

*Mcmenamins*



**PUBS, BREWERIES & HISTORIC  
HOTELS**



# McMenamins By The Numbers



Started in 1983

2300 People

52 Properties (2 States)

25 Breweries (1985)

8 Movie Theaters (1986)

8 Hotels (1990)

1 Winery (1990)

1 Cider House (1992)

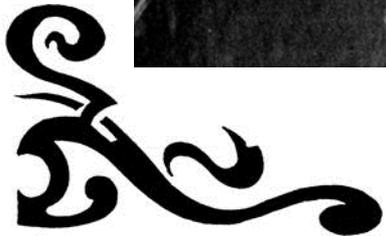
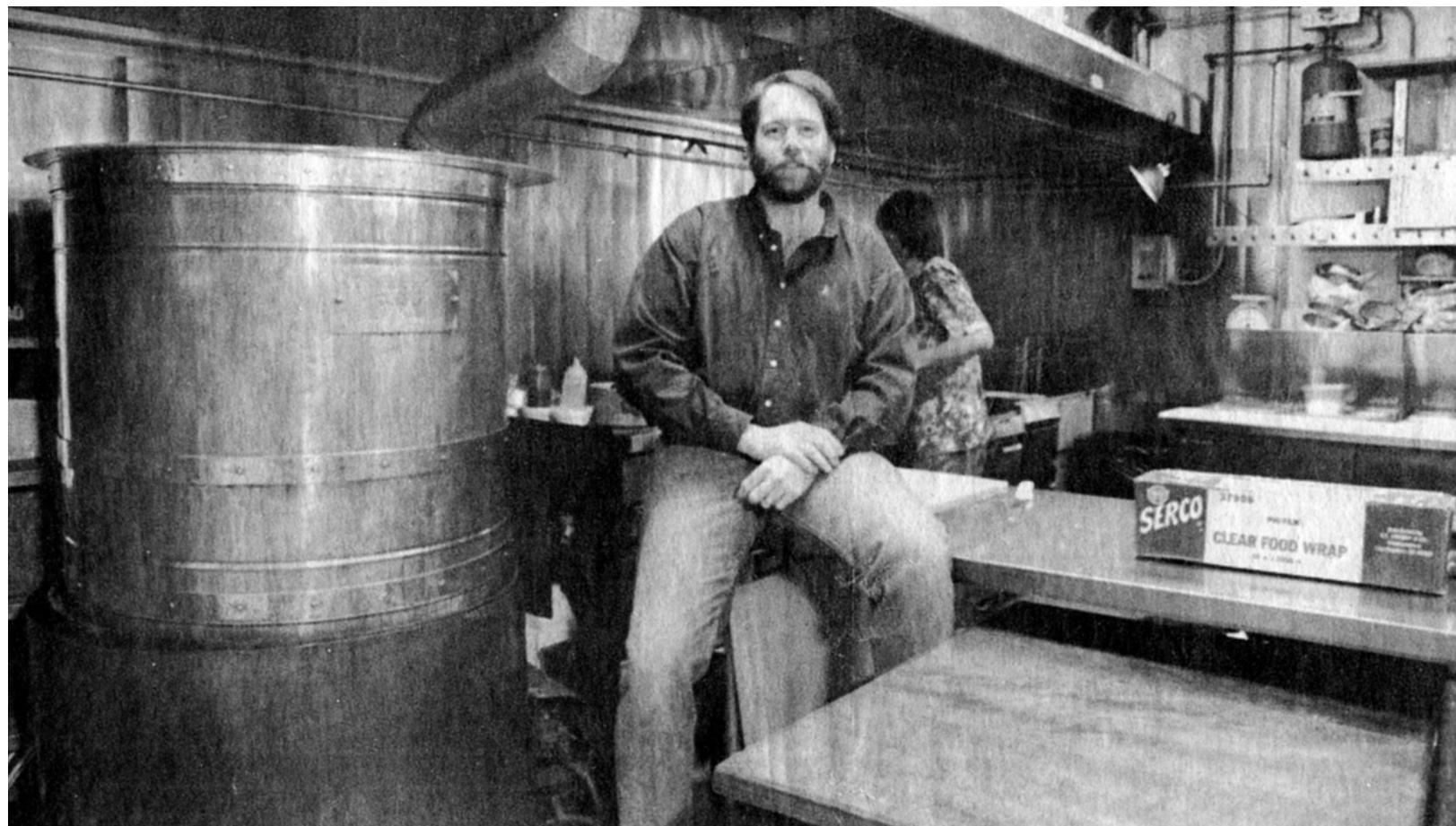
5 Spas (1997)

