

# oregon wine

**OREGON WINE INDUSTRY REVIEW**

**November 20, 2025**

**PREPARED BY:**

**DANNY BRAGER**

**BEVERAGE ALCOHOL INDUSTRY CONSULTANT**





# oregon wine

OREGON WINE INDUSTRY REVIEW  
November 20, 2025

THE  
BIG  
PICTURE

# WELCOME TO THE “HEART” OF O-N-D

*OND IMPORTANT, BUT WHAT YOU DO THE REST OF THE YEAR IS EQUALLY IMPORTANT*



## % of Annual Wine Sales (from 2024)

- **38%** of DtC shipments

**WINE  
BUSINESS  
ANALYTICS**

**SOVOS** ShipCompliant

3 mos Oct, Nov, Dec

- **31%** of Off Premise sales

**NIQ**

14 weeks w.e. 10/12 thru 1/11

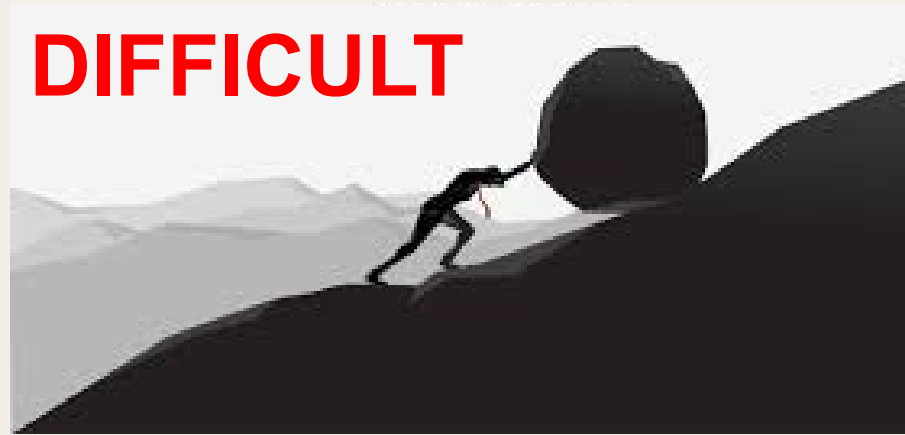
- **32%** of On Premise sales

**CGA**  
Powered by NIQ

16 weeks w.e. 10/12 thru 1/25

# MARKET CONDITIONS

**DIFFICULT**



- **Several cyclical and structural factors at play – and all *'at one time'* to varying degrees – cumulatively negatively impacting Demand**
  - A. Economic and Geo-Political factors**
  - B. Consumer factors – demographics, lifestyles**
  - C. Competitive factors – from within & beyond Alcohol**
  - D. Supply > Demand**
- **Financial stress for many – spending cautiousness**
- **Alcohol shelf space/menu assortment reductions – on & off premise**
- **No MAGIC/SILVER bullet – but areas of OPPORTUNITY out there!**

