GUIDELINES FOR PROTECTED GEOGRAPHICAL INDICATION WILLAMETTE VALLEY

Presentation of the Willamette Valley Wineries Association

Attachment 1 : information on the history and mandate of the WVWA as the primary organization protecting Willamette Valley wines, our appellation and, most importantly, the unique attributes of place reflected in the superior quality products made here.

1 – Name of the Protected Geographical Indication

1.1--Attachment 1.1 and Attachment 1.2

2 – Product description

2.1 –Types of products

2.2 –Analytic standards

2.3 – Product description

3 – Demarcated area

Attachment 2 :

- *1982 WVA Petition Letter DA (1982)*
- *1983 Federal register Establishment and approval of WV as American viticultural area*
- *2016 WV AVA Expansion Fed Register 2016-04710.012017 : last version of the provision on WILLAMETTE VALLEY in the US Alcohol Tobacco Tax and Trade Bureau Regulation (reflected in the US Code of Federal Regulations)*
- *maps showing the regions covered by the Willamette Valley appellation: willamette_valley_ava_north, and willamette_valley_ava_south*
- *further background information on sub-AVAs of the valley and the actual bounds of the WILLAMETTE VALLEY AVA: OWB Oregon-Wine-Willamette-Valley-AVA-110116*
- *Attachment 3 eCFR-Code of Federal Regulations*

4 – Grape varieties

5 – Yields

6 – Winemaking and packaging

6.1 – General requirements

6.2 – Winemaking approach

6.3- Sustainability as a core value

Attachment 3 : A copy of LIVE's Annual Endorsement is attached as a reference (7-IOBC endorsement).

Attachment 4: How Green is Willamette Valley

7 – Link with the geographical area

Attachment 5 : Swinchatt The Evolution of Terroir.2009

7.1 – Specificity of the geographical area

7.1.1 Natural Factors

Climate

Soils and geology

Attachment 6

- *OWB Oregon-Wine-Geology-Willamette-Valley-110116*
- *Soils Map*
- *Soils OR map AVA map.012017*

7.1.2 Human Factors

Attachment 7:

- *OWB Oregon-Wine-Industry-History*
- *OPC Oregon Pinot Noir Story 2016*

Attachment 8 :

- *OWB Economic Impact Study OR-EconReport-2014-FINALnetrev2*
- *2015-Oregon-Vineyard-and-Winery-Census-September-2016*
- *2016-Oregon-Vineyard-and-Winery-Census*

7.2 Specificity of the product

Attachment 9: copies in reference to collateral for Willamette Valley promotions for the foreign markets as examples of sales activity for WV wines in the EU and beyond, as well as wine tasting sessions, directed at professional wine distributors and European press, to ensure that European *traders are well acquainted with the full range of first quality Willamette Valley wines.*

- *A SUMMARY of Press and Media on Willamette_Valley_in_12_01_2017*
- *Le Figaro 2016-05-21-1778@LE_FIGARO (002)*
- *Le Monde - Drouhin en Oregon les pionners bourguignons du pinot noir - Mai2016 (002)*
- *MagazineVIGNERON - DomaineDrouhinOregon - Dec2016*
- *Portland Gourmet Traveller articles.Australia*
- *Prince of Pinot PinotFile 07.07 Willamette Valley Appellations.2008*
- *lChristy Canterbury.Gruner Veltliner_Civilta del bere_Dicembre 2014.IT*
- *Falstaff 2013.Austria*
- *Tim Atkin Christy Canterbury Oregon_Report_2014*
- *The Mystique of Place, Jonathan Swinchatt review copy*

Winemakers of the Willamette Valley

Attachment 10

- *OWB2016 Quantitative Consumer Study Topline v2 WV.FullGlassResearch.012017*

7.3 Link between the specificity of the product and the geographical area

8. Checks

Information: national and local regulation applicable to Willamette Valley Wines

Attachment11:Attachment 11.1Attachment 11.2

- *Labeling 1977 3.18.77 Labeling Press Release*
- *Labeling Current Oregon Wine Labeling - January 2013.012017*
- *Labeling Oregon-Wine-Labeling-Regulations-110116*

EU References Folder: For access to the complete DropBox with all Attachments

https://www.dropbox.com/sh/574sevxrqh2qf7j/AACJnSQugkq84kx3bT00qxEpa?dl=0.

Presentation of the Willamette Valley Wineries Association

Willamette Valley Wineries Association

Address: 10200 SW Eastridge St #214, Portland, OR 97225

Phone: (503) 297-2962
Website: willamettewines.com

The Willamette Valley Wineries Association (WVWA) is a US Federal 501 (c) (6) tax exempt organization, also recognized by the State of Oregon as a Domestic Non-Profit Corporation founded in 1983 and governed to *By-Laws of Yamhill County Wineries Association DBA Willamette Valley Wineries Association* first adopted in 1986, Federally approved July 31, 1987, and amended several times in the interim, the last in 2017. It represents more than 225 member wineries cooperating for the benefit, promotion and protection of the premium wine-growing region of Willamette Valley, the viticultural area defined in US 27 CFR paragraph 9.90. The members of the association range from small family businesses to large international wine brands selling hundreds of thousands of cases of wine each year, with the average winery size being 5,000 cases. The focus of the organization is preserving Willamette Valley as a viticultural and enological treasure, producing the highest quality wines, and marketing Willamette Valley wines in the national and international market place. Its vision is to maintain a leadership position in the promotion and protection of the Willamette Valley appellation as one of the finest winegrowing regions in the world, developed to that level in just over a half-century, beginning in 1965. Willamette Valley is much more than a name. These words define an official appellation, designated for its uniqueness and quality, and as such, the WVWA has assumed the duty of preserving it for those who have earned the right to put it on their labels, and protecting it from those who would pirate it to deceive consumers.

- ***Willamette-Valley-Wineries-Association background***

With its history, expertise and mandate, the WVWA is obviously in an ideal position to comment on the significance of WILLAMETTE VALLEY as a geographical indication for wine. Its goal is straightforward: a wine label must not suggest that wines come from Willamette unless they really do.

The WVWA represents the Willamette Valley AVA ("AVA" denoting a viticultural appellation approved by the US TTB appellation control system) where greater than 70% of the wineries and vineyards in the state of Oregon are located.

The state of Oregon as-a-whole also has two promotional, research and advocacy organizations, the Oregon Winegrowers Association/Oregon Wine Board which serve to promote and protect the state of Oregon's wine industry in its entirety, and with which the WVWA collaborates.

Both WVWA and OWA/OWB are original signers of the Declaration of Place (or The Napa Accord, 2005 & 2009). Involvement in GI Place Name protection activities with EU partners since 2002 (European Institute), the Willamette Valley has been known for pioneering stringent truth-in-labeling regulations, including prohibition of semi-generic place names, since 1977. As the WVWA and Oregon signatory to the Napa Accord, Harry Peterson-Nedry was quoted in the San Francisco Chronicle:

Oregon's wine industry has long-since recognized the critical importance of "place", requiring since 1977 that no unauthentic place name or semi-generic geographical indicator be used on Oregon wine labels, and that 100% of all grapes identified on the label be from that source. We heartily support worldwide recognition of accurate place identity as a basic tool for the consumer in purchasing wine and other products whose quality depends on where it is grown or made. Unless we want commonplace wines, we should honor unique places where great wines are made!

1 – Name of the Protected Geographical Indication

Only wines coming from the Willamette Valley can pretend to the PGI "Willamette Valley."

"WILLAMETTE VALLEY" is a protected geographical indication under the laws of the United States. Willamette Valley is recognized as an appellation of origin for wine and has been officially recognized as an American Viticultural Area (AVA) since 1983 (Title 27 - Chapter I - Subchapter A - Part 9 - Subpart C §9.90)

- US regulations recognize AVA (or sub-AVA) included in the Willamette Valley area.

The name of the sub AVA may appear on the label together with "Willamette Valley".

As of today, the sub AVAs recognized are Yamhill-Carlton AVA, Ribbon Ridge AVA, Eola-Amity Hills AVA, Chehalem Mountains AVA, Dundee Hills AVA, McMinnville AVA and Van Duzer Corridor AVA.

- The strong origin of the name "Willamette", is closely linked to the history of the place.

Many of the geographical place names in the Willamette Valley are Native American-derived rather than being fanciful names from the Eastern US or even Europe (like Dundee).

The name "Willamette" is the French trapper version of the Clackamas-Chinook American Indian "Wallamt", a place name for the location at Willamette Falls (now Oregon City) where the Willamette and Clackamas Rivers join; "Chehalem," which names a ridge of mountains and a sub-AVA (Chehalem Mountains) in the northern Willamette Valley, means "peaceful valley" or "valley of flowers" and was derived from the name for the "Che-ahm-ill" tribe or the Atfalati tribe of the Kalapooia family and culture; "Yamhill" also derives from a Native American name, this from "Yamhelas" the Native American tribe that is a part of the Kalapooian family and is at the same time the name of the Oregon county (founded in 1843, five years before the Oregon Territory was created, and initially encompassing all of Oregon west of the Willamette River, from the Columbia River in the north to the California border on the south) with the densest population of vineyards and wineries, a town in that county, and another sub-AVA (Yamhill-Carlton); the southern border of the Willamette Valley, the Callapooya Mountains, was named for the Kalapooia family of tribes of Native Americans that broadly settled the valley and were its sole residents for 8000 years until immigrant wagon trains of 1843 and 1844 brought the bulk of the original settlers into the area, trailblazing what was known as the "Oregon Trail" route across the continent, its heyday in 1846-69 seeing more than 400,000 people migrate to the West.

2 – Product description

2.1 - Types of products

The protected geographical indication "*Willamette Valley*" is reserved for **still wines (red, rosé, white) and quality sparkling wines**.

