

DISTRICT 3 • SONOMA AND MARIN

SONOMA: READING THE GROUND AHEAD

What years of prices, volume and vineyard value suggest about the ground ahead.



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can carry a bottle.
The vineyard must
carry the rest.”*

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Sonoma

The road west keeps changing its mind. Vineyards give way to pasture, apple trees, redwoods, then the cold Pacific. You can eat oysters near the water, find old Zinfandel farther inland, and stop for tacos before anyone has mentioned a tasting menu. None of it feels arranged for a single kind of visitor. Sonoma works because art doesn’t have to match.

That variety is more than atmosphere. It shapes what can be grown, who can grow it and how the region meets a changing market. The District 3 record asks whether this breadth provides economic shelter—or whether the value carried by Sonoma’s name travels farther than the return to its vineyards.

[READ THE BRIEF →](#)

02 THE PRICE

The higher price that bought less

In 2000, the average reported price for purchased District 3 wine grapes was \$2,039 per ton. By 2025, it was \$2,763. On the invoice, the price went up.

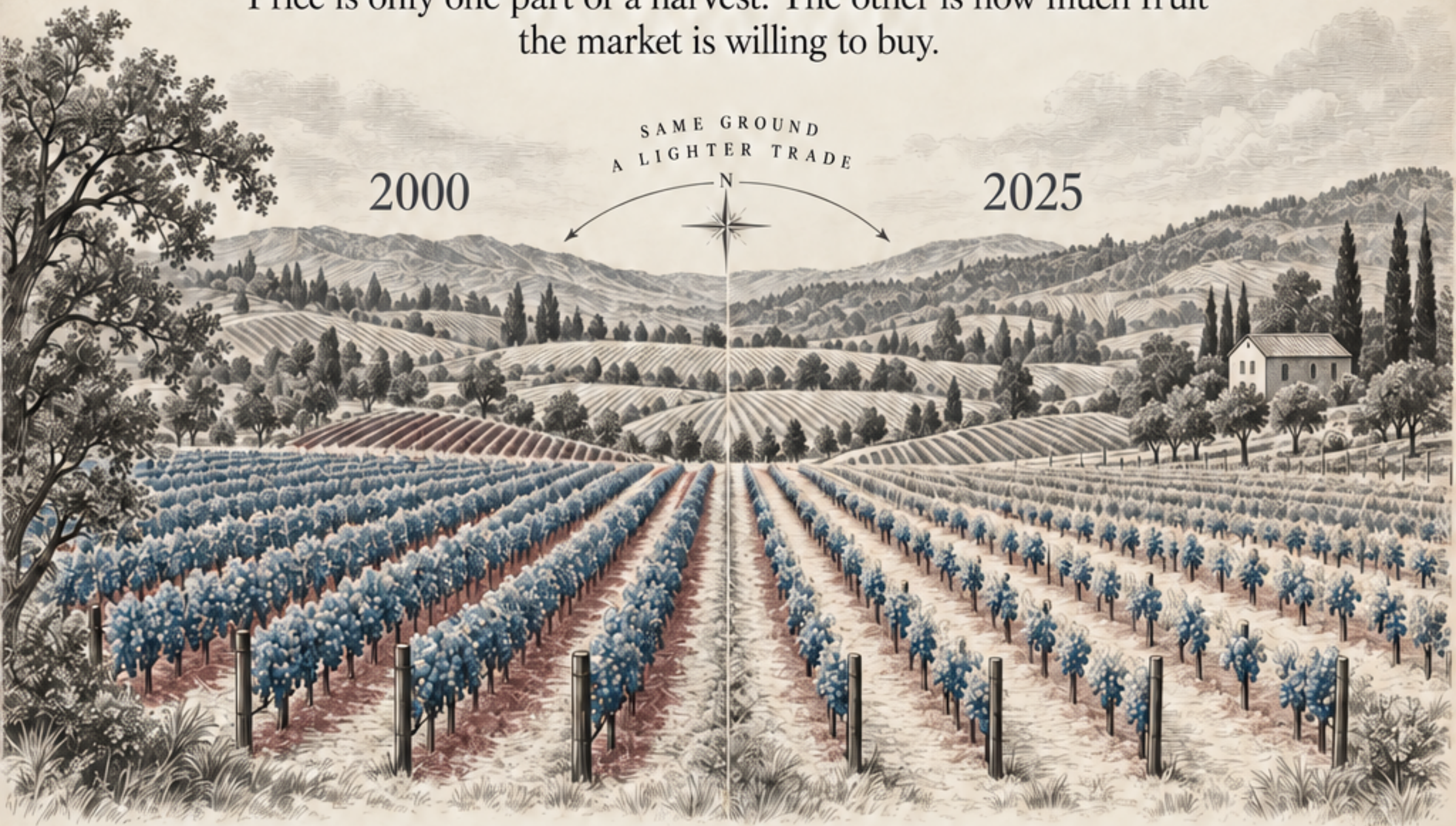
CWMI DISTRICT 3 PRICE RECORD				
YEAR	DESCRIPTION	PRICE PER TON	NOTES	
2000	District 3 wine grapes (purchased)	\$2,039	Reported price	
2025	District 3 wine grapes (purchased)	\$2,763	Reported price	
AFTER ADJUSTING FOR INFLATION, THE 2025 PRICE WAS WORTH 27.8% LESS THAN THE 2000 PRICE.				

