the state of Oregon. The goal is to document the scope and breadth of Oregon's wine industry for each region and vintage over time.[1] Thus, the project is effectively a large-scale data collection and analysis effort that involves requesting data from every known vineyard and winery in Oregon. Maintaining a current mailing list is a significant part of this project as is encouraging wineries and wine grape producers to participate in the census.

With guidance from OWB, IPRE develops and collects data through an online winery and wine grape producer data collection instrument. IPRE uses the systematic approach to design and analysis developed by Dr. Don Dillman at Washington State University called the "Tailored Design Method for Mail and Internet Surveys." Dillman advocates a structured administration process with structured follow-up to boost response rates. IPRE uses a data collection instrument that was developed by USDA and refined by both SOU and IPRE (see appendix for the data collection instrument).

The process begins by building a database of all known wineries and vineyards in the state. IPRE uses data from the Oregon Liquor and Cannabis Commission (OLCC) on licensed producers supplemented by data from Wine Business Analytics (data in previous years was acquired from Wines & Vines). No complete central database exists of vineyards. IPRE relies on lists previously developed for the study, information from the Oregon Wine Board and its partner associations (including AVA associations), as well as Internet

[1] We have received repeated questions/requests regarding presenting data for nested AVAs. Our ability to model production at smaller geographies is limited by data. We began collecting nested AVA data for vineyards for the 2021 vintage and developed pilot estimates for three nested AVAs using 2021 data. We are unable to develop reliable estimates by nested AVA due to the lack of sufficient data.

research to develop the list of vineyards. IPRE now has acreage data on over 1,100 vineyards totaling over 38,800 acres.[2] IPRE expends considerable effort in reviewing and validating the lists each year. The unit of analysis is individual producers (business entities). Building and maintaining the database is a big part of the project—given the dynamics of the wine industry. Table 1 shows the number of wineries and vineyards in Oregon by region in 2025.

Table 1. Vineyards and Wineries in Oregon, by Region, 2025

Region	Vineyards		Wineries	
	Number	Percent	Number	Percent
North Willamette Valley	879	60.2%	692	64.3%
South Willamette Valley	125	8.6%	75	7.0%
Umpqua Valley	88	6.0%	45	4.2%
Rogue Valley	206	14.1%	128	11.9%
Columbia River	144	9.9%	79	7.3%
Other Oregon	18	1.2%	24	2.2%
Total	**1,460**	**100%**	**1,076**	**100%**

IPRE's database includes over 2,600 businesses. It is important to note the overlap that exists in the database—many business entities have both a vineyard and winery; some are just vineyards; some are just wineries. A complication emerges for vineyards and wineries that are linked, but do not share the same name. This is further complicated by the fact that the vineyard section disaggregates results by both region and variety. Many growers produce more than one grape variety, and many wineries produce more than one type of wine.

IPRE uses the online platform Qualtrics to collect data through a secure internet portal. Qualtrics allows management of all aspects of the administration of the data tool and provides data on who provided data, how long it took, as well as managing follow-up correspondence sending reminders only to individuals that have not provided data. Producers for which IPRE has an email contact receive a solicitation to submit data. In 2025, we contacted individuals on the list up to 23 times.[3] OWB and partner associations also shared links to the data collection instrument several times through The Grapevine and other industry correspondence to ensure that any producers that IPRE did not have listed in its database had an opportunity to respond. To improve participation, we also called the largest wineries and vineyards that had not participated to encourage them to participate, performed in-person and virtual meetings with regional growers' associations, collaborated with OSU Ag Extension to encourage survey participation, and presented at the 2025 Oregon Wine Symposium.

The data collection instrument is broadly divided into two sections: (1) the vineyard section; and (2) the winery section. It uses conditional branching to direct respondents to appropriate areas of the data

[2] For context, we estimate Oregon had 44,724planted acres in 2025; our database reflects nearly 87% of the estimated total planted acres.

[3] Ideally this many contacts would not be necessary, but due to limited participation rates and with each solicitation generating more participants, we continued solicitations as long as possible.

collection instrument. For example, if an entity does not grow grapes, the respondent will skip the vineyard section. Appendix A includes a copy of the 2025 data collection instrument.

Data Analysis

The Vineyard and Winery Census is based on sample data. The results presented in the 2025 Vineyard and Winery Census were developed through statistical models that weight up the sample data to represent estimates of the scope and extent of wine and grape production across many different variables.