2.2 –Analytical standards

General analytical characteristics below apply to still wines:

General analytical characteristics	
Maximum total alcoholic strength (in % volume)	16%
Minimum actual alcoholic strength (in % volume)	7%
Minimum total acidity	4 g/L tartaric pH=4.0 max
Maximum volatile acidity (in milliequivalents per litre)	23.31 mEq/L (Red Wines) 19.98 mEq/L (White Wines)
Maximum total sulphur dioxide (in milligrams per litre)	150 mg/L 40 mg/L Unbound SO2

General analytical characteristics below apply to quality sparkling wines:

General analytical characteristics	
Maximum total alcoholic strength (in % volume)	14%
Minimum actual alcoholic strength (in % volume)	7%
Minimum total acidity	5 g/L tartaric pH=4.0 max
Maximum volatile acidity (in milliequivalents per litre)	23.31 mEq/L
Maximum total sulphur dioxide (in milligrams per litre)	150 mg/L 30 mg/L Unbound SO2

2.3 – Product description

Willamette Valley wines are characterised by the type of grape variety.

Willamette Valley red wines, Pinot noir, with minor amounts of Syrah, Cabernet sauvignon and Gamay noir, and Willamette Valley white wines, predominately Chardonnay, Pinot gris and Riesling, with Pinot noir/Chardonnay quality sparkling blends, constitute almost all of the production of the Willamette Valley.

As cool climate medium-bodied wines Willamette Valley wines all show marked acidity and project bright, fresh ripe fruit and mineral driven tannins.

Below, Bree Boskov, MW paints a picture of the rich framework of Willamette Valley wines, from red to rose to white to sparkling, descriptors showing a family of wines that reflect the influences of climate and variety. Additional technical work to characterize Willamette Valley wines focusing on Pinot noir, by Elizabeth Tomasino, PhD, a research scientist in wine sensory analysis and flavor chemistry at Oregon State University's Oregon Wine Research Institute, gives soils' and other local factors' influences visibility, focusing on the sub-AVAs of the Willamette Valley:

1) Still Wines

- ***Red Wines***

Although there is an over-arching family of aromas, flavors and textures relating wines from the Willamette Valley, ranging in Pinot noir from red fruits to black (strawberry, cherry, black cherry, blackberry, blueberry, huckleberry, cassis), and spices or savory elements from peppers to baking spices, herbs, animal meats and forest floor or mushroom; with generally bright high-acid, moderately fine tannin, and long-and-broad, fully emollient textures, there are interesting variants to these descriptors as wines from specific sub-AVAs show their distinctiveness or signature aromas, flavors and textures.

Pinot noir descriptors: Willamette Valley Pinot noirs exhibit colors ranging from translucent light red to deeply saturated almost-black purple, with aromas and flavors of concentrated fruit-forward red and black fruits, from pomegranate, strawberry and cherry to blackberry and plum, red and purple floral aromatics, earthiness from hummus to tea leaf, iodine and ferric iron notes, baking spices of sassafrass, cola mineral and, with age, more complex savory characters of ham, mushroom, leather and herbal spices. Flavors and mouth textures are complex and layered with fine grained tannins of tea leaf and cherry tobacco and a round velvet mid-palate giving an elegant structure and richness, reflecting the fruits and deep savory food elements seen on the nose and tea leaf tannins, with bright acidity lifting the palate and maintaining attractive flavors over a great length and contributing to age worthiness.

Yamhill-Carlton AVA – aromas include biscuit, anise/fennel, violet, mushroom, blackcurrant, taste/mouthfeel include dry and chewy

Ribbon Ridge AVA – aromas include nutmeg, black jam, floral, taste/mouthfeel include grippy, tingle and lift

Eola-Amity Hills AVA – aromas include blackberry, cinnamon, bay leaf, earthy, taste/mouthfeel include chamois, concentrated and dusty

Chehalem Mountains AVA - aromas include clove, lilac, vanilla, taste/mouthfeel include mouth coating, fleshy and full

Dundee Hills AVA – aromas include rose, chamomile, blueberry and resinous, taste/mouthfeel include fine emery, fleshy and viscous

McMinnville AVA – aromas include clove, herbaceous, date, taste/mouthfeel include metallic, adhesive and thin

Heart of the Willamette – aromas include rose, strawberry, cherry, taste/mouthfeel include chalky, powder, soft

- ***Rosé wines***

Pinot noir, Gamay noir, and Pinot gris are finished as lightly pigmented Rosé wines, reflecting bright floral and berry fruit driven wines with light minerality and creaminess, all with hallmark vibrant acidity, enough to allow aging. Rosés from Pinot noir predominate in the Willamette Valley and range from blood orange to wild strawberries and raspberries with red florals, with a creamy palate. The hallmark vibrant acidity in Willamette Pinot noir rosés provides the ability to bottle age a few years.

- ***White wines***

Reflecting the same or even more brightness of fruit as Pinot noir, but with different fruit types reflected, whites range from citrus, stone fruit (peach, pear, etc.) and floral elements of white blossom and orchard florals, and pronounced minerality and salinity (from pH, acidity and lean bright fruit). A core of fresh pure fruit flavors and long palate driven by marked high acidity brings length and longevity to the white wines of the Willamette Valley. With age the wines exhibit dried flowers, marmalade citrus notes and elements of honey and developed mineral notes.

Pinot Gris

The first Pinot gris in the United States was in the Willamette Valley and is in an acid driven style, with fresh crisp orchard tree fruit, exotic spices of wild ginger, raw honeycomb and alpine herbs, and with an underlying earthy mineral core and driven by bright juicy acidity.

Riesling

Willamette Valley Riesling is brilliant, clean, transparent-to-platinum in youth, with a fresh acid back bone and steely mineral undertones, with concentrated citrus and stone fruit flavors--fruits of wild peach through lime cordial, with a defining lavender and white blossom floral aromatic turning to toast and honeyed marmalade notes with age. Vibrant acidity, mineral core and low pHs guarantee long aging.

Chardonnay

Willamette Valley Chardonnay is one of the coolest expressions of Chardonnay in the US, brilliant, platinum-to-white gold in color, with the aromatic purity of cool climate citrus and tree fruits. They show flavors packed on a medium-bodied palate, driven by juicy, steely acidity, and a filling a stylistic flavor range from creamy forward stylings to reductive, smoky interpretations. The compact fruit with high acidity and minerality makes them tight in their youth, yet ensures evolution through time beyond a decade.

Quality Sparkling Wines:

Willamette Valley quality sparkling wines are produced as white and rosé wines, made from Pinot noir, Chardonnay, and in some instances including Pinot meunier. They exhibit fine-to-medium mousse, with finesse, pearly threads of bubbles, and expressive, clean, acid edged fruit flavors of barely ripened stone fruit and racy citrus. Rosés visually range from clear cherry red to a "hint" of pink colors. Aromatically rosés exhibit rose petal floral to red skinned apple to a light plum-strawberry depending on the blend and the maturity of the fruit at harvest. A characteristic "spice" component is not unusual as well. Typical aromatic and flavor descriptions can include wild strawberry and other summer berries, citrus as in blood orange/tangerine, apples/crab apple, spices as in dried herbs and ginger. Nervy high acidities promise extended time of more than ten years in bottle.

The aromatics of Brut Sparkling wines made with Chardonnay, Pinot noir, and Pinot meunier can range from white flowers to ocean shore-oyster shell to apple/pear to citrus white grapefruit. Flavors vary by the percentages of grape variety used and location the fruit was grown. Flowers from delicate white to rose, spices from vanilla to ginger to dried herbs, fruits including green, yellow, red skinned apples, crab apple, tart berries, and Anjou-like pear, citrus white grapefruit, starfruit, and tangerine are possible. Acidity is bright, and vibrant, while the finish can be quite long on ripe fruit expression.

Geographic influences:

The Willamette Valley straddles the 45th parallel North. The Willamette Valley really is at the northern extreme of where one can consistently ripen cool climate varieties important to quality sparkling wines (e.g. Pinot noir, Pinot meunier, and Chardonnay).

In the Willamette Valley sparkling wine grapes mature with complex, ripe fruit flavors without losing high natural acidity. The fruit can be harvested at peak ripeness as one moves up in elevation. Ripe fruit flavors, high natural acidity, and low alcohol winegrapes harvested in mid-September produce complex, quality, long aging sparkling wines. The Willamette Valley by virtue of its high northern latitude, proximity to a cold ocean, rain shadowed sloped vineyards, dynamic photoperiod, and inability to successfully ripen warmer climate grape varietals presents a unique "new" style of North American wine. Today there are up to one-hundred producers of traditional method sparkling wines and production continues to grow in both number of producers and volume.

3 – Demarcated area

The Willamette Valley is a geographic region located in Western Oregon and is an appellation of origin for wines. The Willamette Valley constitutes the watershed of the Willamette River, the main tributary between the Coast Range and Cascade Range of mountains, running northward from approximately 44.05 N latitude near Eugene, Oregon on the border of the Callapooya Range of mountains, which constitute the third and southern boundary, and emptying into the Columbia River at Portland at approximately 45.52 N latitude, the northern boundary of Oregon being the Columbia River at this point, as it flows towards the Pacific Ocean, 60 miles to the west.

The boundary of the Federally (USTTB)-recognized American Viticultural Area was established and the merits of the appellation were acknowledged and approved in 1983, with a minor boundary adjustment in 2016, which increased the size by 29 square miles (75 km2) to 5389 square miles (13,957 km2). The AVA includes 3,438,000 total acres (1,391,000 ha) of plantable and non-plantable land, the valley ranging approximately 150 miles South-to-North and approximately 60 miles at its widest point. Currently planted to 19,800+ acres (8013+ha), this growing region has explored only a minor part of its potential in the 53 years of existence, but the unique critical factors of the growing region, as commonly held by vignerons within its boundaries, are the cool and protected climate (from heat, cold and rain) between the two mountain ranges and the appropriate geology of its soils for grape growing.

