



OREGON
WINE
BOARD

ANNUAL REPORT
2014-2015

INDUSTRY.OREGONWINE.ORG



LETTER FROM YOUR CHAIRWOMAN

In what has been another record-shattering year for Oregon wine, our industry continues to advance at a brisk pace. It was a year in which industry growth was again unprecedented while at the same time our brand awareness and acclaim reached new levels. During this time of prosperity, your Board continued to build and hone existing programs and introduce new ideas to support our thriving community.

It was a year in which the latest Vineyard and Winery Census Report showed our harvest reached a new all-time high as acreage planted, tonnage harvested and number of wineries continued their steady march upward. Our most recent economic impact study placed our industry's overall annual contribution to the state at \$3.35 billion, a 28% increase over the past three years.

Our industry is well positioned for growth and the proof is seen in the statistics:

- Overall production in 2014 was more than 78,000 tons, up 39% over the prior vintage.
- The total number of wineries reached 676, an all-time high and a 12% jump over 2013.
- The number of vineyards topped 1,000 for the first time at 1,027, an 8% increase.
- On the sales side, total wine sales surpassed \$430 million and exports jumped an impressive 50%.
- The number of designated American Viticulture Areas in Oregon grew to 18 with The Rocks District of Milton-Freewater.

The diversity and quality of our wine are driving increasing consumer demand. Oregon wine sales enjoyed a robust 11% gain, nearly three times the national average for table wine, according to Nielsen, a global market research firm. And, Oregon wines are helping drive the momentum in the fastest growing segment of the consumer market — the \$12-per-bottle and higher category.

While our share of the state's agricultural pie may not be the largest, the multiplier effect of Oregon wine is impressive due to our industry's close connections to the tourism and culinary sectors. Our industry is credited with contributing more than \$207 million in tourism revenue to the state and creating more than 17,000 total jobs and \$527 million in wages. Additionally, our industry helps various local communities by contributing \$65 million in property taxes annually and nearly \$11 million to various charities.

Industry growth is spread throughout the state with production gains ranging from 25% to 90% for our wine regions in Southern Oregon, the Columbia Gorge, the Walla Walla Valley and the Willamette Valley.

Your directors and the OWB staff remain focused on supporting this robust growth with programs that enhance the health of the industry and continue to build Oregon Wine's brand. Here are some of the highlights from the past fiscal year:

- Launched the Oregon Wine A-List Awards, recognizing restaurant wine programs that go above and beyond in their support of Oregon wine.
- Expanded Oregon Wine Month, making it the most successful to date.
- Strengthened partnerships with Travel Oregon and Alaska Airlines to extend the successful Oregon Wines Fly Free program for two more years.
- Introduced a new and improved [consumer website](#) and launched a new [industry website](#) dedicated to providing specific industry information and resources, including a redesigned marketplace for grapes and other products.
- Completed successful grant applications to fund various programs, including funding to host influential buyers from around the world and enabling international tastings for importers and restaurateurs in Europe and Japan.
- Acknowledged the need to invest in science supporting improved viticulture and enology understanding through a 17% increase to technical research funding based on the recommendation of the industry's research committee.

We are living in a special time for our industry and it's been a privilege and an honor to serve as your chairwoman this past year. On behalf of the Oregon Wine Board of Directors and with deepest appreciation for your partnership in our collective endeavors for the state of Oregon,

Ellen Brittan | Brittan Vineyards
Chairwoman, Oregon Wine Board

MARKETING

Marketing and communications programs are designed to promote broader availability of Oregon wines, drive more revenue, generate wine tourism and enhance the value of Brand Oregon. Here are summaries of some key programs.

Oregon Wines Fly Free

The spring of 2015 marked the first anniversary of the Oregon Wines Fly Free program running continuously. Since its inception, more than 5,000 cases of Oregon wine have been checked for free on Alaska Airlines. This partnership between OWB, Travel Oregon and Alaska Airlines helps drive purchases of Oregon wine by waiving the baggage fees on cases checked on Alaska Airlines' outbound flights from five airports across Oregon that serve the state's diverse wine regions. It is the only statewide program of its kind in the U.S.



There are currently 312 Oregon wineries participating in Oregon Wines Fly Free. To help tasting room staff raise awareness of this program among their consumer audiences, the OWB introduced an online marketing toolkit in September 2014. The kit includes downloadable signage, digital assets and content ideas for e-newsletters and social media. In addition, OWB produced new table-top signage and window clings.

