

2013 Oregon Vineyard and Winery Census Report

October 2014

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

- The number of “all” wineries, including TTB-bonded and OLCC Grower Sales Privilege and Winery license holders, increased 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, 2013¹

Variety	All Planted Acreage	Harvested Acreage	Yield per Harvested Acre	Production	Price Per Ton ²	Value of Production ³
	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>	<i>Tons</i>	<i>Dollars</i>	<i>1,000 Dollars</i>
Cabernet Franc	146	144	2.87	413	2,124	877
Cabernet Sauvignon	528	423	2.46	1,042	2,124	2,213
Chardonnay	1,164	1,012	2.80	2,828	2,236	6,324
Gewüztraminer	189	173	1.80	312	1,610	502
Merlot	425	395	2.73	1,081	1,874	2,025
Müller Thurgau	127	121	4.50	545	1,278	696
Pinot Blanc	227	196	3.07	600	1,628	977
Pinot Gris	3,445	3,204	3.22	10,321	1,562	16,118
Pinot Noir	14,808	13,595	2.38	32,355	2,651	85,768
Sauvignon Blanc	101	82	2.17	178	1,782	317
Syrah	570	522	2.62	1,370	2,154	2,950
Tempranillo	350	258	2.57	664	2,106	1,398
Viognier	241	212	2.26	479	1,943	932
White Riesling	653	584	3.13	1,830	1,507	2,757
Zinfandel	100	92	2.29	211	1,959	413
All Others	880	667	3.03	2,018	1,844	3,722
Total⁴	23,955	21,681	2.59	56,246	2,249	127,990

¹ Includes estimates for incomplete responses.

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

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

⁴ Totals may not add up due to rounding.

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

Growing Area	Number of Vineyards	All Planted Acreage	Harvested Acreage	Yield per Harvested Acre	Production
	<i>Number</i>	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>	<i>Tons</i>
North Willamette Valley ²	545	15,259	14,224	2.54	36,199
South Willamette Valley ³	102	1,978	1,629	2.90	4,731
Umpqua Valley ⁴	70	2,382	2,056	2.08	4,273
Rogue Valley ⁵	140	2,582	2,214	3.25	7,201
Columbia River ⁶ and at large	94	1,754	1,557	2.46	3,834
Total⁷	951	23,955	21,681	2.59	56,239

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, 2013¹

	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	319	37	341	671	1,368

¹ Totals 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, 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	-	-	-
Totals	460	56	129

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

Table 5: Wine grapes: Production, by selected variety and area, Oregon, 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	1,042	2,828	1,081	10,321	32,355	1,370	1,830

¹ Includes estimates for incomplete responses.

² See Growing Area descriptions in Vineyard Section Table 2.

Table 6: Wine grapes: Price per ton, by selected variety and area, Oregon, 2013¹

Variety	North Willamette Valley ²	South Willamette Valley ²	Umpqua Valley ²	Rogue Valley ²	Columbia River ² and at large
	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>
Cabernet Sauvignon	-	-	-	1,866	2,502
Chardonnay	2,451	2,379	-	1,645	-
Merlot	-	-	-	1,659	2,242
Pinot Gris	1,575	1,582	-	1,499	1,681
Pinot Noir	2,813	2,494	1,881	1,666	2,432
Syrah	-	-	-	2,039	2,252
White Riesling	1,730	-	-	1,251	1,244

¹ Price per ton is the mean of the average prices received by Oregon grape growers.

² See 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, 2013¹

Growing Region ²	All wineries ³	Wineries crushing grapes	Total wine grapes crushed	Total cooperage ⁴
	<i>Number</i>	<i>Number</i>	<i>Tons</i>	<i>1,000 Gallons</i>
North Willamette Valley	384	236	35,689	10,475
South Willamette Valley	56	34	4,274	1,510
Umpqua Valley	33	20	1,061	523
Rogue Valley	75	40	5,807	1,393
Columbia River and at large	57	40	5,758	1,459
Total	605	370	52,588	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, 2013 totals¹

Growing Region ²	Estate grown	Purchased from Oregon	Purchased from other states	Custom crush	All crush
	<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
South Willamette Valley	1,895	2,173	50	157	4,274
Umpqua Valley	631	240	-	190	1,061
Rogue Valley	3,387	1,321	72	1,027	5,807
Columbia River and at large	1,346	3,060	938	413	5,758
Total	20,750	21,286	1,769	8,782	52,588

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, 2013¹

Variety	Oregon			Grown in Other States	All Crush
	Estate Grown	Other Oregon Grown ²	All Oregon Grown		
	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>
Cabernet Franc	119	139	258	94	352
Cabernet Sauvignon	223	402	625	280	906
Chardonnay	1,118	1,460	2,578	96	2,674
Gewürztraminer	226	153	379	9	388
Merlot	257	475	732	174	906
Müller Thurgau	221	244	465	-	465
Pinot Blanc	305	225	531	-	531
Pinot Gris	3,290	5,369	8,658	96	8,754
Pinot Noir	12,459	17,753	30,212	103	30,315
Sauvignon Blanc	42	85	127	20	147
Syrah	315	693	1,008	170	1,178
Tempranillo	424	317	742	16	758
Viognier	141	299	440	45	484
White Riesling	673	1,123	1,797	23	1,820
Zinfandel	97	57	153	21	174
All Other	838	1,249	2,087	623	2,710
Total ³	20,750	30,043	50,793	1,770	52,563
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>
	1,308	1,893	3,201	112	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, 2013¹

Variety and wine type	Case sales	Share of total case sales ²	Bulk sales ³
	<i>Cases</i>	<i>Percent</i>	<i>Gallons</i>
Cabernet Franc	4,551.6	0.2	12,690.0
Cabernet Sauvignon	27,178.2	1.0	23,855.0
Chardonnay	110,219.8	4.1	21,289.4
Gewürtraminer	17,076.7	0.6	1,983.0
Merlot	20,798.6	0.8	31,700.0
Müller-Thurgau	9,884.2	0.4	7,193.6
Pinot Blanc	22,458.6	0.8	3,990.5
Pinot Gris	573,284.5	21.3	228,538.0
Pinot Noir	1,425,965.7	53.1	281,249.3
Sauvignon Blanc	5,262.1	0.2	-
Syrah	27,021.9	1.0	5,099.3
Tempranillo	22,794.2	0.8	3,090.0
Viognier	18,436.6	0.7	1,075.0
White Riesling	82,287.3	3.1	7,275.5
Zinfandel	4,731.0	0.2	1,500.0
Red Blends	103,532.4	3.9	22,283.0
White Blends	43,743.4	1.6	30,594.0
All Rosé & Blush Blends	57,309.7	2.1	3,103.0
All other still wines	87,436.9	3.3	1,041.3
All sparkling wines	21,563.5	0.8	-
Totals	2,685,537	100	687,550
Total dollars	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, 2013¹

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>
399,536	231,677	631,213	510,661	176,304	139,447	159,970	999,470	2,617,065

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
<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
Other Whites	1,850	0	6,656	1,332	142	76	202	127	334	44	74	10,837
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
Other Reds	100	0	1,208	304	0	0	68	0	0	8	251	1,939
Totals	21,197	2,025	11,572	8,406	2,189	428	5,436	2,598	2,983	1,744	3,165	61,742

¹ Includes estimates from historical data for incomplete responses.