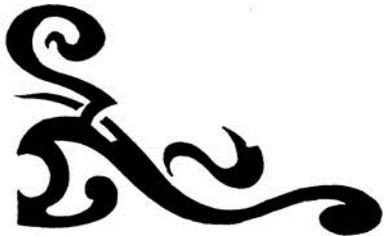
1 Golf Course (1998)

2 Distilleries (1998)

1 Coffee Roastery (2000)













# Community Involvement





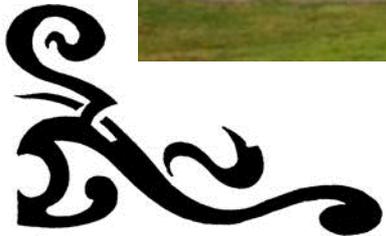




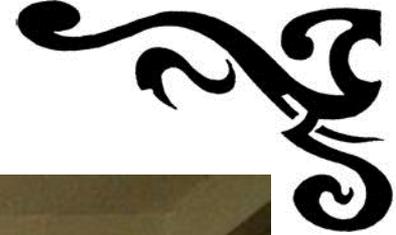






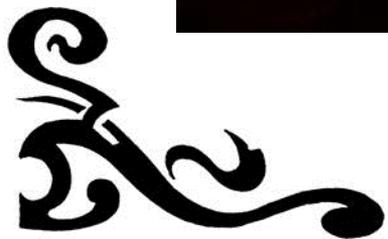


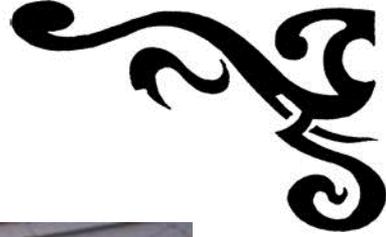








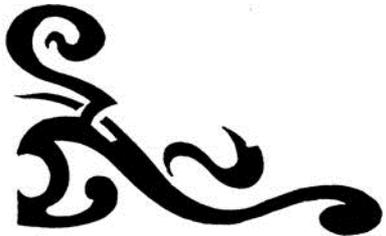
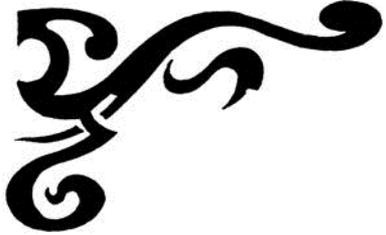










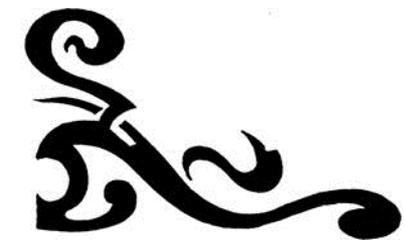


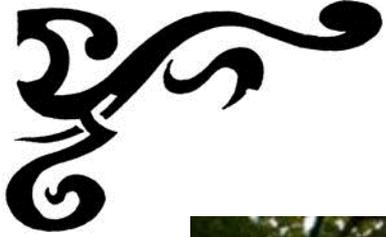






Family









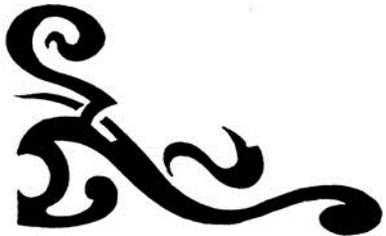








# The Future





# Rogue Ales: an Oregon story

# Where we at?

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- Born in Ashland - 1988
- Raised in Newport - 1989
- Kids moved out of the house – 1999
- Dad wanted a Farm - 2008

