

2018 Oregon Vineyard and Winery Report

September 2019

Overview:

2018 saw increases in sales, revenue and production for Oregon wineries and vineyards.

- The leading variety in planted acreage and production remains Pinot Noir accounting for 57% of all planted acreage and 59% of wine grape production.
- The estimated value of wine grape production topped \$200 million for the first time.
- The number of vineyards increased from 1,144 to 1,165 and total planted acreage increased by nearly 2,000 acres from 33,996 to 35,972, an increase of 5.8%. The highest growth rate in planted acreage was seen in the Umpqua and Rogue valleys at 10%.
- The overall number of wineries increased from 769 to 793 with the biggest increases coming from South Willamette Valley, which added 16, and the North Willamette Valley, which grew by 12.
- Total tons crushed increased by 3.3% from 77,170 tons to 79,685 tons.
- Case sales increased 15% from 3.60 million to 4.15 million, supported by increases in domestic sales outside of Oregon, direct to consumer channels and international sales.
- The leading the export market for Oregon wine is Canada, which accounted for 45% of export sales. Notable growth was seen in Scandinavian markets, Mexico, Hong Kong/China and South Korea.

Vineyard Section:

Table 1: Wine Grapes: Acreage, yield, production, price and value by variety, 2017-2018¹

Variety	All Planted Acreage		Harvested Acreage		Yield per Harvested Acre		Production		Price per Ton ²		Value of Production ³	
	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018
	<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>
Albariño	-	122	-	106	-	3.31	-	350	-	-	-	-
Cabernet Franc	313	364	212	277	3.07	2.57	653	710	2,412	2,451	1,574	1,742
Cabernet Sauvignon	1,105	1,377	912	1,154	2.37	2.38	2,416	2,745	2,786	2,810	6,731	7,712
Chardonnay	2,123	2,406	1,818	2,185	3.20	2.77	5,812	6,049	1,884	1,860	10,949	11,248
Gamay	-	116	-	79	-	3.78	-	298	-	1,823	-	543
Gewürztraminer	183	173	151	137	2.47	2.75	373	377	1,264	1,178	472	444
Malbec	242	268	191	204	2.84	3.28	543	669	2,606	2,483	1,416	1,662
Merlot	553	699	514	498	2.81	3.49	1,442	1,736	2,366	2,033	3,413	3,530
Müller Thurgau	79	69	71	67	3.56	3.45	253	230	1,086	843	275	194
Pinot Blanc	214	225	208	216	4.11	4.06	853	877	1,813	1,726	1,547	1,513
Pinot Gris	4,888	5,078	4,656	4,732	2.96	3.01	13,786	14,222	1,199	1,469	16,532	20,896
Pinot Noir	19,697	20,616	18,488	19,763	2.89	2.97	53,457	58,780	2,375	2,301	126,965	135,254
Riesling	540	500	500	442	3.55	3.38	1,778	1,496	1,224	1,412	2,176	2,113
Sauvignon Blanc	88	69	71	51	3.79	4.92	269	253	1,821	1,978	489	501
Syrah	1,316	1,598	1,002	1,367	2.91	3.32	2,915	4,538	2,407	2,130	7,015	9,667
Tempranillo	368	394	319	338	3.17	3.73	1,011	1,260	1,994	1,996	2,017	2,515
Vignier	276	380	243	302	3.42	3.11	833	938	1,765	1,573	1,470	1,476
Other ⁴	2,011	1,519	1,651	1,366	3.00	3.38	4,948	4,605	1,757	1,676	8,806	7,717
Total⁵	33,996	35,972	31,008	33,283	2.94	3.01	91,342	100,133	2,056	2,033	191,846	208,726

¹ Includes estimates for incomplete responses.

² Price per ton is a weighted average of price received by Oregon grape growers (see Table 4).

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

⁴ Other includes all other varieties, including some varieties for which data were collected but reported values were too small to disclose.

⁵ Totals may not add up due to rounding.

- No data reported, or reported data were insufficient to develop estimates.

