

11-2013

## 2012 Oregon Vineyard and Winery Census Report

Southern Oregon University Research Center

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Growth was seen in nearly all aspects of the Oregon wine industry in 2012 (see footnote). The number of vineyards grew to 905 with planted acreage increasing 25% over 2011. While the average yield per acre declined slightly, total production was up 21% due to more acreage coming into harvest and less fruit not being harvested. Price per ton averaged statewide rose by 19% and, in combination with greater production, resulted in a 42% increase in total crop value. The number of "all" wineries, including TTB-bonded and OLCC Grower Sales Privilege and Winery license holders, increased from 463 to 545 in 2012. The number of wineries crushing grapes increased from 350 in 2011 to 379 in 2012, an increase of 29 wineries. The total amount crushed from the 2012 vintage is estimated to be 51,364 tons, up 22% over the lighter 2011 vintage. Case sales, including domestic and export sales, are estimated to have increased 17% from 2011 to 2012, while the total dollars for all wine sales are estimated to have increased by 13% to over 300 million dollars for the first time.

\* Note that some differences in reported values over the last few years are expected due to the shift from the USDA to SOURCE conducting the census. For example, some of the 2012 growth in number of wineries, production and sales is likely attributed to a more comprehensive identification of Oregon wineries, potentially correcting underestimates in past years.

**Vineyard Section:**
**Wine grapes: Acreage, yield, production, price and value, variety, Oregon, 2011-2012<sup>1</sup>**

Variety	All Planted Acreage		Harvested Acreage		Yield per Harvested Acre		Production		Price Per Ton <sup>2</sup>		Value of Production <sup>3</sup>	
	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012
	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Dollars</i>	<i>Dollars</i>	<i>1,000 Dollars</i>	<i>1,000 Dollars</i>
Cabernet Franc	120	153	110	148	2.61	3.00	287	444	2,240	2,209	643	981
Cabernet Sauvignon	640	642	490	560	2.46	2.51	1,206	1,407	2,370	2,471	2,858	3,477
Chardonnay	950	1,160	740	936	2.60	2.78	1,923	2,605	1,800	1,746	3,461	4,548
Gewürztraminer	200	236	150	216	1.68	1.99	252	430	1,390	1,363	350	586
Merlot	460	518	360	447	3.14	2.93	1,129	1,308	1,870	1,834	2,111	2,399
Müller Thurgau	80	120	70	99	3.67	4.47	257	443	1,010	1,029	260	456
Pinot Blanc	160	271	150	251	2.83	2.71	424	680	1,520	1,921	644	1,306
Pinot Gris	2,590	3,426	2,460	3,049	2.46	2.43	6,046	7,423	1,310	1,531	7,920	11,365
Pinot Noir	12,560	15,369	10,870	13,998	2.18	2.04	23,726	28,565	2,270	2,738	53,858	78,211
Sauvignon Blanc	80	124	50	64	3.04	2.42	152	155	1,660	1,365	252	212
Syrah	530	907	470	844	2.81	2.48	1,319	2,097	2,110	2,614	2,783	5,482
Tempranillo	190	380	170	303	2.28	2.08	387	631	2,060	2,005	797	1,265
Viognier	210	299	160	249	3.29	2.40	526	598	1,670	1,760	878	1,052
White Riesling	700	718	550	542	3.45	3.34	1,899	1,812	880	1,248	1,671	2,261
Zinfandel	90	95	80	86	2.39	2.22	191	191	1,630	1,882	311	359
All Others	840	1,030	620	895	2.86	1.56	1,776	1,397	1,600	1,676	2,842	2,341
<b>Total<sup>4</sup></b>	<b>20,400</b>	<b>25,448</b>	<b>17,500</b>	<b>22,687</b>	<b>2.37</b>	<b>2.21</b>	<b>41,500</b>	<b>50,186</b>	<b>1,950</b>	<b>2,317</b>	<b><sup>3</sup>81,755</b>	<b><sup>3</sup>116,301</b>

<sup>1</sup> Includes estimates for incomplete responses.

