



The Economic Impact of the Wine and Wine Grape Industries on the Oregon Economy 2024

Summary Report

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Executive Summary

Oregon's wine industry generated an estimated \$8.487 billion economic impact in 2024. In 2022, the sum was \$8.177 billion (+3.8 percent in 2024). Growth in the industry has continued since 2022, though at a slower pace than from 2019 to 2022 (+12.9 percent growth as estimated in the previous report). Many headwinds confront the industry as it looks toward 2030. Oregon wine is still in the shadow of both the pandemic and recent wildfires; the state's wine industry is also affected by broader shifts in wine demand and by federal policy changes, such as uncertainty around tariffs and immigration enforcement, which affect both the costs of doing business and household costs in Oregon. Estimated revenues, wages, and taxes are in current dollars and not adjusted for inflation. In 2024, estimated wine-related jobs in Oregon totaled 38,088, down by 1,349 jobs from 2022; related wages totaled \$1.747 billion, 2.8 percent higher than wages and salaries paid in 2022. Key findings include:

- Over 1,535 Oregon wine grape growers produced a total crop value in 2024 of \$329.1 million (including more than 610 estate vineyards), with 47,343 planted and 39,178 harvested acres.
 - Planted acreage increased by 2,856 (+6.4 percent) acres from 2022 to 2024 and over 9,940 acres from 2019 to 2024;
 - Harvested acreage was 1,596 fewer acres in 2024 than in 2022, in contrast.
 - Approximately 129,740 tons of grapes were produced by Oregon vineyards, down 5.3 percent from 2022 (137,065 tons of grapes were produced in 2022);
 - Yields were similar in 2024 to 2022, hence the decline in tonnage was primarily due to some growers leaving grapes unharvested on the vine.
 - Statewide median grape prices in 2024 were approximately \$2,465 per ton, up almost 4.8 percent from 2022 median prices per ton (\$2,353 per ton in 2022);
 - Grapes sourced in Oregon and crushed by Oregon wineries were 93,673 tons in 2024 (down from 94,426 tons in 2022);
 - Pinot noir, chardonnay, and pinot gris are the most harvested grape varieties, with red varieties (weighted average price/ton of \$2,738) selling for higher prices generally than white (weighted average price of \$2,120/ton);
 - North Willamette Valley remains the largest grape-growing region in Oregon, with almost five times the volume of South Willamette Valley; Rogue and Umpqua valleys are similar in size to South Willamette Valley.
- Over 1,070 Oregon wineries or wine companies produced an estimated 5.717 million nine-liter (9L) equivalent cases. Oregon's wineries sold over 5.76 million 9L equivalent cases of wine, generating revenues of over \$913.2 million in 2024 from sales of packaged wine:
 - Approximately 61.7 percent of 9L equivalent units were sold in other US states outside Oregon in 2024, up from 60.1 percent sold nationally in 2022, roughly offsetting an in-state decline of wholesale/retail sales of Oregon wine;
 - Direct-to-consumer (DTC) sales were 18.1 percent of 9L equivalent units sold by Oregon wineries in 2024, versus 19.3 percent in 2022; tasting-room volume was 8.1 percent of

the total, or 465,202 9L equivalents; tasting-room sales were lower in 2024 compared with 2022 in both percentage of total sales and 9L-equivalent volume.

Results along the supply chain included:

- Retail sales of wine in Oregon from all sources via all channels topped \$1.097 billion in 2024, up 1.1 percent from 2022;
 - On-premise sales revenue increased while volume decreased, primarily driven by price increases and declining wine sales in casual, lower-priced establishments;
 - Off-premise revenues increased slightly, but volume declined as consumers overall reduced consumption; higher-priced wines' share of total sales increased.
 - These retail sales supported an estimated 3,546 jobs in stores and retailers, as well as 5,918 jobs in restaurants and other on-premise retail (including wine bars), up 171 jobs from 2022, but only 339 jobs in distributors and importers (down from 401 jobs in 2022).
- Wine-related activity in 2024 contributed over \$270.7 million in state and local tax revenues for the state of Oregon and its municipalities (\$264.8 million in state and local tax revenues in 2022 for the state of Oregon), with an estimated \$111.3 million in property tax revenues (approximately 41.1 percent of total estimated tax revenues).

Visitors to Oregon are drawn to wineries across the state, especially in areas such as Yamhill and Hood River counties in 2024. Winery visitors continued post-pandemic travel in 2024; Travel Oregon estimated that out-of-state tourists visited a winery 18.8 percent of the time.

- Between 2022 and 2024, revenues from wine-related tourism increased by 13.5 percent, contributing \$860.9 million to the Oregon economy from an estimated 4.137 million visitors continuing post-pandemic travel in 2024; however, estimated tourism revenues were 3.67 percent less in 2024 than in 2019, a reflection of the pandemic's continued effects;
- Wine-related visitors supported 9,109 jobs and \$329.16 million in wages in 2024. Tasting room data show that average annual visitors fell about five percent between 2022 and 2024, with 0.3 percentage points fewer conversions per visitor to tasting room sales.

Occupations in vineyards and wineries have shifted somewhat since 2022. The 2024 data show that jobs in vineyards include grounds maintenance workers, vehicle operators, and repair-shop workers. For wineries, occupations beyond winemaking and bottling facilities included tasting room workers, logistics, sales, marketing, graphic designers, and restaurant-style work. Vineyard and winery jobs may include roles that could easily be performed in other industries. This industry needs to remain competitive with statewide labor markets. Organizations such as OWB and other regional and advocacy organizations that assist in regional economic and workforce development and bring consumers to Oregon wineries (affecting direct-to-consumer possibilities, tasting room visits, and advertising generally) provided support for this report. We have made some adjustments to the 2022 totals from the previous edition based on new information as of December 2025.

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Introduction

The wine industry is undergoing a period of fundamental change. For vineyard owners and managers, concerns over wildfires, shifting climatic conditions, and winery demand are changing bearing acreage levels and varietal mix. For wineries, current and perceived shifts in consumer preferences away from wine and alcoholic beverages generally, changing economic conditions that increase uncertainty, and the pandemic's lingering shadow on distribution and restaurant portfolios are affecting production, inventory, and retail sales. Generally, rising tariffs, immigration policy concerns tied to new federal policies, travel demand shifting toward lower spending levels and travel frequency, rising competition for visitor and discretionary spending, and rising costs of doing business all add to the Oregon wine industry's uncertainty. These impacts ripple through supply chains that include hotels, retailers, trucking, warehousing, dentists, banks, credit unions, and hundreds of other industries, as well as thousands of workers. However, this report shows that the Oregon wine industry remains a strong economic force and partner with its supply chain, travel, and retail partners, as well as a large employer and provider of state and local revenues throughout the state economy.

The Oregon Wine Board (OWB) commissioned similar studies to this one, quantifying the economic impact of the wine grape and wine industries in Oregon for the years 2005, 2010, 2013, 2016, 2019/2020 (combined), and 2022. For this 2024 edition, EFA is again the lead consultant, with Full Glass Research (FGR) providing guidance and industry modeling when needed (FGR has been involved since this report's 2005 edition).

Economic impact estimates for an industry's overall effects on a region originate from the "multiplier" effect of core business revenues, which become annual spending for employees, vendors, and owners. For wine-related businesses, we estimate incomes generated by wineries and vineyards from selling crops (grapes) and products (bottled and bulk wine after grapes are processed). The multiplier effects describe how wine-industry employees and vendors, spending their wages and business revenues, respectively, on more goods and services, in turn generate more wages and spending in other industries. The cycle continues until all the income is used. The power of wine exports (any wine sold outside Oregon) is that export sales increase the amount of income circulating within Oregon; exports also include out-of-state travelers attracted to Oregon's wine areas, helping expand the multiplier effects of this industry on Oregon's economy.

The number of jobs supported by vineyards and wineries throughout Oregon is an important indicator of this industry's economic and social footprint. Wages paid, the breadth of employment opportunities, and support for agricultural industries all express the Oregon wine

industry's importance to the state economy. We also estimate this industry's charitable contributions to non-profits statewide. Tourism is a partner industry in which Oregon's vineyard and winery regions attract overnight visitors across the state. For cities and counties, overnight stays generate more tax revenue than day trips and create opportunities for downtowns and areas near wineries and vineyards to showcase other retailers and businesses while visitors are in town. Allied industries, those with direct ties to vineyards or wineries, including vineyard management, trucking, equipment maintenance, accounting and legal, and other examples, extend this industry's supply chain and economic impacts to affect hundreds of employers and tens of thousands of workers.

Economic impacts, as reported here, concern cash flows, taxable transactions, and income rather than value-added income to Oregon's economy. It is important to recognize that these data and estimates consider revenues, not profits. The economic impacts are measured as cash flows and taxable transactions. We also estimate the added value that Oregon's wine industry generates as income that stays in Oregon (versus paying for out-of-state goods and services, from vineyard work to visitor experiences). One classic way to use our results is to support legislative and regulatory advocacy. A winery or wine business advocacy group may also use these data to talk about the wine industry's importance and its partnerships with regional employers and governments. While this report shows the impressive economic power of this industry, driven by tailwinds over time, there are many headwinds as we approach 2030. Support for statewide vineyards and vintners may be no more important than during the latter five years of the 2020s.

Methodology

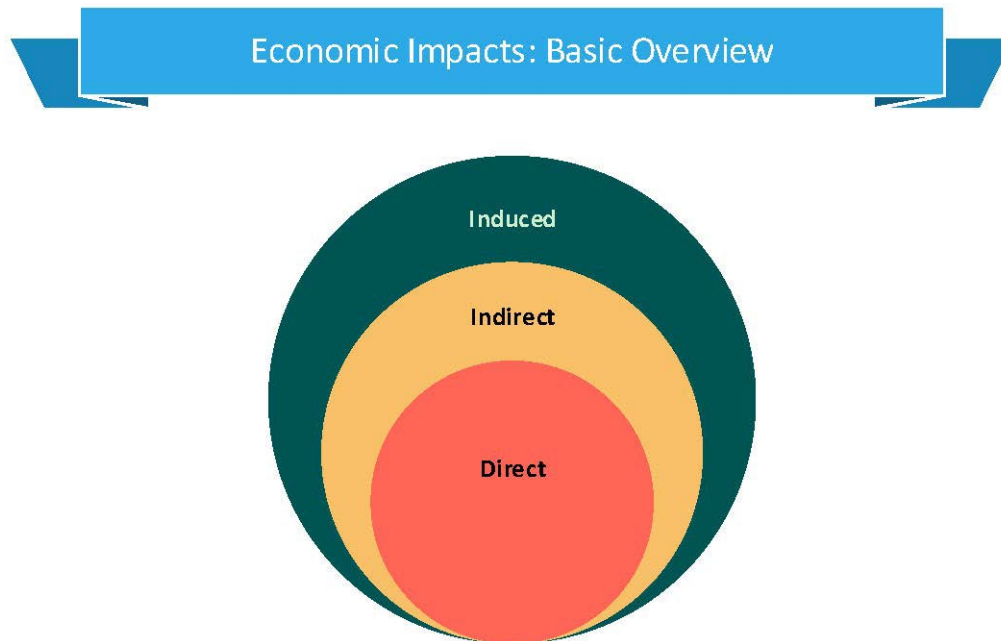
This report combines primary and secondary data sources (including survey work our team conducted with OWB's assistance and networks in 2025). An important document for this study is the University of Oregon's 2024 Vineyard and Winery Report. As in previous reports, the latest version of the University of Oregon (U of O) Vineyard and Winery Report served as our primary source of data on vineyards and wineries. Because there is a consistent time series from the same methodology, these data allow our team to both describe the core wine industry and match it with jobs and wages from government sources such as the Bureau of Labor Statistics and its Quarterly Census of Employment and Wages (QCEW). In 2024, Oregon employed approximately 1,584 people in vineyards and 4,146 in wineries. These jobs are the core of industry hiring.