Table 2: Wine Grapes: Vineyards, acreage, yield and production by growing area, 2017-2018¹

Region	Number of Vineyards		All Planted Acreage		Harvested Acreage		Yield per Harvested		Production	
	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018
	<i>Number²</i>	<i>Number²</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 ³	637	651	19,705	20,279	18,458	19,860	2.94	2.98	54,365	59,122
South Willamette Valley ⁴	119	105	3,819	4,157	3,659	3,913	2.85	2.78	10,416	10,871
Umpqua Valley ⁵	82	86	3,227	3,552	2,904	3,106	2.93	2.98	8,494	9,268
Rogue Valley ⁶	198	190	4,860	5,360	4,129	4,417	2.92	3.23	12,061	14,249
Columbia River ⁷	**	119	**	1,798	**	1,384	**	3.28	**	4,538
Other Oregon ⁸	**	14	**	826	**	603	**	3.46	**	2,085
<i>Columbia River and Other Oregon</i>	<i>108</i>	<i>133</i>	<i>2,384</i>	<i>2,624</i>	<i>1,858</i>	<i>1,987</i>	<i>3.23</i>	<i>3.33</i>	<i>6,006</i>	<i>6,623</i>
Total⁹	1,144	1,165	33,996	35,972	31,008	33,283	2.94	3.01	91,342	100,133

¹ Includes estimates for incomplete responses.

² Numbers fluctuate due to inconsistent responses and consolidation of vineyard operations.

³ Includes Yamhill-Carlton, Chehalem Mountains, McMinnville, Ribbon Ridge, Dundee Hills, Eola-Amity Hills and Van Duzer Corridor AVAs, and areas north of Monmouth and the South Salem Hills.

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

⁵ Includes Elkton Oregon and Red Hill Douglas County AVAs.

⁶ Includes Applegate Valley AVA.

⁷ Includes the Oregon side of Columbia Gorge, Columbia Valley and Walla Walla Valley AVAs, including The Rocks District of Milton-Freewater.

⁸ Includes Snake River Valley AVA as well as any area not within other denoted AVA boundaries.

⁹ Totals may not add up due to rounding.

** Other Oregon Areas were combined with Columbia River data in the 2017 report.

Table 3: Wine Grapes – Acreage and production by variety and growing area, 2018¹

Variety	North Willamette Valley ²			South Willamette Valley ²			Umpqua Valley ²			Rogue Valley ²			Columbia River ²			Other Oregon Areas ²		
	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	Planted Acreage	Harvested Acreage	Production
	Acres	Acres	Tons	Acres	Acres	Tons	Acres	Acres	Tons	Acres	Acres	Tons	Acres	Acres	Tons	Acres	Acres	Tons
Albariño	9	9	20	5	5	6	92	84	299	16	8	25	-	-	-	-	-	-
Cabernet Franc	16	15	28	4	4	4	20	13	26	185	128	327	138	117	325	-	-	-
Cabernet Sauvignon	125	121	189	86	86	206	54	50	129	616	544	1,281	412	337	886	84	15	54
Chardonnay	1,785	1,724	4,371	156	86	247	20	13	77	246	191	911	63	48	141	134	123	301
Gamay	96	71	269	18	7	22	-	-	-	-	-	-	-	-	-	1	1	7
Gewürztraminer	46	45	95	39	20	66	27	20	52	40	33	103	4	4	8	17	15	54
Malbec	3	0	1	-	-	-	77	74	152	126	93	315	61	36	202	-	-	-
Merlot	9	5	9	2	2	9	143	139	402	212	141	515	250	196	747	84	15	54
Müller Thurgau	58	55	201	8	8	25	3	3	4	-	-	-	-	-	-	-	-	-
Pinot Blanc	197	189	732	16	16	70	-	-	-	12	11	74	-	-	-	-	-	-
Pinot Gris	2,778	2,577	7,797	1,326	1,257	3,380	277	238	732	570	539	1,793	101	99	339	25	23	180
Pinot Noir	14,176	14,120	42,511	2,360	2,320	6,534	2,062	1,818	4,804	1,587	1,222	3,753	301	193	537	130	90	641
Riesling	278	252	945	4	4	12	24	20	43	99	82	307	37	31	135	59	54	54
Sauvignon Blanc	35	25	90	4	3	15	-	-	-	25	19	128	5	4	21	-	-	-
Syrah	259	252	744	2	2	5	379	330	1,357	502	395	1,281	203	158	586	252	230	565
Tempranillo	46	45	154	12	12	28	135	119	388	139	117	470	28	13	59	34	31	161
Viognier	22	20	71	18	-	-	20	13	34	308	259	797	11	10	36	-	-	-
Other ³	340	329	895	93	77	232	218	173	768	665	627	2,154	166	125	443	-	-	-
Total, 2018	20,279	19,860	59,122	4,157	3,913	10,871	3,552	3,106	9,268	5,360	4,417	14,249	1,798	1,384	4,538	826	603	2,085
Total, 2017	19,852	18,567	54,365	3,819	3,659	10,416	3,227	2,904	8,494	4,841	4,129	12,061	**	**	**	2,384**	1,858**	6,006**

