

2014 Oregon Vineyard and Winery Census Report

August 2015

2014 was a record year for the Oregon wine industry.

- The number of vineyard operations increased by 8% to 1,027 leading to a 14% increase in planted acreage from 2013.
- Vineyard production was up an average of 39% with the majority of the increase coming from higher yields (~60%).
- Pinot Noir leads all varieties accounting for 63% of harvested acreage and 58% of vineyard production.
- The number of “all” wineries, including TTB-bonded and OLCC Grower Sales Privilege and Winery license holders, increased from 605 to 676.
- Total tons of grapes crushed increased 33% from 52,589 tons to 70,112 tons with Pinot Noir accounting for 58%.
- Case sales for 2014 increased 7% overall from 2014 with wine club and website/phone orders increasing at 12% each.
- Oregon and national sales grew by 12% and 5% respectively, while international sales grew by 50%.
- Total sales increased 14% to \$430 million in 2014.

Vineyard Section:

Table 1: Wine grapes: Acreage, yield, production, price and value, variety, 2013-2014¹

Variety	All Planted Acreage		Harvested Acreage		Yield per Harvested Acre		Production		Price per Ton ²		Value of Production ³	
	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014
	<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	146	170	144	148	2.87	3.37	413	501	2,124	2,225	877	1,114
Cabernet Sauvignon	528	606	423	567	2.46	2.78	1,042	1,575	2,124	2,399	2,213	3,778
Chardonnay	1,164	1,353	1,012	1,120	2.80	3.55	2,828	3,972	2,236	1,945	6,324	7,725
Gewüztraminer	189	237	173	216	1.80	2.66	312	576	1,610	1,356	502	781
Merlot	425	487	395	384	2.73	3.46	1,081	1,330	1,874	1,950	2,025	2,593
Müller Thurgau	127	110	121	89	4.50	4.86	545	431	1,278	1,073	696	463
Pinot Blanc	227	262	196	220	3.07	4.44	600	978	1,628	1,685	977	1,648
Pinot Gris	3,445	3,631	3,204	3,421	3.22	4.01	10,321	13,701	1,562	1,422	16,118	19,478
Pinot Noir	14,808	17,146	13,595	15,356	2.38	2.95	32,355	45,239	2,651	2,518	85,768	113,897
Sauvignon Blanc	101	73	82	67	2.17	3.34	178	223	1,782	1,534	317	342
Syrah	570	665	522	574	2.62	3.41	1,370	1,960	2,154	2,345	2,950	4,596
Tempranillo	350	344	258	316	2.57	2.66	664	839	2,106	2,084	1,398	1,749
Vioignier	241	257	212	230	2.26	3.34	479	768	1,943	1,839	932	1,412
White Riesling	653	754	584	685	3.13	3.20	1,830	2,194	1,507	1,017	2,757	2,232
Zinfandel	100	100	92	97	2.29	3.35	211	324	1,959	1,814	413	588
All Others	880	1,196	667	1,004	3.03	3.64	2,018	3,653	1,844	1,685	3,722	6,155
Total ⁴	23,955	27,390	21,681	24,494	2.59	3.20	56,246	78,264	2,249	2,136	127,990	168,552

¹ Includes estimates for incomplete responses.

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

³ Value of production is derived by multiplying quantity times price.

⁴ Totals may not add up due to rounding.

Table 2: Wine grapes: Vineyards, acreage, yield and production by growing area, 2013-2014¹

Growing Area	Number of Vineyards		All Planted Acreage		Harvested Acreage		Yield per Harvested Acre		Production	
	2013	2014	2013	2014	2013	2014	2013	2014	2013	2014
	<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 ²	545	591	15,259	16,545	14,224	15,158	2.54	3.36	36,199	50,977
South Willamette Valley ³	102	103	1,978	2,750	1,629	2,395	2.90	2.94	4,731	7,038
Umpqua Valley ⁴	70	70	2,382	2,660	2,056	2,408	2.08	2.12	4,280	5,102
Rogue Valley ⁵	140	156	2,582	3,226	2,214	2,650	3.25	3.27	7,201	8,667
Columbia River ⁶ and at large	94	107	1,754	2,209	1,557	1,883	2.46	3.44	3,834	6,480
Total ⁷	951	1027	23,955	27,390	21,681	24,494	2.59	3.20	56,246	78,264

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: Acreage and production, by variety and area, 2013 and 2014 totals¹