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

<sup>3</sup> Value of production is derived by multiplying quantity times price, rather than the summation of value by variety.

<sup>4</sup> Totals may not add due to rounding.

**Wine grapes: Vineyards, acreage, yield and production by growing area, Oregon, 2011-2012<sup>1</sup>**

Growing Area <sup>2</sup>	Number of Vineyards		All Planted Acreage		Harvested Acreage		Yield per Harvested Acre		Production	
	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012
	<i>Number</i>	<i>Number</i>	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>
North Willamette Valley	510	529	13,120	18,139	11,820	16,171	2.25	2.29	26,547	37,027
South Willamette Valley	100	103	2,060	1,687	1,630	1,504	1.77	1.21	2,878	1,817
Rogue Valley <sup>3</sup>	120	126	2,100	2,440	1,900	2,176	3.56	2.29	6,771	4,983
Umpqua Valley	50	52	1,350	789	840	703	2.38	1.97	2,000	1,385
Columbia River and at large	90	95	1,770	2,385	1,310	2,135	2.52	2.33	3,304	4,964
<b>Total<sup>4</sup></b>	<b>870</b>	<b>905</b>	<b>20,400</b>	<b>25,440</b>	<b>17,500</b>	<b>22,689</b>	<b>2.37</b>	<b>2.21</b>	<b>41,500</b>	<b>50,176</b>

<sup>1</sup> Includes estimates for incomplete responses.

<sup>2</sup> See [www.oregonwine.org](http://www.oregonwine.org) for growing area descriptions.

<sup>3</sup> Rogue Valley data includes Applegate Valley.

<sup>4</sup> Totals may not add due to rounding.

**Wine grapes: Fruit losses, as reported, Oregon, 2011 and 2012<sup>1</sup>**

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>
<b>Total, 2012</b>	<b>116</b>	<b>14</b>	<b>105</b>	<b>1,005</b>	<b>1,240</b>
Total, 2011	653	14	528	1,895	3,090

<sup>1</sup> Totals include only reported data. No estimates were made for missing or incomplete data.

**Wine Grapes: Acreage changes and fruit not harvested, as reported, by variety, Oregon, 2012 and 2011 <sup>1</sup>**

Variety	New Plantings		Removals		Not Harvested	
	Acres		Acres		Tons	
Cabernet Franc		1		2		-
Cabernet Sauvignon		3		-		10
Chardonnay		66		18		9
Gewürztraminer		4		-		-
Merlot		-		2		-
Müller Thurgau		19		-		-
Pinot Blanc		23		1		-
Pinot Gris		26		2		1
Pinot Noir		401		40		2
Sauvignon Blanc		-		9		-
Syrah		5		-		3
Tempranillo		8		1		-
Viognier		3		-		-
White Riesling		17		1		1
Zinfandel		-		1		-
All Others		20		171		-
<b>Total, 2012</b>		<b>596</b>		<b>248</b>		<b>26</b>
Total, 2011		394		143		305

<sup>1</sup> Totals include only reported data. No estimates were made for missing or incomplete data.

**Wine grapes: Production, by selected variety and area, Oregon, 2011 and 2012 totals <sup>1</sup>**

Growing Area <sup>2</sup>	Cabernet Sauvignon	Chardonnay	Merlot	Pinot Gris	Pinot Noir	Syrah	White Riesling
	Tons	Tons	Tons	Tons	Tons	Tons	Tons
North Willamette Valley	5	2,052	1	4,443	24,494	86	897
South Willamette Valley	22	71	8	411	1,052	2	21
Rogue Valley <sup>3</sup>	504	393	613	870	1,436	771	702
Umpqua Valley	32	33	68	33	901	79	92
Columbia River and at large	844	55	615	1,642	664	1,153	100
<b>Total, 2012</b>	<b>1,407</b>	<b>2,604</b>	<b>1,305</b>	<b>7,399</b>	<b>28,547</b>	<b>2,091</b>	<b>1,812</b>
Total, 2011	1,206	1,924	1,129	6,045	23,726	1,319	1,899

<sup>1</sup> Includes estimates for incomplete responses.