The later price carried less purchasing power than the earlier one. This does not describe every variety, contract or vineyard. It does reveal something a nominal price can conceal: more dollars did not necessarily mean more economic shelter.

What, then, was the premium protecting?

Fewer tons. A lighter market.

Price is only one part of a harvest. The other is how much fruit the market is willing to buy.



PURCHASED VOLUME • 11.7% LOWER

REAL PURCHASED-MARKET VALUE • 36.2% LOWER

2000–2025 ENDPOINT COMPARISON

 BLUE MARKS • PURCHASED TONS

 BURGUNDY GROUND • VALUE AFTER INFLATION

WHAT THE MISSING TONS EXPLAIN

The market did not lose 36.2% of its value simply because fewer grapes were purchased. Volume declined 11.7%.
The remaining pressure came from what each ton was worth after inflation. A smaller trade was taking place at a weaker real price.

Less fruit explains part of the decline. The value of the price explains the rest.

This is not the whole Sonoma wine economy. It is the narrower market in which growers offered fruit and buyers purchased it.

How much fruit can leave the market
before the landscape begins to change?

LESS FRUIT
LESS WEIGHT

THE LANDSCAPE
KEEPS THE SCORE

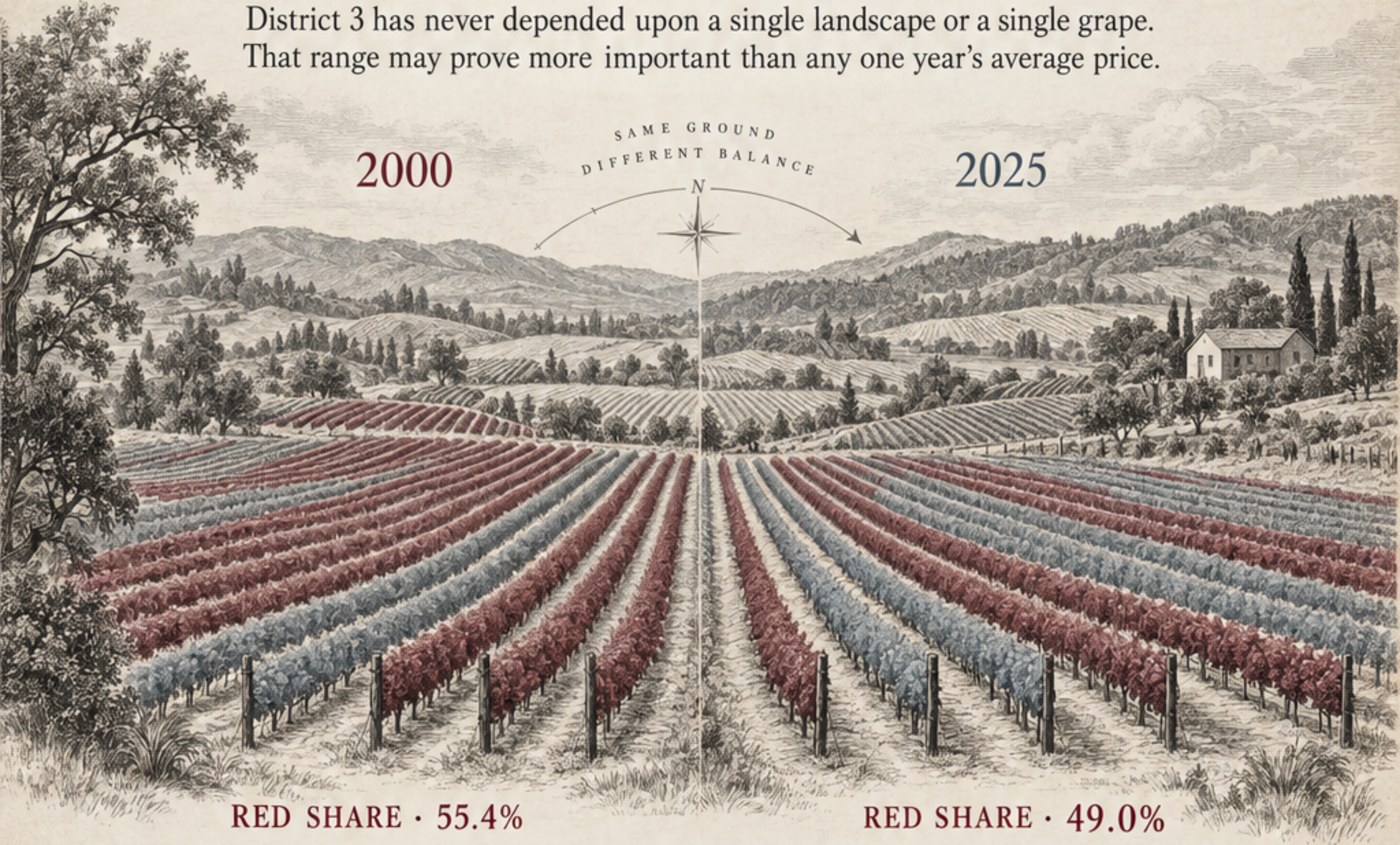
MIX
PLACE
TIME

04 — THE CHANGING MIX

DEMAND MOVES
ROOTS REMAIN

The market turns before the vineyard can.

District 3 has never depended upon a single landscape or a single grape. That range may prove more important than any one year's average price.



Red varieties represented 55.4% of purchased volume in 2000. By 2025, their share had fallen to 49.0%. This is not a wholesale reversal. It is a shift in balance.

The movement deserves attention because plantings cannot turn as quickly as demand. A restaurant can rewrite a wine list in an afternoon. A distributor can reduce an order before lunch. A vineyard lives on a longer clock.

MORE DIRECTIONS, NOT AN EASY ANSWER

Sonoma's advantage may lie in the very quality that makes it difficult to summarize. Coast and inland valley, cool sites and warm ones, familiar varieties and less obvious choices all occupy the same county. That does not guarantee protection from a weaker market. It may give the region more directions in which to move.

*The figures do not tell growers what to plant.
They show where an older arrangement may be losing its certainty.*