Variety	North Willamette Valley ²			South Willamette Valley ²			Umpqua Valley ²			Rogue Valley ²			Columbia River ² and at large		
	Planted Acreage	Harvested Acreage	Production	Planted Acreage	Harvested Acreage	Production	Planted Acreage	Harvested Acreage	Production	Planted Acreage	Harvested Acreage	Production	Planted Acreage	Harvested Acreage	Production
	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>
Cabernet Franc	2	2	8	-	-	-	4	4	13	112	92	297	51	51	182
Cabernet Sauvignon	5	5	7	8	7	16	34	25	40	209	193	424	350	337	1,088
Chardonnay	970	828	3,008	127	87	315	59	49	133	153	119	405	43	36	110
Gewüztraminer	122	108	236	42	38	86	19	17	44	47	47	171	7	7	39
Merlot	2	2	8	1	1	3	68	46	82	192	118	394	224	217	842
Müller Thurgau	80	70	345	16	15	75	11	3	11	3	-	-	-	-	-
Pinot Blanc	201	175	827	16	8	15	4	4	17	40	33	120	-	-	-
Pinot Gris	2,030	1,911	8,343	506	485	1,740	428	411	1,030	323	282	1,228	344	332	1,359
Pinot Noir	12,169	11,183	35,219	1,858	1,621	4,380	1,687	1,578	3,076	933	726	2,031	499	247	532
Sauvignon Blanc	19	17	46	11	11	31	9	4	14	28	28	93	7	7	39
Syrah	38	36	102	1	1	1	80	54	119	282	229	828	264	254	911
Tempranillo	29	27	109	4	3	6	99	88	188	169	155	420	43	43	118
Viognier	39	31	106	8	2	9	17	13	31	186	179	604	6	6	19
White Riesling	429	413	1,320	93	79	269	41	17	48	139	132	427	52	44	130
Zinfandel	-	-	-	-	-	-	4	4	6	47	44	173	48	48	145
All Others	409	349	1,294	57	36	91	97	90	250	363	273	1,052	270	256	966
Total, 2014²	16,545	15,158	50,977	2,750	2,395	7,038	2,660	2,408	5,102	3,226	2,650	8,667	2,209	1,883	6,480
Total, 2013 ²	15,259	14,224	36,199	1,978	1,629	4,731	2,382	2,056	4,280	2,582	2,214	7,201	1,754	1,557	3,834

¹ Includes estimates for incomplete responses.

² See Growing Area descriptions in Vineyard Section Table 2.

³ Totals may not add up due to rounding.

- No data to report.

Table 4: Wine grapes: Price per ton, by variety and region, 2014¹

Variety	Statewide ²				Regions ¹																			
					North Willamette Valley				South Willamette Valley				Umpqua Valley				Rogue Valley				Columbia River and at large			
	Average ³	Median ⁴	Low	High	Average ³	Median ⁴	Low	High	Average ³	Median ⁴	Low	High	Average ³	Median ⁴	Low	High	Average ³	Median ⁴	Low	High	Average ³	Median ⁴	Low	High
	<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>	<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>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>
Cabernet Franc	2,225	2,190	1,167	3,250	-	-	-	-	-	-	-	-	-	-	-	-	2,157	2,034	1,167	2,360	2,312	2,200	2,173	3,250
Cabernet Sauvignon	2,399	2,037	1,490	3,750	-	-	-	-	-	-	-	-	-	-	-	-	2,097	2,090	1,490	2,400	2,511	2,021	1,550	3,750
Chardonnay	1,945	1,901	801	3,530	2,022	2,200	802	3,530	1,589	1,600	801	1,839	-	-	-	-	1,560	1,500	830	2,440	-	-	-	-
Gewürztraminer	1,356	1,393	700	2,000	1,277	1,388	700	1,800	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Merlot	1,950	1,821	1,429	3,250	-	-	-	-	-	-	-	-	-	-	-	-	1,980	1,800	1,429	2,217	1,945	1,868	1,550	3,250
Müller Thurgau	1,073	1,200	1,000	1,500	1,068	1,100	1,000	1,500	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Pinot Blanc	1,685	1,626	1,250	3,000	1,692	1,673	1,250	3,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Pinot Gris	1,422	1,553	789	3,136	1,373	1,600	1,000	3,136	1,620	1,500	789	1,939	-	-	-	-	1,601	1,352	1,200	1,864	-	-	-	-
Pinot Noir	2,518	2,500	1,429	5,000	2,562	2,665	1,455	5,000	2,918	2,300	1,560	3,643	2,140	2,000	1,429	2,500	2,106	1,935	1,435	2,271	2,248	1,945	1,693	3,496
Sauvignon Blanc	1,534	1,800	1,181	2,201	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Syrah	2,345	2,100	1,000	3,508	-	-	-	-	-	-	-	-	-	-	-	-	2,209	2,072	1,000	2,500	2,444	2,200	1,787	3,508
Tempranillo	2,084	2,039	1,492	3,491	-	-	-	-	-	-	-	-	-	-	-	-	2,133	2,088	1,570	2,417	2,144	2,100	1,800	2,500
Viognier	1,839	1,854	1,200	2,200	-	-	-	-	-	-	-	-	-	-	-	-	1,923	1,900	1,490	2,034	-	-	-	-
White Riesling	1,017	1,426	612	2,575	891	1,700	612	2,545	1,767	1,300	768	2,575	-	-	-	-	1,110	1,300	950	1,431	-	-	-	-
Zinfandel	1,814	1,717	1,194	2,002	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
All Others	1,685	1,800	458	3,250	1,224	1,506	458	3,000	1,459	1,600	1,250	2,442	-	-	-	-	2,110	2,016	993	2,745	1,737	2,136	1,200	3,250
Total²	2,136	2,148			2,149	2,312			2,490	2,030			2,140	2,000			1,931	1,812			2,180	2,060		

¹ See Growing Area descriptions in Vineyard Section Table 2.