Business revenue estimates for the production and sale of wine or wine grapes, derived from various official and proprietary data sources, form the core of our study's results.¹ Vineyard

¹ See the Sources section for more detail on the data sources we used to complete this study.

and winery operations become goods and services demanded across additional “core” industries: distribution, retailers, restaurants and wine bars, and tourism. Travel Oregon and Dean Runyan Associates (DRA) provided estimates of tourism spending and jobs across Oregon’s counties and the state, helping define the industry’s effects on winery visits. [Community Benchmark](#) also provided data from Oregon winery clients to help us more precisely measure direct-to-consumer (DTC) sales and visitors through winery doors. The economic impacts flow from the economic size of these core industries. The sum of business revenues, wages, and employment in these core industries acts as our estimate of “direct” economic impacts as described below and estimated by the IMPLAN® model.²

Figure 1



Direct effects arise when wineries generate revenue and then pay vendors and workers to produce, manage, and sell bottled wine from the current year’s harvest. **Indirect** effects arise from producers’, workers’, and vendors’ spending on a broad array of other merchants, vendors, and employees, creating a second round of business revenues, jobs, wages, and tax revenues. This round of spending creates further **induced** effects on Oregon’s economy. As affected employees and businesses spend on goods and services across Oregon, business revenues rise for grocery stores, medical offices, restaurants, accountants, carpenters, and other industries.

Allied industries include vineyard and winery maintenance and management (including the revenues and jobs of businesses that expand grape acreage), trucking, glass, corks, seals, label

² Please see <http://www.implan.com> for more information on IMPLAN® and also the “Economic Impact Estimation” section in this report.

printing, warehousing, and various professional services. For example, during wildfires, testing facilities see increased demand as wineries are concerned about smoke impacts on grapes, bulk juice, and perhaps stored bottled products. When new product lines are produced and launched, label designers and printers, packaging supply vendors, and marketing companies within Oregon may be hired. These professional services and other allied industries serve hundreds of other industries throughout Oregon, but also generate specific revenues, associated jobs, and wages paid directly by vineyards and wineries. We call out those allied industries as distinct from the array of indirectly affected industries because of their strong connections to Oregon's wine industry.

A winery's sales are either domestic (in Oregon) or exported (somewhere else in the world, including other states in the US). Wholesaler revenues made by Oregon-based workers or firms impact the Oregon economy, regardless of where Oregon wines are distributed. While sales of wine produced outside Oregon are counted in retail and wholesale revenues, the broader economic impacts are reduced because the costs of those goods sold are treated as revenues for wineries outside Oregon. Such "leakages" are accounted for in the IMPLAN® model; for example, incomes generated by Oregon's winery industry created "import" purchases that generate revenue for businesses in other states and countries. Oregon-based distributor sales that are outside the state of Oregon are not counted unless those businesses are selling Oregon wines.

Broader economic effects come from how vendors and their workers spend their revenues and wages, respectively. Indirect impacts on vendors and winery employee spending are augmented by those who visit wineries, especially when those visitors stay overnight or perhaps use a winery as an event center (weddings, corporate retreats, etc.). Such connected economic outcomes (e.g., how visitors to wineries become overnight guests at regional hotels or on-site at wineries with lodging options when visiting Oregon's wine regions) reflect gains from shared marketing and regional partnerships among wineries, restaurants, hotels, and transportation businesses. Some methodology changes from the previous (2022) version include:

- Oregon Liquor Control Commission (OLCC) has, since 2021, stopped reporting wine gallonage at the producer level; it is now just reported monthly in the aggregate. The tax-exempt portion of Oregon winery sales that were sold into Oregon distribution had to be estimated from the University of Oregon winery survey and historical data.
- The Federal Tax and Trade Bureau of Alcohol and Firearms (TTB) also no longer publishes timely data on wine production by state (national-level data are available);
- Data on direct-to-consumer (DTC) sales in this 2024 edition continues to rely on the expanded data coverage from Oregon Wine Board's partnership with the University of Oregon and on a private-sector service provider known as Community Benchmark

(www.communitybenchmark.com) specializing in DTC sales tracking for clients;

- Additional data sources include Nielsen, SipSource at Wine and Spirit Wholesalers of America (WSWA).³ Firms such as bw166 fill gaps in distribution and retail tiers.

During Fall 2025, EFA and OWB surveyed Oregon’s vineyards and wineries. The survey focused on recent pricing and yields, as well as overall costs and revenues across industries. Still, we also asked (winery and vineyards were asked different questions as self-identified):

Winery Questions	Vineyard Questions
<ul style="list-style-type: none">• Prices and percentage volume by sales channel (DTC to International);	<ul style="list-style-type: none">• Acreage, planted and bearing
<ul style="list-style-type: none">• Cases (9L equivalents) sold in 2024;	<ul style="list-style-type: none">• Yields
<ul style="list-style-type: none">• Cases (9L equivalents) produced in 2024;	<ul style="list-style-type: none">• Full-time and part-time employees
<ul style="list-style-type: none">• Full-time employees and part-time employees;	<ul style="list-style-type: none">• Major expenses in 2024 (payroll, operating expenses);
<ul style="list-style-type: none">• Major expenditure levels for 2024;	<ul style="list-style-type: none">• Average price per ton;
<ul style="list-style-type: none">• Cash and product charitable contributions in 2024;	<ul style="list-style-type: none">• Cost per new acre developed from dirt to first harvest;
<ul style="list-style-type: none">• Number of visitors.	<ul style="list-style-type: none">• Maintenance cost per acre per year.

Survey answers provide color and additional information throughout this study and support or help refine the assumptions we make to fill information gaps. Charitable contribution levels and a beginning look at visitor volume are just two examples. We want to thank those who participated. Let’s now have a brief look at wine in Oregon’s economy.

Wine in the Oregon Economy

The Oregon wine industry retains a large share of its economic value locally because grapes are grown in-state. This supply-chain integration (agricultural harvests as inputs into manufacturing, and then retail tasting rooms on winery grounds) is a strategic economic-development goal that is difficult to achieve. Oregon wineries buy grapes from regional vineyards and produce wine using equipment similar to that used in other food or beverage manufacturing processes, as well as a substantial investment in specialized tools such as wine barrels. The cost of goods sold for wineries is mainly grape purchases from local farmers (the 2024 University of Oregon Vineyard and Winery Report suggested almost 98 percent of grapes used in Oregon wine came from Oregon) or from the winery’s vineyards. Such transfer costs within “estate” wineries exemplify vertical integration and local economic development. In 2024, over 93,670 tons of Oregon grapes were used to create wine for Oregon wineries; nearly 130,000 tons were harvested, with some grapes or grape juice exported from Oregon to other wine-producing areas for blending.

³ Please see <https://www.bw166.com/>; <https://www.wswa.org/sipsource>; for more on these data sources.

In addition, as a consumer packaged good, wine retains much higher added value within the state compared to commodity crops sold as is or converted into commodities such as juice concentrate or flour. Once a wine sector reaches the scale of Oregon’s, many contributing inputs, such as packaging, production infrastructure, and equipment, and professional services like design, accounting, compliance, marketing/PR, and information systems support, are supplied or produced in the home state. Also, wine distribution from producers to retailers and restaurants provides additional wages and employment in storage, trucking, sales, and delivery services, as well as staffing premises where wine is sold.

Finally, tourists come to Oregon to visit wineries, which enhances Oregon’s economy, as with any other attraction (such as Mount Hood). When visitors stay overnight, the effects include more income and jobs for regional restaurants and brick-and-mortar retailers. The wine industry also provides event facilities for weddings and corporate events that combine on-premise wine sales with overnight guests who would not be there but for vineyards and wineries in Oregon. Each industry “tier” contributes tax revenues to city, county, and state governments. We estimate state tax revenues and fees collected from income and transactions (for example, the privilege tax on wine production, transient lodging tax (TLT) revenues, and state income taxes).

Direct-to-consumer (DTC) markets allow further vertical integration in the wine industry. Wineries can vertically integrate from dirt to retail through an array of DTC channels: (1) wine club; (2) tasting room; (3) catalog or third-party sales, where consumers are shipped products directly. Wine clubs are a classic example of winery marketing conversions, especially tied to winery visitors and events. Online wine stores and similar outlets expand how consumers can purchase wine without leaving their homes, have it delivered, and offer wineries more options for inventory management. Table 1 summarizes 2024 estimates compared to 2022, showing that the in-state and out-of-state customer bases have remained relatively similar, though overall sales volumes and total dollars have changed.

Table 1: DTC in 2022 and 2024, 12-month Sum to December in Each Year, Oregon Wines, % of Current Dollars or 9L Equivalent (9L Equiv) case sales

Oregon DTC Shipments, In- and Out-of-State, January to December 2022	Oregon DTC Shipments, In- and Out-of-State, January to December 2024
<u>In-state</u>	<u>In-state</u>
Value share (Dollars): 55%	Value share (Dollars): 55%
Volume share (9L Equiv Cases): 56%	Volume share (9L Equiv Cases): 54%
<u>Out-of-state</u>	<u>Out-of-state</u>
Value share (Dollars): 45%	Value share (Dollars): 45%
Volume share (9L Equiv Cases): 44%	Volume share (9L Equiv Cases): 46%

Source: University of Oregon, FGR, Sovos, and bw166

Wine production remains a labor-intensive business, regardless of technological advances. A multiplier effect is created – revenues generated by wineries are transmitted into additional wages, tourism, and tax effects – and broadens economic gains across the state economy. Our survey data provides additional details about Oregon’s wine industry that inform our direct impact estimates.

Survey Data

In partnership with the Oregon Wine Board, EFA again distributed a survey to wineries, vineyard owners, and vineyard managers. What the survey data provide are additional perspectives on wine-industry performance, cost structure, charitable contributions, yields, and tons harvested per acre, and use of sales channels. The pandemic’s shadow remains over winery supply chains, and the direct-to-consumer (DTC) boom of 2020-2023 shifted in 2024 (see Figure 4 for more details on the shift in supply-chain composition and the reduction in total sales). Key results not readily available elsewhere include estimates of the number of tasting room visitors and industry considerations of future outcomes. As always, we promised and maintained the anonymity of surveyed businesses, reporting results only in the aggregate. Major survey-question sections included:

- Vineyard and winery demography (location, size, and yields);
- Winery production and sales (sales channels and prices per channel for 9L equivalents);
- Vineyard production and sales (yields and grape prices); and
- Winery and vineyard cost structure and charitable contributions.

Demographics

The survey instrument began with questions on business location and type. Wineries, vineyard owners, and vineyard managers were asked to answer this survey in all Oregon counties when applicable. Respondents were from the following counties, in order of most to least respondents (there were 58 responses from those surveyed, or 2.9 percent, assuming a universe of 2,000 independent vineyard and winery businesses). This survey is intended as an industry sampling to augment our team’s available data; it is not intended to be a scientific survey of the entire industry, such as the annual University of Oregon census. Our survey included:

Counties with wineries: Yamhill, Douglas, Jackson, Polk, Lane, Marion, Umatilla, Hood River, Multnomah, Washington.

Counties with vineyards: Yamhill, Douglas, Jackson, Marion, Polk, Josephine, Lane, Umatilla, Benton, Clackamas, Washington, Hood River.

Survey Insights into Winery Production, Sales, and Income: 2024

The number of 9L case equivalents produced ranged from 200 to 250,000 9-liter equivalents, while sales volumes ranged from 100 to 186,000 for a winery in terms of survey responses. The ratio of full-time to part-time workers in wineries was typically just over 1 to 1 (47 percent was the median part-time worker percentage for those wineries responding). In vineyards, due to contract workers and the surge during harvest, approximately 71 percent of vineyard workers are part-time. Tasting room visits ranged from 100 visitors to over 113,000 in 2024. The median number of visitors to a winery tasting room (among those surveyed who reported having one) was 3,111 in 2024. Questions on sales channels showed the diversity of Oregon wineries' sales strategies: direct-to-consumer (DTC) channels ranged from 3 to 98 percent of total sales, with a median of 26 percent sold in the tasting room, 20 percent sold through wine clubs, five percent sold direct to trade (direct to restaurants and retail), with the remainder (49 percent) sold to distribution within Oregon and globally otherwise. Prices in DTC channels ranged between \$120 per 9L-equivalent case to \$1,044 per case; distribution freight-on-board (FOB) pricing, a typical wholesale price indicator, ranged between \$80 to \$380 per case for the same wineries. One benefit of these survey results is that the ranges allow us to estimate winery retail markups relative to wholesale pricing, markups that wineries retain as retailers.

Payroll expenses averaged 45.8 percent for surveyed wineries, and marketing expenses accounted for about 9.4 percent of operating expenses in 2024. This proportion of operating expenses is up from 2022, suggesting Oregon's wineries were sensing a need to shift toward augmented marketing. Charitable contributions by wineries were a mix of cash and in-kind contributions of wine. These ranged from \$12,000 to \$159,000 in cash and over \$153,000 in the in-kind value of donated wine. These data help us understand the social impact of Oregon's wine industry as these businesses give back to their communities through auctions, charitable events, and direct donations.