Willamette Valley as an AVA is described specifically in the US TTB Title 27-Chapter 1-Subchapter A-Part 9-Subpart §9.90 and reads as follows:

Boundaries. The Willamette Valley viticultural area is located in the northwestern part of Oregon, and is bordered on the north by the Columbia River, on the west by the Coast Range Mountains, on the south by the Calapooya Mountains, and on the east by the Cascade Mountains, encompassing approximately 5,200 square miles (3.3 million acres). The exact boundaries of the viticultural area, based on landmarks and points of reference found on the approved maps, are as follows: From the beginning point at the intersection of the Columbia/Multnomah County line and the Oregon/Washington State line;

(1) West along the Columbia/Multnomah County line 8.5 miles to its intersection with the Washington/Multnomah County line;

(2) South along the Washington County line 5 miles to its intersection with the 1,000 foot contour line;

(3) Northwest (15 miles due northwest) along the 1,000 foot contour line to its intersection with State Highway 47, .5 mile north of “Tophill”;

(4) Then, due west from State Highway 47 one-quarter mile to the 1,000 foot contour line, continuing south and then southwest along the 1,000 foot contour line to its intersection with the Siuslaw National Forest (a point approximately 43 miles south and 26 miles west of “Tophill”), one mile north of State Highway 22;

(5) Due south 6.5 miles to the 1,000 foot contour line on the Lincoln/Polk County line;

(6) Continue along the 1,000 foot contour line (approximately 23 miles) east, south, and then west, to a point where the Polk County line is intersected by the Lincoln/Benton County line;

(7) South along Lincoln/Benton County line, 11 miles to its intersection with the Siuslaw National Forest line;

(8) East along the Siuslaw National Forest line six miles, and then south along the Siuslaw National Forest line six miles to State Highway 34 and the 1,000 foot contour line;

(9) South along the 1,000 foot contour line to its intersection with Township line T17S/T18S (31 miles southwest, and one mile west of State Highway 126);

(10) East along T17S/T18S 4.5 miles to Range line R6W/R7W, south along this range line 2.5 miles to the 1,000 foot contour line;

(11) Northeast, then southeast along the 1,000 foot contour line approximately 12 miles to its intersection with the R5W/R6W range line;

(12) South along the R5W/R6W range line approximately 0.25 mile to the intersection with the 1,000 foot contour line;

(13) Generally southeast along the meandering 1,000 foot contour line, crossing onto the Letz Creek map, to a point on the 1,000 foot contour line located due north of the intersection of Siuslaw River Road and Fire Road;

(14) South in a straight line approximately 0.55 mile, crossing over the Siuslaw River and the intersection of Siuslaw River Road and Fire Road, to the 1,000 foot contour line;

(15) Generally southeast along the meandering 1,000 foot contour line, crossing onto the Roseburg, Oregon map, to the intersection of the 1,000 foot contour line with the Lane/Douglas County line;

(16) East along the Lane/Douglas County line approximately 3.8 miles to the intersection with the 1,000 foot contour line just east of the South Fork of the Siuslaw River;

(17) Generally north, then northeast along the 1,000 foot contour line around Spencer Butte, and then generally south to a point along the Lane/Douglas County line 0.5 mile north of State Highway 99;

(18) South along the Lane/Douglas County line 1.25 miles to the 1,000 foot contour line;

(19) Following the 1,000 foot contour line around the valleys of Little River, Mosby Creek, Sharps Creek and Lost Creek to the intersection of R1W/R1E and State Highway 58);

(20) North along R1W/R1E, six miles, until it intersects the 1,000 foot contour line just north of Little Fall Creek;

(21) Continuing along the 1,000 foot contour line around Hills Creek, up the southern slope of McKenzie River Valley to Ben and Kay Dorris State Park, crossing over and down the northern slope around Camp Creek, Mohawk River and its tributaries, Calapooia River (three miles southeast of the town of Dollar) to a point where Wiley Creek intersects R1E/R1W approximately one mile south of T14S/T13S;

(22) North along R1E/R1W 7.5 miles to T12S/T13S at Cedar Creek;

(23) West along T12S/T13S four miles to the 1,000 foot contour line;

(24) Continuing in a general northerly direction along the 1,000 foot contour line around Crabtree Creek, Thomas Creek, North Santiam River (to its intersection with Sevenmile Creek), and Little North Santiam River to the intersection of the 1,000 foot contour line with R1E/R2E (approximately one mile north of State Highway 22);

(25) North along R1E/R2E (through a small portion of Silver Falls State Park) 14 miles to T6S/T7S;

(26) East along T6S/T7S six miles to R2E/R3E;

(27) North along R2E/R3E six miles to T5S/T6S;

(28) Due northeast 8.5 miles to the intersection of T4S/T5S and R4E/R3E;

(29) East along T4S/T5S six miles to R4E/R5E;

(30) North along R4E/R5E six miles to T3S/T4S;

(31) East along T3S/T4S six miles to R5E/R6E;

(32) North along R5E/R6E 10.5 miles to a point where it intersects the Mount Hood National Forest boundary (approximately three miles north of U.S. Highway 26);

(33) West four miles and north one mile along the forest boundary to the 1,000 foot contour line (just north of Bull Run River);

(34) North along the 1,000 foot contour line, into Multnomah County, to its intersection with R4E/R5E;

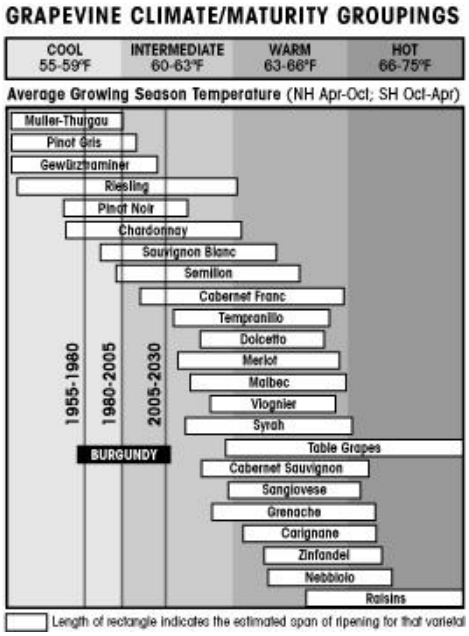
(35) Due north approximately three miles to the Oregon/Washington State line; and

(36) West and then north, 34 miles, along the Oregon/Washington State line to the beginning point.

[T.D. ATF-162, 48 FR 54221, Dec. 1, 1983, as amended by T.D. TTB-134, 81 FR 11112, Mar. 3, 2016]

4 – Grape varieties

Varieties that are appropriately grown in the Willamette Valley include those shown below as COOL (55-59F in Dr. Greg Jones' "*Grapevine Climate/Maturity Groupings*" graphical view of ripening windows by variety, with the Willamette Valley efforts focused on the grapes grown in Region One and Region Two of the University of California-Davis classification of world wine regions (below, in "*Heat Summation*" table):



Heat Summation

Given as Degree-Days above 50F for Selected Sites Worldwide

Region	*Location*	*Heat Summation* April 1- Oct 31	
One	Geisenheim, Germany	1790	
One	Reims, France	1820	
One	**McMinnville, OR**	**2066**	**Willamette Valley**
One	Coonawarra, AU	2170	
One	**Forest Grove, OR**	**2205**	**Willamette Valley**
One	Beaune, France	2300	
One	Bordeaux, France	2390	
One	**Roseburg, OR**	**2445**	**Umpqua Valley**
Two	Auckland, New Zealand	2540	
Two	Yakima, WA	2600	
Two	San Luis Obispo, CA	2620	
Two	Melbourne, Australia	2750	
Two	**Medford, OR**	**2815**	**Rogue Valley**
Two	Santa Barbara, CA	2820	
Two	**Grants Pass, OR**	**2870**	**Rogue Valley**
Two	Napa, CA	2880	
Two	Sonoma, CA	2950	
Three	St Helena, CA	3170	

Source: Winkler, *General Viticulture*

Although the climate change being experienced by all world wine regions would suggest higher CDD heat summations than in this 20-year old table (e.g., McMinnville over the last 5-years averaged 2572 CDD, compared to averages of 2295 for 1997-2016 and 1970 for 1961-1990—the threshold for Region 2 is 2500 CDD), the relative ripening abilities by region are still valid. The first seven grape varieties that Dr. Jones' graphical table suggests do well in Region One-to-Two (Muller-Thurgau, Pinot gris,

Gewurztraminer, Riesling, Pinot noir, Chardonnay, Sauvignon blanc) are indeed appropriate for the Willamette Valley based on what has historically been planted there in the 54 years of grapegrowing, the "*Willamette Valley Production in 2018*" table below showing that the Top 8 varieties constitute 97% of all grape acreage in the valley, with Pinot noir by-far the predominant grape planted at 68% and the Top 3 varieties (Pinot noir, Pinot gris, Chardonnay) constituting 93% of all Willamette Valley plantings. Interestingly, the inclusion recently of Syrah, Cabernet Sauvignon and Gamay noir in the Top 8, as Muller-Thurgau, Gewurtztraminer, Riesling, and Sauvignon blanc shrink in territory, speaks to conscious (or subconscious) climate change adaptations.

Willamette Valley Production in 2018					**2011-16**
Variety	Acres	Tons	T/Ac	% Planted	T/Ac
Pinot noir	16536	49045	2.97	**68%**	**2.57**
Pinot gris	4104	11177	2.72	**17%**	**3.38**
Chardonnay	1941	4618	2.38	**8%**	**2.96**
Riesling	282	957	3.39	**1%**	**3.52**
Syrah	261	749	2.87	**1%**	
Pinot Blanc	213	802	3.77	**1%**	
Cabernet Sauvignon	211	395	1.87	**1%**	
Gamay Noir	114	291	2.55	**1%**	
Gewurztraminer	85	161	1.89	0%	
Muller-Thurgau	66	226	3.42	0%	
Tempranillo	58	182	3.14	0%	
Viognier	40	71	1.78	0%	
Sauvignon Blanc	39	105	2.69	0%	
ALL	**24,436**	**69,993**	**2.86**	100%	**2.77**

Taking these elements into account, the following wine grapes are best adapted today to produce still wines and quality sparkling wines benefiting from the AVA "Willamette Valley": Pinot noir, Pinot gris, Chardonnay, Riesling, Pinot blanc, Pinot meunier. Future adaptations to climate change point towards

growth in Syrah, Gamay noir, Viognier, Tempranillo, Sauvignon blanc, Gruner veltliner, Albarino and Chenin blanc.