² Statewide prices include data from all regions including those with insufficient data to report separately.

³ Averages are a weighted average of prices received by Oregon grape growers.

- Insufficient data available to report at the regional level.

Winery Section:

Table 1: Wineries: Number, crush and cooerage, by growing region, 2013-2014¹

Growing Region ²	All Wineries ³		Wineries Crushing Grapes		Total ⁵ Wine Grapes Crushed	
	2013	2014	2013	2014	2013	2014
	<i>Number⁴</i>	<i>Number⁴</i>	<i>Number⁴</i>	<i>Number⁴</i>	<i>Tons</i>	<i>Tons</i>
North Willamette Valley	384	440	236	262	35,689	50,511
South Willamette Valley	56	67	34	41	4,274	3,079
Umpqua Valley	33	41	20	28	1,061	1,848
Rogue Valley	75	80	40	42	5,807	6,767
Columbia River and at large	57	48	40	39	5,758	7,908
Total⁵	605	676	370	412	52,588	70,112

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.

⁵ Totals may not add up due to rounding.

Table 2: Wineries: Crush, by type of acquisition and area, 2013 and 2014 totals¹

Growing Region ²	Estate Grown	Purchased from Oregon	Purchased from Other States	All Crush, 2014	All Crush, 2013
	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>
North Willamette Valley	26,236	23,272	1,004	50,511	35,689
South Willamette Valley	1,849	1,203	26	3,079	4,274
Umpqua Valley	1,341	507	0	1,848	1,061
Rogue Valley	4,574	2,184	8	6,767	5,807
Columbia River and at large	2,643	3,866	1,399	7,908	5,758
Total, 2014³	36,644	31,031	2,437	70,112	
Total, 2013 ³	20,750	21,286	1,769		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.

³ Totals may not add up due to rounding.

Table 3: Wineries: Crush, by origin and variety, 2013-2014¹

Variety	Oregon						Grown in Other States		All Crush	
	Estate Grown		Other Oregon Grown ²		All Oregon Grown		2013	2014	2013	2014
	2013	2014	2013	2014	2013	2014				
	<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	119	197	139	101	258	298	94	32	352	330
Cabernet Sauvignon	223	412	402	271	625	683	280	292	906	975
Chardonnay	1,118	1,853	1,460	1,463	2,578	3,315	96	243	2,674	3,558
Gewürztraminer	226	500	153	124	379	624	9	67	388	691
Merlot	257	456	475	359	732	815	174	203	906	1,018
Müller Thurgau	221	275	244	124	465	400	-	-	465	400
Pinot Blanc	305	626	225	230	531	856	-	-	531	856
Pinot Gris	3,290	5,893	5,369	6,748	8,658	12,641	96	99	8,754	12,741
Pinot Noir	12,459	21,496	17,753	17,728	30,212	39,224	103	86	30,315	39,310
Sauvignon Blanc	42	134	85	85	127	220	20	11	147	231
Syrah	315	694	693	675	1,008	1,369	170	269	1,178	1,638
Tempranillo	424	660	317	288	742	948	16	66	758	1,014
Viognier	141	335	299	336	440	671	45	63	484	734
White Riesling	673	920	1,123	1,616	1,797	2,536	23	248	1,820	2,785
Zinfandel	97	220	57	100	153	320	21	65	174	385
All Other	838	1,972	1,249	783	2,113	2,754	623	692	2,736	3,447
Total ³	20,750	36,644	30,043	31,031	50,819	67,675	1,770	2,437	52,589	70,112
Case Equivalent ⁴	1,308	2,309	1,893	1,956	3,201	4,265	112	154	3,313	4,419

¹ Includes estimates for incomplete responses.

² Includes all fruit purchased from Oregon growers.

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: Sales by sales channel, 2013-2014¹

Year	Direct to Consumer			Wholesale (FOB, Trade, etc.)			Total Cases ²	Total Dollars ²
	Tasting Rooms	Wine Clubs	Website/Phone Orders	Sold in Oregon	Sold Nationally (excluding Oregon)	Sold Internationally		
	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>		
2014	386,126	186,441	72,954	570,994	1,555,686	92,763	2,864,963	430,417,579
2013	399,536	166,519	65,158	510,661	1,475,191	61,742	2,678,807	376,132,956

¹ Includes estimates for incomplete responses.

² Totals may not add up due to rounding.