Survey Insights into Vineyards and Vineyard Management, 2024

We asked vineyard owners, vineyard managers, and wineries that own vineyards questions about vineyard operations in Oregon. The total acres reported were 4,420, with 4,269 bearing acres (approximately 10.9 percent of the total harvested acreage reported by the University of Oregon in 2024). Vineyard owners and managers who responded reported an average of \$2,836 per ton. The University of Oregon wine industry report suggested the average price for Oregon overall was \$2,048/ton, down from 2022's average of \$2,411/ton (median price per harvested ton of grapes was \$2,750 in our survey data and \$2,465 based on the University of Oregon/OWB data). Our survey data showed a median of 3.0 tons per acre (this was also the median, suggesting the survey data on yields was somewhat symmetrical); The University of

Oregon also showed an average of 3.31 tons per acre in 2024 (down from 3.36 on average in 2022), ranging from 1.85 tons per acre in Umpqua Valley to 3.62 tons per acre in Rogue Valley. Willamette Valley (North and South) had yields of 3.4 and 3.45 per acre, representing 72.7 percent of the vineyards in the University of Oregon study.⁴

The average cost of planting new vineyards ranged from \$10,000 per acre to \$109,000 per acre, with a median of \$21,500 per acre. Few wineries were planting new vineyards, according to our industry survey results. Vineyard maintenance costs ranged from \$700 to \$28,250 per acre, with a median of \$7,530; median costs per acre to maintain vineyards were slightly lower in 2024 than in 2022, at approximately \$7,800, reflecting fewer vineyards and acreage to maintain and likely more competition among vineyard management firms. Much like wineries, there was a mix of full-time and part-time workers for harvest and maintenance; in 2022, the mix was about 20 part-time workers for every 18 full-time workers by headcount. Very little of the harvested acreage in our study was sold to wineries outside Oregon, suggesting that demand for Oregon fruit was in Oregon.

Summary Data

The Wine Market in the U.S. & Oregon

We will see below that bearing acres, grape tons harvested and processed, and the nine-liter (9L) equivalents sold have changed since 2022. However, we will also see that while revenues from wine-related tourism have increased, tasting-room sales revenue and volume have decreased between 2022 and 2024. Sales of Oregon-made wine make the broadest contribution to the Oregon economy versus wines from other places. While sales of “imported” (non-Oregon) wines create jobs and revenue at the wholesale and retail levels, the core supply-chain gains are made elsewhere because Oregonians buying these wines generate revenue for wineries in other states and countries. The sales by Oregon wineries connect grapes harvested by farmers to broader supply-chain partners and ultimately to global consumer markets.

Figure 2a showcases one of the main concerns in the wine industry since 2024 (when the 2023 data were released). A combination of US population growth and lower estimated wine consumption per person among those 21 years or older brought per-person consumption in the United States back to pre-2010 levels in 2024. The US wine industry is reacting as if this is a structural shift in general consumption habits, and thus a demand shock that needs to be mirrored by a supply adjustment across the entire supply chain (from vineyards and vineyard development to tasting rooms). Changes

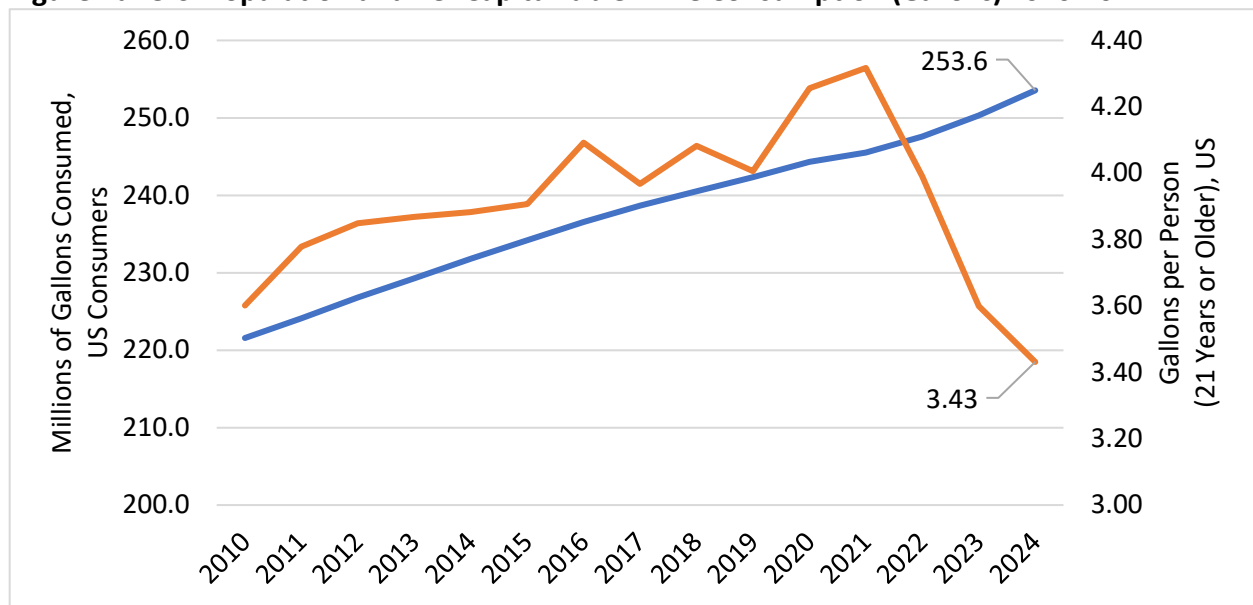
⁴ Wine areas and valleys such as Umpqua are part of “All Others” in the Appendix when we consider economic impacts by county and region.

Economic Impact of Oregon Wine 2024

in 2023 and 2024 are likely to affect the size and scope of the American wine industry, with Oregon playing a significant role in viticulture, winery jobs, and production outside California. Three main factors have driven the decline in per-capita wine consumption:

1. The expiration of certain cultural, distribution, and demographic factors that fueled the 1995-2015 wine boom in America.
2. A general decline in alcohol consumption, in particular among the large and aging baby boomer population.
3. For wine specifically, substitution of competitive categories such as craft beer, cocktails, and ready-to-drink (RTD) alternatives like hard tea or lemonade, premixed cocktails, etc., especially among consumers under 40.

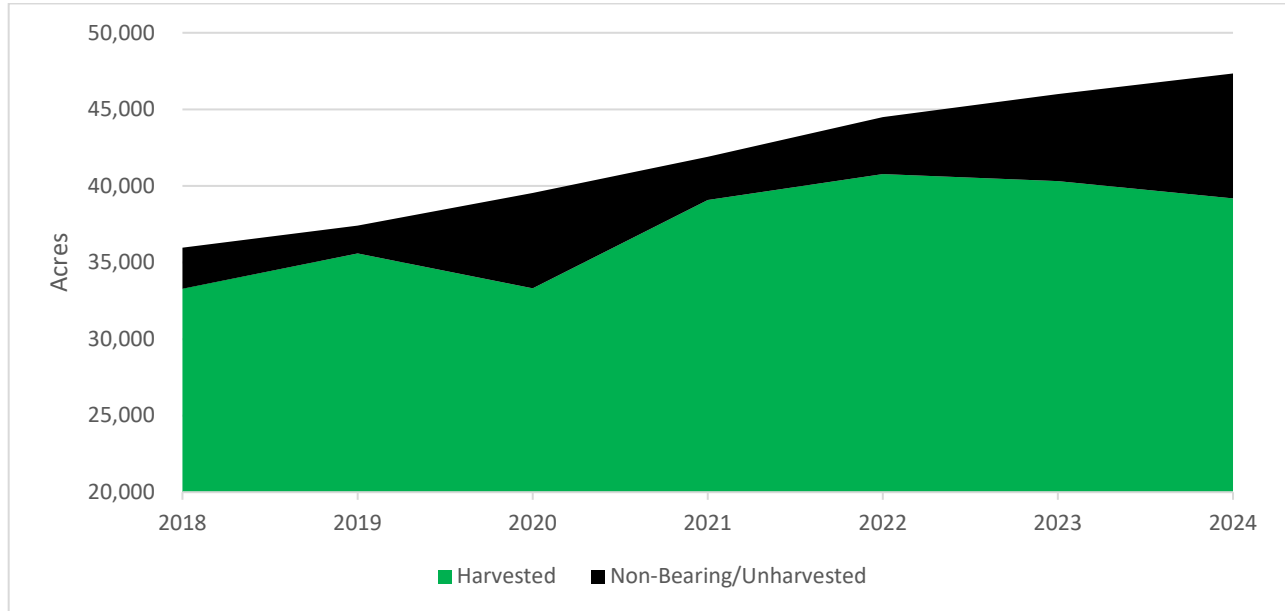
Figure 2a: U.S. Population and Per Capita Table Wine Consumption (Gallons) 2010-2024



Sources: U.S. Census, BW166 (via Wine Institute)

Figure 2b shows the basics of the supply reaction in terms of vineyard acres, those planted and those harvested from 2014 to 2024. While the pandemic and wildfire disruptions to harvests are clearly evident in Figure 2b, the recent decline in harvested acres suggests that vineyard owners and wineries are responding to the demand shifts in Figure 2a by reducing harvested acreage rather than removing acreage. This may moderate winery inventories and reduce available volume to sell in Oregon as the 2020s come to a close. However, unless sales growth resumes, potential supply will remain in excess of demand in the near to medium term.

Figure 2b: Oregon Vineyard Acreage, Harvested and Non-Bearing or Unharvested Acres, 2014 to 2024



Source: Oregon Vineyard & Winery Reports, 2015 to 2025

Research for this report and comparisons to past data made clear that the current and near future of the Oregon wine industry is strongly impacted by the tumultuous period of 2019 to 2021 (see Figure 2b):

- New plantings accelerated during the period 2015 to 2019.
- The 2020 fires significantly reduced both the harvested acreage and the subsequent wine supply.
- At the same time, sales of wine spiked from a combination of increased direct-to-consumer sales and wholesalers rebuilding suddenly depleted inventories.

This combination of events sent misleading market signals of short supply and increased grape prices during 2021-2023, muffling the supply impact from the surge in new plantings coming online around that time and probably encouraging yet more planting. But the sales spike was temporary, and when yields returned to normal in non-smoke vintages, and yet more acreage was coming online, the wine and winegrape markets veered abruptly to oversupply.

The following sections will describe and quantify the direct economic impacts of Oregon's main wine-related industries:

- Wine Grape Cultivation and Farming;
- Wineries and Wine Manufacturing;
- Distribution and Wholesale;
- Retail and Restaurant Sales (On- and Off-Premise); and
- Tourism (Wine-related travel and tasting room retail).

Wine Grape Cultivation⁵

Direct Employment: 1,584 jobs

Total Wages: \$69,240,000

Wine Grape Grower Revenues, 2024: \$199,364,000 (non-estate bottled grapes)

2024 was a difficult year for Oregon vineyards and wineries, beginning with a decline in grape value. Oregon’s vineyards remain among the top five states for premium winegrape harvest volumes (“premium” grapes are those that cost more than \$1,000 per ton when purchased or transferred) in the US. As noted earlier, the University of Oregon estimated that Oregon vineyards harvested approximately 129,739 tons of grapes at an average price of \$2,048 per ton in 2024, from 1,537 vineyard properties (University of Oregon, 2025). Planted acreage was estimated at 47,343 acres in 2024, up 2,856 acres from 2022. We saw those dynamics in Figure 2b. Vineyards owned by wineries, “estate” vineyards, harvest grapes that represent a transfer cost to a winery, but not a cash transaction.

In 2024, however, Oregon wine grapes remained the state’s most valuable fruit crop. The State of Oregon, in partnership with the National Agricultural Statistical Service (NASS), estimated the market value of \$195,529,000 (including grapes harvested at estate wineries). For vineyards that grow fruit to become inputs for estate-bottled wines, the transfer value is a cost to wineries.

Table 2: Oregon Total Dollar Value by Commodity, 2016, 2019, 2022, 2023, and 2024

Commodity	2016	2019	2022	2023*	2024
Blueberries	\$104,580,000	\$134,000,000	\$183,000,000	\$146,380,000	\$195,529,000
Hazelnuts	\$118,800,000	\$84,480,000	\$100,750,000	\$127,170,000	\$162,624,000
Pears	\$148,000,000	\$108,774,000	\$90,752,000	\$117,026,000	\$120,425,000
Cherries	\$79,200,000	\$75,221,000	\$68,282,000	\$63,594,000	\$72,520,000
Apples	\$59,800,000	\$38,746,000	\$40,753,000	\$47,261,000	\$28,171,000
Cranberries	\$10,600,000	\$14,851,000	\$16,442,000	\$23,517,000	\$21,903,000
Wine Grapes	\$167,800,000	\$237,784,000	\$330,026,000	\$348,994,000	\$329,109,000

Source: NASS, University of Oregon Vineyard and Winery Census for the selected years

Value-added income occurs at the crush and storage stages after grape juice is produced, fermented, and stored, and then bottled and boxed. Approximately 48 percent of grapes are non-estate, accounting for \$158.5 million in revenue for wine grape farmers alone. Table 2 provides a quick comparison to other crops.