Other wine grapes see some use: Arneis, Auxerrois, Cabernet Franc, Dolcetto, Gewurztraminer, Merlot, Muller-Thurgau, Sangiovese, Zinfandel.

5 – Yields

There is no mechanism in the U.S.A. to regulate by law or rule the maximum yields for vineyards. Rather, a combination of the marketplace, the desire of Willamette Valley winegrowers to make great wine, and their desire for the viticultural growing region to be known for producing great wine has resulted in an observed maximum yield for vineyards, from which the wines labelled with the Willamette Valley AVA or one of the nested AVAs are made.

***Pinot noir and other Red wines**: the maximum observed is **7,850 kg/ha (45 hl/ha)**;*

***Chardonnay**: the maximum observed is **10,100 kg/ha (60 hl/ha)**;*

***Other Whites**: the maximum observed is **12,330 kg/ha (70 hl/ha)**;*

***Quality sparkling wines**: the maximum observed is **15,700 kg/ha (90 hl/ha)**.*

6 – Winemaking and packaging

6.1 – General requirements

Grapes grown in Willamette Valley stated on the label require 100% be from Oregon and 95% from the Willamette Valley area claimed.

To state a grape variety on the label, 90% of the wine must be from this grape variety.

6.2 – Winemaking approach

Ultimately, it is the quality of the wine that makes important wine regions push to better understand technologically the key techniques and decision-making rationale that make great wines from a classic wine region, and then preserve that knowledge.

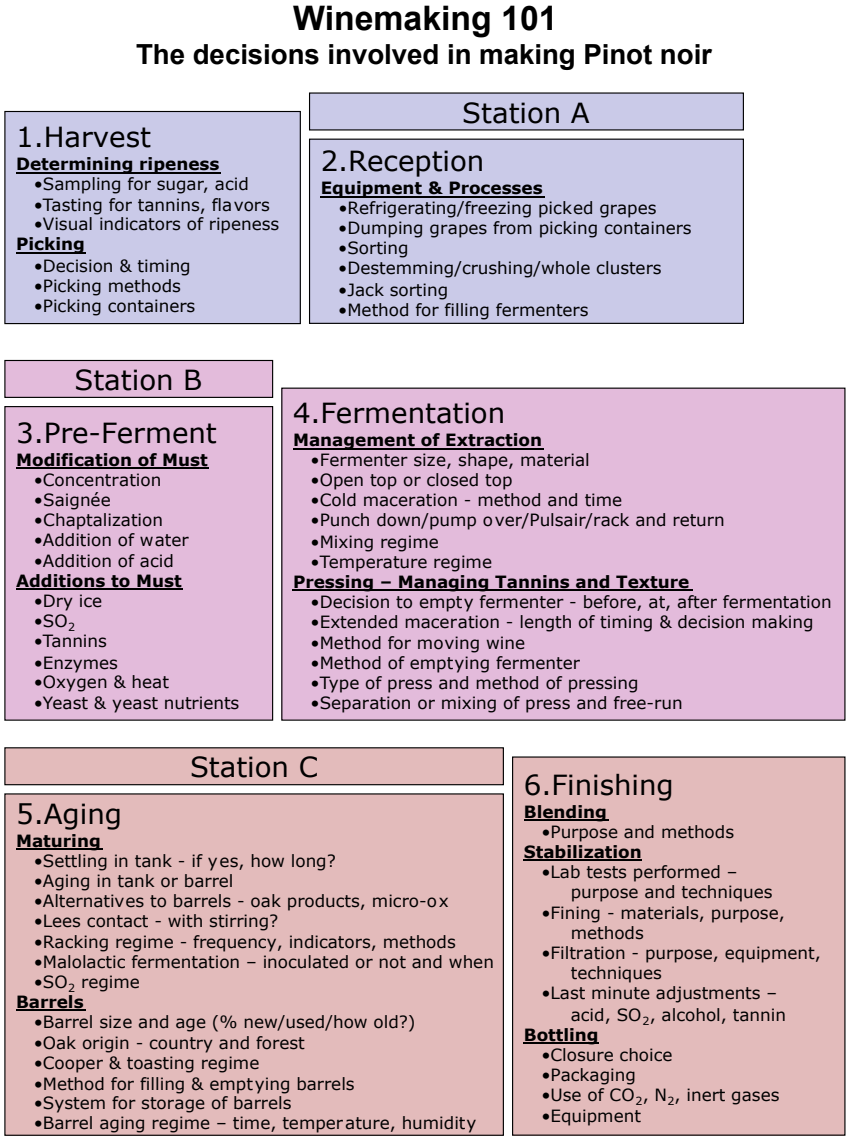
To this end, creative and experimental winemaking and grape growing are essential.

To make this work a focus on strong education and sharing of technical information is required, depending on collaborative industry groups having oversight on research, training, and technical communications—a strong set of organizations such as Oregon State University (with viticultural and winemaking extension PhDs and their groups), Oregon Wine Board, Oregon Winegrowers Association, Oregon Pinot Camp, Oregon Wine Symposium, Oregon Wine Research Institute, Chemeketa Community College's Northwest Wine Studies Center at Eola, Willamette Valley Wineries Association and smaller, focused technical groups on varieties (Pinot noir, Chardonnay, Riesling), viticulture tech committee work,

Steamboat Winemakers Conference and specific pure research (e.g., Cropload Trials, AVA Wine Characterization Studies) apply the rigor to push learning and adherence to advanced practices.

Education and Technology Transfer happen regularly within regional topical workshops and statewide gatherings such as OWIS (Oregon Wine Industry Symposium) and OPC (Oregon Pinot Camp). The basic standard practices for winemaking and viticultural approaches are visible in the OPC Handbook. Each year OPC holds an educational 4-day workshop on Pinot Noir and select white wines, discussing all facets of how stellar Willamette Valley wines are made.

This work allows the development of the representative graphic below ("*Winemaking 101, the decisions involved in making Pinot noir*") which details winemaking processes that link to assure high quality product, whether Pinot noir or any other varieties that follow the strict and technical requirements put in place for Pinot noir.



6.3- SUSTAINABILITY AS A CORE VALUE: Sustainable practices and beliefs are inherent to the Willamette Valley wine industry, beginning with the pioneering families who largely embodied the back-to-nature, socially responsible contract of late 60s and 70s young professionals. Idealistic and striving for a purity in environment, work and home life, pioneers from the beginning employed farming practices that were soft, seeking alternatives to petrochemical sprays, integrating serious research and collaborative learning to make up for mostly lacking first-hand experience, and attempting to be as transparent and honest about winemaking as they could be.

An independent, but progressive mindset has been the hallmark of West Coast states' political and social life over the past century and especially in the last 50 years in the Willamette Valley. In 1973 passage of

a landmark Land-use Planning bill (Senate Bill 100) in Oregon guaranteed protections to the varied zoned uses of property in the state, differentiating residential, commercial, industrial, agricultural and forestry, and establishing a system for updating and challenging uses. Right-to-farm was assured, but with zoning that requires periodic justification in referenda, as urban growth boundary expansions are sought to accommodate population growth.

Collaboration has long been the most obvious strength of the Willamette Valley wine industry, most valuably in the early years, as it established organizations of self-governance that

- produced the (still) most strict and progressive truth-in-labeling regulations that prevented use of semi-generic place names, defined proper varieties and required percentages to carry label variety and place names (1977);
- self-taxed the industry to fund technical research, marketing and administration (1977);
- developed leadership and guidance education in annual technical symposia, beginning
    - in the 1970s with the Oregon Horticulture Show,
    - in the 1990s with Grape Day in conjunction with Oregon State University, and
    - in the 2000s with the *Oregon Wine Symposium*,
- supported the *Oregon Wine Grape Growers Guide,* written and published by industry members (1983), used in other wine regions, and now in its 5th edition;
- established environmental protection and sustainability guidelines with third-party certification in programs *Salmon-Safe* (1996) and *LIVE* (Low Input Viticulture and Enology) (1997), still on-going, with LIVE spread to adjoining states and now including broader contexts than vineyard alone, with winery and social sustainability issues addressed, a Winery LIVE Certification program instituted in 2008. LIVE is itself certified internationally by the IOBC (International Organisation for Biological Control-- www.iobc-global.org).

Biodynamic certification by Demeter and USDA (US Department of Agriculture) Organic certification have been added to the suite of sustainability options, raising the WV and state *third-party certified sustainable vineyards to 48%*, the largest in any US growing region, or approximately 15,000 acres (6070 ha) statewide, not counting those farming sustainably but not choosing to seek certification. Most recent figures show LIVE certified acreage constitutes two-thirds of the state's certified sustainable vineyards (ref p36-37 of file 4-OWB Economic Impact Study OR-EconReport-2014-FINALnetrev2).

- established *Salud* (1992) as an organization to provide vineyard worker healthcare, loosely patterned after Hospices de Beaune in Burgundy, with winery funded auctions centered on best barrel sales of the most current vintage by winery to benefit the cause (http://saludauction.org/mission/).

Much attention is being given to global climate change today, the industry making progress with Willamette Valley wineries achieving *LEED Certification* (Leadership in Energy and Environmental Design) (2002/2005/etc.) for green building designs; joining Oregon's *Carbon Neutral Challenge* (2008), the first US wine industry carbon reduction program; and, embracing wind and solar as many wineries in the WV took advantage of state funded programs for alternative sources of energy.