Due to its success and popularity among both wineries and consumers, the Oregon Wines Fly Free program has been extended for an additional two years, through the spring of 2017. This news generated more than 100 news stories that received \$1.19 million in ad value via earned media in the Northwest and beyond.

Oregon Wine A-List Awards

The Oregon Wine A-List Awards recognize restaurants that exhibit exceptional support for Oregon wines as demonstrated by depth, breadth, prominence and presentation on their lists. Rebranded from Superior Cellars in 2015, the Oregon Wine A-List Awards aim to build the presence of Oregon wine within restaurant programs by engaging with restaurant wine buyers and sommeliers, providing public recognition to Oregon's biggest advocates and driving consumers to Oregon Wine A-List restaurants.



The 2015 list recognizes 72 restaurants, including special notation of nine Regional Stars and one Restaurant of the Year: The Joel Palmer House in Dayton, Oregon. In addition, Andy Zalman of Higgins in Portland, was named Wine Director of the Year. These notable restaurants were announced and honored at the Oregon Wine Industry Awards Dinner. The Oregon Wine A-List Awards garnered 47 original stories throughout the nomination period and after the announcement of all the winners.

The Oregon Wine A-List Awards are managed in partnership with the Oregon Wine Press.



Oregon Wine Month

May 2015 marked the fourth annual celebration of Oregon Wine Month. In preparation, OWB developed a new campaign reflecting the unique attributes of Oregon wine, brought to life by vintage photographs of industry founders Richard Sommer and David and Diana Lett. The final campaign was delivered through a media plan generating more than 2.5 million consumer impressions across digital, print and radio media, as well as a precisely defined social media campaign targeting high-end wine consumers in the Pacific Northwest. Two news releases were distributed in the months leading up to Oregon Wine Month, which resulted in 42 articles that garnered more than \$385,200 in ad value via earned media. OWB also created an online marketing toolkit for wineries to use containing downloadable campaign materials for display in tasting rooms and across digital media.



In addition to announcing Oregon Wine Month, the campaign drove consumers to view events on a newly launched consumer website. Wineries, distributors, retailers and restaurants were invited to submit events for this calendar; 223 events were submitted for May, representing 102 businesses across 13 AVAs. The events calendar on oregonwine.org was the most visited page on the website. A consumer sweepstakes, offering a weekend getaway in one of three Oregon wine regions, garnered more than 3,200 entries, all of which have been added to the consumer database for future outreach efforts.

Oregon Wine Month 2015 delivered sales results across multiple channels. OWB engaged with four distributors with coverage across Oregon, and all four showed growth in their Oregon portfolios compared to 2014. Growth ranged from 15 to 54% in off-premise accounts and 2 to 25% in the on-premise channel. Wineries also reported good direct-to-consumer sales out of their tasting rooms during May. Of the 78 reporting wineries, 85% said they experienced tasting room sales growth of 10 to 14% on average.

Looking forward to 2016, OWB plans to expand the breadth of Oregon Wine Month activity throughout the state, with a particular focus on increased engagement with the on-premise channel. Increased geographic reach is also a key priority for the future growth of Oregon Wine Month.