⁵ Employment and wages come from Bureau of Labor Statistics for all calendar years shown. Revenues come from the University of Oregon Vineyard and Winery Report for all calendar years.

Winery Revenues and Employment in Oregon⁶

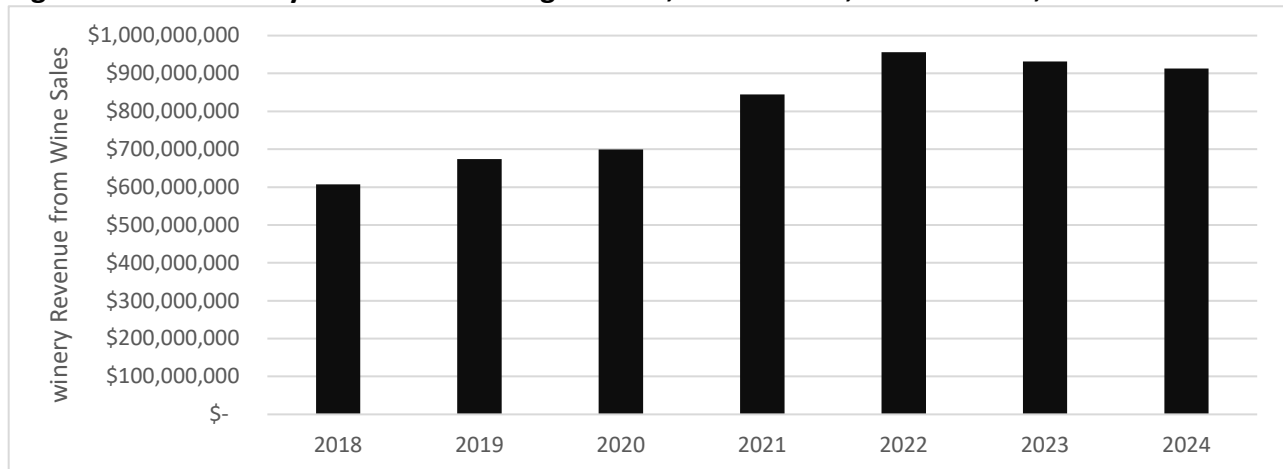
Direct Employment in 2024: 4,146 workers

Total Wages in 2024: \$199,996,000

Total Revenue in 2024: \$913,268,100

The impact of wine sales originates from two different sources: (1) wine sold by Oregon wineries both within and outside the state of Oregon; (2) total sales of wine from all sources within the state of Oregon. Sales of wine in Oregon, regardless of origin, benefit parts of the supply chain, including support industries such as trucking, storage, retail software, business and legal services, restaurants, and more. Figure 3 shows estimated winery revenues by the University of Oregon/Oregon Wine Board annual study from 2018 to 2024.

Figure 3: Total Winery Revenues for Oregon Wine, All Channels, 2018 to 2024, Current Dollars



Source: University of Oregon Vineyard and Winery Report, 2024 data are the latest available.

Although winery sales volume increased slightly vs. 2022, revenues were down due to a decline in the proportion of sales made direct-to-consumers, as well as likely discounting or promotion costs in the 3-tier system. Winery revenues from sales into distribution increased very slightly, driven by higher shipments to wholesale out-of-state and modest increases in exports and private-label sales. However, the estimated winery average revenue per case declined by \$1.55 in 3-tier channels. Since the net revenue per case is lower than what one would project from MSRPs, discounting or promotional allowances likely played a factor in the decline.

DTC channels remain very important to small winery business models, enabling them to capture all or part of wholesale and retail margins and to exercise greater direct control over marketing and communications. Table 3 also presents data on 9L-equivalent wine sales across the wine distribution chain, as well as total dollar sales from 2018 to 2024, showing the growth of overall

⁶ Winery revenues shown here do not include sale of bulk wine to other wineries or bottlers. Employment and wages come from Bureau of Labor Statistics for calendar years 2018 to 2024.

sales while channels (direct, distribution, and retail) shifted over those five years.

Table 3: 9L Equivalent Sales (Cases or 9L) and Total Sales Revenues (Current \$), Oregon, 2018-2024

	2018	2019	2020	2021	2022	2023	2024
Winery Revenues							
9L Totals	4,147,495	4,666,599	4,698,467	5,295,226	5,717,159	5,986,635	5,769,739
Tasting Room	568,070	632,807	254,660	437,312	497,393	479,271	465,202
Wine Clubs	264,552	283,937	356,328	379,889	423,070	431,155	419,599
Internet or Phone	90,088	104,664	136,516	167,120	182,949	171,233	161,395
DTC Subtotal	922,710	1,021,408	747,504	984,321	1,103,412	1,081,659	1,046,196
DTC % of Total	22.2%	21.9%	15.9%	18.6%	19.3%	18.1%	18.1%
Wholesale	650,182	732,168	757,995	813,661	886,160	911,195	870,145
National	2,373,214	2,689,686	2,933,646	3,216,910	3,438,871	3,707,926	3,557,854
International and Private	201,389	223,337	259,322	280,334	288,716	285,855	295,544

Source: University of Oregon Winery and Vineyard Survey

DTC is linked to tourism and to how wineries serve as attractors for visitors to Oregon. Tasting room traffic is largely dependent on tourism, and tasting rooms are where the majority of winery club members are enrolled. Approximately 40.1 percent of all direct-to-consumer sales were through wine clubs in 2024, up from 38.3 percent in 2023. Oregon’s wineries have seen a return to traditional three-tier markets (distribution within Oregon and beyond), with 2023 volume sales slightly higher than in 2022 and 2024. Oregon winery sales to all channels in 2024 in all markets (including wholesale, retail, direct-to-consumer, and export) were 5,769,739 9L cases of bottled products, with revenues of approximately \$913.3 million. Shipments of bottled wine out of state of 3,557,854 9L cases in 2024 were more than in 2022, but a small slip from 2023. Sales to other parts of the United States were 61.7 percent of the 9L equivalent sales in 2024 for Oregon wineries (60.1 percent in 2022), providing a domestic market outside Oregon and extending the state’s supply chain for wineries and vineyards. Oregon wineries have considerably expanded their distribution and visibility out of state over the past ten years, which has been fortunate, since export growth since 2022 has almost offset declines in the wholesale/retail tier within the state.

Jobs at Wineries and Vineyards: What Wine Industry Workers Do

In the 2024 edition of the Economic Impact of Oregon Wine, we continue our consideration of occupations within vineyards and wineries, as in the 2022 edition. New immigration enforcement policies and the pandemic’s lingering effects on the labor force are dynamically changing labor supply across Oregon. While our data do not cover 2025, when several policy headwinds continued or expanded to affect the wine industry, we want to track changes and consider how any shifts point toward policy needs for this industry from a training and workforce development standpoint.

Oregon’s labor force, as 2024 ended, was still not back to pre-pandemic levels. This was also true in California. Worker migration, remote work, shifting industry needs, shifts in consumer

demand, and the use of technology instead of hiring or expanding workers all play a role. Vineyards and wineries tend to hire with specific job skills.⁷ The typical vineyard or vineyard management operation, along with its use of workers, is shown in Table 4. Average wages are shown for 2024 to provide perspective on per-worker costs in Tables 4 and 5. We also repeat the 2022 results here for comparison.

Vineyard jobs tend to be a blend of vineyard management jobs (vehicle operators, grounds or land maintenance, and repair workers) and classic farm jobs. As with other businesses, larger firms may also have vineyard management, office jobs, and sales roles. Within a winery, there may be jobs for those who sell harvested, bulk grapes that will not come to the winery floor, as well as people who supervise vineyard operations and maintenance. Table 4 shows that the main occupation is for those workers in vineyards performing many subtasks, including the actual harvests:

- Trimming and grafting;
- Trellis and fence work;
- Soil preparation;
- Pre-harvest work;
- Harvest;
- Post-harvest work in preparing for dormancy and the next year.

Table 4: Vineyard Occupations, Proportion of Industry Hiring, and Estimated Monthly Wages, 2022 and 2024

Occupation	% of Workers 2022	Average Annual Salary/Wage 2022 (2022 \$)	% of Workers 2024	Average Ann Salary/Wage 2024 (2024 \$)
Vineyard Workers	84.3%	\$22,320	80.9%	\$25,601
Supervisors	3.6%	\$45,052	5.5%	\$41,699
Material Moving Workers	2.0%	\$23,552	2.8%	\$22,601
Other Management Occupations	1.4%	\$59,934	2.2%	\$47,909
Retail Sales Workers	1.6%	\$18,721	1.4%	\$18,999
Motor Vehicle Operators	0.6%	\$23,819	1.0%	\$22,224
Top Executives	0.5%	\$143,808	1.0%	\$124,537
Grounds Maintenance Workers	0.8%	\$26,583	0.8%	\$27,608
Financial Clerks	0.8%	\$34,284	0.8%	\$31,271
Office and Administrative Support Workers	0.7%	\$27,543	0.7%	\$26,470
Vehicle and Mobile Equipment Installers, Mechanics, and Repairers	0.6%	\$35,165	0.6%	\$33,100
All Others	3.1%	\$46,459	2.2%	\$41,007
Totals	100.0%	\$25,130	100.0%	\$28,188

Sources: Bureau of Labor Statistics Occupation and Wage Survey (OEWS) and IMPLAN®

Notice that supply-chain occupations (material movers, ground maintenance) are included here as well. For wineries, occupations are similar to those in other manufacturing facilities. Jobs include vehicle operators (forklifts and trucks, for example), tasting room staff, classic

⁷ See <https://www.onetonline.org/> and enter the occupation name in “Occupational Keyword Search” for more details.

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production workers on a bottling line, sales and design workers in brand management, cooks for wineries that have event operations and may have a commercial kitchen or restaurant facilities, and managers. The typical winery operation in Oregon and its labor use are shown in Table 5.

Table 5: Winery Occupations, Proportion of Industry Hiring, and Estimated Monthly Wages, 2022 and 2024

Occupation	% of Workers 2022	Average Annual Salary/Wage 2022 (2022 \$)	% of Workers 2024	Average Annual Salary/Wage 2024 (2024 \$)
Winery Production Occupations	18.5%	\$59,632	19.0%	\$64,452
Food and Beverage Serving Workers	14.6%	\$29,098	18.1%	\$35,328
Material Moving Workers	8.7%	\$51,320	7.7%	\$54,774
Installation, Maintenance, and Repair Occupations	4.3%	\$74,149	4.6%	\$79,700
Sales Representatives, Wholesale and Manufacturing	5.2%	\$71,398	4.2%	\$75,913
Cooks and Food Preparation Workers	3.1%	\$35,247	4.0%	\$39,070
Other Sales and Related Workers	3.9%	\$43,241	3.8%	\$48,684
Motor Vehicle Operators	4.3%	\$57,866	3.7%	\$65,508
Business Operations Specialists	2.8%	\$86,392	3.2%	\$87,128
Art and Design Workers	3.1%	\$51,130	3.1%	\$51,101
Retail Sales Workers	3.4%	\$30,703	2.8%	\$38,154
Top Executives	2.4%	\$134,269	2.2%	\$146,213
All Others	25.7%	\$98,020	23.7%	\$80,064
Totals	100.0%	\$ 58,771	100.0%	\$63,542

Sources: Bureau of Labor Statistics Occupation and Wage Survey (OEWS) and IMPLAN®

Why Tracking Occupations Matters

In the 2024 edition of this report, we present occupations across both vineyard and winery supply chains, from dirt to tasting rooms and retailers. By 2030, we will likely see shifts in the number of workers dedicated to vineyard work, with some partially replaced by machine harvesting, driven by changes in immigration enforcement and advances in harvest and vineyard management technologies. This is also true in wineries, including tasting rooms, as artificial intelligence and shifting consumer demographics change how customers interact and how comfortable they are with technology. Given recent federal immigration changes and shifts in the wine industry's labor supply and demand, the workforce is both a challenge and an opportunity for the industry nationally and in Oregon. Working with regional community colleges and high schools on both vocational and professional training programs helps prepare the industry for change. Smaller wineries and vineyards are at greater risk, especially as their workforces and ownership age. Rising search costs, wages, and other hiring costs are like a regressive tax.