Meg Houston Maker, *Maker's Table*, sees the cultural environment begun a half-century ago and continuing in the Willamette Valley to support sustainable practices:

> *When I visited in 2014,…. I found a lot of first- and second-generation makers working in [an] old-fangled way. Many seem as passionate about ecology and human systems as they are about the wine itself. They truly care how their wine comes to be. They respect both the land and the people working it, because both are their legacy, and both are their (and our) future.*

7 – Link with the geographical area

7.1 – Specificity of the geographical area

In the Willamette Valley, high quality wines typical of the terroir are produced from cool climate grapes specified above, grown in vineyards almost exclusively situated on hillsets of either volcanic and/or sedimentary soils pushed up from the valley floor by tectonic action, at elevations between 61 and 305 meters (200 and 1000 feet). Hillside soils provide adequate root depth and water retention, vine nutrients without being too rich (thereby encouraging easy, verdant growth rather than necessary stressed fruiting priorities) and good soil and air drainage for friable soils and reduced chance of frost and disease pressures (e.g., powdery mildew). The hillside soils are of three types (volcanic, sedimentary and loess glacial silt) and transmit unique and predictable aromas, flavors, minerality, and growth characteristics to the vines and resultant wines.

The gradient provided by 244 meters (800 feet) of elevation gain also gives a variety of ripening conditions for different grape variety needs as well as additional versatility adapting to climate change, with warmer sites lower and cooler sites at higher elevations, thus projecting riper and softer wine characters lower, brighter fresh fruit and higher acidity higher. Further refinement is given by site aspect, facing south or east or west on these hills to address the sun, a real benefit in the early, cool history of the region, as vineyards sought perfect ripening facing due south.

As important as the hillside locations are to give ripening, water, flavors and acidity, the critical feature of Willamette Valley wines comes from the bowl-shaped nature of the valley, which contributes the general cool climate conditions of this protected valley—protected by Cascade and Coast ranges of mountains to the East and West, preventing hot, dry, continental weather and cool, wet weather, respectively, from perturbing the growing season. Full ripeness is achieved in this protected bona fide cool climate region, while retaining acidity from cool growing and ripening seasons. High quality wines of finesse, verve and structural integrity require this acidity to make Willamette Valley wines excellent food wines, short-to-medium term, which also have long aging potential.

Secondary attributes of the Willamette Valley that argue its distinction besides physical Natural Factor characteristics are the Human Factors--exceptional focus, collaboration, technical rigor and organizational approaches—that brought world-wide interest and relationships. And, also the Reputation developed early-on for a singular ability to make a notoriously difficult variety, Pinot noir, as

a peer in the New World to the Old World's Burgundy. Other varieties succeed here for similar reasons as Pinot noir, but Pinot noir is its pinnacle claim to notoriety. Press, academia, peers and consumers all know Willamette Valley wines based on Pinot noir.

7.1.1 Natural Factors

Climate

The Willamette Valley is a bona fide cool climate wine growing region, with climate mainly responsible for its unique terroir, with a nod to soils and people. Although the climate is changing, with significantly different temperatures and rainfall over the half-century of its existence growing cool climate varieties, the Willamette Valley retains its relative advantages as all regions warm and become slightly different.

The 45th Parallel runs through the middle of the Willamette, giving long daylength and generally moderate temperatures. With 15 hours or more of daylight, the advantage over more southern regions (e.g., WV having 1 ½ hours more mid-summer sun than Napa) helps compensate in ripening for generally lower temperatures. Temperatures in the Willamette Valley begin and end cool during the growing season, with a Mediterranean profile in mid-summer where adequate heat accumulation for ripening occurs and with very low rainfall until late Fall and Winter, in which the majority of precipitation falls. The protected nature of the valley, with the Cascade Mountains preventing invasion of continental climate heat in summer and cold in winter and with the Coast Range moderating Pacific Ocean rainfall by dropping most of the nearly 100 inches of coastal rain in the mountains, leaving 30-40 inches of rain for the Northern Willamette Valley growing region. The Pacific Ocean contributes an overall moderating influence over the US West Coast wine regions of California, Oregon and Washington State.

Dry summers and early falls make soil water retention and availability of aquifers for irrigation water important. Approximately 25% of Willamette Valley plantings are drip irrigated, the remainder subsisting well on winter rains retained in moderately deep soils. More mature plantings thrive non-irrigated, with deeper root systems making plants robust to weather extremes of drought or heavy rainfall.

Willamette Valley heat accumulation, measured in a summary of heat for a growing year called Cumulative Degree-days, fits nicely into the Region One Classification known for bright acidity and yet full ripening in most years, at 2066 CDD (1148 CDDcelsius). [As a reference, the heat summation continuum includes the Mosel (1790 CDD/994 CDDcelsius), Champagne (1820 CDD/1011 CDDcelsius), Bordeaux (2390 CDD/1328 CDDcelsius), Melbourne (2750 CDD/1528 CDDcelsius) and Napa (2880 CDD/1600 CDDcelsius). Viewed as average growing season temperatures in Region One, Champagne is 57.6F (14.2C), Willamette Valley 58.6-59.2F (14.7-15.1C), Burgundy 59.4F (15.2C).]

Moreover, the cool climate moderated by large bodies of water like the Pacific Ocean allows the diurnal temperature to swing from warm days to very cool nights, onshore ocean wind flow cooling the Willamette Valley by as much as 30-40F (16.5-22C) at night.

A challenge: climate change

A compilation CDD graph shows how recent yswingears far exceed historical half-century CDD averages and specific vintages in the last 20-30 years—e.g., the thirty years of 1961-90 averaged 1970 CDD (1094 CDDcelsius), fifteen years of 1997-2011 saw 2202 CDD (1223 CDDcelsius), and the last five years 2012-2016 crossed into Region Two territory of 2572 CDD (1429 CDDcelsius), a 30% increase in accumulated heat in slightly over 50 years. The warming has had short-term benefits for more consistent ripening, bigger croploads, lower costs and flashier wines appealing to much of the marketplace, but deviating slightly from a leaner, more elegant and food-friendly style associated with the Willamette Valley. Plus, it is obvious that these incremental steps in warming can't be reversed when we want, that once the train has left the station it keeps picking up speed and is hard to stop. To maintain our regional characteristics and style, we must adapt to these changes.

Climate Change IS a reality and adaptation IS occurring which will keep Pinot Noir the dominant grape variety despite warming. Adaptation is happening either consciously or sub-consciously, as newer plantings explore higher elevations, different aspects such as northern slopes rather than southern, more extreme foothills of the mountain ranges and different clones and varieties. There is pressure to experiment, but maintaining our primary commitment to Pinot Noir and other cool climate varieties. Some adaptation to maintain historical varieties and styles happens in the vineyard, in grape growing canopy management, plantation density, croploads and harvest timing; and, in winemaking approaches to extraction and chemistry adjustments. With global warming, the natural boundaries for invasive species of diseases, animals and insects are changing too, requiring quarantine, alertness and control of dangerous immigrant species, much as the Willamette Valley was required to react when, in 1990, phylloxera was first identified in the valley. Technically, the Willamette Valley has committed to monitoring and adapting to climate change, to maintain the quality and uniqueness of the appellation.

Soils and geology

The West Coast of the US sits on active fault lines, with active volcanos and relatively recent shifting and uplifts that created many of the features in Oregon's western wine regions, especially in the Willamette Valley. All western Oregon from the Cascade Mountain Range west was underwater 12-50 million years ago, when pressure from the colliding North American and Pacific plates raised Western Oregon, including the Willamette Valley, and created the Coast Range to the west and Cascade Range to the east. During this later 5-10 million years, lava flows westward layered over the marine bedrock from accumulated sediments of varying ages. Afterwards, buckling and tilting continued in the Willamette Valley from tectonic tension, creating hill-sets that became the key hillside wine growing areas in the valley, with layers exposed to provide unique and expressive soils. These soils were basaltic and marine sedimentary in nature, areas such as the Dundee Hills, McMinnville, and Amity-Eola Hills being almost exclusively *volcanic/basalt* with Ribbon Ridge and Yamhill-Carlton *ocean sedimentary* in nature.

Other soils were created much more recently, including *loess soils of blown glacial silt* within the last million years, as are found on the northern side of the Chehalem Mountains, and within the last 18

thousand years, at the end of the last ice age, accumulated layers of rich silt released by frequent breaks in ice dams in adjoining states, known collectively as the Missoula Floods, filling the Willamette Valley with floodwaters and what they carried to a 400 foot (122 meters) elevation height.

The Willamette Valley soil series used successfully for wine grapes are the volcanically-derived *Basalt* (Jory family), ocean *Sedimentary* (Willakenzie family), and wind-blown glacial silt created *Loess* (Laurelwood family), all being moderate-to-deep, with good water-holding capability, without being alluvial or richly fertile, and being friable and well-drained.

7.1.2 Human Factors

Oregon was the destination of many immigrants from the Eastern United States in the mid-to-late 1800s, seeking room to settle and farm, as well as to escape conditions where personal freedoms were constrained, the Willamette Valley being the focal point of the migrations, as wagon trains endured all manner of ordeals, seeking "Oregon or Bust." The reputation of the Willamette Valley quickly spread as a rich, verdant valley for farming, as well as being rich in natural resources from salmon to game for meat and pelts, all with friendly Native Americans to greet them, unlike plains natives encountered on the trip west. The rich soils of the valley floor attracted farmers, with orchardists looking to the hillsides where the wine industry would eventually focus its attention. Immigration to the Willamette Valley was stimulated by the impact of the "highly fertile alluvial soils across its broad, flat plain. A massively productive agricultural area, the valley was widely publicized in the 1820s as a 'promised land of flowing milk and honey'. Throughout the 19th century it was the destination of choice for the oxen-drawn wagon trains of emigrants who made the perilous journey along the Oregon Trail.[2] "

Developers advertised subdivided hillsides for aspiring Eastern orchardists, hillsides of prunes, cherries and hazelnuts that would become vineyards fifty to one hundred years later.