¹ Includes estimates for incomplete responses.

² See Growing Area descriptions in Vineyard Section Table 2.

³ Other includes all other varieties, including some varieties for which data were collected but reported values were too small to disclose.

** Other Oregon Areas were combined with Columbia River data in the 2017 report.

- No data reported, or reported data were insufficient to develop estimates.

Table 4: Wine Grapes - Price per ton by variety and growing area, 2018 (Revised October 2018)¹

Variety	Statewide ²				Regions																								
					North Willamette Valley ³				South Willamette Valley ³				Umpqua Valley ³				Rogue Valley ³				Columbia River ³				Other Oregon Areas ³				
	Average ⁴	Median	Low ⁵	High ⁶	Average ⁴	Median	Low ⁵	High ⁶	Average ⁴	Median	Low ⁵	High ⁶	Average ⁴	Median	Low ⁵	High ⁶	Average ⁴	Median	Low ⁵	High ⁶	Average ⁴	Median	Low ⁵	High ⁶	Average ⁴	Median	Low ⁵	High ⁶	
	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
Cabernet Franc	2,451	2,558	1,709	2,942	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Cabernet Sauvignon	2,810	2,500	2,087	3,588	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Chardonnay	1,860	2,000	1,000	3,500	1,824	2,089	1,391	3,254	1,922	2,200	1,344	2,653	-	-	-	-	-	-	-	-	2,464	2,519	2,265	2,497	-	-	-	-	-
Gamay	1,823	2,134	871	2,708	1,846	2,503	1,274	2,708	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Gewürztraminer	1,178	1,250	1,128	1,553	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Malbec	2,483	1,950	1,228	2,845	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Merlot	2,033	1,900	1,278	2,914	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Müller Thurgau	843	1,000	800	1,094	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Pinot Blanc	1,726	1,651	1,267	2,491	1,931	1,800	1,526	2,267	1,326	1,651	1,171	1,834	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Pinot Gris	1,469	1,475	750	2,199	1,412	1,500	927	2,150	1,402	1,437	913	1,544	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Pinot Noir	2,301	2,447	1,040	5,476	2,422	2,618	1,086	4,262	2,084	2,425	866	3,946	-	-	-	-	2,124	2,000	1,859	2,560	1,891	2,300	1,612	2,518	1,887	1,708	1,971	2,252	-
Riesling	1,412	1,427	820	2,176	1,415	1,500	1,004	1,885	1,783	1,382	1,166	2,025	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Sauvignon Blanc	1,978	1,954	1,700	2,420	-	-	-	-	1,883	1,700	1,700	1,930	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Syrah	2,130	2,200	1,168	3,303	-	-	-	-	-	-	-	-	-	-	-	-	2,254	2,211	2,144	2,289	2,090	2,890	1,812	3,303	-	-	-	-	-
Tempranillo	1,996	1,950	1,754	2,133	-	-	-	-	-	-	-	-	-	-	-	-	1,874	2,000	1,856	2,097	-	-	-	-	-	-	-	-	-
Viognier	1,573	1,460	1,043	1,994	-	-	-	-	-	-	-	-	-	-	-	-	1,669	1,688	1,611	1,735	-	-	-	-	-	-	-	-	-
All other varieties ⁷	1,676	1,781	457	3,456	1,443	1,500	704	1,963	1,255	1,423	996	2,588	-	-	-	-	2,400	1,950	1,718	2,248	2,093	2,000	1,705	3,300	-	-	-	-	-
Average	2,033	1,989			2,237	2,028			1,915	1,837			2,188	1,800			1,844	1,900			2,264	2,300			1,644	1,450			

