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2013 Oregon Vineyard and Winery Census Report

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2013 Oregon Vineyard and Winery Census Report

December 2014

During 2013 the Oregon wine industry continued growth in many areas:

- The number of vineyards grew 6.5% to 951 with yields increasing, on average.
- Total vineyard production in 2013 was up 10% over 2012 while the price per ton averaged statewide was relatively flat.
- As a result of the higher production, the total crop value rose 10% to 128 million dollars.
- The number of “all” wineries, including TTB-bonded and OLCC Grower Sales Privilege and Winery license holders, increased from 545 to 605 in 2013.
- The total amount crushed from the 2013 vintage is estimated to be 52,588 tons, up 2.4% over the large 2012 vintage, with estimated case production totaling 3.3 million.
- Case sales, including domestic and export sales, are estimated to have increased 13% from 2012 to 2013, while the total dollars for all wine sales are estimated to have increased by 21% to 376 million dollars in 2013.
- Pinot Noir continues to lead statewide production representing 58% of the tonnage grown and crushed.

Vineyard Section:

Table 1: Wine grapes: Acreage, yield, production, price and value, variety, Oregon, 2012-2013¹

Variety	All Planted Acreage		Harvested Acreage		Yield per Harvested Acre		Production		Price Per Ton		Value of Production ⁴	
	2012	2013	2012	2013	2012	2013	2012	2013	2012 ²	2013 ³	2012	2013
	Acres	Acres	Acres	Acres	Tons	Tons	Tons	Tons	Dollars	Dollars	1,000 Dollars	1,000 Dollars
Cabernet Franc	120	146	112	144	2.85	2.87	320	413	2,209	2,124	708	877
Cabernet Sauvignon	489	528	412	423	2.37	2.46	977	1,042	2,471	2,124	2,413	2,213
Chardonnay	1,148	1,164	1,002	1,012	2.87	2.80	2,875	2,828	1,746	2,236	5,020	6,324
Gewüztraminer	184	189	173	173	1.87	1.80	323	312	1,363	1,610	440	502
Merlot	387	425	360	395	2.65	2.73	952	1,081	1,834	1,874	1,746	2,025
Müller Thurgau	125	127	121	121	4.26	4.50	516	545	1,029	1,278	531	696
Pinot Blanc	194	227	176	196	2.76	3.07	486	600	1,921	1,628	933	977
Pinot Gris	3,349	3,445	3,167	3,204	3.02	3.22	9,550	10,321	1,531	1,562	14,621	16,118
Pinot Noir	14,170	14,808	12,868	13,595	2.21	2.38	28,441	32,355	2,738	2,651	77,871	85,768
Sauvignon Blanc	79	101	54	82	2.66	2.17	144	178	1,365	1,782	196	317
Syrah	483	570	445	522	2.64	2.62	1,171	1,370	2,614	2,154	3,062	2,950
Tempranillo	307	350	234	258	2.17	2.57	508	664	2,005	2,106	1,020	1,398
Viognier	214	241	196	212	2.45	2.26	481	479	1,760	1,943	847	932
White Riesling	680	653	609	584	3.62	3.13	2,208	1,830	1,248	1,507	2,755	2,757
Zinfandel	94	100	86	92	2.12	2.29	182	211	1,882	1,959	343	413
All Others	858	880	691	667	3.00	3.03	2,072	2,018	1,676	1,844	3,472	3,722
Total⁵	22,880	23,955	20,706	21,681	2.47	2.59	51,206	56,246	2,317	2,249	115,978	127,990

¹ Includes estimates for incomplete responses.

² Price per ton is a weighted average of price received by Oregon grape growers.

³ Price per ton is the mean of the average prices received by Oregon grape growers.

⁴ Value of production is derived by multiplying quantity times price, rather than the summation of value by variety.

⁵ Totals may not add up due to rounding.

Table 2: Wine grapes: Vineyards, acreage, yield and production by growing area, Oregon, 2012-2013¹

Growing Area	Number of Vineyards		All Planted Acreage		Harvested Acreage		Yield per Harvested Acre		Production	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
	Number	Number	Acres	Acres	Acres	Acres	Tons	Tons	Tons	Tons
North Willamette Valley ²	526	545	14,564	15,259	13,298	14,224	2.38	2.54	31,661	36,199
South Willamette Valley ³	89	102	1,943	1,978	1,553	1,629	3.13	2.90	4,858	4,731
Umpqua Valley ⁴	62	70	2,235	2,382	2,139	2,056	2.18	2.08	4,655	4,280
Rogue Valley ⁵	132	140	2,473	2,582	2,210	2,214	2.99	3.25	6,605	7,201
Columbia River ⁶ and at large	84	94	1,664	1,754	1,505	1,557	2.28	2.46	3,427	3,834
Total⁷	893	951	22,880	23,955	20,706	21,681	2.47	2.59	51,206	56,246

¹ Includes estimates for incomplete responses.