On-Premise Market Research

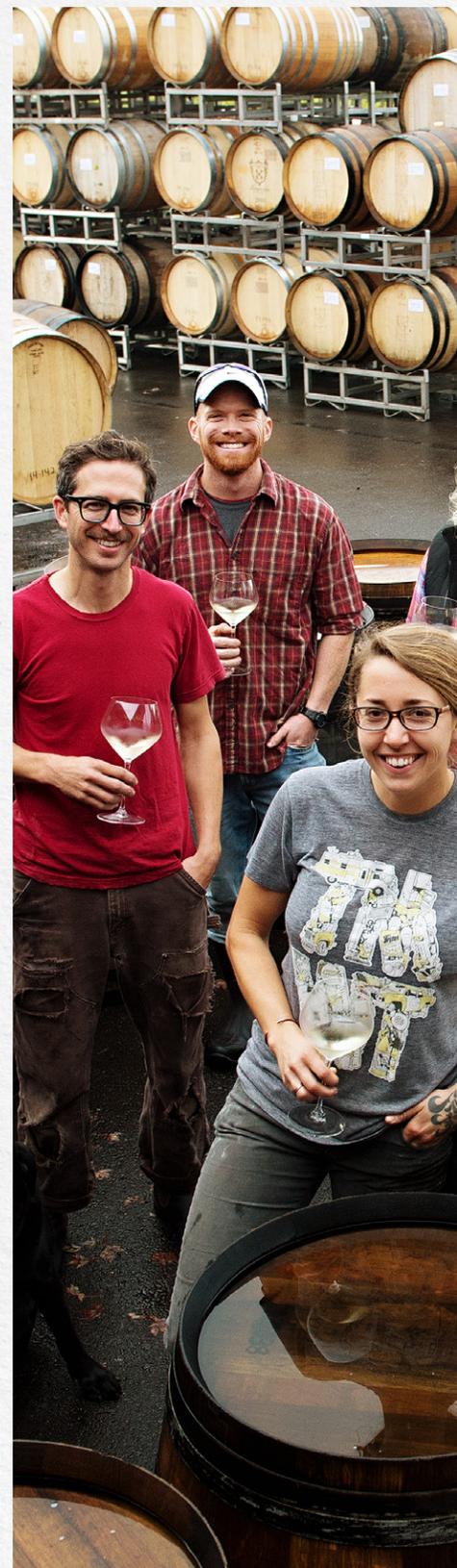
In late 2014, a series of in-depth, hour-long, confidential interviews were conducted among leading Portland restaurant wine directors and sommeliers. The interviewees represented restaurants with wine lists that have a varied range of Oregon Wines in terms of regions and varieties. The goal of the research was to understand the barriers to greater success for Oregon wineries in our home market; the attitudes and motivations of on-premise wine buyers in Oregon and what influences them as they build their wine lists; and how the Oregon wine industry can better position Oregon wine to this important and influential audience.

While the research revealed many nuanced insights, there were a few themes and takeaways that emerged across the interviews:

- Oregon wine is well respected for its high quality. However, the beauty of wine is its diversity and the intellectual curiosity it invokes and satisfies. Therefore, for

“... I believe Oregon will prove to be the best Pinot Noir terroir in the US, especially where age-worthiness is taken into account.”

-CHRISTY CANTERBURY MW
A TIM ATKINS MW SPECIAL REPORT, JULY 2014



“It’s a very exciting time to be a fan of Oregon’s Chardonnay. These are bright wines, transparent and driven by terroir. It’s a market segment that the new world has been lacking, and Oregon is getting ready to make some big noise here. So get on this boat before it leaves the dock.”

-GREGORY DAL PIAZ
SNOOTH
AUGUST 2014



sommeliers and wine buyers there is a limit to the placements any one region will capture on a well-constructed list.

- Wineries and sales reps need to prepare, research and approach each account and know how the wine they’re selling fits the restaurant’s needs or fills a gap on its list.
- Relationships are critical in earning placements and getting wines on a list – develop them not only with the buyer, but with the restaurant staff and the distributor representative.
- Have a concise and compelling brand story: One that distinguishes your brand and can easily be retold by everyone who touches your wine – from the distributor to the buyer to the servers to the restaurant’s customers.

COMMUNICATIONS

Media Relations

The communications team focused much of its resources on internal industry messaging and external media relations, which helped continue to build the equity of Brand Oregon. OWB brought in more than 10 key national premium and ultra-premium wine writers over the course of the year. All tours were designed to expose the media to the breadth of Oregon’s wine regions, winemakers and exceptional quality wines.



Tour with wine writers

The OWB also reached out to national writers who were not able to visit Oregon by successfully pitching story ideas and soliciting samples from the industry. These publications included Forbes, Fortune, Big Life and Le Pan. The OWB will continue to pursue outreach to wine and business publications with a broad reach going forward.

Additionally, OWB coordinated the shipment of more than 500 wines to the U.K. for Neal Martin of The Wine Advocate. These wines were reviewed in conjunction with Neal’s first visit to Oregon in January 2015, when he met with more than 70 additional producers. All-in-all, Neal reviewed more than 1,300 wines. Of those, 357 wines were rated 90 points or higher in the March 2015 online review. This comprised more than 12 varieties from 13 AVAs.

Throughout the course of the year, more than 8,000 articles mentioning Oregon Wine were published with an equivalent purchased advertising value exceeding \$147 million.