<sup>2</sup> See [www.oregonwine.org](http://www.oregonwine.org) for growing area descriptions.

<sup>3</sup> Rogue Valley data includes Applegate Valley.

**Wine grapes: Price per ton, by selected variety and area, Oregon, 2011-2012 <sup>1,2</sup>**

Variety	North Willamette Valley		South Willamette Valley		Rogue Valley		Umpqua Valley		Columbia River and at large	
	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012
	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
Cabernet Sauvignon	<sup>3</sup> 950	1,400	<sup>3</sup> 1,530	2,035	1,600	1,774	-	2,200	2,740	2,713
Chardonnay	1,940	1,880	2,100	1,707	1,480	1,423	<sup>3</sup> 1,130	1,367	1,170	1,291
Merlot	-	920	<sup>3</sup> 1,680	2,050	1,460	1,454	<sup>3</sup> 1,690	-	2,160	2,198
Pinot Gris	1,260	1,440	1,410	1,371	1,430	1,668	<sup>3</sup> 1,190	1,776	1,630	1,883
Pinot Noir	2,350	2,918	2,510	2,549	2,030	2,057	1,500	2,157	1,590	<sup>3</sup> 2,672
Syrah	<sup>3</sup> 2,580	2,687	-	-	2,070	1,968	1,710	2,200	2,150	2,784
White Riesling	1,470	1,538	1,230	<sup>2</sup> 972	1,080	1,174		1,059	<sup>3</sup> 760	1,118

<sup>1</sup> Price per ton is a weighted average of prices received by Oregon grape growers.

<sup>2</sup> Includes estimates for incomplete responses.

<sup>3</sup> Price is based on a limited number of reports.

## Winery Section:

### Wineries: Number, crush and cooerage, by growing region, Oregon, 2011-2012 <sup>1</sup>

Growing Region <sup>2</sup>	All wineries <sup>3</sup>		Wineries crushing grapes		Total wine grapes crushed		Total cooerage	
	2011	2012	2011	2012	2011	2012	2011	2012
	<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 <sup>4</sup>	270	325	228	238	27,719	33,974	7,952	9,544
South Willamette Valley <sup>5</sup>	46	53	40	40	6,683	5,793	696	1,375
Rogue Valley <sup>6</sup>	55	65	38	40	3,910	6,451	1,071	1,890
Umpqua Valley	33	32	17	23	1,550	2,948	516	1,062
Columbia River and at large	59	70	27	38	2,171	2,198	1,736	2,281
<b>Total</b>	<b>463</b>	<b>545</b>	<b>350</b>	<b>379</b>	<b>42,033</b>	<b>51,364</b>	<b>11,971</b>	<b>16,152</b>

<sup>1</sup> Includes estimates for incomplete responses.

<sup>2</sup> Survey respondents identified one of these growing regions as their production location. See [www.oregonwine.org](http://www.oregonwine.org) for growing area descriptions.

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

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

<sup>5</sup> Includes areas south of Monmouth and the South Salem Hills and all of Lane County.

<sup>6</sup> Rogue Valley data includes Applegate Valley.

### Wineries: Crush, by type of acquisition and area, Oregon, 2011 and 2012 totals <sup>1</sup>

Growing Region <sup>2</sup>	Estate grown	Purchased from Oregon	Purchased from other states	Custom crush	All crush, 2012	All crush, 2011
	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>
North Willamette Valley <sup>3</sup>	13,509	13,340	631	6,494	33,974	27,719
South Willamette Valley <sup>4</sup>	2,267	3,232	142	152	5,793	6,683
Rogue Valley <sup>5</sup>	3,340	2,233	84	794	6,451	3,910
Umpqua Valley	1,274	1,163	48	462	2,948	1,550
Columbia River and at large	928	635	272	363	2,198	2,171
<b>Total, 2012</b>	<b>21,320</b>	<b>20,602</b>	<b>1,178</b>	<b>8,264</b>	<b>51,364</b>	
Total, 2011	16,529	18,461	765	6,277		42,033

<sup>1</sup> Includes estimates for incomplete responses.