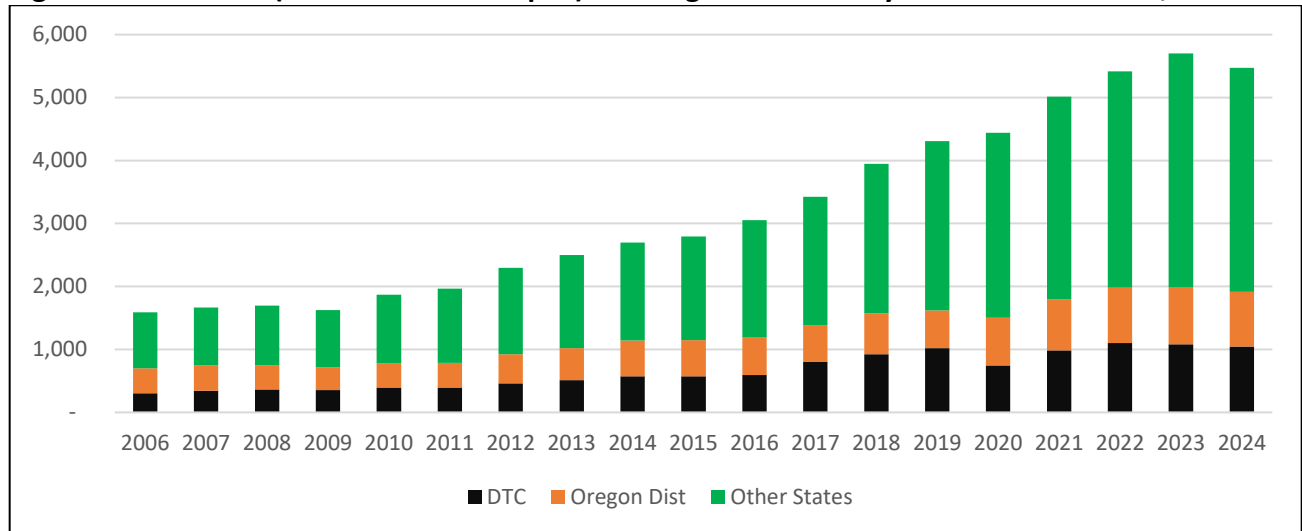
Distribution (Wholesalers, brokers, importers)⁸

Direct Employment: 339 jobs
Total Wages: \$23,173,000
Total Revenue: \$595,952,200

Similar to other states, wines in Oregon are sold through the “three-tier system”. Winery shipments move to distributor-wholesaler businesses, which then sell to retailers and restaurants (off-premise and on-premise sales) before sale to final consumers at those points of sale.⁹ Figure 4 shows the case-sales progression from 2006 to 2024 and the destination of 9L equivalent sales in the United States for Oregon wineries.

Our team considers multiple data sources when estimating the allocation of wine distributed to off-premise and on-premise retailers. Our survey results, as shown above, provide one source of data. Other sources include Wine and Spirit Wholesalers of America (SipSource), which provided our team with wholesale data (previously unavailable at the state level), Nielsen point-of-sale scan data, and Full Glass Research (FGR) estimates. Since 2011, this report has used a mix of sources and survey data to finalize estimates of sales through channels and 9L-equivalent pricing, refining conclusions from the University of Oregon’s annual survey work.

Figure 4: Case Sales (Thousands of 9L Equiv) for Oregon Wineries by Destination Market, 2006-24



Source: OLCC data for 2024 and University of Oregon Winery and Vineyard Report. DTC sales include tasting room, club, web, and mail sales to consumers in Oregon and out of state.

⁸ Employment and wage data come from IMPLAN® and from Bureau of Labor Statistics as weighted by the total gross state product in wineries as a proportion of other food and beverages applied to distribution and wholesale. Revenues come from Full Glass Research and its distribution model based on wholesale prices and volumes as a proportion of the total 9L equivalents sold in Oregon in 2024.

⁹ Wineries may also sell directly to retail tier accounts within their own state, skipping the wholesale tier. Less than 3% of all Oregon winery volume is sold in this manner.

From 2022 to 2024, some changes in selling wine from distribution to retailer tiers (both off-premise and on-premise) include:

- On-premise wine consumption continued to decline in an environment with competition rising from other beverages and other products. However, rising prices and product mix resulted in a small increase in revenue.
- Overall off-premise volume declined, but sales revenues rose slightly as wines priced \$10 to \$30 per 750ml were less affected than those bottles under \$10 per unit. While average prices for Oregon wine decreased slightly, Oregon wine did increase its market share in Nielsen-tracked off-premise stores.
 - However, many chain stores were decreasing the number of items and shelf-space in the wine section, while inventories were higher than historical levels at distributors.
- Sales to other states outside Oregon increased in terms of proportion of overall sales volume in distribution, comparing 2024 to 2022.

The difference between 9L equivalents sold in Figure 6 and overall distributor sales is due to wines imported into the state from other states and abroad.¹⁰ Wineries discount their wines when selling to distributors. Distributors and retailers then mark up products to cover the cost of value-added services, including profits. Major distributors in Oregon have little publicly available information because they are privately owned, so our sources come from distributing known shipments of wine into Oregon distribution from Oregon winery and OLCC data, allocated across channels in a model using Nielsen IQ point-of-sale scan data, SipSource data that follows the wholesale tier across multiple channels, and IMPLAN® data on the relative size of distribution relative to retail and manufacturer sales.

Total Retail and Restaurant Level Wine Sales in Oregon (all sources)

Direct Employment: 9,465 jobs

Total Wages: \$319,510,600

Total Revenue: \$1,097,492,100 from all off-premise and on-premise retailers excluding wineries

Retail and restaurant sales are important core industries for wineries and vineyards, as they are the final link between grapes and consumers. The two main categories for retail sales outside of DTC are (1) on-premise (wine consumed on location at wine bars, hotels, restaurants, etc.) and (2) off-premise (wine purchased from retail stores ranging from fine wine shops to large chains, including warehouse stores). Off-premise sales are much higher, typically 80-85% of retail tier volume. However, its share of total retail dollar sales is smaller, primarily because of differences in profit margins (restaurant markups are typically 5 or more times higher than

¹⁰ As measured by the OLCC in tax-paid imports and releases from bonded warehouses.

those of stores). As with the distributor tier, there is outside competition for Oregon wineries' on-premise menu space and retail shelf space. Since Oregon wines are not generally sold in the high-volume, low-priced segments, Oregon wine accounts for approximately 13% of retail wine volume in Oregon. However, because of its higher average price and production within Oregon, its share of retail tier revenues and economic impact is much higher.

Tourism¹¹

Direct Employment: 9,109 jobs

Total Wages: \$329,161,400

Total Revenue: \$860,975,100

Tasting room visits, travelers to Oregon's wine-producing regions, and revenues from these visitors are closely tied regionally. Previous editions of this report have connected data on tasting room sales and visitation spending, jobs, and regional outcomes since this report's inception. Visitors to Oregon wineries come from all over the world. Oregon's wine regions remain an important attraction to Oregon for those who live both inside and outside the state.

Dean Runyan Associates (DRA) provides annual economic impact analyses and estimates for all of Oregon's counties and statewide outcomes for Travel Oregon.¹² These data have been an important component in estimating the flow of visitors from outside Oregon and their per-person spending, as they leave an economic footprint by visiting wineries. We do not count tourism expenditures by Oregonians because (to be conservative) we are counting expenditures on tourism within Oregon that would happen anyway; the choice to visit an Oregon winery by Oregonians is reflected in tasting room sales.

In 2024, we estimated that wine-industry-related tourism generated \$860.9 million in spending (up from \$758.5 million in 2022). Our tourism revenues estimate once again includes spending on hotel stays, food, entertainment, transportation, retail, and other businesses while visitors are in Oregon and also visiting wineries. We estimate over 4.137 million visitors to Oregon's wineries in 2024; Travel Oregon estimates 18.8 percent of overall visitors coming to Oregon from outside the state visited a winery while here in 2024. Oregon's tourism industry benefits from the Oregon wine industry statewide, as visitors to wineries and other tourism assets span all 36 counties in Oregon. The following subsection provides more details about visitor spending and patterns in Oregon.

¹¹ See <https://www.travelstats.com/dashboard?ucode=4100> for more on the Oregon tourism industry and aggregate data for the state overall.

¹² See <https://industry.traveloregon.com/research/oregon-travel-impacts/> for the latest Dean Runyan Associates report for Travel Oregon.

Oregon Wineries and Tourism

Oregon's economy statewide, according to Dean Runyan Associates (DRA), experienced visitor spending growth of \$339 million (+1.1 percent) from 2022 to 2024, bringing total visitor spending to \$14.308 billion in 2024. This level of statewide spending supported 4,500 additional jobs in 2024 versus 2022, bringing total tourism-related jobs to approximately 121,000 workers in 2024. In recent years, DRA has expanded its estimates to include travelers and the number of travel "parties" that stay overnight ("parties" are when more than one person shares a room or a vacation rental). Our estimates use tasting-room visits and sales data alongside of DRA and Travel Oregon visitor data as closely as possible to connect estimated winery visits to broader economic impacts, similar to other services that are "exported" from Oregon. DRA data are foundational for understanding Oregon's travel industry.

Travelers may come to Oregon specifically to visit wineries; Travel Oregon estimates that 18.8 percent of out-of-state travelers visited wineries in 2024, up from 14.3 percent of such visitors in 2022. Tasting facilities are generally both gateways to winery products and stories and reception centers for travelers. We also do not count tasting room sales in tourism; they are included in the estimated winery revenues stated above. Economic impacts expand when visitors stay overnight. In its 2024 edition, DRA estimated that 37 percent of travel spending is from Oregonians.

Because we want to relate a subset of Oregon travel incomes and jobs to wineries as a destination, we need to make assumptions and use recent studies to estimate spending by these winery visitors. Our survey of Oregon wineries (in partnership with the Oregon Wine Board) suggested that approximately 4,137,800 people visited a winery-based tasting room in 2024. In our 2022 study, that figure was 3,682,750, or approximately 12.3 percent growth. We estimated that, on average, 75 percent of a group of four would visit a winery (for every three adults 21 and over, there would be one child). Per Dean Runyan Associates' data in 2024, this yields \$276.74 per person per day, totaling \$860.97 million in revenue from wine-industry tourism, adjusted for tasting-room sales. The blend of our survey's data on tasting-room visitors, Dean Runyan and Travel Oregon's data about Oregon's visitors generally, Community Benchmark tasting room visits and spending, and tasting-room sales volume from the University of Oregon helped generate our estimates:

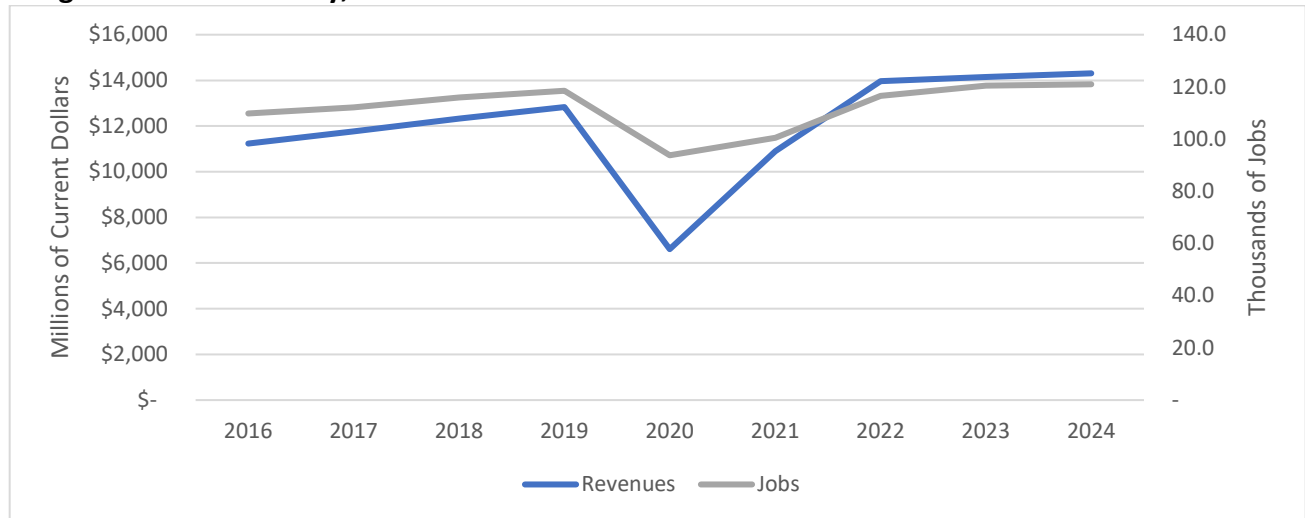
- Residents of Oregon who traveled within Oregon, visited wineries, or had their incomes affected by the core wine industry's income growth and job support are counted in our indirect and induced impacts.
- This spending supported over 9,109 jobs, paying over \$329.1 million in wages across Oregon:
 - Regional spending by visitors to Oregon's wineries was concentrated in five

major counties, as in past editions of this study: Yamhill, Hood River, Jackson, Marion, and Washington;

- The proportion of total spending in major categories is also critical in helping determine our final results on the economic impact of travel.