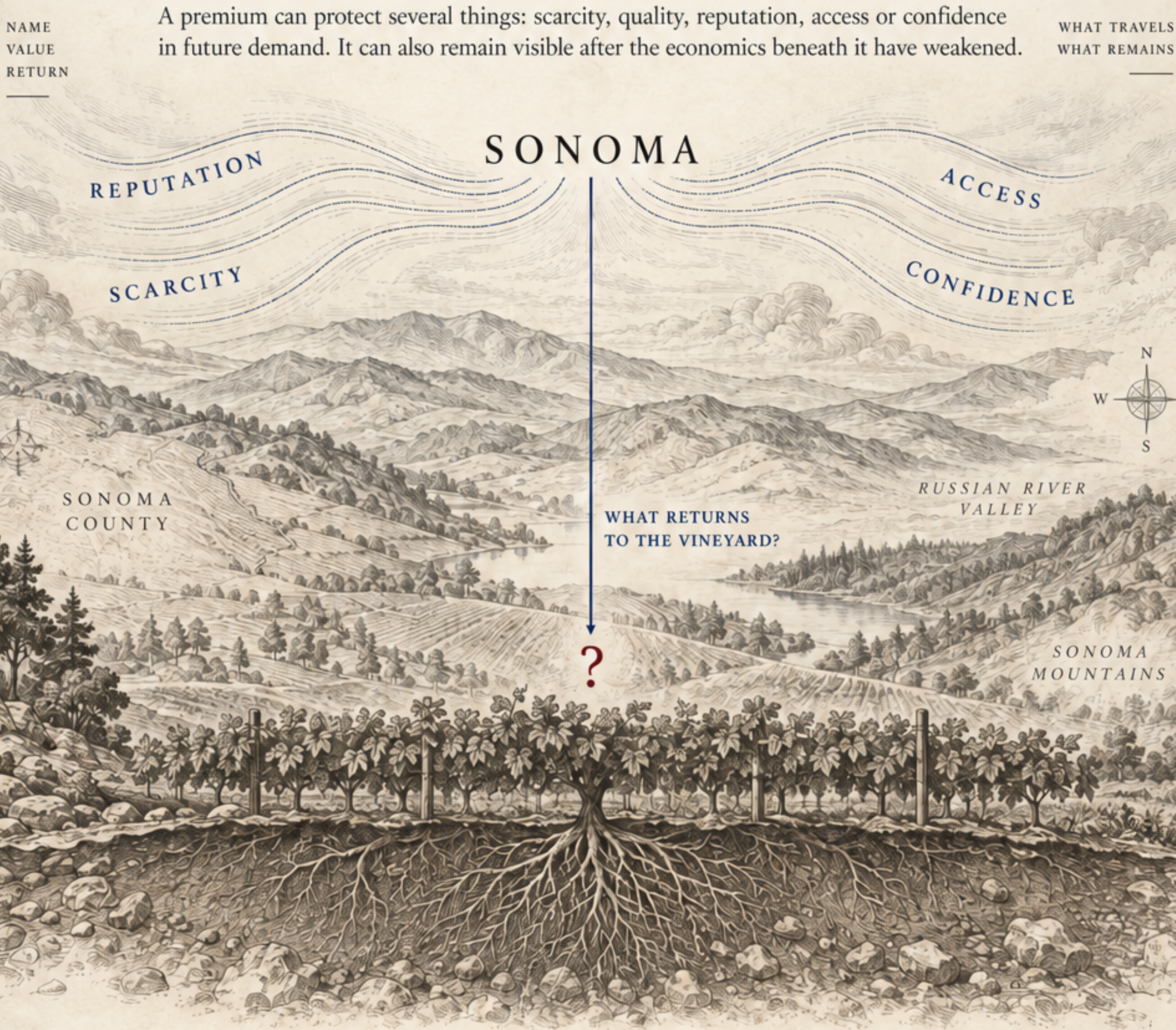
Can variety become economic room to move?

COAST
VALLEY
RANGE

A LONGER
CLOCK

05 — WHAT THE PREMIUM PROTECTS

A name can travel farther than its return.



Sonoma still commands recognition. The question is whether that recognition returns enough value to the vineyard—or whether more of it is being captured later, after the fruit leaves the farm.

The District 3 record cannot answer that question by itself. It can show that the average reported price rose, its inflation-adjusted value declined, fewer purchased tons moved through the market and the total real value of that trade contracted more sharply.

THE UNFINISHED RETURN

The arrow traces the possible path of value from Sonoma’s name back to the vineyard. It stops above the vines because the record cannot establish how much of the regional premium reaches the grower. The question mark represents that missing connection.

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The vineyard must carry the rest.”*

Where does the premium finally settle?