A total of 246 businesses participated in the 2025 vintage data collection process. This represented a decrease from previous years. In 2024, 306 businesses participated, in 2023, 442 businesses participated; 463 businesses participated in 2022, and 450 businesses participated in 2021. Of the 246 participating businesses, 208 provided data on grape production a 16% decrease from the 249 businesses that provided data on grape production in 2024.

The overall response rate is limited as an indicator of the quality of the sample data IPRE uses to prepare the Census. The industry is composed of businesses of all sizes, with a small number of large businesses that account for a significant proportion of total production. Better indicators of the quality of the sample are planted acres, production, and tons of grapes crushed.

Table 2 shows the number of data points collected for vineyards for all varieties by region (note that vineyards that grow more than one variety provide data for all varieties grown). For example, if a vineyard in the North Willamette Valley reported growing three varieties, it would account for three of the 458 data points collected for that region. These data points provide the foundation for Tables 1,2, and 4 in the vineyard section. The 2025 vineyard census was based on 796 data points. The 2024 vineyard Census was based on 747 data points, the 2023 vineyard Census had 917 data points; and the 2022 Census had 945 data points.

Table 2. Vineyard Section – Number of Data Points by Region for All Varieties

Region	Number of Participating Businesses	Data Points by Variety
North Willamette Valley	162	498
South Willamette Valley	24	67
Umpqua Valley	17	78
Rogue Valley	23	90
Columbia River	15	36
Other Oregon	4	27
Total	**245**	**796**

Producers reported 9,336 planted acres, or 21% of the 44,724 estimated total planted acres. However, the data reported for 2025 are not the sole source of data IPRE relies on to estimate total acres – we have data on over 1,100 vineyards that documented more than 38,800 planted acres. The harvested acres and production figures are estimated using ratios based on vineyards that provided data for all three

variables, by reviewing trends observed in previous Census reports, and by reviewing trends in west coast wine production. The IPRE Research Team makes estimates for harvest and production for vineyards that did not provide complete data, consistent with footnote 1 of the vineyard tables ("Includes estimates for incomplete responses"). These methods improve the overall accuracy of the results and compensate for incomplete responses.

The vineyard estimates reflect statistical relationships between planted acreage, harvested acreage, yield and price (see Figure 1). Harvested acreage is estimated using the ratio between planted and harvested acreage as reported by participating businesses. Production is harvested acreage multiplied by yield per harvested acre (again, as reported by participating businesses). Value of production is production times median price per ton. We note that estimated production by region and variety may not sum to the reported total. Total production is harvested acreage times yield per harvested acreage. Figures by region and variety may not sum due to weighting based on reported yield.

Figure 1: Process for Developing Planted Acre, Harvest, Yield, Production, and Value Estimates

The grape price report presents average and median data from vineyards that report *external* grape sales (or sales to a 3rd party not affiliated with their business). IPRE modified the data collection form in 2018 (for the 2017 Census) to collect only data from 3rd party sales to reflect actual market conditions. Table 3 shows the number of data points by region and variety. Six data points are required to make average and median estimates, representing at least 20 tons of reported sales. Averages are weighted by tons sold to better reflect sales prices. To illustrate the variability of prices and navigate limited responses, IPRE presented 25th and 75th percentile values of prices rather than the traditional average of the top three and bottom three prices. IPRE received 297 price points in 2025, 382 price points in 2024, and 387 in 2023, which limited our ability to provide price per ton estimates for some varieties and regions. IPRE received 422 price points in 2022 and 398 in 2021.

Table 3. Price Report – Number of Data Points by Region and Variety, 2025

Variety	Statewide	North Willamette Valley	South Willamette Valley	Umpqua Valley	Rogue Valley	Columbia River	All Other
Albarnio	2	2					
Cabernet Franc	8	4			2	2	
Cabernet Sauvignon	4		1		1	1	1
Chardonnay	51	47	4				
Chenin Blanc	3	1	1			1	
Gamay	18	15	2		1		
Gewurztaminer	5	4	1				
Malbec	2				2		
Merlot	2					2	
Muller Thurgau	1	1					
Pinot Blanc	11	10	1				
Pinot Gris	29	24	4	1			
Pinot Noir	87	71	12	3	1		
Riesling	15	14	1				
Sangiovese	1					1	
Sauvignon Blanc	8	2	2		2	1	1
Syrah	8	2			3	3	
Tempranillo	4	4					
Viognier	6	2		1	2	1	
All Other Varieties	32	22			7	3	
Total	**297**	**225**	**29**	**5**	**21**	**15**	**2**

Table 4 shows response to the winery section by region. Overall, 207 wineries provided crush and sales data or about 20% of all wineries. In 2024, 312 wineries provided data, in 2023, 361 wineries provided data. Responding wineries reported crushing 27,650 tons of grapes in 2025 or 37% of the estimated 73,771 total tons crushed. This is a 30,000-ton decrease from the 57,794 tons of grapes reported by wineries in 2024. This is due, in part, to fewer responses and variation in the respondent pool as well as challenging market conditions.