# Numbers tell a story

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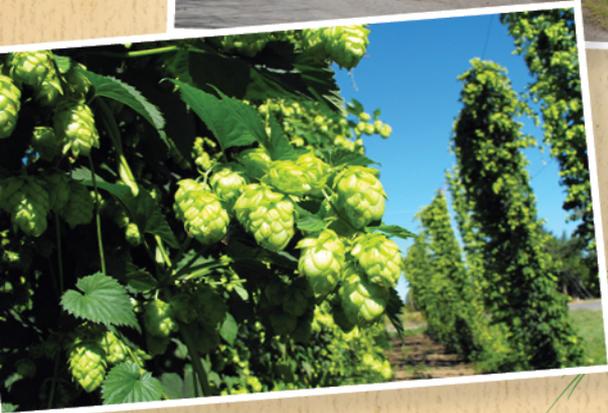
- 3<sup>rd</sup> largest employer in Lincoln County
- 345 employees (300+ in Oregon)
- Operate in 6 Oregon counties
- Distribute to all 49 states
- Export to 46 countries
- 574,000 visitors YTD

**ROGUE FARMS**  
INDEPENDENCE, OR

# ROGUE FARMS

GROW THE REVOLUTION

**ROGUE FARMS**  
TYGH VALLEY, OR



# OREGON MEETING HALLS

# ROGUE



**ROGUE ALES PUBLIC HOUSE - NEWPORT**



**BREWER'S ON THE BAY - NEWPORT**



**THE GREEN DRAGON - PORTLAND**



**ROGUE HALL - PORTLAND**



**ROGUE ALES AT PDX - PORTLAND**



**DISTILLERY & PUBLIC HOUSE - PORTLAND**



**CHATOE ROGUE TASTING ROOM - INDEPENDENCE**



**ROGUE ALES PUBLIC HOUSE - EUGENE**

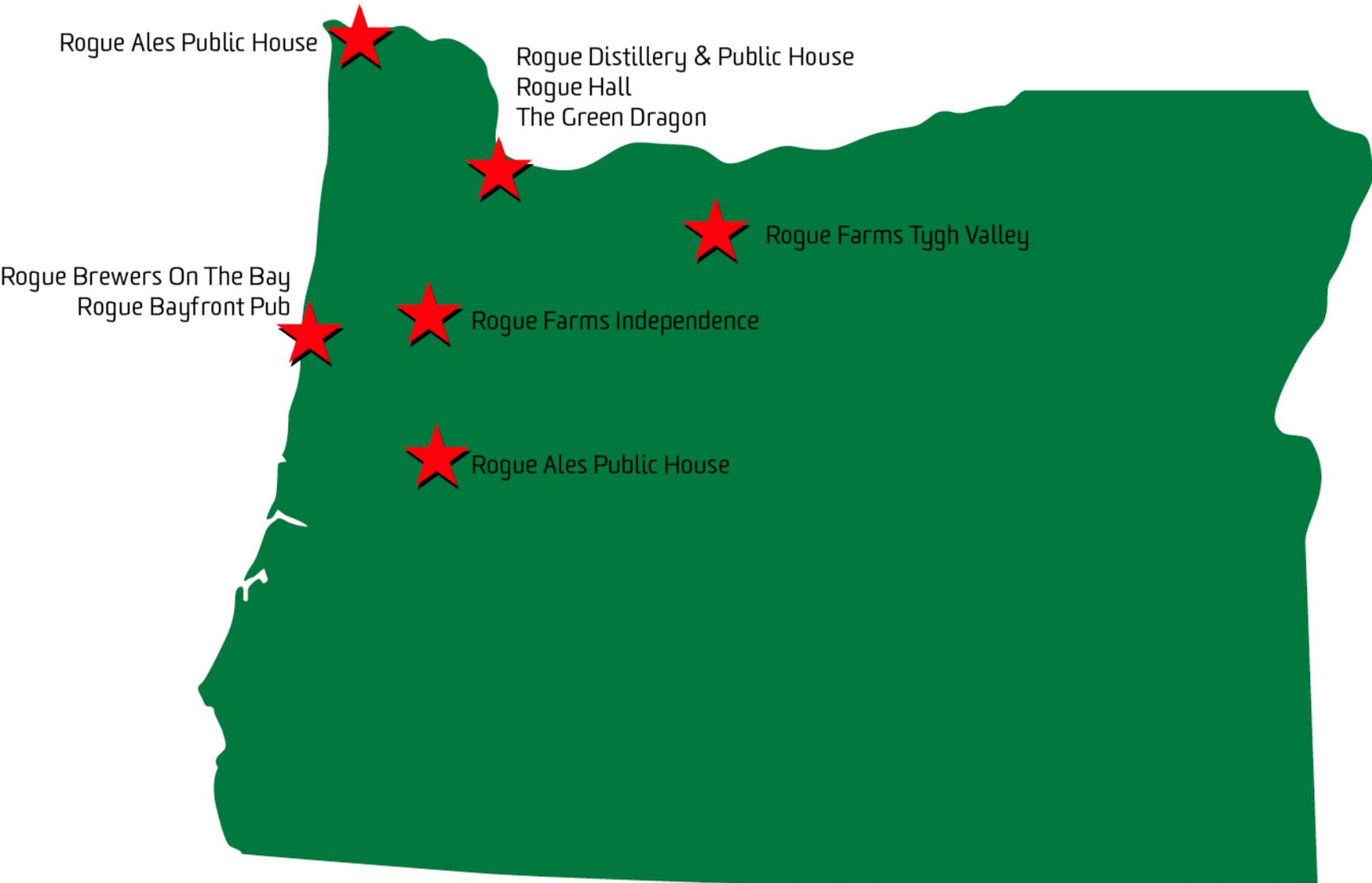


**ROGUE ALES PUBLIC HOUSE - ASTORIA**

# ROGUE

WHERE TO FIND ROGUE WORLDWIDE







**1 JOB IN A  
BREWERY GENERATES**

# Beer Serves America.

For every one job at a brewery or beer importer, there are 45 jobs created in supplier industries and in local communities across the country. Directly and indirectly, the beer industry employs more than 2 million Americans, and contributes \$246 billion to the U.S. economy. The impact from beer goes beyond the name you see on the label of your favorite brand. For more information, visit [www.BeerServesAmerica.org](http://www.BeerServesAmerica.org).