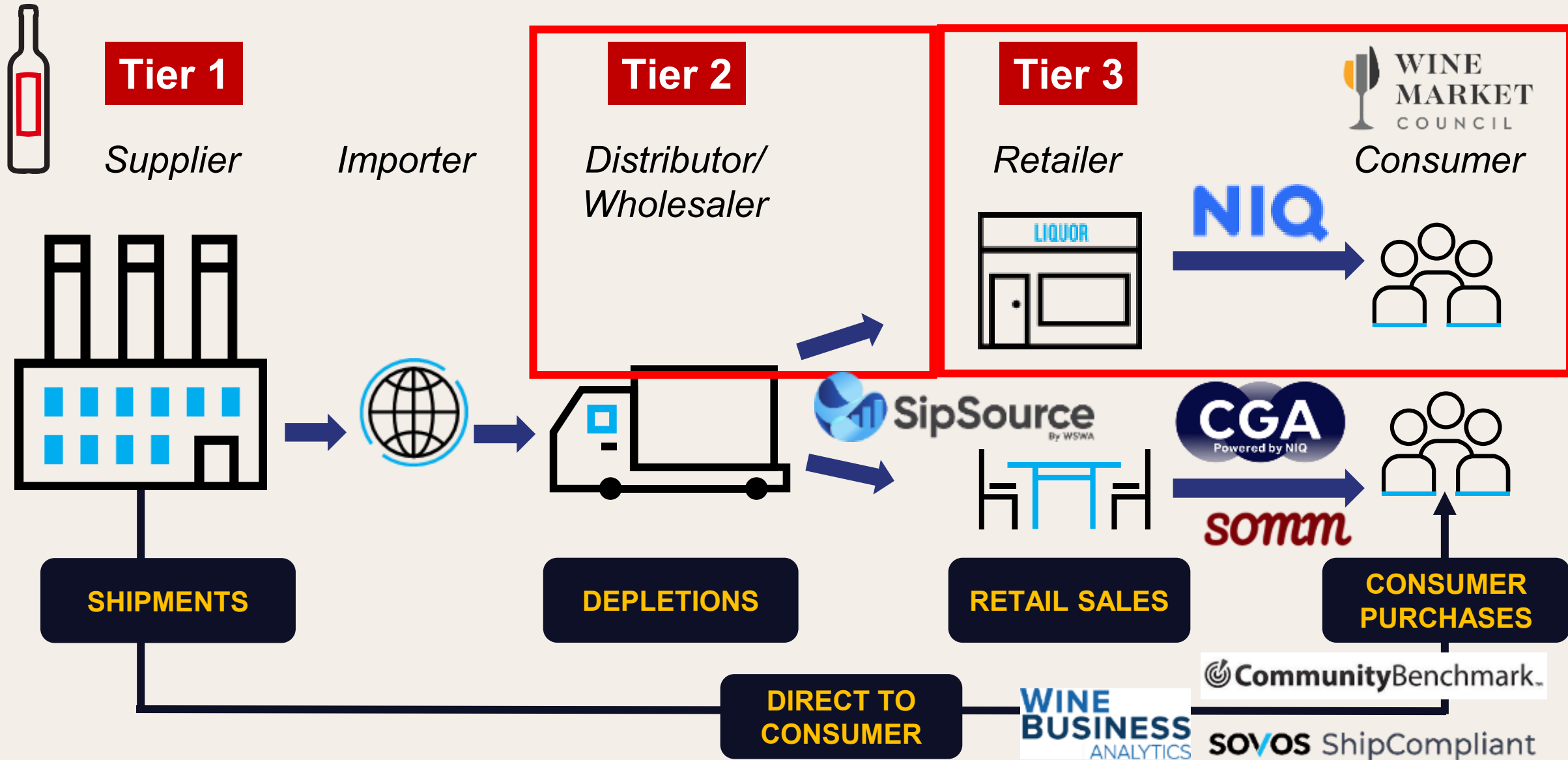


**Cyclical/Structural Challenges**

- **Economic**
- **Demographics/Lifestyles**
- **Competitive**

# WINE ROUTE TO MARKET

(SOME QUANTITATIVE DATA SOURCES)



# SEVERAL DATA SOURCES



SHIPMENTS	DEPLETIONS	OFF PREMISE RETAIL SALES	ON PREMISE RETAIL SALES	DtC
ALL CHANNELS	ON + OFF PREMISE	SELECTED OFF PREMISE CHANNELS	RESTAURANTS/ BARS	DtC SHIPMENTS
tax paid shipments by domestic producers plus customs data on imported wines	Depletions from 20 participating wholesalers (and NABCA)	<ul style="list-style-type: none"> <li>• Food, Drug, Mass Merch, Club (ex Costco), Military</li> <li>• Liquor (31 states non control, INCL 20 Liquor chains across those states and Independents)</li> <li>• Convenience</li> </ul>	 <ul style="list-style-type: none"> <li>• Sales to on premise guests</li> </ul> <ul style="list-style-type: none"> <li>• Menu placements</li> </ul>	Aggregate of... <ul style="list-style-type: none"> <li>• online orders placed at Winery website</li> <li>• winery wine club shipments to their members</li> <li>• tasting room purchases shipped to consumers</li> </ul>
	<b>CONSUMER RESEARCH</b>		<b>U.S. Wine Consumer Buying, Habits, and Attitudes</b>	

