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Southern Oregon University Research Center

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2011 Oregon Winery Census Report

December 2012

In prior years a **combined** Oregon Vineyard and Winery Report was produced by the U.S. Department of Agriculture, National Agricultural Statistics Service, Oregon Field Office (USDA-NASS). For the 2011 vintage, the vineyard report was compiled by the USDA-NASS (available at <http://www.nass.usda.gov/or>) while the **winery data** were collected by the Southern Oregon University Research Center (SOURCE) and compiled into this separate report.

The number of “all” wineries, including TTB-bonded and OLCC Grower Sales Privilege and Winery license holders, increased from 419 to 463 in 2011. The number of wineries crushing grapes (TTB-bonded) increased from 315 in 2010 to 350 in 2011, an increase of 35 wineries. The total amount crushed from the 2011 vintage is estimated to be 42,033 tons, up 41 percent over the light 2010 vintage and 14 percent over the 2009 vintage. Case sales, including domestic and export sales, are estimated to have increased 6 percent from 2010 to 2011, passing the 2 million case production total for the first time, while the total dollars for all wine sales are estimated to have increased by 9 percent.

Funding for this survey was provided by the Oregon Wine Board.

Wineries: Number, crush and cooerage, by growing region, Oregon, 2010-2011¹

Growing Region ²	All wineries ³		Wineries crushing grapes		Total wine grapes crushed		Total cooerage	
	2010	2011	2010	2011	2010	2011	2010	2011
	<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>
N Willamette Valley ⁴	273	270	206	228	21,172	27,719	7,357	7,952
S Willamette Valley ⁵	45	46	36	40	2,480	6,683	995	696
Umpqua Valley	26	33	15	17	563	1,550	346	516
Rogue Valley ⁶	45	55	34	38	2,519	3,910	980	1,071
Columbia River and at large	30	59	24	27	3,066	2,171	839	1,736
Total	419	463	315	350	29,800	42,033	10,517	11,971

¹ Includes estimates for incomplete responses.

² Survey respondents identified one of these growing regions as their production location. See www.oregonwine.org for growing area descriptions.

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

⁴ Includes Yamhill-Carlton District, Chehalem Mountains, McMinnville, Ribbon Ridge, Dundee Hills, Eola-Amity Hills and areas north of Monmouth and the South Salem Hills.

⁵ Includes areas south of Monmouth and the South Salem Hills and all of Lane County.

⁶ Rogue Valley data includes Applegate Valley.

Wineries: Crush, by type of acquisition and area, Oregon, 2011 and 2010 totals¹

Growing Region ²	Estate grown	Purchased from Oregon	Purchased from other states ³	Custom crush	All crush, 2011	All crush, 2010
	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>
N Willamette Valley ⁴	10,311	11,782	322	5,304	27,719	21,446
S Willamette Valley ⁵	2,189	1,180	0	36	6,683	4,649
Umpqua Valley	528	820	24	178	1,550	562
Rogue Valley ⁶	2,497	746	0	667	3,910	2,519
Columbia River and at large	1,004	3,933	419	92	2,171	624
Total, 2011	16,529	18,461	765	6,277	42,033	
Total, 2010	12,362	12,798	792	3,848		29,800

¹ Includes estimates for incomplete responses.

² Survey respondents identified one of these growing regions as their production location.

³ New category, not separated from general purchased in previous years.

⁴ Includes Yamhill-Carlton District, Chehalem Mountains, McMinnville, Ribbon Ridge, Dundee Hills, Eola-Amity Hills and areas north of Monmouth and the South Salem Hills.

⁵ Includes areas south of Monmouth and the South Salem Hills and all of Lane County.

⁶ Rogue Valley data includes Applegate Valley.