It is important to recognize that these data are not adjusted for inflation. Visitors are paying more and generating more aggregate revenue through a combination of experiences and higher average prices. Jobs and wages have increased as part of the general recovery of visitor-supporting industries since 2020 (the pandemic shock). Figure 5 shows their estimates of travel spending and the number of jobs supporting visitors. These data provide a way to consider how travel spending has changed since 2016 (we show 2016 to 2024 below), with the pandemic shock clearly evident.

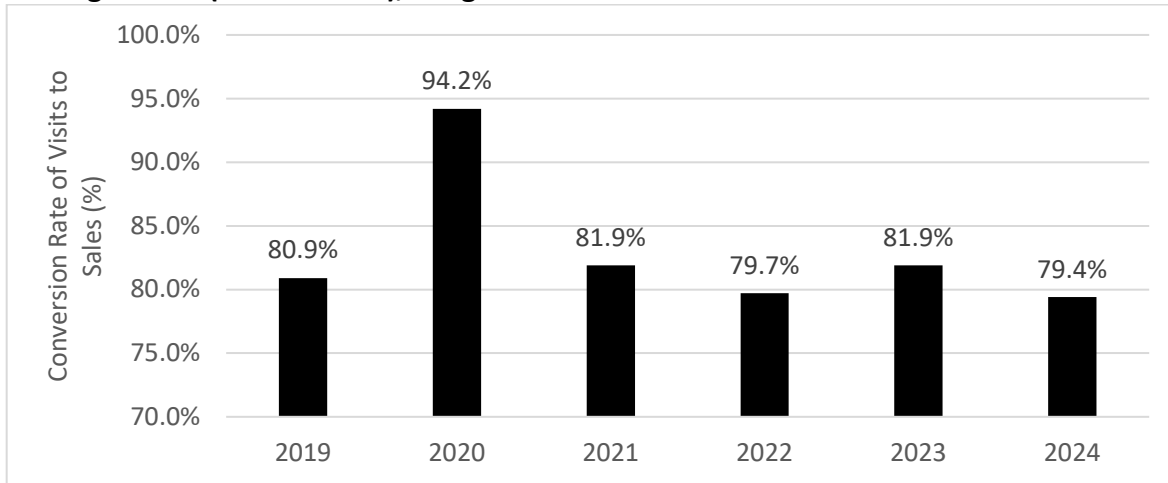
Figure 5: Business Revenues (Millions of Current Dollars) and Jobs (Thousands of Jobs) Estimates, Oregon Tourism Industry, 2016 to 2024



Source: Dean Runyan Associates, The Economic Impact of Travel for Oregon, 2024 (preliminary)

Monitoring how winery visitors spend is our final stop in this tourism-focused section. The Oregon Wine Board (OWB) is partnering with Community Benchmark (see <https://communitybenchmark.com/> for more), which has 112 tasting rooms at wineries surveyed in its sample since 2019. Figures 6 and 7 show two perspectives on the Community Benchmark data for Oregon wineries from 2019 to 2024. Community Benchmark data from 2024 provides metrics to watch for a link between tourism and tasting room sales. The conversion rate is much like a tasting room sales efficiency score: it measures the probability that a tasting room visitor becomes a wine buyer at the tasting facility. Figure 6 shows their data on conversions from 2019 to 2024. Community Benchmark clients in Oregon represent approximately 60 percent of total direct-to-consumer sales.

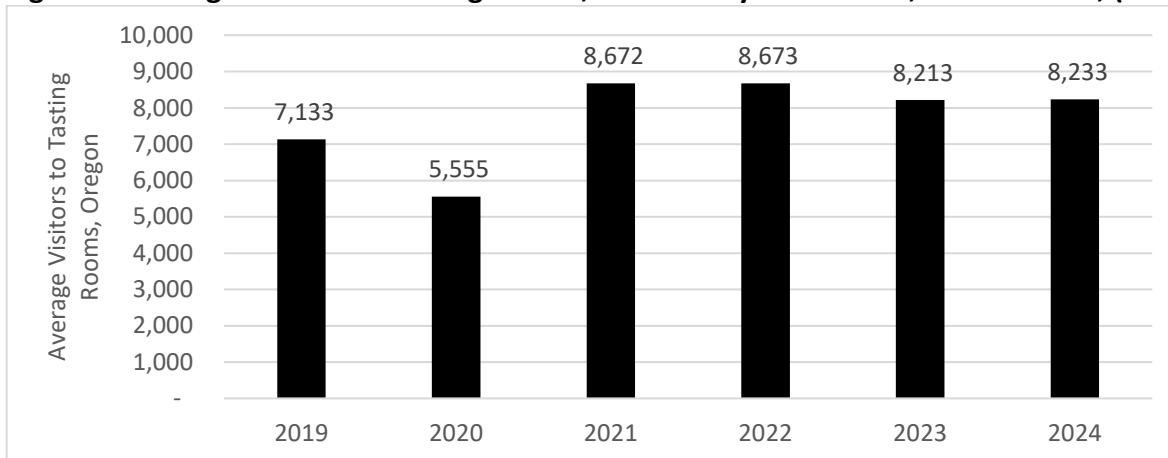
Figure 6: Conversion Rates of Visitors to Sales, Community Benchmark, 2019 to 2024, % of Visitors to Tasting Rooms (112 wineries), Oregon



Source: Community Benchmark via Oregon Wine Board

Figure 7 shows the average number of visitors to tasting rooms from Community Benchmark’s sample. This is also an important metric to monitor. A major concern is the link between overall visitation and tasting room success; the synergy among statewide marketing, wine club, and tasting room sales and expansion; and competition for visitor dollars once visitors arrive in Oregon’s wine areas, which may affect spending, wine-club enrollments, and retention in 2025 and beyond.

Figure 7: Average Visitors to Tasting Rooms, Community Benchmark, 2019 to 2024, (112 wineries)



Source: Community Benchmark via Oregon Wine Board

The long-term challenge is a shifting demographic toward a less mobile but core wine-drinking audience, and younger cohorts of travelers who are and remain attracted to making wineries part of their visits to Oregon. The tasting-room conversion and volume data helped our final analysis on overall spending by Oregon visitors who also visited wineries.

Direct Economic Impacts Review: Jobs and Wages

Table 6 presents the “direct” economic impact figures for employment and wages based on the core industries described above. The production and sale of wine require employment in vineyards, wineries, distribution, retail, and restaurants. For 2024, the direct employment impacts are at least 15,490 jobs within the state of Oregon and generate over \$610 million in gross wages and salaries. For vineyard employment, the average annual salary is \$43,712 for agricultural-style jobs; for winery employment, \$48,238 in manufacturing-style jobs; for distribution employment, \$68,405.

Table 6: Wine Industry Direct Employment, 2022 and 2024

					2022-24	2022-24
Industry	Employment (Empl) 2022	Wages 2022	Employment (Empl) 2024	Wages 2024	% Change Empl	% Change Wages
Vineyard	1,660	\$61,710,500	1,584	\$69,240,000	-4.6%	12.2%
Winery	3,977	\$198,507,000	4,146	\$199,996,000	4.2%	0.8%
Distribution/Wholesale	401	\$26,031,900	339	\$23,189,300	-15.5%	-10.9%
Off-premise Retail	3,500	\$109,419,800	3,511	\$127,232,900	0.3%	16.3%
Eating & drinking places	5,794	\$154,876,300	5,918	\$190,987,400	2.1%	23.3%
Totals	15,332	\$545,060,100	15,498	\$610,645,600	1.1%	12.0%

Sources: Bureau of Labor Statistics, IMPLAN® EFA, and Full Glass Research

In all cases, wages are rising due to labor-market conditions of slow supply growth and rising demand in 2024 as recovery and expansion from the pandemic recession continued. For vineyards, annual wages and salaries per worker increased by nearly \$6,550 on average, while winery worker wages fell on average by approximately \$1,700 per year. Distribution wages rose by nearly \$3,480 per worker as continued growth in trucking demand for home and business deliveries reduced the available workforce and increased wages.

Likely, the annual salaries of full-time vineyard and winery employees are significantly underestimated. The BLS statistics do not include owners of businesses not on the payroll, nor other non-salaried family members. For certain agricultural businesses, these can be a significant number of individuals and dollars, especially in Oregon, with its many small family-owned wineries and vineyards. Wholesale and retail employment impacts are modeled based on wine sales vs. total industry revenues for those industries. Due to the seasonal and overlapping nature of winery and vineyard jobs, the use of vineyard management companies, and the nature of BLS data for these professions, it is highly likely that the BLS numbers are underestimates (see Appendix 2 for more details).

Allied Industries: Vineyards and Wineries

We have analyzed several industries related to the wine industry, given its presence. For example, vineyard and winery development, design, and maintenance businesses and jobs would not exist if grape vineyards and wineries were not in Oregon at a scale that supported them. Furthermore, vineyard development can take two to five years from raw land to a viable harvest, suggesting that income is generated by allied industries before vineyard owners or wineries generate subsequent revenues.

For other industries, wineries' revenues are more tied to the cost of goods sold (e.g., tanks, trucking, warehousing) or to administrative and marketing costs (e.g., printing and professional services). These lines of business are also supported because the wine industry in Oregon has sufficient scale for allied industries to develop specific lines of business and investments that serve the wine industry directly. We used IMPLAN® and changes from the 2022 data in production, acreage, income, jobs, and wages to estimate the 2024 effects on these industries specifically. Table 7 shows results in summary form; these industries generated an additional \$24.2 million in business revenues (+9.7 percent from 2022):

Table 7: Allied Industry Business Revenue Summary, Wine Industry Impact, 2022 and 2024

Industry	Direct Impact 2022	Direct Impact 2024
Vineyard Development	\$39,719,700	\$43,308,200
Vineyard Maintenance and Equipment	\$77,640,000	\$80,933,000
Winery Maintenance, equipment, tanks, infrastructure	\$58,339,500	\$61,557,900
Glass, corks, closures, packaging	\$12,283,100	\$14,833,100
Trucking, Shipping, Warehousing	\$33,495,200	\$45,103,800
Professional Services - banking, insurance, accounting, consulting, etc.	\$21,746,700	\$21,088,000
Printing (including wine labels)	\$6,062,200	\$6,586,600
Totals	\$249,286,400	\$273,410,600

Note: We have removed “Winery and Agricultural Inputs” from past reports, now generally counted as indirect.

Taxes & Regulation

The wine industry, based on current legislation and how it creates taxable transactions (outside retail sales), invests in properties, and generates overnight stays from visits to wine-related areas, supports significant tax revenue at the federal, state, and local levels of government. In Oregon, tax dollars are raised through excise taxes, income taxes, estate and gift taxes, payroll taxes, property taxes, and other business taxes and fees, such as occupational taxes, licenses, and import duties; Oregon does not have a sales tax on taxable retail sales. Wine production and sales are licensed and regulated at the state and federal levels. Vineyards and wineries pay

for permits, inspections, local ordinances compliance, and other activities that generate fees and other income at the county and city levels.

Some changes to the Oregon Tax Code between 2022 and 2024 affected our results in Table 9. Generally, key tax rates have fallen, as reflected in Table 9, with economic activity in Oregon’s wine industry at a similar level to 2022. Examples include:

- **Corporate Tax Rate:** The top marginal corporate tax rate decreased from 5.9% in 2022 to 5.3% on Jan. 1, 2023, and further to 4.8% on Jan. 1, 2024;
- **Personal Income Tax:** The top marginal personal income tax rate was 4.9% in 2022, with further adjustments bringing it to 4.4% in 2024;
- **Unemployment Insurance:** The unemployment insurance tax rate was reduced to 1.9% (from 2.9%), with a \$7,000 wage base (based on trust fund levels).