Grapes were first planted in the Willamette Valley in the modern era in 1965, the valley being selected in the 1960s and 1970s by young largely technical California-based pioneers for its climate and its resemblance to European climes known for grape varieties, such as Pinot Noir (especially), Chardonnay, Riesling and other cool-climate grapes. Given the fast-growing reputation during the first half-century of grape growing and winemaking in the Willamette Valley, the term Willamette Valley or Willamette, on its own as the dominant and distinctive element of both this appellation, stand for wines of that origin and the resultant quality.

THE STEPS TAKEN: Individuals from the Willamette Valley began worldwide interaction from the beginning, focused largely on Western Europe's Burgundy, Alsace and Germany, with David Adelsheim, Charles Coury, Dick Erath and others developing relationships that helped the WV industry at critical points. Clonal investigation to augment the excellent quality of most of pioneers' initial imports from California mother blocks was the focus of Erath/Coury/Adelsheim's work in the 70s and 80s, the most notable Adelsheim's work with Raymond Bernard of the U of Dijon in Bourgogne on PN and Chardonnay (1984). Working harvests and attending European enology and viticulture schools were important educational opportunities for some pioneers and their next generation.

In 1979, several Willamette Valley and California Pinot Noir makers combined fly-fishing and eating fun with serious comparisons of their Pinot Noirs, especially their difficult or flawed cuvees, at a fly-fishing lodge in southern Oregon, beginning the annual Steamboat Conference, attended over the years by winemakers from ALL Pinot Noir regions of the world: Oregon, California, Bourgogne, New Zealand, Australia, Austria, Alsace, Loire, Germany, Spain, Italy Chile, Argentina, South Africa, Tasmania, Canada et al. Steamboat is widely credited with initiating the worldwide discussion about Pinot Noir, establishing standards for openness, self-critique, and acceptable quality levels.

A Pinot Noir diaspora spread, being helped by the natural expansion of travel by aspiring, young winemakers to other regions during their learning years, especially as Harvest Interns, with the Willamette Valley beginning to send and receive interns in the 1980s and 1990s— notable among these Veronique Drouhin working in the WV with Eyrie, Adelsheim and Bethel Heights in the mid-80s and making a decision with her family that proved major validation of the Willamette Valley when Maison Joseph Drouhin winery from Bourgogne bought land in the WV and formed Domaine Drouhin Oregon (1988, first commercial vintage). Recent immigration and interest by other well-known wine companies in the 2000-10s from Germany (Ernst Loosen), France (Louis Jadot [2013], Dominique Lafon, Louis-Michel Liger-Belair, Jean-Nicolas Meo) and California (Jackson Family, Jordan, Silver Oak) reinforce the Willamette Valley's willingness to openly accept others who respect the values of the WV.

The Willamette Valley industry, hungry to facilitate technical discussions pertinent to cool growing regions, hosted with Oregon State University the first International Cool Climate Wine Symposium (1984) on viticultural and enological topics, with the wine world's top academics and technically skilled industry presenting papers and, most importantly, discussing passionately all manner of issues for 3 days. This symposium continues today on a quadrennial basis, alternating between cool climate regions.

WILLAMETTE VALLEY ECONOMIC CONTRIBUTION:

Today, the Willamette Valley is the most populated area of Oregon, with 1,131,000+ residents, centered in three major metropolitan areas (Portland, Salem [the capital of Oregon], and Eugene) and outlying small towns, largely farming, forestry or sub-urban in nature. The I-5 Corridor (Interstate Highway 5) is the spine of the valley, running North-South on the western side of the Cascade Range from the California border to the Washington border. Portland, the largest city, has a reputation for not only fine Willamette Valley and broader Oregon wines, but is a mecca for foodies, hipsters, creative types, outdoorspeople, and youth in general. The culinary scene, craft beer, artisan spirits, coffee and tea attract tourists worldwide.

Grape growing and winemaking contribute significantly to the economy of the region, with 71% of vineyard acreage of Oregon and 73% of wine coming from the Willamette Valley, propelled by the international reputation for Willamette Valley Pinot noir. The economic impact continues to grow, with the most recent impact study from 2016 indicating whole state contribution of $5.6 Billion (4.67 B Euros) from the overall wine industry, $1.4 Billion (1.31 B Euros) in net value added to the economy, with nearly 20,000 jobs in wine-related agriculture, production and sales fields. The growth continues despite and almost unfazed by the economic downturn of the last decade, driven by Pinot noir's 171% acreage increase, closely followed by Pinot Gris's 137% increase. The Willamette Valley is home to approximately

30,000 acres of grapes, 715 vineyards, and 554 wineries, with 73% of this activity being Pinot noir, for which the Willamette Valley has been known for much of its half-century.

7.2 Specificity of the product

The Willamette Valley is recognized worldwide for wine quality, innovation, collaboration and inclusiveness, and continued potential to achieve great wine contributions in new regions of the valley and with the inexorably changing climate. Recognition is apparent in the highly visible and broadly inclusive world events in which it participates, in openness as a world wine industry citizen, and in critical awareness by press, writers, academics and others.

The Willamette Valley is almost all about Pinot noir, with 73% of all planted acreage of 19,778 acres (8004 ha) being Pinot noir, the remainder being almost all cool climate white varieties such as Pinot gris, Chardonnay, Riesling, and many rarer varieties.

Pinot Noir appears to be the essence of Willamette Valley wines and largely went toward building the strong reputation of wines the area.

To celebrate the Pinot Noir community that extended beyond technical fields, in 1987 the *International Pinot Noir Celebration, or IPNC*, was created to allow consumers and trade to exult for 3-4 days in tastings, meals and educational workshops featuring the magical array of Pinot noir from around the globe, but as hosts humbly including but limiting numbers from the cool climate of the Willamette Valley. Of course, held during the last few days of July, selected as the historically driest and warmest and therefore predictable for events in the WV, we did suggest that even cool climates can be searingly hot part of the year!

Over the 30 years (through 2016), 318 wineries from the following regions outside the US came to celebrate Pinot noir and share their passion and knowledge: since 1987, the IPNC has hosted 186 Pinot Noir winemakers from France, 39 from New Zealand, 27 from Australia, 15 from Italy, 14 from Canada, 12 from Germany, 7 from Switzerland, 7 from Austria, 4 from Chile, 3 from South Africa, and one each from Argentina, England, Israel, and Spain. Guest speakers at the IPNC have included such luminaries as Lalou Bize-Leroy, Robert Drouhin, Jancis Robinson, Robert Parker, Remington Norman, Michael Broadbent, James Halliday, Hugh Johnson, David Lett, Matt Kramer, Alan Meadows, or essentially anyone significant and seriously involved in Pinot Noir.

Most significantly, over 16,800 non-winery celebrants have attended since 1987, some for all years or nearly so. Admiration is broad for IPNC:

> *The Oregon International Pinot Noir Celebration has run for more than 25 years and it includes workshops, lectures, and even movies as part of the festivities and the food, typically created by celebrated Portland and Valley chefs, is always superb.* – Lucy Waverman *The Globe and Mail*
>
> *Oregon proved its quality on the world stage, along with its collaborative spirit, as nearly 700 visitors descended on McMinnville for the 26th International Pinot Noir Celebration.* – Gabriel Savage, *the drinks business*

In keeping with the hedonistic appeal of Pinot noir itself, the emphasis (at IPNC) is very much on the word "celebration". - Tim Atkin, *Decanter*

One of the most enjoyable wine weekends in the world. -Jancis Robinson - *JancisRobinson.com*

IPNC has been overwhelmingly successful, resorting in early years to lotteries to pick lucky attendees, so-much-so that it was necessary to shunt potential candidates elsewhere, which was opportune for the Oregon Wine Marketing Coalition (1994) board, who realized that inviting retailers, sommeliers, restauranteurs, and distributors to Oregon's beauty and its passionate winemakers was an unrealized opportunity, and so much better than laboring through expensive and ill-attended roadshows around the US and world. *Oregon Pinot Camp* or *OPC* (2000) has annually seen a fresh group of 275 international and US wine trade bond and become disciples of Pinot noir and the collaborative spirit of the Willamette Valley, greater than 4500 in total at this point.

Press, with written *reviews, stories, books, videos, tastings and competitions* has evolved over time, witness to an ongoing improvement in quality and recognition of Willamette Valley wine. Press was probing and curious about the WV in the 1970s, then highly excited in the 1980s prompted by two tastings, the 1979 Gault Millau tasting in which a 1975 Willamette Valley Pinot noir from Eyrie asserted itself and a follow-on tasting arranged in 1980 by Domaine Joseph Drouhin's Robert Drouhin, curious and wanting to reprise the first tasting. Depending on vintage variability, with the WV climate being on the edge of consistency until global warming presented itself, and with not-yet adequately mature vines and winemakers, press pronouncements early-on swung pendulum-like from disappointment to presaged greatness. Quality now is consistently high due to high standards of grapegrowing and winemaking, providing a steady pull for outside wineries to investigate and for some to buy and immigrate.