Wineries: Crush, By Origin and Variety, Oregon, 2010-2011¹

Variety	Oregon						Grown in Other States		All Crush	
	Estate Grown		Other Oregon Grown ²		All Oregon Grown		2010	2011	2010	2011
	2010	2011	2010	2011	2010	2011				
	<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	68	111	75	114	143	225	11	8	154	233
Cabernet Sauvignon	207	363	214	384	421	747	167	190	588	937
Chardonnay	634	985	728	927	1,362	1,912	14	27	1,376	1,939
Gewürztraminer	124	147	117	84	241	232	25	59	266	291
Merlot	201	283	242	399	443	683	92	107	535	790
Müller Thurgau	108	95	110	20	218	116	1	0	219	116
Pinot Blanc	230	336	151	165	381	501	7	0	388	501
Pinot Gris	1,960	2,687	3,147	4,386	5,107	7,073	20	24	5,127	7,098
Pinot Noir	6,696	9,426	9,832	15,842	16,528	25,268	16	14	16,544	25,282
Sauvignon Blanc	23	42	60	133	83	176	3	0	86	176
Syrah	313	285	477	732	790	1,017	183	129	973	1,146
Tempranillo	95	188	82	118	177	306	3	17	180	323
Viognier	103	175	201	193	304	369	19	15	323	383
White Riesling	913	676	597	677	1,510	1,353	61	24	1,571	1,377
Zinfandel	17	38	32	42	49	80	37	9	86	89
All Other	670	690	581	520	1,251	1,210	133	142	1,384	1,352
Total ³	12,362	16,529	16,646	24,738	29,008	41,268	792	765	29,800	42,033
Case Equivalent ⁴	1,000 cases	1,000 cases	1,000 cases	1,000 cases	1,000 cases	1,000 cases	1,000 cases	1,000 cases	1,000 cases	1,000 cases
	779	1,042	1,049	1,559	1,828	2,601	50	48	1,878	2,649

¹ Includes estimates for incomplete responses.

² Includes all purchased fruit and custom crushed fruit.

³ Totals may not add due to rounding.

⁴ Equivalent cases of wine production equals tons crushed times 150 gallons divided by 2.38 gallons per case.

Wineries: Inventory, by vintage, variety and wine type, Oregon, January 1, 2012^{1, 2}

Variety and wine type	Bottled Inventory by Vintage ³					Bulk Inventory by Vintage				
	2011 Vintage	2010 Vintage	2009 and earlier Vintages	Total	Share of Total	2011 Vintage	2010 Vintage	2009 and earlier Vintages	Total	Share of Total
	<i>1,000 Cases</i>	<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>1,000 Gallons</i>	<i>Percent</i>
Cabernet Franc	0.0	0.1	11.5	11.6	0.6	23.4	15.9	1.1	40.4	0.5
Cabernet Sauvignon	0.1	1.4	27.2	28.8	1.4	110.5	67.0	18.8	196.3	2.4
Chardonnay	1.6	29.7	32.3	63.6	3.1	235.7	23.4	6.7	265.7	3.3
Gewürztraminer	0.2	3.3	5.9	9.4	0.5	18.0	2.2	0.0	20.1	0.2
Merlot	0.7	2.1	16.5	19.2	0.9	95.5	43.7	23.3	162.5	2.0
Müller Thurgau	0.6	0.9	2.2	3.7	0.2	4.1	0.2	0.2	4.5	0.1
Pinot Blanc	0.2	8.0	7.0	15.3	0.7	55.8	0.5	0.0	56.3	0.7
Pinot Gris	17.9	141.6	33.2	192.7	9.4	1,120.4	14.5	6.7	1,141.7	14.1
Pinot Noir	24.5	620.4	591.7	1,236.7	60.4	4,008.2	476.0	52.2	4,536.3	56.2
Sauvignon Blanc	0.2	7.0	61.3	68.4	3.3	138.9	70.5	1.2	210.7	2.6
Syrah	0.2	3.2	31.2	34.6	1.7	159.7	60.0	21.5	241.2	3.0
Tempranillo	0.0	0.9	14.9	15.8	0.8	98.9	50.0	13.0	161.9	2.0
Viognier	0.0	4.6	5.4	10.0	0.5	34.4	0.6	0.4	35.4	0.4
White Riesling	0.8	29.2	29.1	59.2	2.9	156.1	63.5	10.5	230.1	2.9
Zinfandel	0.1	0.6	1.6	2.3	0.1	7.7	1.8	0.0	9.5	0.1
Red Blends	0.9	24.6	109.1	134.6	6.6	19.9	11.5	21.9	53.3	0.7
White Blends	0.9	6.7	8.3	15.9	0.8	28.5	2.4	0.0	31.0	0.4
Rose and Blush Blends	2.3	1.9	2.4	6.6	0.3	58.7	0.4	0.0	59.1	0.7
Other Still Wines	9.1	11.1	20.8	40.9	2.0	208.7	58.4	24.8	291.9	3.6
All Sparkling Wines	0.0	29.2	50.5	79.7	3.9	288.6	21.8	13.2	323.6	4.0
Total ⁴	60.2	926.5	1,062.3	2,048.9	100.0	6,871.8	984.2	215.3	8,071.2	100.0

¹ Includes estimates for incomplete respondents.