An excise tax is a type of sales tax on a specific commodity, in this context, wine. Employers in the industry also pay payroll taxes to federal and state governments for their employees, along with a percentage of their net income in the form of income taxes, which are paid at the corporate level or passed through to individuals, depending on the ownership structure. We have not included estate or county taxes in the tax revenue summary below. Oregon has no state sales tax. Property tax is a local government tax on property ownership. Property taxes are shown in Appendix 3 – County and Regional Impacts, since local governments primarily use them.

Table 8: Oregon State Taxes, Licenses, and Other Fees Directly Related to Wine, 2019, 2022, and 2024

Tax Type	Estimated 2019	Estimated 2022	Estimated 2024
Employment Taxes	\$6,227,100	\$5,525,400	\$ 7,267,000
Corporate Income	\$11,928,200	\$17,140,700	\$ 18,067,900
Personal Income	\$72,945,800	\$64,230,400	\$ 49,124,600
Other Taxes and Fees	\$68,055,300	\$85,907,800	\$ 84,990,800
Property Taxes	\$75,083,400	\$92,094,400	\$ 111,320,100
Total	\$234,239,900	\$264,898,700	\$ 270,770,400

Source: Oregon Department of Revenue, OLCC, FGR, and IMPLAN®, Oregon Transient Lodging Tax (TLT), as related to winery visits, is included in “Other taxes and Fees” as is Oregon’s privilege tax on wine production.

We are now ready to examine the economic impact estimates by combining the data above.

Total Oregon State Economic Impact

Table 9: Business Revenue Impacts, 2022 and 2024, Oregon Wine Industry

Revenue	Total Oregon 2022	Total Oregon 2024
Wine Grape Sales	\$330,026,000	\$329,109,000
Winery Sales	\$956,424,300	\$913,268,100
Distributor Sales	\$590,031,400	\$595,952,300
Retailers and Restaurant Wine Sales	\$1,085,308,500	\$1,097,492,100
Tourism	\$758,466,800	\$860,975,100
Vineyard Development	\$39,719,700	\$43,308,200
Vineyard Maintenance and Equipment	\$77,640,000	\$80,933,000
Winery Maintenance, equipment, tanks, infrastructure	\$58,339,500	\$61,557,900
Tax Revenues (includes estimation for property taxes)	\$264,898,700	\$270,770,400
Wine Industry Indirect (Services and Suppliers) - IMPLAN	\$1,183,898,600	\$1,321,398,000
Wine Industry Induced Revenues - IMPLAN	\$1,132,629,300	\$1,165,136,200
Total Revenues	\$6,477,382,800	\$6,739,900,300

Table 10: Wage and Total Economic Impacts, 2022 and 2024, Oregon Wine Industry

Wages	Total Oregon 2022	Total Oregon 2024
Vineyard Employees	\$61,710,500	\$69,240,000
Winery Employees	\$198,507,000	\$199,996,000
Distributor Employees	\$26,016,100	\$23,173,000
Tourism Employees	\$318,636,200	\$329,161,400
Retailers' Employees (wine-related)	\$109,419,800	\$128,523,200
On-premise employees (wine-related)	\$154,876,300	\$190,987,400
Wine Industry Indirect (Services and Suppliers) - IMPLAN	\$451,145,000	\$458,364,900
Wine Industry Induced - IMPLAN	\$379,266,500	\$348,048,100
Total Wages	\$1,699,577,400	\$1,747,494,000
TOTAL IMPACT (Revenue + Wages)	\$8,176,960,200	\$8,487,394,300

Table 11: Employment Impacts, 2022 and 2024, Oregon Wine Industry

Employment	Total Oregon 2022	Total Oregon 2024
Vineyard Employees	1,660	1,584
Winery Employees	3,977	4,146
Distributor Employees	401	339
Tourism Employees	8,806	9,109
Retailers' employees (wine-related)	3,500	3,546
On-premise employees (wine-related)	5,794	5,918
Wine Industry Indirect (Services and Suppliers) - IMPLAN	8,626	7,408
Wine Industry Induced - IMPLAN	6,673	6,037
Total Employment	39,437	38,088

Measuring Net Economic Effects

We calculated total revenues, jobs supported, and wages for every major sector impacted by vineyard harvests, wine production, and sales. The net economic effects summarize the economic impact of the wine industry’s supply chain on Oregon’s economy. These data help policymakers and industry advocates better understand the size and scope of policy decisions that support and generate jobs and business revenues annually.

Measuring **net economic effects** recognizes supply chain links and overlaps. For example, wineries may also be vineyards. Harvested grapes are transferred costs from one part of a business to another rather than a market transaction. As such, winery revenues capture those “sales” once wine is bottled and sold. Further, it is important to think of winery production as creating costs, while inventoried wine from previous harvests generates current revenues. As bottled wine moves from one link in the supply chain to the next, each link “adds value” to the inputs purchased (net economic effects or “domestic product”) but does not generate the entire value of revenues created. For example:

- The revenue from grape sales is also part of the winery’s revenues.
- Distributor revenues include the revenues of the wineries from which wine is purchased;
- Direct sales to restaurants and retail, as well as buying from wholesalers, include the revenue from those links in the supply chain.

Policymakers comparing alternative policies with industry-wide effects, or assessing the economic contributions of unrelated industries (such as construction), might find that a similar methodology yields a preferred net economic impact. Figure 13 shows such data for the wine industry, comparing this study to the previous two editions.

Table 12: Net Economic Effects – Value-Added Revenues Only

Industry Tier	2019	2022	2024
Grape Grower Revenues	\$144,420,600	\$158,412,500	\$135,106,900
Net Winery Direct Impact	\$544,045,100	\$626,398,300	\$713,904,100
Net Wholesale Tier Direct Impact	\$405,843,700	\$421,901,900	\$239,707,500
Net Retail Tier Direct Impact	\$821,324,600	\$888,787,400	\$568,782,200
Subtotal	\$1,915,634,000	\$2,095,500,100	\$1,657,500,700
Indirect & Induced Net Impact (IMPLAN)	\$618,189,600	\$591,248,400	\$448,766,400
Total Net Effect	\$2,533,823,600	\$2,686,748,500	\$2,106,267,100

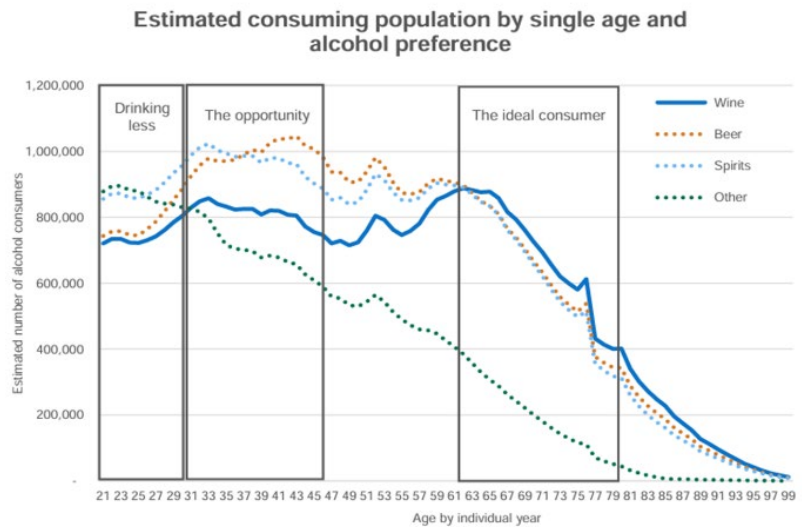
For 2024, margin reductions, shifts in off-premise pricing to reduce inventory levels, lower tons harvested, lower sales volumes of Oregon wine, and reduced tasting room sales all contributed to lower net revenues from core wine industry activities. Changes continue to drive policy shifts and raise concerns for the wine industry worldwide.

To 2030: Shifting Markets and Expectations

In parts of this year’s report, we allude to problems facing Oregon’s wine industry. In previous editions of this study, we considered the wine industry’s future tactically: DTC sales had to slow, shifting emphasis toward reclaiming three-tier channels from distribution to retail, and the core wine drinker was aging. The tourism industry has become a larger external component of wine-industry success, serving as a channel for DTC sales (tasting room and wine club sales), winery events, and additional marketing based on visitors’ experiences at the winery. What 2024 and 2025 brought the industry was a confluence of multiple factors that created more headwinds than tailwinds. In 2024, yields

(tons harvested per acre of bearing acres) increased from 2023, but the number of harvested acres fell. The 2025 data likely shows a continued reduction in crop value and winery sales revenue, followed by slower growth, if not a downturn, in distribution and retail.

Tourism may remain somewhat stable. However, getting younger, mobile consumers to see wine as part of their lives and Oregon as a place to visit must remain a focus of winery and destination marketing strategies. As this graphic from Silicon Valley Bank's State of the Industry 2026 report suggests, there is a demographic shift that shows the decline in classic consumer segments. These shifts pose a challenge to sales from tasting rooms to grocery stores if the industry does not harness the potential opportunities brought by younger cohorts (travel may be that portal).¹³



Source: SVB analysis and estimates

Our survey asked vineyard and winery leaders for reflections on the future. Most were concerned about lower demand for Oregon wine due to economic conditions, oversupply of both bottled wine and grapes, declines in wine club memberships, lower visitation by travelers, and shifting demographics, tastes, and preferences affecting wine demand more generally.

Changes in federal policy regarding both tariffs (taxes on imported goods that act like a sales tax) and immigration have shifted international trade, travel, and the availability of labor for the wine industry from dirt to glass. Volatility in bottled wine pricing and availability, as well as

Changes in federal policy regarding both tariffs (taxes on imported goods that act like a sales tax) and immigration have shifted international trade, travel, and the availability of labor for the wine industry from dirt to glass. Volatility in bottled wine pricing and availability, as well as

¹³ See <https://www.svb.com/trends-insights/reports/wine-report/> for the latest Silicon Valley Bank report on wine.

international visitors reducing their spending in the United States, likely act as additional headwinds for Oregon's wineries. Tariffs are a regressive tax on both smaller wineries and this industry's lower-wage workers. Such pressures could lead to more mergers, acquisitions, or business closures as well as rising wage demands and fewer labor resources.

Opportunities exist. In recent work and data presented at the Oregon Wine Symposium in 2026 on the wine industry, the Wine Market Council provided practical considerations for the future.¹⁴ In the 2026 version of this report, we will likely see some downward market momentum, but also likely a slight turn toward growth to 2030. The following pursuits may help tell why such growth will take place:

- A focus on marketing to consumer groups that wineries have not targeted in the past;
- Offerings of distinctive or unique wine or wine-based products that appeal to a new and expanding consumer type, targeting distribution and communication to new consumers; and
- Wineries becoming more tactically effective in distribution, consumer communications, or hospitality/customer relations.

Some fundamental challenges for Oregon's wine industry include:

- 1) A shifting consumer base, part 1: "baby boomers" (those born between 1946 and 1964), the first generation to adopt classic table wine widely as a lifestyle choice, are now curtailing consumption. Alcohol consumption is falling more generally among this population cohort. This population is also an important wine club constituent; many wine club enthusiasts have accumulated wine and are now dropping out of clubs.
- 2) A shifting consumer base, part 2: Younger consumers do drink wine; Millennials (those born between 1981 and 1996) are the largest demographic segment of wine consumers as of 2025. However, their purchases are more diversified across drink categories than those of baby boomers or Generation X consumers (born between 1965 and 1980), and wine is losing share among Millennials, especially for casual and social occasions. Wellness is also an important factor for Millennials, with a greater focus on diet choices and mental health than on cardiovascular health or perceived cancer risk.
- 3) Direct-to-Consumer (DTC) sales have declined for multiple reasons. The number of tasting rooms has grown faster than the number of tourists. The core visitor audience from past decades (baby boomers and older) is traveling less and visiting wineries less often.
- 4) While most wine regions currently have excess supply relative to demand, Oregon is particularly acute because a combination of factors in 2020-2021 (wildfires and the pandemic, for example) obscured oversupply issues and created optimism based on sales expectations during the pandemic. Overplanting continued, and acreage moving into production over the next two years exceeds expected needs (see Figure 2b).

¹⁴ See <https://winemarketcouncil.com/> for more information.