Below are examples from various types of press, largely from the last couple years, highlighting the value of WILLAMETTE VALLEY as a geographical indication. These include *Quotes* of interest; *Articles* showing the uniqueness of the place and people, i.e., the *terroir*, especially in the context of 50 years' passion and toil; *Book* references; *Videos; Advertisements and Collateral,* including WV distinctions; and *Polling* data of high frequency consumers of fine wines, indicating a heightened awareness of the WV as a region comparable to other world class appellations (NOTE—a DropBox collection of the following references for these Guidelines, plus other references, are available by requesting a link.):

- Oregon (WV) makes only 1% of US fine wine, but 24% of all Wine Spectator wines reviewed and scored as 90 or above are Oregon (WV), with 56% of ALL Oregon wines reviewed receiving 90 or above.
- **Two of the Top Three wines in Wine Spectator's Top 100 Wines of 2016** were from the Willamette Valley, Beaux Freres and Domaine Serene.
- WVWA Video for Wine Enthusiast Star Awards Recognition of the Willamette Valley as **Wine Region of the Year 2016**.
- Wine Spectator Videos of winemaker interviews on the Willamette Valley 2015-16.
- Press and Media on Willamette Valley 1.17.2017, a vast repository of many recent reviews and stories, with clickable links to access original sources.
- Champagne's advertisements on valuing place names like Champagne, Willamette Valley, Napa…

- Press Releases and articles on Napa Declaration of Place (2005) and its initial 6 wine region signatories.
- Articles from Figaro, Falstaff, Vigneron and other magazines.
- OWB Full-Glass Research 2017 poll results showing awareness among fine wine consumers (High Frequency High End consumers) of the Willamette Valley; e.g., among US winegrowing regions 53% claimed to be Very Familiar and Have Tried Many WV wines, third to Napa and Sonoma; 25% claimed to Frequently Drink (at least monthly) WV wines, again after 36 and 37% for Napa/Sonoma; and, rated WV wine Quality 5.6 in 1-7 range, Napa and Sonoma 6.3 and 6.0.
- *Decanter's* ***2016 World Wine Awards Best of Show*** *Platinum is Willamette Valley's Domaine Serene Pinot noir.*

With greater than 70% of Oregon's grape growing and winemaking taking place in the Willamette Valley, and with the Willamette Valley reputation for Pinot Noir dominating recognition for Oregon wines from the beginning, it is reasonable to consider that "Oregon" data speaks largely for the Willamette Valley, i.e., when reference is made to Oregon, especially in publications, it generally means the Willamette Valley. As Paul Gregutt, a key US wine writer, asserts "the (Willamette) valley is often considered synonymous with 'Oregon Wine Country'" (2-OPC Oregon Pinot Noir Story 2016). *It is with this premise that we use quotes, data and references to Oregon and Willamette Valley at times interchangeably in this memorandum.*

The Willamette Valley is mainly recognized for Pinot Noir, internationally and by top-tier critics, seeing the region's potential in the early years and now largely considering it realized, even in the eyes of **Robert M. Parker, Jr.**

> *Oregon is finally fulfilling its vast potential. (Feb 2013).*

Or, as **Isaac Asimov** of the *New York Times* summarizes,

> *The Willamette Valley is a place where the Pinot Noir ideals of finesse and grace can be consistently met. (Sept-Oct 2016).*

Although the reputation of the Willamette Valley is led by Pinot Noir, *white wines* also succeed in the same cool climate that preserves fresh fruit and acidity. As *Snooth*'s **Gregory dal Piaz** claims,

> *Today we are celebrating Oregon's diversity and its emergence in particular as the country's top source for white wines... I know that when I look for a domestic white wine, more often than not I reach for something from Oregon. (Feb 2013)*

WILLAMETTE VALLEY is internationally recognized as one of the world's most famous wine regions and one of the United States' premier wine-growing appellation, as shown in the press, marketing collateral from export markets and general interest in the growing region by well-known EU and US wine companies.

Direct to Consumer Appeal: Assessing relative strengths between US wine regions in appealing to consumers and directly shipping to them, the 2020-Direct-to-Consumer-Wine-Shipping-Report.pdf, just released showed: *In 2019 Oregon continued to outperform other regions and overall DtC channel up 13% in DTC value, +9.2% in volume, and up 3.6% price per bottle. Oregon, in particular, continued its long*

string of impressive growth, doubling its share of the total value of the DtC channel since 2011. Oregon is now in its eighth year of outperforming the overall DtC shipping channel.

Oregon is unique among all regions tracked in this report in that no other winery region is so fully dependent upon a single varietal. In 2019, Pinot Noir shipments accounted for 54% of the volume of wine shipped and 67% of the total value of DtC shipments from Oregon wineries [again, remember this is the Willamette Valley]. Average price *per bottle shipped to $50.82. Overall, Oregon wineries shipped $143 million of Pinot Noir to consumers across the country, a 13% increase over 2018. Since 2011, the value of DtC shipments from Oregon wineries has increased 393%, from $43 million to $212 million.* ***No other region tracked in this report has benefited from such a dramatic increase in attention from American wine drinkers. We expect the growth in Oregon direct shipments to continue to outpace the overall channel in the short term.***

Consumers become tourists also. In a Willamette Valley Winery Association *Survey of Wine Tourists – Final Report of Findings, 2019,* findings showed the Willamette Valley [provides] significant competition as a top-of-mind desired wine country region, even among High Potential Visitors. When asked, in an open-ended format, which wine regions they most want to visit, Willamette Valley was the third most-written in domestic wine region, after 24.4 percent for Napa Valley and 19.7 percent for Sonoma County.

The listings of references to WILLAMETTE VALLEY wines that can be found on the internet are virtually endless and reflect significant reference to these denominations. A Google search for the combination of "Willamette" and "wine" returns 550,000 results, the combination of "Willamette Valley" and "wine" still 500,000 hits.

Over years, the Oregon Wine Board and Willamette Valley Wineries Association have actively promoted the Willamette Valley appellation in the European Union and internationally in general, with multiple group marketing junkets to gatherings such as ProWein, London Wine Fair, GoWest and others, plus marketing education tours and sales competitions in areas like Japan, South Korea and China.

7.3 Link between the specificity of the product and the geographical area

(also see 7.1-- Specificity of the geographical area)

Wines from the Willamette Valley are unique, identifiable and characteristic of the growing region, largely deriving from climate, soils and macro geographical variables including varietal fit and grapegrower and winemaker philosophical and technical backgrounds. In general, successful and characteristic Willamette Valley wines have pronounced acidity, fresh but ripe fruit flavors and aromas specific to the varietal, good polyphenolic structure, and ageability of several decades.

The different grape varieties planted adapt perfectly to the climatic conditions of the Willamette Valley area, especially in the period of climatic warming. They also allow wines to express the creativity of the wine growers in the production of authentic cuvées.

The characteristics seen as being unique for the Willamette Valley, with Pinot Noir especially, include brightness and fresh fruit aspects, with the acidity provided by the protected cool climate; varying red-

to-black fruit characters and varying levels of structural phenolics or tannin associated with soil types, elevations and geography; and a broad array of stylistic fingerprints from evolving winemaker views of Pinot noir's personality.

The cool climate moderated by large bodies of water like the Pacific Ocean allows the diurnal temperature to swing from warm days to very cool nights, onshore ocean wind flow cooling the Willamette Valley by as much as 30-40F (16.5-22C) at night. This affects plant respiration, permits plant cooling, and preserves acidity that is characteristic of the Willamette Valley wines.

Maturation of both vineyards and winemaking knowledge are responsible for the now-established Willamette Valley quality, consistency and unique stylistic characters. Over the 50+ years of this region's work, an admirable collaboration internally and with the winemaking world has helped to assign the imprint of the Willamette Valley.

As such, it retains what OPC's *Oregon Pinot Noir Story* describes as its attraction and distinction:

> *Oregon's wine pioneers came to the Willamette Valley looking for the perfect place to grow Pinot noir—a place where long hours of summer sun combined with cool temperatures at the beginning and end of the growing season. Wine grapes ripen slowly here, with a long period of flavor development at the end of the growing season and harvest in late September or early October.* Sec 2 p2 Oregon Pinot Camp 2016

Finally, the dry nature of growing and final ripening seasons helps decrease disease pressures for mildew and molds like botrytis at key times.

8. Checks

1.1. *Virtually all wine from the Willamette Valley is varietally designated and must be a minimum of 90% from that variety, per Oregon State Laws and Regulations (OAR 845 OLCC Regulations).*

1.2. *Wine origins must be accurate, with AVAs claimed on labels requiring 95% minimum in the bottle be from that AVA.*

1.3. *All Willamette Valley wines must be vinified and prepared for bottling in Oregon, a requirement to safeguard quality and grape origins, with the premise that careful treatment of these delicate wines and facilitation of collaborative activity in finishing the wine where the grapes were grown is important. If a wine label shows "Willamette Valley AVA" as its appellation of origin, Federal labeling regulations [Code Federal Regulation, Title 27 CFR 4.25(e)(3)(iv)] require that the wine be fully finished in Oregon. The U.S Alcohol and Tobacco Tax and Trade Bureau (TTB) has defined "fully finished" wine in rulemaking materials as wine that is "ready to be bottled, except for cellar treatment and blending that does not result in*

an alteration of class and type."

1.4. *Multiple organizations at the US Federal, Oregon State and industry levels control various facets of grape growing, wine production, name and brand protection, labelling and business practices, as prescribed by federal, state, and industry certifying organization regulations.*

1.5. *At the Federal level, the Alcohol and Tobacco Tax and Trade Bureau (TTB) within the U.S. Treasury Department governs production of wine under 27CFR24 and the labeling of wine under 27CFR4. The TTB audits production practices at wineries by periodic review. It audits labeling practices by requiring a Certificate of Labeling Approval for every wine sold in interstate commerce in the country.*

1.6. *To refer to a grape-growing certification program (such as organic, biodynamic, LIVE or salmon-safe) on a wine label, the TTB requires proof from the third-party certifying organization that the vineyard, from which the grapes for a wine come, was certified by the organization for the growing year concerned.*

1.7. *The State of Oregon has several labeling regulations that are stricter than the Federal regulations, include minimum percentage of a grape variety for varietally-labeled wines and minimum percentage from the geographical region mentioned in the appellation of origin. The checks on compliance with these rules are the responsibility of the Oregon Liquor Control Commission, which can inspect winemaking records as part of its industry oversight.*

1.8. *Limitations on the use of herbicides and pesticides in viticulture are set by the U.S. Department of Agriculture and the Oregon Department of Agriculture. Some chemicals are prohibited for all agricultural use and are not available for purchase. Other chemicals are only prohibited for viticultural use. Checks for compliance are generally complaint-driven.*

The following organizations administer and control the checks in the Willamette Valley through the processes and systems detailed below:

Alcohol and Tobacco Tax and Trade Bureau (TTB)

TTB is in charge of enforcement of the provisions of the Federal Alcohol Administration Act (FAA Act) to ensure that only qualified persons engage in the alcohol beverage industry. TTB control in particular enforcement of regulation regarding Wine Appellations of Origin, American Viticultural Area (AVA) and Labels as defined by 27 CFR part 9 and 27 CFR 4.25 More specifically, the Trade Investigations Division (TID) of the TTB is comprised of investigators who ensure industry compliance with the laws and regulations TTB administers and the Market Compliance Office monitors alcohol beverages in the marketplace for compliance through the alcohol beverage sampling program.