² Includes bonded and tax-paid inventory owned by Oregon wineries.

³ One case is equivalent to nine liters.

⁴ Totals may not add due to rounding.

Wineries: Sales, by variety type, Oregon, 2010-2011¹

Variety and wine type	2010			2011		
	Case sales	Share of total case sales ²	Bulk sales	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>
Still Wines:						
Cabernet Franc	2,611.0	0.1	476.0	3,236.3	0.2	990.0
Cabernet Sauvignon	24,325.0	1.3	90.0	18,701.2	0.9	3,855.0
Chardonnay	76,218.0	3.9	3,974.0	79,393.8	3.9	51,976.0
Gewürtraminer	12,287.0	0.6	1,200.0	11,517.0	0.6	500.0
Merlot	20,316.0	1.1	5,861.0	14,541.6	0.7	1,400.0
Müller-Thurgau	7,239.0	0.4	–	4,211.5	0.2	–
Pinot Blanc	18,020.0	0.9	2,871.0	12,933.3	0.6	–
Pinot Gris	402,479.0	20.8	64,101.0	473,697.2	23.2	69,414.0
Pinot Noir	957,203.0	49.6	200,035.0	1,047,356.5	51.3	350,763.0
Sauvignon Blanc	4,862.0	0.3	–	3,309.0	0.2	–
Syrah	22,362.0	1.2	917.0	15,741.7	0.8	6,673.0
Tempranillo	6,671.0	0.3	300.0	8,885.6	0.4	400.0
Viognier	10,521.0	0.5	1,220.0	9,788.2	0.5	375.0
White Riesling	88,388.0	4.6	7,854.0	108,812.6	5.3	3,050.0
Zinfandel	3,461.0	0.2	–	1,100.3	0.1	200.0
Red Blends	83,976.0	4.3	1,408.0	89,018.5	4.4	2,059.0
White Blends	70,114.0	3.6	–	33,489.0	1.6	1,073.0
All Rosé & Blush Blends	24,696.0	1.3	960.0	26,680.8	1.3	–
All other still wines	78,794.0	4.1	45.0	55,436.9	2.7	–
All sparkling wines	16,220.0	0.8	–	22,846.5	1.1	–
Totals	1,930,763	100	291,312	2,040,698	100	492,728
Total dollars	253,740,302			276,158,894		

¹ Includes estimates for incomplete respondents.

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

³ Bulk wine sales are from responses only and have **not** been estimated for incomplete respondents.

Wineries: Domestic Sales, by destination, Oregon, 2010-2011¹

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>
2011	271,808	140,686	412,494	394,314	135,393	93,957	131,703	814,064	1,981,925
2010	256,626	142,184	398,810	381,646	127,831	88,709	124,347	749,883	1,871,226

¹ Includes estimates for incomplete respondents.

Wineries: Export sales, by variety, Oregon, 2011 totals¹

Variety and Wine Type	Canada	Japan	All Other Asia	Caribbean Islands	United Kingdom	Scandinavia	All Other Destinations	All Export Sales	
								2011	2010
	<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	5,012	514	180	540	337	633	640	7,856	5,972
Other Whites	578	6,266	604	268	52	112	230	8,110	9,879
Pinot Noir	14,040	2,803	7749	2,539	1,802	1,678	5643	36,254	34,554
Merlot	58	–	–	–	–	–	20	78	78
Other Reds	925	2,629	588	–	2,247	6	80	6,475	5,848
All Others ²									3,206
Totals									
2011	20,613	12,212	9,121	3,347	4,438	2,429	6,613	58,773	
2010	20,483	10,993	5,962	3,866	5,256	3,469	8,836		59,537

¹ Includes estimates for incomplete respondents.

² Previous years only, 2011 is divided in to all other whites and all other reds.