Appendix 1 – Impact of Oregon Wineries & Vineyards Alone

The complete report describes the effects of wine production and sales throughout the economy, from input and service suppliers to retail sales, for all types of wine. A substantial portion of retail and wholesale revenue and wage effects is attributable to the sales of wine imported into Oregon, whether from other states or countries. This appendix isolates the economic impact of just Oregon-produced wine and grapes on the state economy. Table A-1 enumerates revenue, wages, and jobs that are derived solely from Oregon wine grapes and wine, without the impact of wine imported into the state.

Table A-1: Core Winery Supply Chain Impacts, 2024 Estimates

Sector	Revenue	Wages	Jobs
Vineyards	\$329,109,000	\$69,240,000	1,584
Wineries	\$913,268,100	\$199,996,000	4,146
Wholesalers	\$119,190,500	\$4,634,600	68
Retail tier	\$219,498,400	\$25,704,600	1,822
Tourism	\$860,975,100	\$329,161,400	9,109
Suppliers (indirect)	\$138,084,500	\$66,194,100	1,225
Induced	\$555,261,500	\$186,575,700	2,204
Oregon 2024	\$3,135,387,100	\$881,506,400	20,158
Oregon 2022	\$2,914,914,800	\$840,571,000	20,042

An important note: although Oregon wineries represent a minority of total wine revenues in Oregon, they have an economic impact far beyond their share of retail sales or consumer purchases. When it comes to direct impacts, although Oregon wine accounts for only 13% of sales volume, it is responsible for 34% of the revenue impact and 69% of the employment impact. This is large due to the high value added and labor-intensive nature of the transformation from raw grapes to finished packaged wine, which sells at higher-than-average prices because of Oregon’s reputation for quality.

Appendix 2 – Under-reporting of Jobs & Wages in Official BLS Statistics

The jobs and wages of those employed directly by the wine industry are based on data from the Bureau of Labor Statistics (BLS). However, the BLS data for vineyard and winery jobs are certainly an underestimate, due to the following factors:

- Reporting of wages and jobs to the BLS is based on participation in the unemployment insurance program. Vineyards or wineries that are too small to meet the required payroll threshold, use mostly contracted labor, or mainly family members, generally do not report to the BLS. In addition, vineyard management and some agriculture companies are classified into different sectors.
- Seasonal and part-time work in the industry may cause problems in estimating the number of full-time equivalent jobs when reporting to the BLS. BLS also reduces salary and wage estimates because the BLS does not distinguish between part-time and full-time jobs in monthly wage estimates; a part-time wage is divided among full-time jobs. Historically, industry salary surveys have been lower than official data.
- Many wineries crush or bottle at other facilities; production jobs in the BLS data may not be categorized as such jobs for “Wineries” but under “Other Manufacturing”.
- Wineries that own vineyards may register workers as working for “wineries” rather than “vineyard” workers.

Appendix 3 - County and Regional Impacts

Appendix 3 shows the Oregon wine industry’s economic impact allocated by wine-growing region and by county. The method used to allocate these impacts by region and county varies, depending on what is being measured. In some cases (e.g., winery employment), the data is directly available at the county level from the federal Bureau of Labor Statistics. In other cases, state-level data has been allocated based on winery production, vineyard acreage, or other county-level data. IMPLAN® also serves as a data source, as the economic impact models for each county include estimates of income, wages, and employment for wineries, vineyards, and allied industries.

Property taxes have been included because they are a major source of local government revenue. Also, the employment impact for distributors and some professional services has been allocated based on estimated business revenue, rather than actual workplace or residency. Finally, the regional definitions exclude some counties. Because of differences in methodology, the regional and county numbers do not match the corresponding state totals in some cases. These data are intended to be used independently of the broader estimates in this report. Table A-2 shows the three major wine regions of Oregon, and Table A-3 shows the county allocation.

Table A-2: Wine Industry Economic Impact by Region 2024

Region	Wine-Related Revenue (\$)*	Related Wages (\$)*	Related Jobs	Indirect & Induced Jobs	Property Taxes
Willamette Valley	\$2,469,614,500	\$644,953,200	15,158	8,269	\$80,275,000
Southern Oregon	\$443,703,800	\$93,234,000	3,694	2,015	\$12,946,500
Columbia Valley	\$767,634,000	\$171,237,400	4,914	2,682	\$14,928,500
All other	\$115,844,600	\$31,656,400	877	479	\$3,170,100
Oregon 2024	\$3,796,796,900	\$941,081,000	24,643	13,445	\$111,320,100
Oregon 2022	\$3,894,256,400	\$863,696,100	24,138	15,300	\$92,094,600
Oregon 2019	\$3,669,248,500	\$727,921,600	24,047	16,001	\$71,060,300

Note: * Wholesale & Retail revenues from all wines of all types/sources

Table A-3: Wine Industry Economic Impact by County, 2024

Counties	Wine-Related Revenue (\$)*	Related Wages (\$)*	Related Jobs*	Indirect & Induced Jobs	Property Taxes
Baker	\$1,362,400	\$358,700	6	3	\$20,200
Benton	\$110,676,000	\$19,124,300	784	428	\$3,907,200
Clackamas	\$95,152,800	\$20,563,900	611	334	\$2,235,200
Clatsop	\$5,881,800	\$1,033,500	49	27	\$201,300
Columbia	\$2,324,300	\$492,800	10	6	\$34,400
Coos	\$16,760,700	\$13,782,200	161	88	\$295,500
Crook	\$1,530,200	\$131,900	6	3	\$22,700
Curry	\$16,999,700	\$3,730,500	133	73	\$251,800
Deschutes	\$43,447,200	\$6,737,600	350	191	\$1,680,700
Douglas	\$111,037,900	\$20,494,000	968	528	\$3,199,300
Gilliam	\$1,486,100	\$808,900	9	5	\$48,000
Grant	\$3,428,600	\$724,100	25	14	\$92,900
Harney	\$38,000	\$18,800	-	-	\$600
Hood River	\$404,125,100	\$89,718,500	2,929	1,598	\$7,855,500
Jackson	\$282,521,500	\$56,628,700	2,399	1,309	\$8,108,300
Jefferson	\$3,418,300	\$445,700	23	13	\$119,800
Josephine	\$50,144,400	\$16,111,300	327	178	\$1,638,900
Klamath	\$6,274,400	\$1,087,500	45	25	\$194,400
Lake	\$2,390,900	\$407,900	13	7	\$65,500
Lane	\$165,042,800	\$46,233,500	1,091	595	\$5,761,900
Lincoln	\$1,963,000	\$510,200	16	9	\$41,900
Linn	\$53,245,200	\$7,728,700	171	93	\$885,800
Malheur	\$684,100	\$138,400	2	1	\$10,100
Marion	\$373,938,800	\$91,782,100	1,880	1,026	\$10,087,600
Morrow	\$2,321,300	\$1,213,600	4	2	\$34,400
Multnomah	\$119,483,300	\$34,350,600	828	452	\$4,273,100
Polk	\$242,752,800	\$46,491,500	1,531	835	\$7,437,100
Sherman	\$2,011,700	\$1,081,100	11	6	\$55,100
Tillamook	\$908,500	\$404,300	6	3	\$13,500
Umatilla	\$109,051,800	\$28,483,600	567	310	\$2,602,300
Union	\$4,177,000	\$251,300	10	5	\$61,900
Wallowa	\$2,728,200	\$1,128,200	10	6	\$40,400
Wasco	\$248,638,000	\$49,931,700	1,394	761	\$4,333,300
Washington	\$294,891,500	\$69,833,200	1,948	1,063	\$9,121,700
Wheeler	\$1,527,300	\$272,800	10	5	\$22,600
Yamhill	\$1,014,431,300	\$308,845,400	6,314	3,443	\$36,565,400
Oregon	\$3,796,796,600	\$941,081,000	24,643	13,445	\$111,320,100

Note: *includes wholesale & retail impact from all wines of all types/sources, plus tourism

Source data and methods for business revenue impacts:

- Wine Grape Sales: University of Oregon Winery and Vineyard Reports (2022 to 2024)
- Winery Sales: University of Oregon Winery and Vineyard Reports (2022 to 2024)
- Distributors' Sales (in Oregon): University of Oregon Winery and Vineyard Reports (2022 to 2024) and Oregon Liquor Control Commission (OLCC), SipSource, and Full Glass Research (FGR) Distribution Model
- Tasting room conversions and winery visitation: Community Benchmark data (<https://communitybenchmark.com/>) provided by Oregon Wine Board
- Retailers and Restaurant Wine Sales (in Oregon): FGR Distribution Model and Nielsen
- Tourism: Dean Runyan Associations and University of Oregon Winery and Vineyard Reports (2022 to 2024), FGR Tourism Model, Travel Oregon <https://www.travelstats.com/barometer/oregon>
- Vineyard Development: IMPLAN®
- Vineyard Maintenance and equipment: IMPLAN®
- Winery Maintenance, equipment, tanks, infrastructure: IMPLAN®
- Winery & Agricultural inputs: IMPLAN®
- Glass, corks, closures, packaging: IMPLAN®
- Trucking, Shipping, Warehousing: IMPLAN®
- Professional Services - banking, insurance, accounting, consulting, etc.: IMPLAN®
- Printing (including wine labels): IMPLAN®
- Tax Revenues (includes estimation for property taxes): Estimated from business revenues above by the IMPLAN® model
- Government fees and direct funding: Estimated business revenues as estimated by the IMPLAN® model
- Other Indirect effects: Estimated from business revenues above by the IMPLAN® model
- Wine Industry Induced Revenues: Estimated from business revenues above by the IMPLAN® model

Employment and wage data for all line-item industries come from the Bureau of Labor Statistics and the IMPLAN® estimates for indirect and induced industries. Survey data on costs of goods sold, employment levels, and revenues for vineyards and wineries provided additional data and a second source to corroborate IMPLAN® estimates for 2024, as needed.

Confidential interviews with industry insiders by Full Glass Research and EFA. Special acknowledgments go to Full Glass Research for foundational help with this report, as well as special thanks to the staff and partners of the Oregon Wine Board. We would also like to thank the University of Oregon, Oregon Wine Board, and Community Benchmark for data access and more perspective on Oregon's tasting rooms and sales channels.

About Economic Forensics and Analytics, Inc. (EFA)

Economic Forensics and Analytics, Inc. (EFA) is an independent research and consulting firm located in Sonoma County, California. Since 2000, we've been dedicated to providing clients with customized economic analysis at reasonable costs when compared to our larger, local competitors. We keep overhead low and pass the savings on to you. We serve a wide range of clients in the private and public sectors throughout California. EFA provides clients with economic impact reports to support economic development. For governments and businesses alike, EFA can provide economic impact analysis using the latest data and a proven method for describing the effects of decisions. EFA's president, Robert Eyler, PhD, holds a doctorate in economics from the University of California, Davis. See more at www.econforensics.com.

About Full Glass Research (FGR)

Full Glass Research, founded by Christian Miller in January 2005, is dedicated to consumer, market, and economic research in the wine and food industries. In addition to consulting and research for private and government clients, Full Glass Research also helped found and continues to advise the Wine Opinions national trade and consumer panels. Christian Miller has worked in the wine and food industries since 1983. He earned his undergraduate degree in Economics from Franklin & Marshall College in 1980 and an M.B.A. from Cornell University in 1985, followed by successive research and management positions at Kendall-Jackson and Sebastiani Vineyards. His experience includes working with both small and large companies as a negotiant and brand manager, as well as in operations analysis and market research. Before starting Full Glass Research, he was Director of Research at MKF, a leading CPA/Consultant firm in the wine industry. He was a founding member of the Wine Market Council's Research Committee, and currently co-manages the OIV Wine Marketing Program at the University of California, Davis. Full Glass Research can be reached at www.fullglassresearch.com.

About the Oregon Wine Board

The Oregon Wine Board is a semi-independent state agency that replaced the Oregon Wine Advisory Board when Governor Ted Kulongoski signed House Bill 3442 into law on September 23, 2003. The Board is charged with supporting enological, viticultural, and economic research and promoting grape growing and winemaking in Oregon. The legislation aims to give the state's wine industry greater autonomy and authority to develop, market, and promote Oregon wine. The Oregon Wine Board can be reached at industry.oregonwine.org or info@oregonwine.org.

Thank you to our partners

The Oregon Wine Board would like to thank these state and regional associations for their support in promoting involvement in this research: Central Oregon Winegrowers, Oregon Wine Council, Oregon Winegrowers Association, Rocks District Winegrowers, Rogue Valley Vintners, Rogue Valley Winegrowers Association, Umpqua Valley Winegrowers Association, Walla Walla Valley Wine, and Willamette Valley Wineries Association.