¹ Includes estimates for incomplete responses. Refinements to the 2018 data collection form specified that respondents should only report sales to third-party entities (in or outside Oregon).

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

³ See Growing Area descriptions in Vineyard Section Table 2.

⁴ Averages are weighted by the number of tons sold at the price reported by Oregon grape growers.

⁵ Lows are a weighted average of the lowest three prices reported by Oregon grape growers.

⁶ Highs are a weighted average of the highest three prices reported by Oregon grape growers.

⁷ Other includes all other varieties, including some varieties for which data were collected but reported data were insufficient to develop estimates (including Albariño).

- No data reported, or reported data were insufficient to develop estimates.

Winery Section:

Table 1: Wineries – Number and crush by region, 2017-2018¹

Region ²	All Wineries ³		Number of Wineries Crushing Grapes		Total Wine Grapes Crushed	
	2017	2018	2017	2018	2017	2018
	<i>Number</i>	<i>Number</i>	<i>Number⁴</i>	<i>Number⁴</i>	<i>Tons</i>	<i>Tons</i>
North Willamette Valley	491	503	284	293	56,653	58,369
South Willamette Valley	73	89	34	35	8,116	8,502
Umpqua Valley	44	42	37	38	3,303	3,390
Rogue Valley	96	93	61	63	5,919	6,147
Columbia River	**	42	**	29	**	2,948
Other Oregon	**	24	**	10	**	328
<i>Columbia River and Other Oregon</i>	65	66	38	39	3,179	3,277
Total	769	793	454	468	77,170	79,685

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 Winery and Growers Sales Privilege License holders (issued by the OLCC).

⁴ Numbers fluctuate year over year due to inconsistent responses.

** Other Oregon Areas were combined with Columbia River data in the 2017 report.

Table 2: Wineries – Crush by grape source location and crush region, 2018¹

Region ²	Sourced in Oregon	Sourced from Other States	All Crush
	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>
North Willamette Valley	57,336	1,033	58,369
South Willamette Valley	8,179	323	8,502
Umpqua Valley	3,390	0	3,390
Rogue Valley	5,716	430	6,147
Columbia River	1,359	1,589	2,948
Other Oregon	0	328	328
Total, 2018	75,980	3,704	79,685
Total, 2017	73,132	4,038	77,170

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 – Sales by channel, 2017 and 2018¹

Year	Direct to Consumer			Wholesale (FOB, Trade, etc.)				Total Cases	Total Dollars
	Tasting Rooms	Wine Clubs	Web/ Phone Orders	Sold in Oregon	Sold Nationally (excluding Oregon)	Sold Internationally	Private Label		
	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>		
2018	568,070	264,552	90,088	650,182	2,373,214	104,477	96,912	4,147,494	607,329,293
2017	489,820	233,391	81,852	579,155	2,039,747	94,351	84,177	3,602,493	550,623,346

¹ Includes estimates for incomplete responses.

Table 4: Wineries – Export sales by destination, 2017 and 2018¹

Year	Canada	Mexico	Denmark	United Kingdom	Sweden	All Other Europe	Hong Kong/ China	Japan	South Korea	All Other Asia	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>
2018	47,338	478	4,115	11,200	3,036	5,621	2,894	9,658	1,515	1,191	17,427	104,477
2017	46,692	394	2,584	10,047	2,248	4,918	2,209	8,952	1,057	1,075	14,173	94,351

¹ Includes estimates for incomplete responses.



This report is sponsored by the Oregon Wine Board (industry.oregonwine.org).