² Includes Yamhill-Carlton District, Chehalem Mountains, McMinnville, Ribbon Ridge, Dundee Hills, Eola-Amity Hills and areas north of Monmouth and the South Salem Hills.

³ Includes areas south of Monmouth and the South Salem Hills and all of Lane County. ⁴ Includes Elkton and Red Hills.

⁵ Includes Applegate Valley.

⁶ Includes Columbia Gorge, Columbia Valley, Walla Walla Valley, and Snake River Valley.

⁷ Totals may not add up due to rounding.

Table 3: Wine grapes: Fruit losses, as reported, Oregon, 2012 and 2013¹

Year	To Animals	To Herbicide	To Disease	To Weather	All Losses
	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>
Total, 2013	319	37	341	671	1,368
Total, 2012	116	14	105	1,005	1,240

¹Totals include only reported data. No estimates were made for missing or incomplete data.

Table 4: Wine Grapes: Acreage changes and fruit not harvested, as reported, by variety, Oregon, 2012 and 2013¹

Variety	New Plantings	Removals	Not Harvested
	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>
Cabernet Franc	1	1	9
Cabernet Sauvignon	5	5	13
Chardonnay	54	0	1
Gewürztraminer	2	-	-
Merlot	2	1	5
Müller Thurgau	-	-	-
Pinot Blanc	11	2	-
Pinot Gris	67	9	20
Pinot Noir	295	31	43
Sauvignon Blanc	3	-	-
Syrah	3	2	6
Tempranillo	10	2	6
Viognier	5	2	5
White Riesling	3	1	23
Zinfandel	1	-	2
All Others	-	-	-
Total, 2013	460	56	129
Total, 2012	596	248	26

¹Totals include only reported data. No estimates were made for missing or incomplete data.

Table 5: Wine grapes: Production, by selected variety and area, Oregon, 2012 and 2013 totals¹

Growing Area ²	Cabernet Sauvignon	Chardonnay	Merlot	Pinot Gris	Pinot Noir	Syrah	White Riesling
	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>
North Willamette Valley	5	1,989	8	5,825	24,931	77	1,277
South Willamette Valley	11	268	6	2,039	2,131	-	53
Umpqua Valley	25	102	59	552	3,037	67	106
Rogue Valley	427	400	482	1,029	1,788	747	314
Columbia River and at large	574	69	526	876	468	479	81
Total, 2013	1,042	2,828	1,081	10,321	32,355	1,370	1,830
Total, 2012	1,407	2,604	1,305	7,399	28,547	2,091	1,812

¹Includes estimates for incomplete responses.

²See Growing Area descriptions in Vineyard Section Table 2.

Table 6: Wine grapes: Price per ton, by selected variety and area, Oregon, 2012¹-2013²

Variety	North Willamette Valley ³		South Willamette Valley ³		Umpqua Valley ³		Rogue Valley ³		Columbia River ³ and at large	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>
Cabernet Sauvignon	1,400	-	2,035	-	2,200	-	1,774	1,866	2,713	2,502
Chardonnay	1,880	2,451	1,707	2,379	1,367	-	1,423	1,645	1,291	-
Merlot	920	-	2,050	-	-	-	1,454	1,659	2,198	2,242
Pinot Gris	1,440	1,575	1,371	1,582	1,776	-	1,668	1,499	1,883	1,681
Pinot Noir	2,918	2,813	2,549	2,494	2,157	1,881	2,057	1,666	-	2,432
Syrah	2,687	-	-	-	2,200	-	1,968	2,039	2,784	2,252
White Riesling	1,538	1,730	-	-	1,059	-	1,174	1,251	1,118	1,244

¹Price per ton is a weighted average of price received by Oregon grape growers.

²Price per ton is the mean of the average prices received by Oregon grape growers.

³See Growing Area descriptions in Vineyard Section Table 2.

- Insufficient data available to report at the regional level.

Winery Section:

Table 1: Wineries: Number, crush and cooperage, by growing region, Oregon, 2012-2013¹

Growing Region ²	All wineries ³		Wineries crushing grapes		Total wine grapes crushed		Total cooperage ⁴	
	2012	2013	2012	2013	2012	2013	2012	2013
	<i>Number</i>	<i>Number</i>	<i>Number</i>	<i>Number</i>	<i>Tons</i>	<i>Tons</i>	<i>1,000 Gallons</i>	<i>1,000 Gallons</i>
North Willamette Valley	325	384	238	236	33,974	35,689	9,544	10,475
South Willamette Valley	53	56	40	34	5,793	4,274	1,375	1,510
Umpqua Valley	32	33	23	20	2,948	1,061	1,062	523
Rogue Valley	65	75	40	40	6,451	5,807	1,890	1,393
Columbia River and at large	70	57	38	40	2,198	5,758	2,281	1,459
Total	545	605	379	370	51,364	52,588	16,152	15,359

¹ Includes estimates for incomplete responses.