1 JOB IN AGRICULTURE



1 JOB IN TRANSPORTATION



3 JOBS IN DISTRIBUTING



7 JOBS IN BUSINESS SERVICES



12.5 JOBS IN PACKAGING, MACHINERY AND OTHER INDUSTRIES



20.5 JOBS IN RETAIL



#thinkbeer



[BeerInstitute.org](http://BeerInstitute.org)

# Proudly Oregon

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- Partnerships:
  - Rogue Creamery
  - Willamette Valley Creamery
  - River's Edge Creamery
  - Portland State University
  - Voodoo Doughnuts
  - Oregon National Guard
  - Oregon Coast Aquarium
  - Portland Saturday Market
  - Rose Festival
  - Oregon Barrel Works
  - Rogue Nation Foundation

# Helpful Policies

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- Liberal growler fill, keg to go, bottle sales
- Spirits bottle sales
- Growler fill for non-breweries
- Reasonable state excise tax
- State challenge grant in 1994 to facilitate export

**Thanks!!!**

# The ECONOMIC IMPACT OF CRAFT Beer In Oregon

Presented by Gary Fish  
CEO, Deschutes Brewery Inc.  
to the  
OLCC Forum

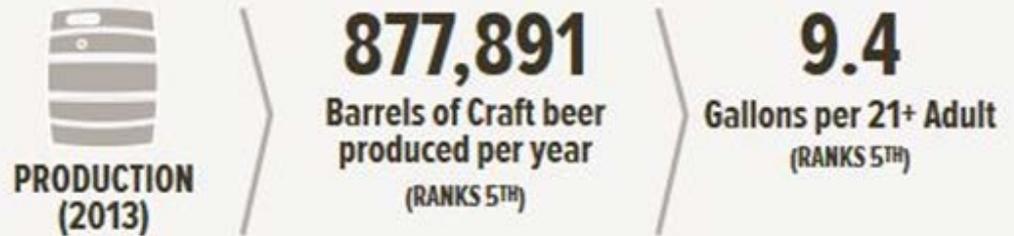




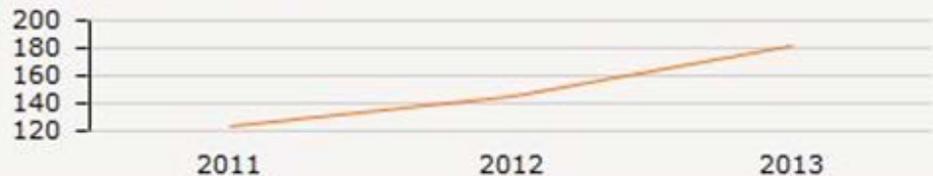
# OREGON



**Oregon Ranks #1 in the nation for breweries per capita.**



NUMBER OF BREWERIES PER YEAR



Source: Brewer's Association, 2013, economic impact calculated using IMPLAN multi-regional analysis beer sector economic model; Oregon Brewer's Guild data used for total number of breweries