Website

In conjunction with the Oregon Wine Symposium and Oregon Wine Month, OWB launched two new websites: One for consumers and one for members of our industry. Oregonwine.org is now solely a consumer-facing site designed to help consumers learn about Oregon and help them plan a trip to Oregon wine country. Industry.oregonwine.org was established to provide industry members with toolkits and information they need to act on the marketing, education and research initiatives implemented by the OWB. By creating these two separate sites, OWB’s goal was to provide an improved user experience for both consumers and industry members.

Forbes

FORTUNE



LE·PAN

INTERNATIONAL MARKETING

Market Access Program (MAP) grant funds along with supplemental funding from the USDA provides the resources for OWB's international marketing activities. Partnering with the Washington State Wine Commission through the Northwest Wine Coalition (NWC) allows OWB to fully leverage these funds by sharing market agents, event costs and travel expenses. With the goal of maximizing cost efficiencies, the NWC once again partnered with the California Wine Institute in March 2015 to host the successful Go West events in London and Stockholm, which attracted a record number of Oregon winery participants.



*ProWein In Dusseldorf,
Germany*

More Oregon wineries than ever participated in the annual ProWein industry trade show in Dusseldorf, which put Oregon wines on the world stage. Oregon's wines were again on display in June 2015 at Vinexpo in Bordeaux when Oregon was selected as the highlighted wine region for a trade and media tasting seminar led by Doug Frost, MS MW. In addition, the NWC held trade tastings in Copenhagen, Tokyo, Osaka and Seoul, which often included an educational component to boost the trade's knowledge of Northwest wines.



*Winery tour during
Oregon Pinot Camp 2015*

OWB also brought influential wine trade members from its international target markets to the U.S. in order to experience the Oregon story firsthand. Partnering with world-class programs such as Oregon Pinot Camp (OPC) provided ideal opportunities to present Oregon to the world and create life-long Oregon wine ambassadors. In June 2015, OWB brought 12 key trade influencers from Australia, Canada, China, Denmark, Japan, Korea, Sweden and the U.K. to attend OPC.

Their visit was preceded by a tour of the state in order to exhibit the quality of wine coming from the entire state. In conjunction with Washington, OWB also brought 13 trade and media from Japan for a state-wide tour in August 2014.



“... [Oregon’s 2012s] have tremendous richness, suppleness and presence without going over the top.”

– HARVEY STEIMAN
WINE SPECTATOR
OCTOBER 2014



EDUCATION

Education programs are designed to inform members of our wine community about technical research and business insights that can improve their grape farming, winemaking and management practices.

Oregon Wine Symposium

The Oregon Wine Symposium continues to expand and deliver highly relevant industry education. It also provides an opportunity for valuable business interaction with suppliers and industry partners. Because of this it is recognized as the leading wine industry educational event in the Pacific Northwest.



This signature event was once again held at the Oregon Convention Center in February 2015. It was anchored by a roster of esteemed presenters and panelists from around the world. Dr. Greg Jones and Mark Freund of Silicon Valley Bank presented the climate report and the state of the industry respectively. Keynote speaker Michael Dorf from City Winery, which has locations in New York City, Napa, Nashville and Chicago, spoke about using technology to facilitate connections with new customers, create meaningful brand experiences and drive sales. Master Sommelier and Master of Wine Doug Frost explored the mind of a sommelier in addition to serving as host for the Industry Awards Dinner, which recognized industry members for their contributions to the Oregon wine industry. The Oregon Wine Industry Awards Dinner also saw the introduction of Oregon Wine A-List Awards winners.

The OWS continued the trend of record breaking trade show participation by enlisting more vendors and sponsors than ever before. With well over 1,000 attendees from more AVAs than ever, the Oregon Wine Symposium continues to deliver content that reflects industry feedback and community input. An ongoing partnership with Oregon State University provides strong viticulture and enology content that addresses current and emerging challenges confronting Oregon’s winemakers and grape growers.

Distribution Seminar Series

The Oregon Wine Board’s education program includes more than just the Symposium. OWB hosted a two-part seminar on the subject of distribution that was attended by 150 people and made available online for those unable to attend, leading to the creation of an [Oregon Wine YouTube channel](#) that supports OWB’s educational efforts.

