The Oregon Wine Board was created in 2003 by HB 3442 and established as a semi-independent state agency.

**Charter**

“The Oregon Wine Board shall operate for the purpose of supporting enological, viticultural and economic research to develop sustainable business practices for wine grape growing and wine making within Oregon and supporting the promotion of Oregon’s wine grape-growing and wine-making industries.”
## 2016-17 BOARD OF DIRECTORS

<table>
<thead>
<tr>
<th>NAME</th>
<th>BUSINESS</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. David Beck</td>
<td>Crawford Beck Vineyard</td>
<td>Amity, OR</td>
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<tr>
<td>Ellen Brittan</td>
<td>Brittan Vineyards</td>
<td>Carlton, OR</td>
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<tr>
<td>Michael Donovan</td>
<td>Irvine Vineyards</td>
<td>Ashland, OR</td>
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<tr>
<td>John Pratt</td>
<td>Celestina Vineyard &amp; TeSoAria Winery</td>
<td>Medford, OR</td>
</tr>
<tr>
<td>William Sweat</td>
<td>Winderlea Vineyard &amp; Winery</td>
<td>Dundee, OR</td>
</tr>
<tr>
<td>Steve Thomson</td>
<td>Cristom Vineyards</td>
<td>Salem, OR</td>
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<tr>
<td>Doug Tunnell</td>
<td>Brick House Vineyards</td>
<td>Newberg, OR</td>
</tr>
<tr>
<td>JP Valot</td>
<td>Silvan Ridge Winery</td>
<td>Eugene, OR</td>
</tr>
<tr>
<td>Hilda Jones</td>
<td>Abacela</td>
<td>Roseburg, OR</td>
</tr>
</tbody>
</table>
INDUSTRY OVERVIEW
Over the past six decades, Oregon has built on a foundation of pioneering spirit to achieve a global reputation for exceptional wine quality, responsible farming, collaboration and innovation.

The results have made Oregon the envy of those around the world who follow fine wine. The esteem in which Brand Oregon and our viticultural areas are held is the reason talent and investment capital migrate here and consumers around the world demand Oregon wine.

- 2000: 135
- 2005: 314
- 2015: 702

CAGR: 11.6%

OREGON WINE BY THE NUMBERS

GRAPE PRODUCTION BY REGION

- North Willamette Valley: 62%
- Rogue Valley: 11%
- Umpqua Valley: 11%
- South Willamette Valley: 11%
- Columbia River Valley and Northeastern Oregon: 6%

Source: Southern Oregon University 2015 Vineyard and Winery Census
OREGON WINE BY THE NUMBERS

GRAPE PRODUCTION BY VARIETY

Source: Southern Oregon University 2015 Vineyard and Winery Census
Oregon Wine by the Numbers

Winery Segment by Annual Production Volume

- 0-4,999 cases: 71%
- 5,000-9,999 cases: 13%
- 10,000-19,999 cases: 9%
- 20,000-49,999 cases: 5%
- 50,000+ cases: 2%

Source: Oregon Liquor Control Commission 2013 Harvest Data
OREGON WINE BY THE NUMBERS

AVAILABILITY OF REGIONAL WINES ACROSS THE U.S.

California 96%
Washington 72%
Oregon 33%

Source: AC Nielsen Total US All Channels ACV 52 w/e 6/16/13
OREGON WINE BY THE NUMBERS

$3.35 billion

17,099 jobs

7,000 rural jobs

$208 million in tourism revenue

Source: 2013 OWB Economic Impact Study
1 million of Oregon’s overnight visitors visited a winery

1.1 million say that “taking a winery tour” was a trip motivator

Source: Full Glass Research, 2013 OWB Economic Impact Study
Source: MMGY Travel Horizons, Wave II, April 2013
“THIS INDUSTRY HAS SIGNIFICANTLY IMPROVED OREGON’S REPUTATION”

(% AGREE)

Oregon Wine Industry: 81%
Local Restaurants: 41%
Packaged Food Brands: 23%
TV/Movie Production: 30%
OREGON WINE BY THE NUMBERS

“THIS INDUSTRY HAS A MAJOR IMPACT ON OREGON’S ECONOMY”
(% AGREE)

- Oregon Wine Industry: 71%
- Local Restaurants: 26%
- Packaged Food Brands: 25%
- TV/Movie Production: 19%

Oregon Business Magazine – October 2014
MARKETPLACE INSIGHTS
Handcrafted, artisan wines
Small, family farms
Organic, sustainably made
Food-friendly wines

928 Total Respondents
Source: 2013 Oregon Wine Reputation Study
“The story of Oregon wine no longer begins and ends with Willamette Valley Pinot Noir, as many of the state’s most exciting new offerings hail from Southern Oregon.”