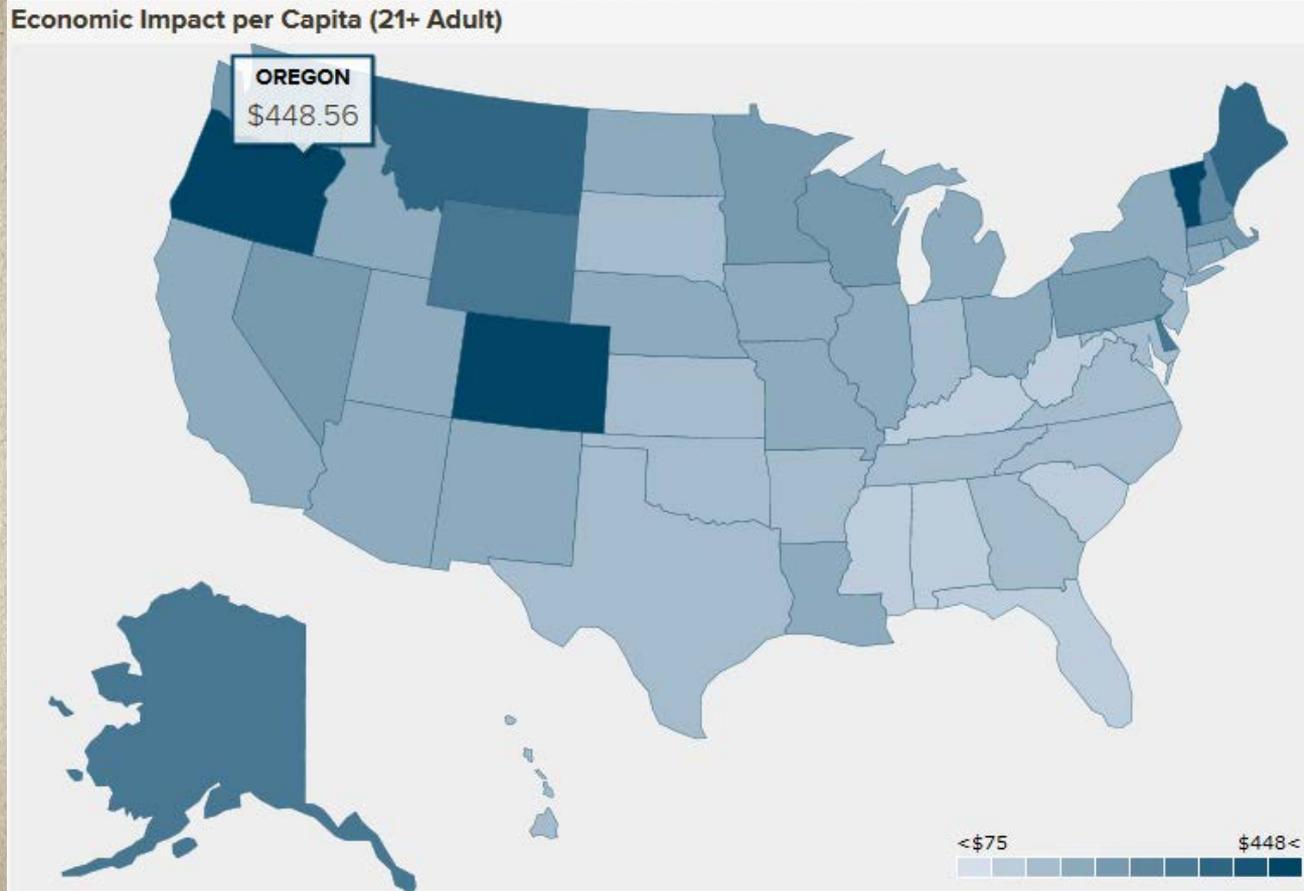
# OREGON Volumetric Production

Rank	State	2013 Craft Barrels	2012 Craft Barrels	2011 Craft Barrels	
1	California	2,948,895	2,453,793	2,020,246	
2	Pennsylvania	1,788,556	1,626,116	1,547,114	
3	Colorado	1,413,242	1,291,771	1,185,354	
4	Ohio	1,097,955	980,969	973,804	
→	5	Oregon	877,891	764,226	659,598
	6	New York	859,535	724,984	638,110
	7	Texas	848,259	713,712	624,903
	8	Michigan	582,909	438,383	356,780
	9	Wisconsin	444,311	398,811	388,025
	10	Minnesota	367,681	308,370	170,102