The seminars included best practices in selecting and managing distributor partners and went on to address four areas of distribution important to wineries. Sarah Graves of Young’s Market spoke to on-premise best practices in Oregon and Bob Liner of Galaxy Wine Co. focused on best off-premise practices. Kathy Byrd of Young’s Market gave insights into the off-premise market while Rick Steckler of Click Distribution presented valuable information for both the on- and off-premise wine market segments.

RESEARCH

The research program is designed to undertake and support research initiatives advancing the efforts of Oregon growers and winemakers in developing their skills and expressing the character of their vineyards. Research funded by the Oregon Wine Board supports the understanding and advancement of the Oregon wine industry in three categories:

1. Trends in grape and wine production and prices over the past year;
2. Economic trends in wine sales through various channels and the contribution of the Oregon wine industry to the state's economy;
3. Academically-based viticulture and enology research.

In 2015, the OWB published the 2014 Oregon Winery and Vineyard Census, conducted and analyzed by a research team at Southern Oregon University. These reports have been produced for decades and provide both vertical and horizontal pictures of the industry.

The 2013 Economic Impact Study showed that the post-recession years of 2011-2014 have seen renewed optimism and investment in the Oregon wine industry with wine sales volume up 39%, resulting in vineyard and winery spending of between \$63 and \$110 million to increase production capacity.

On the technical research side, OWB has worked to advance the industry's knowledge in technical areas by providing direct support to academic scientists and by operating as the primary interface between the industry and the Oregon Wine Research Institute (OWRI) via the Oregon Wine Standing Committee on Research (OWSCR).

The priorities for research project applications are set by a research committee consisting of a broad cross-section of industry members. Projects are recommended for funding to the Board by the research committee. OWSCR and OWB help OWRI ensure that allocations of OWRI funds are made to the industry's highest priorities and most pressing issues. While OWSCR is still a young organization, its process and high level of communication are promising.

Finally, OWB is particularly mindful of the need to maximize the benefit of the funds that are invested in research grants. OWB has launched a concerted effort to enhance the efficiency of the transfer of information derived from research results to members of the industry and to measure return on investment. The results of these efforts will inform future decisions about how much to invest and how best to transfer the fruits of the research.



“The 2012 and 2014 vintages in Oregon’s Willamette Valley saw exceptional sunshine, creating ripe-tasting, rich Pinot Noirs that will be crowd-pleasers.”

-MATT KRAMER,
WINE SPECTATOR
NOVEMBER 2014



2014-2015 Research Projects Funded

- 2014-1399, Walter Mahaffee, Grower Implemented Quantitative LAMP for Initiating and Adjusting Fungicide Program, \$40,093
- 2014-1512, Patty Skinkis, Defining Crop Load Metrics for Quality Pinot Noir Produced in Oregon, \$31,286
- 2014-1491, Michael Qian, Formation of Volatile Sulfur Compounds in Pinot Noir during Barrel Aging - Part Two: Lees Level and Contact Time on Volatile Sulfur Compounds in Wine, \$36,805
- 2014-1507, Michael Qian, Understanding Pinot Noir Grape and Wine Aroma Composition as a Result of Changes in Vine Balance, \$35,805
- 2014-1516, Elizabeth Tomasino, Chiral Terpenes - Quantitation, Threshold Determination and Sensory Impact on Aromatic White Wines, \$39,000
- 2014-1545, James Osborne, Formation of Volatile Sulfur Compounds in Pinot Noir Post-Fermentation - Part One: Role of Grape Amino Acid Content and Wine Lees Composition, \$32,800
- 2014-1662, Laurent Deluc, Determine the Impact of Cluster Thinning and Cluster Zone Leaf Removal on the Hormone Content of Pinot Noir Grape Berry, \$55,079
- 2014-1695, Vaughn Walton, Insect Vector Distribution and Disease Progression Studies to Better Describe Field Epidemiology of Grapevine Red Blotch-Associated and Vine Leafroll Virus in Oregon, \$35,538
- 5014-1703, Patty Skinkis, Impacts of Vine Vigor, Nitrogen, and Carbohydrate Status on Fruitfulness of Pinot Noir, \$39,782

In 2014 OWB invested \$270,000 in eight research projects. [Full reports](#) on these projects can be found on the OWB website.