Paul Gregutt
Wine Enthusiast
January 2016
OREGON WINE REPUTATION FOR QUALITY

DOMESTIC WINE PRODUCTION - 2015

- Domestic: 99%
- Oregon: 1%

WINE SPECTATOR 90+ RATED DOMESTIC WINES IN 2015

- Domestic: 79.3%
- Oregon: 20.6%

Source: OIV, Oregon Wine Board
“Roam from the Rogue Valley to the Applegate Valley, all the way north up Interstate 5 to the Umpqua Valley, and you’ll find about as many types of good wine as you would in your beloved bottle shop. Good wine. Albariño, Tempranillo, Chardonnay, Syrah, Viognier, Cab Franc, Malbec, and yes, plenty of Pinot Noir too.”

Rachel Levin
Sunset Magazine
October 2015
OREGON WINE BOARD
PRIORITIES
Oregon Wine Board has invested $1.8 million in grant funding over the past five years to advance scientific research in viticulture and enology in the state.

Research Priorities
- Develop wine quality
- Educate wine grape growers
- Improve vineyard and winery business practices and economics
MARKETING PRIORITIES

• The inaugural edition was published in April 2016
  – Funded through a Wine Country License Plate grant administered by Travel Oregon

• By the end of June 2016, 191 Oregon winery tasting rooms and other businesses had requested a shipment of guides

• Consumers in 39 states have requested a guide be sent directly to them free of charge

• The Touring Guide is also available to view for free digitally at oregonwine.org.
Partnership with Travel Oregon and Alaska Airlines
  – Year-long program commenced April 2014; now extended through spring 2017

Encourages tasting room visits and, more importantly, purchases
  – Alaska Mileage Plan Members can check a case for free from any Oregon airport (and Walla Walla, WA)
  – Complimentary tastings at more than 300 participating wineries

More than 5,000 cases checked on Alaska from Oregon since program inception!
MARKETING PRIORITIES

THREE-PART MISSION

1. ENCOURAGE A SWELL OF TRADE SUPPORT

2. BUILD THE OREGON WINE BRAND WITH CONSUMERS

3. CREATE A PLATFORM FOR TACTICAL WINERY PROMOTIONS
The Oregon Wine A-List Awards recognize restaurants across the world displaying enthusiasm for Oregon wine and a deep appreciation of the diverse regions, varietals and producers of Oregon.

OBJECTIVES:

- **Grow the presence of Oregon wine** on restaurant lists in Oregon, nationally and internationally.
- **Express appreciation** and build relationships with Oregon wine’s biggest, most influential fans.
- **Increase sales** of Oregon wines at restaurants.
EDUCATION PRIORITIES

• Expansion of the delivery model of current educational programs for BOTH business and technical support to include:
  – online webinars
  – online tools and resources
  – hands-on, statewide learning workshops
MAKE INDUSTRY.OREGONWINE.ORG YOUR GO-TO RESOURCE FOR:

• **MARKETING** toolkits
• Grapevine newsletter archive
• Event submissions for industry and consumer calendars
• Upcoming **EDUCATIONAL** opportunities and materials from past seminars
• Updates on OWB-sponsored technical **RESEARCH**
• Marketplace listings for grapes, bulk wine and job opportunities
• Vineyard and Winery Census Reports, Harvest Reports and Economic Impact Studies
A LOOK AHEAD FOR OREGON WINE

- Develop awareness and appreciation of Oregon wine quality among consumers
- Engage with trade influencers to increase availability of Oregon wine
- Drive competitive advantage through industry education
- Foster industry understanding and impact of funded scientific research
THANK YOU