The research team analyzes wineries by amount of production to develop industry-level production and sales models. A few large producers account for a substantial amount of overall production. The reason that 29% of wineries reported 37% of the overall crush is explained by the fact that a higher proportion of larger producers provided data for the 2025 Census.

Table 4. Winery Section – Response Rate by Region, 2025

Region	Wineries Reporting	Total Wineries	Percent Reporting
North Willamette Valley	127	692	18%
South Willamette Valley	27	75	36%
Umpqua Valley	13	45	29%
Rogue Valley	22	128	17%
Columbia River	12	79	15%
Other Oregon	6	24	25%
Total	**207**	**1,043**	**20%**

It is worth noting that not all data collected for the Vineyard & Winery Census is included in the final reports posted by the Oregon Wine Board. IPRE collects a variety of other data that is of potential interest to the industry.

In previous Census reports, we have explored providing some additional data including grape production by AVA, sustainable farming practices, harvest decisions / reasons for not harvesting grapes, and sparkling wine sales, but have not incorporated those data metrics into the report as small sample sizes and/or lack of longitudinal data make the developing estimates difficult and the results unreliable. In the 2025 Census, a supplemental one-pager was generated from questions pertaining to strategic yield reduction and market conditions given known market shocks (consumption trends and international sales reductions). We will continue to explore ways to provide supplemental data with the annual Vineyard and Winery Census contingent on sufficient sample sizes.

Estimates of Planted Acres by County

IPRE prepares a separate, but related analysis of planted acres by county each year as part of the Vineyard and Winery Census. The estimates of planted acres by county are used by Travel Oregon in their disbursement of distributed funds from the Wine Country License Plates program. The rules and description of this program, along with the eight designated regions receiving direct fund disbursement, are described on the Oregon Secretary of State's website.

The county acreage estimates are a disaggregation of the regional estimates presented in Vineyard Table 1 of the Vineyard and Winery Census. The 2025 census estimates that Oregon had 44,724 planted acres statewide. The county estimates are based on analyzing multiple data sources: (1) our cumulative database of more than 1,400 vineyards, (2) data collected for the 2025 vineyard Census that requests businesses provide data on vineyards (e.g., vineyard name, county and planted acres), and acres planted by variety. We use this data to develop a statistical model that estimates planted acres by county.

Limitations of the Methods and Results

This project is basically a census[4] – IPRE requests data from all vineyards and wineries in Oregon. Ideally, we would collect data from all producers, however, many producers do not provide data. Thus, the Oregon Vineyard and Winery Census uses a sampling methodology to model the scope of Oregon's grape and wine production. As is common with sample-based studies, IPRE observes considerable year-over-year variability in the sample data. This is due to the heterogenous nature of Oregon producers. This variability is considered in our modeling but creates challenges as the results are disaggregated by region, variety, and sales channels. An ongoing challenge is partial responses—many producers only provide part of the requested information, which compounds modeling challenges. IPRE is confident the industry totals presented in the Census present a reasonably accurate estimate of vineyard and winery production in Oregon given what is reported. The accuracy of the data is reduced as it is disaggregated by region and other variables.

About the Institute for Policy Research & Engagement

The Institute for Policy Research & Engagement (IPRE) is a research center affiliated with the Department of Planning, Public Policy, and Management at the University of Oregon. It is an interdisciplinary organization that assists Oregon communities by providing planning and technical assistance to help solve local issues and improve the quality of life for Oregon residents. The role of the IPRE is to link the skills, expertise, and innovation of higher education with the transportation, economic development, and environmental needs of communities and regions in the State of Oregon, thereby providing service to Oregon and learning opportunities to the students involved.

[4] A census is defined as a comprehensive enumeration and survey of all individuals in a geographic area (in this instance, the state of Oregon) to gather information about their characteristics and circumstances.

Appendix: Vineyard and Winery Census Data Collection Instrument