<sup>2</sup> Survey respondents identified one of these growing regions as their production location.

<sup>3</sup> Includes Yamhill-Carlton District, Chehalem Mountains, McMinnville, Ribbon Ridge, Dundee Hills, Eola-Amity Hills and areas north of Monmouth and the South Salem Hills.

<sup>4</sup> Includes areas south of Monmouth and the South Salem Hills and all of Lane County.

<sup>5</sup> Rogue Valley data includes Applegate Valley.

### Wineries: Crush, By Origin and Variety, Oregon, 2011-2012 <sup>1</sup>

Variety	Oregon						Grown in Other States		All Crush	
	Estate Grown		Other Oregon Grown <sup>2</sup>		All Oregon Grown		2011	2012	2011	2012
	2011	2012	2011	2012	2011	2012				
	<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	111	109	114	143	225	252	8	72	233	325
Cabernet Sauvignon	363	336	384	397	747	733	190	226	937	959
Chardonnay	985	1,329	927	1,600	1,912	2,929	27	69	1,939	2,998
Gewürztraminer	147	319	84	167	231	486	59	15	291	501
Merlot	283	273	399	377	682	650	107	130	790	780
Müller Thurgau	95	269	20	135	115	404	-	-	116	404
Pinot Blanc	336	370	165	274	501	644	-	-	501	644
Pinot Gris	2,687	3,193	4,386	5,128	7,073	8,321	24	30	7,098	8,351
Pinot Noir	9,426	12,246	15,842	17,644	25,268	29,890	14	63	25,282	29,953
Sauvignon Blanc	42	574	133	88	175	662	-	3	176	665
Syrah	285	266	732	595	1,017	861	129	174	1,146	1,035
Tempranillo	188	152	118	170	306	322	17	28	323	350
Viognier	175	126	193	182	368	308	15	28	383	336
White Riesling	676	948	677	1,020	1,353	1,968	24	26	1,377	1,994
Zinfandel	38	44	42	47	80	91	9	28	89	119
All Other	690	766	520	899	1,210	1,665	142	285	1,352	1,950
Total <sup>3</sup>	16,529	21,320	24,736	28,866	41,268	50,186	765	1,177	42,033	51,364
Case Equivalent <sup>4</sup>	<i>1,042</i>	<i>1,344</i>	<i>1,559</i>	<i>1,819</i>	<i>2,601</i>	<i>3,163</i>	<i>48</i>	<i>74</i>	<i>2,649</i>	<i>3,237</i>

<sup>1</sup> Includes estimates for incomplete responses.

<sup>2</sup> Includes all purchased fruit and custom crushed fruit.

<sup>3</sup> Totals may not add due to rounding.

<sup>4</sup> 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, 2013** <sup>1,2</sup>

Wine Type	Bottled Inventory by Vintage <sup>3</sup>				Bulk Inventory by Vintage			
	2012 Vintage	2011 and earlier Vintages	Total	Share of Total	2012 Vintage	2011 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	0.2	98.4	98.5	4.1	115.5	34.7	150.2	1.7
All White	33.3	529.6	562.9	23.4	2353.8	316.2	2670.0	29.9
All Red	47.5	1628.5	1676.0	69.7	4651.4	1325.7	5977.1	66.8
Rosé and Blush Blends	9.7	58.1	67.8	2.8	118.2	27.6	145.8	1.6
Total <sup>4</sup>	90.7	2,314.6	2,405.2	100	7,238.9	1,704.2	8,943.1	100

<sup>1</sup> Includes estimates for incomplete respondents.

<sup>3</sup> One case is equivalent to nine liters.

<sup>2</sup> Includes bonded and tax-paid inventory owned by Oregon wineries.

<sup>4</sup> Totals may not add due to rounding.