Alcohol and Tobacco Tax and Trade Bureau
Director, Trade Investigations Division
1310 G Street, NW, Box 12
Washington, DC 20005

The Oregon Liquor Control Commission (**OLCC**)

OLCC has authority to ensure enforcement of the regulation of the State, in particular Oregon's winemaking regulations such as grape varieties, appellation of origin and AVA, labeling requirement. Its specialists conduct inspections or investigations, make arrests and seizures, aid in prosecutions for offenses, issue criminal citations and citations for violations.

OLCC – Headquarters - Regional Office

9079 SE McLoughlin Blvd., Portland, OR 97222

FEDERAL AND LOCAL REGULATIONS applicable to Willamette Valley Wines

The US Controls and Protections for the Willamette Valley and similar viticultural regions, including foreign appellations, consist of several layers, extending from Federal (National) system safeguards to local regulations:

Wine Appellations of Origin (https://www.ttb.gov/appellation/) is the comprehensive view and system for US and Foreign Wine Appellations, as established by US regulations, specifically 27 CFR 4.25, for the U.S. Department of the Treasury, TTB, Alcohol and Tobacco Tax and Trade Bureau. It defines US Appellations per 27 CFR part 9 and Foreign Appellations by trade agreements and the need to conform to requirements of the foreign laws and regulations for the country of origin.

The American Viticultural Area (AVA) system as defined by 27 CFR part 9 and 27 CFR 4.25 is the one appellation of origin that does not depend on political boundaries, such as states, counties, or countries, but rather defines unique areas that have been justified and approved as special by a technically robust system with petition and peer comment. Currently there are 240 TTB-approved American Viticultural Areas. The Willamette Valley was approved as an AVA in 1983 (27 CFR part 9.90), with sub-AVAs of the Willamette Valley approved in 2005-6 to further differentiate unique growing regions—AVA petitions contain detailed information on history, tradition, climate, geography, geology and soils, and precise boundaries. The TTB carefully reviews each petition for true individuality and is responsible for approving only when their technical experts and peers are satisfied the AVA as described has merit. They curate suggested AVA names to prevent overlap, confusion, and business conflicts.

For compliance to the TTB's AVA appellation of origin requirements, a labelled wine must derive 85% or more of the wine's volume from grapes grown in the AVA (Oregon law requires 95%), the wine must be finished in the state in which the AVA exists and must conform to laws and regulations governing composition and production methods required in that state and AVA. As summarized legally:

> *The Willamette Valley, and other wine AVAs, are recognized as appellations under U.S. law pursuant to the Federal Alcohol Act as enforced by TTB. TTB oversees and enforces their use and a wine cannot carry an AVA unless the wine complies with origin requirements for the AVA, i.e. 85% (TTB) or 95% (Oregon) grapes from the designated area and 100% production within the state. If a wine listing an AVA does not comply with the AVA requirements, TTB can remove the wine from the market.*

Within the Willamette Valley specific, unique and high-quality growing areas can apply for AVA recognition, with seven (7) "sub" or "nested" AVAs currently approved: Ribbon Ridge, Chehalem Mountains, Yamhill-Carlton, Dundee Hills, Eola-Amity Hills, McMinnville, and Van Duzer Corridor. Other equally unique and definable areas have indicated interest in gaining this finer AVA resolution, two filing petitions in 2019.

TTB Label Approval System as defined by 27 CFR part 4 and CFR part 24.255-260 regulates identification of wine on each vintage and unique bottling to be sold, including winery, place name, AVA, proprietary names, alcohol % and other TTB requirements, including absence of semi-generic identification. (see below the role of states in this). In order to legally market wine in the US, wine labels for each unique wine must be approved by the TTB, at which time the Federal government reviews for adherence to AVA, varietal, alcohol content (with tax implications), and label composition requirements. Failure to meet requirements during label approval or in TTB audits in the marketplace or winery can preclude sale of the wine or cause it to be removed from the marketplace.

Oregon State Laws and Regulations (OAR 845 OLCC Regulations) further define requirements for production and labelling wines, with the more stringent of Federal and State requirements governing wineries' standards. Oregon's winemaking regulations can be found in Chapter 845 Division 10 of the Oregon Administrative Rules. A link to all of OAR 845-Chapter 10 is found here: https://secure.sos.state.or.us/oard/displayDivisionRules.action?selectedDivision=3868).

In the case of Oregon, based on the youth of the industry (54 years at this point), the idealistic philosophies of the founding core of winemakers, and enjoying success despite having to meet more stringent standards, the following requirements govern Oregon wineries, most since its visionary 1977 labelling laws were instituted:

Grape Variety: If a single grape variety is claimed on the label, 90% or more of that wine's volume must be from that variety (the TTB requirement is 75% and, until recently, was 51%). An exception in Oregon for traditionally blended wines allows that minimum to be 75% for Cabernet sauvignon, with the remainder from a variety listing of 18 grapes (OAR 845-010-0915). Original regulations from 1977 stipulated the correct grape varietal name for use on labels, replacing myriad variant names used in the marketplace.

Appellation of Origin: The appellation of origin must be prominently displayed on the label, as conspicuous as the wine's class or type. An AVA wholly in Oregon, as is the Willamette Valley, must derive from 100% of all grapes grown in Oregon and 95% grown within that AVA (TTB regulations for the US is 85% within AVA).

Semi-Generic Designations: A long list of semi-generic names, such as Champagne, Chablis, Burgundy, Chianti, Sherry, etc., have been prohibited on Oregon labels since 1977 OLCC regulations (now OAR 845-010-0930, on 2/18/1977 as LCC 59) and now also recently by Federal regulation (CFR part 24.257.(c)). A narrow grandfathered exception exists to use the word "Claret" for Bordelaise blends.

Specific OLCC regulations and what they cover are summarized below:

845-010-0280: Standards of Identity and Prohibited Practices Concerning Wine – This regulation states that, generally speaking, federal rules apply to winemaking in Oregon. However there are a few regulations in Oregon that impose more strict standards than those found in the federal rules.

845-010-0290: Labeling Requirements for Wine – This regulation requires labels for wine made in Oregon to comply with applicable federal rules as well as Oregon's own rules.

845-010-0310: Seizure of Substandard Wine – This regulation states that the Oregon Liquor Control Commission (OLCC) will seize wine that is not in conformity with applicable Oregon law and regulations. Depending on the particular issues with the wine, the wine may be reconditioned or may be destroyed.

845-010-0905: Wine Produced or Bottled in Oregon from Vitis Vinifera or its Hybrid Grades — Definitions – This regulation defines certain winemaking related terms as used in this particular section of the OARs.

845-010-0910: Wine Produced or Bottled in Oregon from Vitis Vinifera or its Hybrid Grades — Purpose and Applicability – This regulation establishes the applicability of the rules in this section to wine produced or bottled in Oregon, as well as to all grapes wines in which an "Oregon" appellation is used (including any appellations within the "Oregon" appellation).

845-010-0915: Grape Variety Names – This regulation requires that a higher percentage of the grapes must be of a given variety in order to include the name of that variety on the label (90% under Oregon rules vs. 75% under federal rules). There are exceptions made for an enumerated list of varieties, where a lower percentage of grapes must be of a given variety to appear on the label

845-010-0920: Appellation of Origin – This regulation requires for wines with an Oregon appellation of origin that a higher percentage of grapes must be from the named appellation as compared to what is required by TTB (95% under Oregon rules vs. 85% under federal rules)

845-010-0930: Semi-Generic Designation of Geographic Significance – This regulation prohibits the use on Oregon wines of certain semi-generic names that are otherwise permitted by federal rules, with a special exception created for the use of the term 'claret' if used under very narrow circumstances.

Patent and Trademark System requirements provide important protections for geographic indications and wine origin place names. The United States Patent and Trademark Office administers several levels of recognition and protection, for all aspects of the industry, from winery copyright and trademark to geographical certification marks for geographical areas. Place names and brand names, plus other identifications of value are registered and protected while in use in the marketplace. The Willamette Valley and other AVAs have this tier of protection as backup to the primary TTB enforcement pursuant to the Federal Alcohol Act of appellation control and label approval, by which a lack of compliance means the TTB can remove wine from the market.

Oregon Corporation Commission is the state entity that serves to control business identity and record organizational details of these businesses. Included in this responsibility is registration of Assumed Business Names, which helps to control overlapping or misuse of names, many in the wine industry being place names. This is another level of control to prevent confusion and unchecked use of geographic place names.

How Systems, Processes and Products are Verified Compliant have been detailed to some degree above, showing those different bureaucracies responsible for TTB AVAs, TTB labels, USPTO mark approvals, state regulations and names. Other oversight is provided on technical and production requirements of regulations, both on a Federal and State level, beginning with stringent winery licensing and approvals, periodic agricultural cleanliness and water and equipment inspections, and certification by industry organizations (such as Demeter, LIVE, USDA Organic, AgStats), all requiring auditing of vineyard and winery systems and certifying their resulting adherence.

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