Source: Brewer's Association, 2014



# OREGON LEADS THE WAY



Source: Brewer's Association, 2014, economic impact calculated using IMPLAN multi-regional analysis beer sector economic model



# Oregon Ranks #1 In the Nation

Top Five States in Age 21+ Output per Capita

Rank	State	Output/Capita
1.	Oregon	\$448.56
2.	Colorado	\$436.50
3.	Vermont	\$418.57
4.	Maine	\$324.36
5.	Montana	\$315.37

The total economic impact per capita of Oregon craft beer is the highest in the nation. It is estimated that craft beer generates about \$449 in economic activity per resident of the state.

*Source: Brewer's Association, 2013, economic impact calculated using IMPLAN multi-regional analysis beer sector economic model*



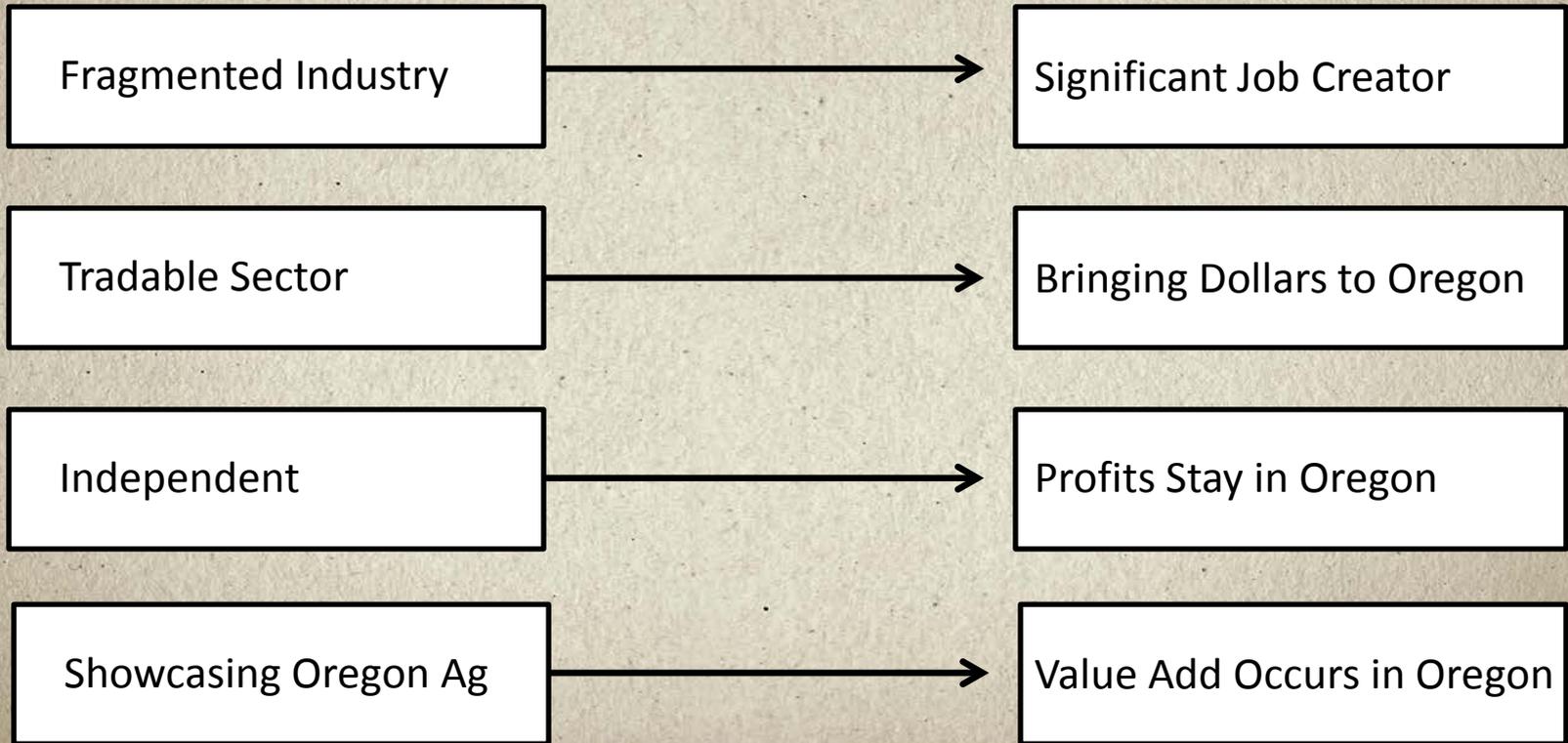