**Wineries: Sales, by variety type, Oregon, 2011-2012** <sup>1</sup>

Variety and wine type	2011			2012		
	Case sales	Share of total case sales <sup>2</sup>	Bulk sales <sup>3</sup>	Case sales	Share of total case sales <sup>2</sup>	Bulk sales <sup>3</sup>
	<i>Cases</i>	<i>Percent</i>	<i>Gallons</i>	<i>Cases</i>	<i>Percent</i>	<i>Gallons</i>
Cabernet Franc	3,236.3	0.2	990.0	3,108.1	0.1	916.0
Cabernet Sauvignon	18,701.2	0.9	3,855.0	24,553.3	1.0	4,455.0
Chardonnay	79,393.8	3.9	51,976.0	116,920.7	4.9	59,575.0
Gewürtraminer	11,517.0	0.6	500.0	14,531.4	0.6	4,643.0
Merlot	14,541.6	0.7	1,400.0	17,191.5	0.7	-
Müller-Thurgau	4,211.5	0.2	-	3,859.0	0.2	1,855.0
Pinot Blanc	12,933.3	0.6	-	18,072.9	0.8	3,088.0
Pinot Gris	473,697.2	23.2	69,414.0	571,711.7	24.0	51,268.0
Pinot Noir	1,047,356.5	51.3	350,763.0	1,148,990.5	48.3	332,873.0
Sauvignon Blanc	3,309.0	0.2	-	2,638.2	0.1	-
Syrah	15,741.7	0.8	6,673.0	15,579.9	0.7	6,121.0
Tempranillo	8,885.6	0.4	400.0	8,563.1	0.4	1,240.0
Viognier	9,788.2	0.5	375.0	9,237.1	0.4	970.0
White Riesling	108,812.6	5.3	3,050.0	106,043.7	4.5	4,510.0
Zinfandel	1,100.3	0.1	200.0	2,121.7	0.1	-
Red Blends	89,018.5	4.4	2,059.0	83,688.2	3.5	1,762.0
White Blends	33,489.0	1.6	1,073.0	109,432.0	4.6	1,514.0
All Rosé & Blush Blends	26,680.8	1.3	-	47,051.3	1.9	-
All other still wines	55,436.9	2.7	-	44,730.5	1.9	1,062.0
All sparkling wines	22,846.5	1.1	-	31,140.3	1.3	3,325.0
<b>Totals</b>	<b>2,040,698</b>	<b>100</b>	<b>492,728</b>	<b>2,379,165</b>	<b>100</b>	<b>479,177</b>
<b>Total dollars</b>	<b>276,158,894</b>			<b>311,740,589</b>		

<sup>1</sup> Includes estimates for incomplete respondents.

<sup>3</sup> Bulk wine sales are from responses only and have not been estimated for incomplete respondents.

<sup>2</sup> Share of total represents the percentage of case sales only.

**Wineries: Domestic Sales, by destination, Oregon, 2011-2012** <sup>1</sup>

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>
2012	318,076	164,634	482,710	461,435	158,440	109,951	154,122	952,637	2,319,295
2011	271,808	140,686	412,494	394,314	135,393	93,957	131,703	814,064	1,981,925

<sup>1</sup> Includes estimates for incomplete respondents.

**Wineries: Export sales, by variety, Oregon, 2012 totals** <sup>1</sup>

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	
												2012	2011
	<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	3,771	30	818	411	137	28	853	180	255	50	668	7,201	7,856
Other Whites	5,469	-	9,452	909	1,736	-	224	216	232	464	132	18,834	8,110
Pinot Noir	11,176	290	2,474	5,180	165	204	3,102	2,078	955	1,838	974	28,436	36,254
Other Reds	749	-	2,003	252	-	5	1,984	124	23	209	50	5,399	6,475
Totals													
<b>2012</b> <sup>2</sup>	<b>21,165</b>	<b>320</b>	<b>14,747</b>	<b>6,752</b>	<b>2,038</b>	<b>237</b>	<b>6,163</b>	<b>2,598</b>	<b>1,465</b>	<b>2,561</b>	<b>1,824</b>	<b>59,870</b>	
2011	20,613	-	12,212	-	-	9,121	3,347	4,438	2,429	-	6,613		58,773

<sup>1</sup> Includes estimates from historical data for incomplete respondents.

<sup>2</sup> Note that export destination categories have changed from 2011.