² Survey respondents identified one of these growing regions as their production location. See Growing Area descriptions in Vineyard Section Table 2.

³ Includes all TTB bonded wineries and Growers Sales Privilege and Winery License holders (issued by the OLCC).

⁴ Numbers fluctuate due to inconsistent responses.

Table 2: Wineries: Crush, by type of acquisition and area, Oregon, 2012 and 2013 totals¹

Growing Region ²	Estate grown	Purchased from Oregon	Purchased from other states	Custom crush	All crush, 2013	All crush, 2012
	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>
North Willamette Valley	13,491	14,493	710	6,995	35,689	33,974
South Willamette Valley	1,895	2,173	50	157	4,274	5,793
Umpqua Valley	631	240	-	190	1,061	2,948
Rogue Valley	3,387	1,321	72	1,027	5,807	6,451
Columbia River and at large	1,346	3,060	938	413	5,758	2,198
Total, 2013	20,750	21,286	1,769	8,782	52,588	
Total, 2012	21,320	20,602	1,178	8,264		51,364

¹ Includes estimates for incomplete responses.

² Survey respondents identified one of these growing regions as their production location. See Growing Area descriptions in Vineyard Section Table 2.

Table 3: Wineries: Crush, By Origin and Variety, Oregon, 2012-2013¹

Variety	Oregon						Grown in Other States		All Crush	
	Estate Grown		Other Oregon Grown ²		All Oregon Grown		2012	2013	2012	2013
	2012	2013	2012	2013	2012	2013				
	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>
Cabernet Franc	109	119	143	139	252	258	72	94	325	352
Cabernet Sauvignon	336	223	397	402	733	625	226	280	959	906
Chardonnay	1,329	1,118	1,600	1,460	2,929	2,578	69	96	2,998	2,674
Gewürztraminer	319	226	167	153	486	379	15	9	501	388
Merlot	273	257	377	475	650	732	130	174	780	906
Müller Thurgau	269	221	135	244	404	465	-	-	404	465
Pinot Blanc	370	305	274	225	644	531	-	-	644	531
Pinot Gris	3,193	3,290	5,128	5,369	8,321	8,658	30	96	8,351	8,754
Pinot Noir	12,246	12,459	17,644	17,753	29,890	30,212	63	103	29,953	30,315
Sauvignon Blanc	574	42	88	85	662	127	3	20	665	147
Syrah	266	315	595	693	861	1,008	174	170	1,035	1,178
Tempranillo	152	424	170	317	322	742	28	16	350	758
Viognier	126	141	182	299	308	440	28	45	336	484
White Riesling	948	673	1,020	1,123	1,968	1,797	26	23	1,994	1,820
Zinfandel	44	97	47	57	91	153	28	21	119	174
All Other	766	838	899	1,249	1,665	2,113	285	623	1,950	2,736
Total³	21,320	20,750	28,866	30,043	50,186	50,819	1,177	1,770	51,364	52,589
Case Equivalent ⁴	<i>1,000 cases</i>	<i>1,000 cases</i>	<i>1,000 cases</i>	<i>1,000 cases</i>	<i>1,000 cases</i>	<i>1,000 cases</i>	<i>1,000 cases</i>	<i>1,000 cases</i>	<i>1,000 cases</i>	<i>1,000 cases</i>
	1,344	1,308	1,819	1,893	3,163	3,201	74	112	3,237	3,313

¹ Includes estimates for incomplete responses.

² Includes all purchased fruit and custom crushed fruit.

³ Totals may not add up due to rounding.

⁴ A case equivalent is equal to tons crushed multiplied by 150 gallons divided by 2.38 gallons per case.

Table 4: Wineries: Inventory, by vintage, variety and wine type, Oregon, January 1, 2014¹

Wine Type	Bottled Inventory by Vintage ²				Bulk Inventory by Vintage			
	2013 Vintage	2012 and earlier Vintages	Total	Share of Total	2013 Vintage	2012 and earlier Vintages	Total	Share of Total
	<i>1,000 Cases</i>	<i>1,000 Cases</i>	<i>1,000 Cases</i>	<i>Percent</i>	<i>1,000 Gallons</i>	<i>1,000 Gallons</i>	<i>1,000 Gallons</i>	<i>Percent</i>
All Sparkling Wines	2.6	99.2	101.8	4.2	78.3	22.7	101.0	1.2
All White	36.1	387.6	423.7	17.3	2017.8	244.8	2262.6	27.3
All Red	68.1	1813.7	1881.8	76.8	4396.3	1360.2	5756.5	69.5
Rosé and Blush Blends	9.8	32.7	42.6	1.7	149.5	10.4	159.9	1.9
Total ³	116.6	2,333.3	2,449.9	100	6,641.9	1,638.1	8,280.0	100

¹ Includes estimates for incomplete responses.