# OREGON HAS NATIONAL IMPACT

At over \$1.2B, the State of Oregon accounts for 3.8% of the total economic impact of craft beer in the nation.

*Source: Brewer's Association, 2013, economic impact calculated using IMPLAN multi-regional analysis beer sector economic model*



# Great things about the craft beer industry



# Fragmented Industry, Significant Direct Job Creator

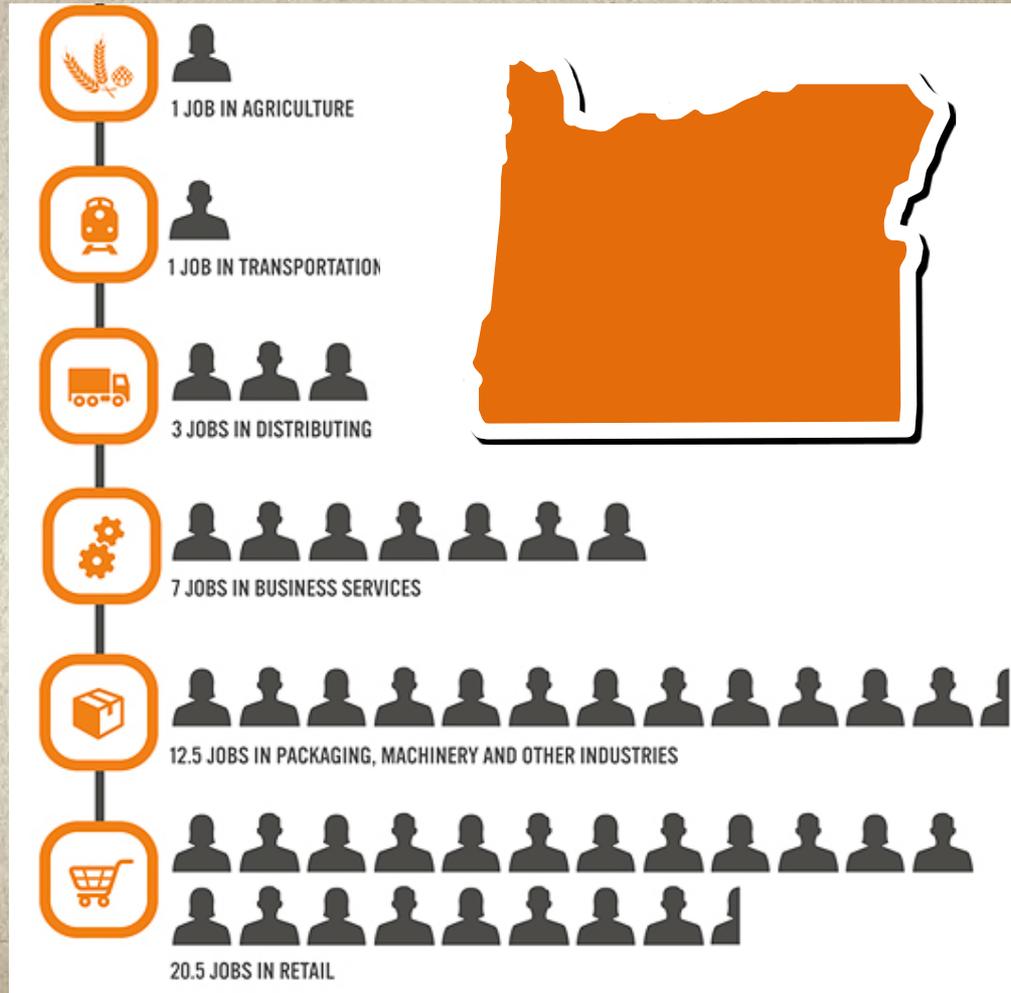


- Fragmented industry promotes job creation
- Smaller scale of brewers and support industry supports job creation
- Geographic diversity results in positive employment impact across many communities throughout the state

Data Source: Oregon Brewer's Guild, 2014



# JOBS Through THE TIERS



Source: Beer Institute, 2014



# Tradable Sector Good: Exporting Beer, Importing Dollars



Oregon craft brewer's sold 64% of the beer they produced outside of the State of Oregon.