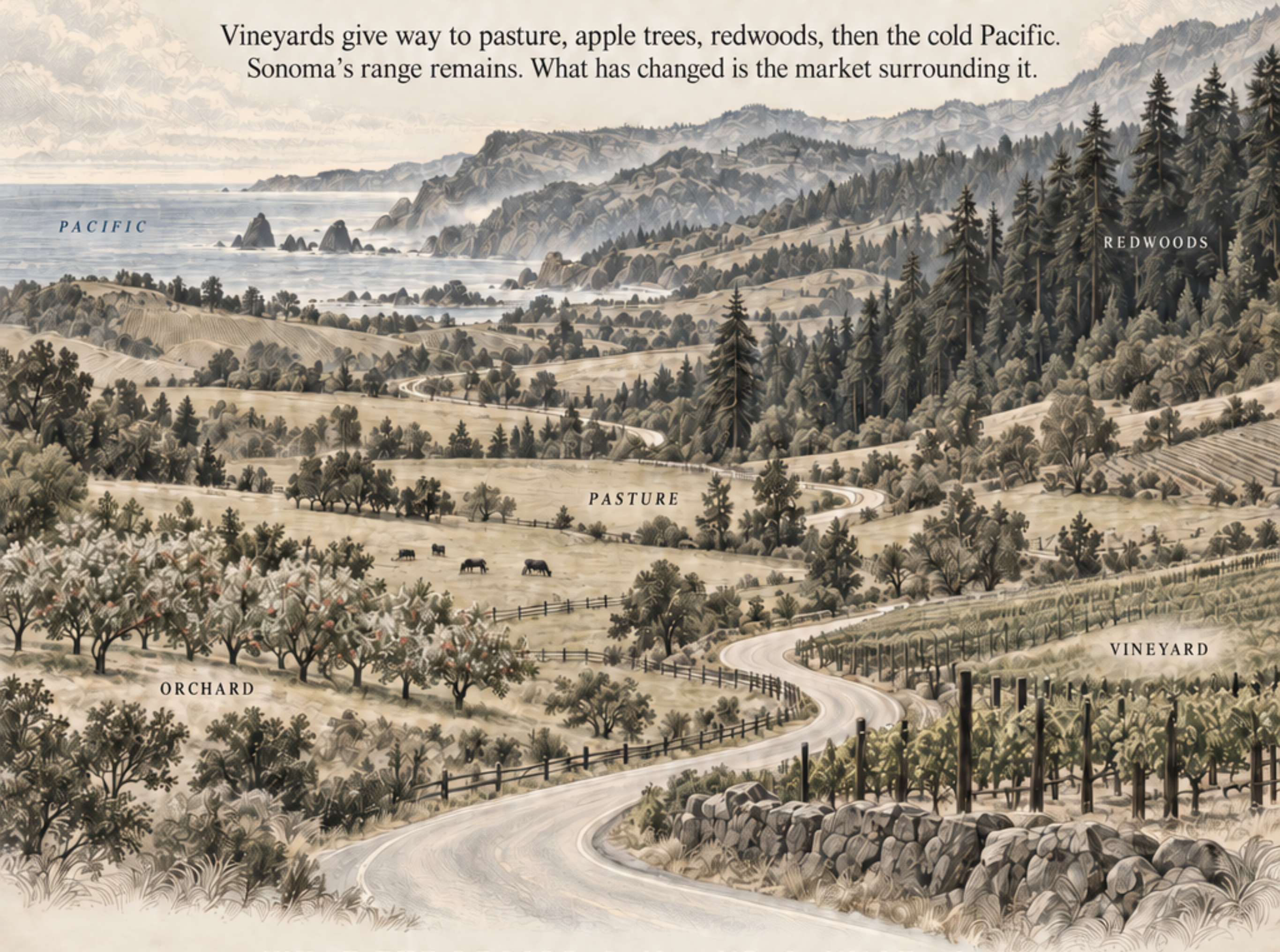
LAND
MARKET
DIRECTION

06 — READING THE GROUND AHEAD

NO SINGLE
ANSWER

THE ROAD WEST STILL KEEPS CHANGING ITS MIND.

Vineyards give way to pasture, apple trees, redwoods, then the cold Pacific.
Sonoma’s range remains. What has changed is the market surrounding it.



WHAT THE RECORD CAN—AND CANNOT—SAY

WHAT IT DEMONSTRATES

From 2000 to 2025, District 3’s purchased-grape market generated substantially less real economic value, even though the reported average price per ton was higher. After inflation, the average price was worth 27.8% less. Purchased volume was 11.7% lower. Together, those movements reduced inflation-adjusted purchased-market value by 36.2%. Red varieties moved from 55.4% to 49.0% of purchased volume—a change in composition, not proof of a wholesale reversal.

WHAT IT DOES NOT DEMONSTRATE

The record does not establish that Sonoma must replant, remove vineyards or become something else. It does not show that the regional name has lost its power, that individual vineyards became unprofitable or that buyers captured the missing value. Nor does it prove that Sonoma’s variety provides economic protection.

THE QUESTION THAT REMAINS

Answering why the market lost real value—and where that value went—requires evidence beyond this record: vineyard costs, contracts, acreage, winery margins, channel pricing and site-level conditions.

**THE VINEYARD HAS NOT NECESSARILY FAILED TO CHANGE.
THE PURCHASED MARKET HAS FAILED TO PRESERVE THE REAL VALUE
IT ONCE CARRIED. THE RECORD CANNOT YET TELL US WHY—OR WHERE THE VALUE WENT.**

That is where the vineyard report begins.
Reading the ground ahead begins here.

THE DISTRICT
THE ACRE

A LONGER
HORIZON