FINANCIALS

Because of a substantial 2014 harvest, the OWB saw an unplanned 28% increase in the Grape Assessment income over the previous year. This allowed the OWB committees, staff and directors to invest in the further development of marketing programs, an overhaul of its online presence, additional education seminars, and several grant applications to supplement marketing and research efforts.

OWB continues to offer technical research grant funding with a total distribution of \$270,000 in 2015. The Board also authorized a 20% increase to the grant program that will be allocated next year. Through a strong partnership with Southern Oregon University Research Center (SOURCE), OWB was able to simplify the annual Vineyard and Winery Census Survey, which reduced its cost by 27% and increased industry participation to 52%.

Expenses came in higher than expected for the annual Oregon Wine Symposium, but the additional investment of funds allowed OWB to bring in more influential presenters such as Doug Frost, Michael Dorf and others. The \$306,000 of total expense is partially offset by the income derived from sponsorships and ticket revenue.

The total budget for the Communications program was equally split between media relations activities, such as inbound media tours, press releases and media contact points, and the development and relaunch of oregonwine.org and industry.oregonwine.org.

The majority of expenses associated with the international marketing activities (totaling \$510,000) are covered by a Federal Market Access Program (MAP) grant, a Global Broad Based Initiative (GBI) and an Emerging Markets Program (EMP) grant. The remaining expense of \$111,000 is partially offset by the \$30,000 collected through industry participation fees.

Nearly 70% of the marketing budget was invested in advancing Oregon Wine Month, including rebranding consumer media and furthering OWB's engagement with distributors. The remaining expenses were devoted to activities including the Oregon Wine A-List Awards and the Oregon Wines Fly Free programs, as well as an on-premise market research study.

OWB manages to the lowest possible level of general and administrative cost. The past year ended just under the previous year's level at 25% of total expenses. With a refreshed focus on grant writing, the OWB was awarded a \$66,000 Specialty Crop Block Grant for the development of trade marketing tools in 2016.





INCOME	BUDGETED	ACTUAL
Grape Assessment (\$25/ton)	1,540,000	1,536,957
Wine Tax (2¢/gal)	330,000	318,688
Symposium & Workshops	210,633	213,253
International Marketing Fees	30,685	30,685
Other Income	600	779
Total Income	2,111,918	2,100,362

EXPENSE	BUDGETED	ACTUAL
Research		
Viticulture & Enological Research Grants	277,000	277,443
Vineyard & Winery Survey	21,600	21,497
Employee Compensation	20,000	18,986
Total Research	318,600	317,926

Education		
Symposium (Including Comp)	286,073	308,390
Workshops (Distribution Series)	5,000	3,172
Meetings/Travel/Administration	4,000	2,462
Employee Compensation	21,000	25,593
Total Education	316,073	339,617

Marketing & Communications		
Communications (Media Relations/Website/Comp)	208,200	208,102
International Marketing (NWC/Comp)	100,940	114,378
Event Marketing (OWM/WFF/A-List)	200,370	166,370
Marketing Collateral (App & Branding)	20,181	7,304
Market Research	20,550	18,452
Meetings/Travel/Administration	10,000	15,897
Employee Compensation	139,900	144,252
Total Marketing & Communications	700,141	674,755

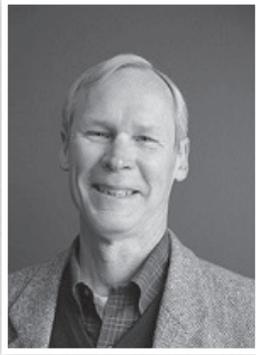
General & Admin		
Board Administration	14,500	13,760
Grant Writing (SCBG/WCLP)	5,000	3,844
Office Administration (Rent/Equipment/Supplies)	102,000	101,341
Staff Administration (Meetings/Travel/Administration)	35,500	46,023
Employee Compensation	300,000	265,892
Total General & Admin	457,000	430,860

Total Expense	1,791,814	1,763,158
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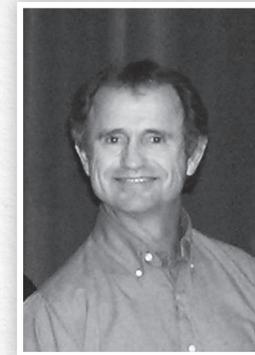
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THANK YOU TO ALL OF OUR VOLUNTEERS.

All this work would not be possible without the countless unpaid hours of dedicated time.

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