² One case is equivalent to nine liters.

³ Totals may not add up due to rounding.

Table 5: Wineries: Sales, by variety type, Oregon, 2012-2013¹

Variety and wine type	2012			2013		
	Case sales	Share of total case sales ²	Bulk sales ³	Case sales	Share of total case sales ²	Bulk sales ³
	<i>Cases</i>	<i>Percent</i>	<i>Gallons</i>	<i>Cases</i>	<i>Percent</i>	<i>Gallons</i>
Cabernet Franc	3,236.3	0.1	916.0	4,551.6	0.2	12,690.0
Cabernet Sauvignon	24,553.3	1.0	4,455.0	27,178.2	1.0	23,855.0
Chardonnay	116,920.7	4.9	59,575.0	110,219.8	4.1	21,289.4
Gewürtraminer	14,531.4	0.6	4,643.0	17,076.7	0.6	1,983.0
Merlot	17,191.5	0.7	-	20,798.6	0.8	31,700.0
Müller-Thurgau	3,859.0	0.2	1,855.0	9,884.2	0.4	7,193.6
Pinot Blanc	18,072.9	0.8	3,088.0	22,458.6	0.8	3,990.5
Pinot Gris	571,711.7	24.0	51,268.0	573,284.5	21.3	228,538.0
Pinot Noir	1,148,990.5	48.3	332,873.0	1,425,965.7	53.1	281,249.3
Sauvignon Blanc	2,638.2	0.1	-	5,262.1	0.2	-
Syrah	15,579.9	0.7	6,121.0	27,021.9	1.0	5,099.3
Tempranillo	8,563.1	0.4	1,240.0	22,794.2	0.8	3,090.0
Viognier	9,237.1	0.4	970.0	18,436.6	0.7	1,075.0
White Riesling	106,043.7	4.5	4,510.0	82,287.3	3.1	7,275.5
Zinfandel	2,121.7	0.1	-	4,731.0	0.2	1,500.0
Red Blends	83,688.2	3.5	1,762.0	103,532.4	3.9	22,283.0
White Blends	109,432.0	4.6	1,514.0	43,743.4	1.6	30,594.0
All Rosé & Blush Blends	47,051.3	2.0	-	57,309.7	2.1	3,103.0
All other still wines	44,730.5	1.9	1,062.00	87,436.9	3.3	1,041.3
All sparkling wines	31,140.3	1.3	3,325.00	21,563.5	0.8	-
Totals	2,379,293	100	479,177	2,685,537	100	687,550
Total dollars	311,740,589			376,132,956		

¹ Includes estimates for incomplete responses.

² Share of total represents the percentage of case sales only.

³ Bulk wine sales are from responses only and do not include estimates for incomplete responses.

Table 6: Wineries: Domestic Sales, by destination, Oregon, 2012-2013¹

Year	Direct to Consumers			Sales to distributors, retailers, and restaurants					All domestic sales
	Wineries or tasting rooms	Wine clubs, events, or online sales	All Direct Sales	Oregon	Washington	New York	California	Other US	
	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>
2013	399,536	231,677	631,213	510,661	176,304	139,447	159,970	999,470	2,617,065
2012	318,076	164,634	482,710	461,435	158,440	109,951	154,122	952,637	2,319,295

¹ Includes estimates for incomplete responses.

Table 7: Wineries: Export sales, by variety, Oregon, 2013 totals¹

Variety and Wine Type	Canada	Mexico	Japan	Hong Kong & China	South Korea	All Other Asia	Caribbean Islands	United Kingdom	Scandinavia	All Other Europe	All Other Destinations	All Export Sales	
												2013	2012
	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>
Pinot Gris	5,920	752	1,119	1,889	630	39	2,115	565	92	690	957	14,768	7,201
Other Whites	1,850	0	6,656	1,332	142	76	202	127	334	44	74	10,837	18,834
Pinot Noir	13,327	1,273	2,589	4,881	1,417	313	3,051	1,906	2,557	1,002	1,883	34,198	28,436
Other Reds	100	0	1,208	304	0	0	68	0	0	8	251	1,939	5,399
Totals													
2013	21,197	2,025	11,572	8,406	2,189	428	5,436	2,598	2,983	1,744	3,165	61,742	
2012	21,165	320	14,747	6,752	2,038	237	6,163	2,598	1,465	2,561	1,824		59,870

¹ Includes estimates from historical data for incomplete responses.