The 893,000 barrels of beer sold outside of the State of Oregon resulted in estimated direct gross receipts of \$214,320,000 into the Oregon state economy.

*Source: Graphic, Oregon Brewer's Guild, 2014; Gross receipts calculated utilizing industry comparable gross revenue per barrel.*



# Oregon CRAFT Brewers: Diverse and Independent

<u>Oregon Brewer</u>	<u>City</u>	<u>Barrels produced</u>	<u>Ownership</u>
1 Craft Brew Alliance	Portland, OR	Over 724,900	Publically traded (NASDAQ: BREW)
2 Deschutes Brewery	Bend, OR	287,730	Independent, partially employee owned
3 Full Sail Brewing Co.	Hood River, OR	115,000	Independent, partially employee owned
4 Rogue Ales Brewery & Headquarters	Ashland, OR	104,000	Independent
5 Ninkasi Brewing Co.	Eugene, OR	86,507	Independent
6 10 Barrel Brewing Co.	Bend, OR	23,500	Independent
7 McMenamins	Throughout the state	22,601	Independent
8 Boneyard Beer Co.	Bend, OR	15,028	Independent
9 Oakshire Brewing	Eugene, OR	10,244	Independent
10 Hopworks Urban Brewery	Portland, OR	10,235	Independent
11 Laurelwood Public House and Brewery	Portland, OR	9,360	Independent
12 GoodLife Brewing Co.	Bend, OR	9,350	Independent
13 Double Mountain Brewery	Hood River, OR	8,900	Independent
14 Hop Valley Brewing Co.	Eugene, OR	8,701	Independent
15 Fort George Brewery	Astoria, OR	7,833	Independent
16 Caldera Brewing Co.	Ashland, OR	7,800	Independent
17 Cascade Lakes Brewing Co.	Bend, OR	6,333	Independent
18 Terminal Gravity Brewing Co.	Enterprise, OR	5,500	Independent
19 Pelican Pub and Brewery	Pacific City, OR	3,879	Independent
20 Worthy Brewing Co.	Bend, OR	3,795	Independent

There are 161 brewing companies in Oregon, the vast majority of which are domiciled in Oregon, owned by residents of the State of Oregon and subject to Oregon taxes.

Source: Brewer's Association, 2014



# SHOWCASING OREGON AGRICULTURE



## **2014 U.S. Commercial Hop Production**

Washington - 29,021 acres (73.9%)

Oregon - 5,559 acres (14.2%)

Idaho - 3,812 acres (9.7%)

Other States - 880 acres (2.2%)

**Total - 39,272 acres**

## **Oregon Hops**

- 22 family farms
- Leading the way in new varietals
- Economic synergies with craft brewers keeps the value added agriculture processing (brewing) in Oregon

*Source: Hop Growers of America, 2014; Oregon Hop Commission 2014*



OREGON is recognized as a bastion for great beer

BEER

## Which state has the best beer?

Published September 02, 2014 · FoxNews.com

255 123 38

Thirsty for a quality brew? Here are the top 10 states with the best beer:

1. Oregon
2. California
3. Colorado
4. Michigan
5. Washington

Oregon is #1 →

State is recognized domestically and abroad as being home of great beer.

Source: Fox News, 2014



# Oregon's Reputation For Great Beer Generates Tourism

- Oregon Brewer's Fest is the largest all craft beer festival in the US. It generated \$31.2m in direct and indirect economic impact for Oregon in 2013
- Portland, OR has more breweries than any other city in the world
- In Bend, OR 45% of visitors visit a brewery during their stay

*Source: Oregon Brewer's Guild, 2014; Visit Bend, 2014*





Ed King, King Estate Winery



Questions?