# ALL BEVERAGE ALCOHOL CATEGORIES IN DECLINE

Dec 2020



+4.7%



+0.3%



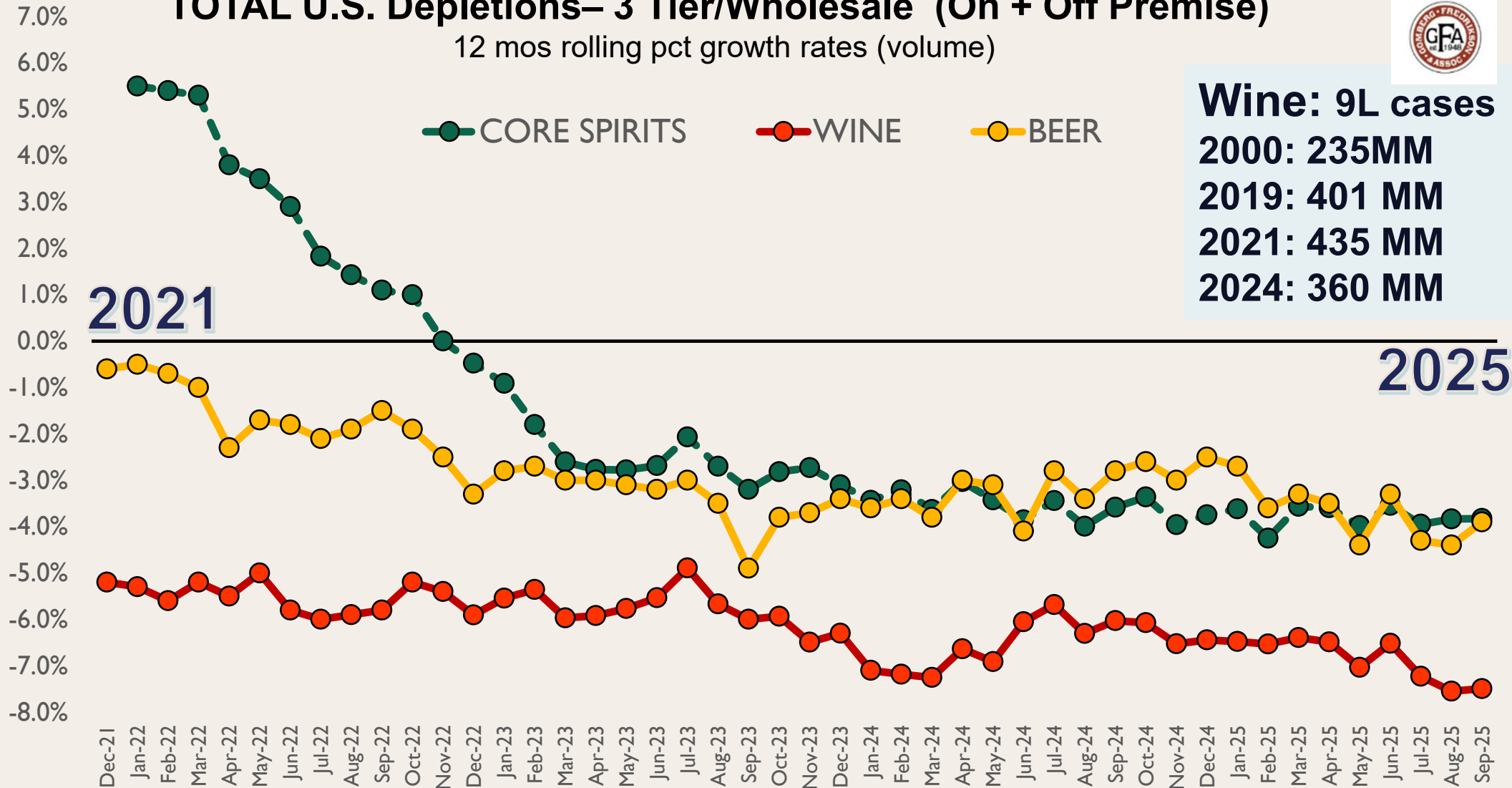
+1.2%

## TOTAL U.S. Depletions— 3 Tier/Wholesale (On + Off Premise)

12 mos rolling pct growth rates (volume)



**Wine: 9L cases**  
**2000: 235MM**  
**2019: 401 MM**  
**2021: 435 MM**  
**2024: 360 MM**



12-Month Rolling Volume % Change – thru Sept 2025 (incl NABCA)



# Retail Realities for Wine

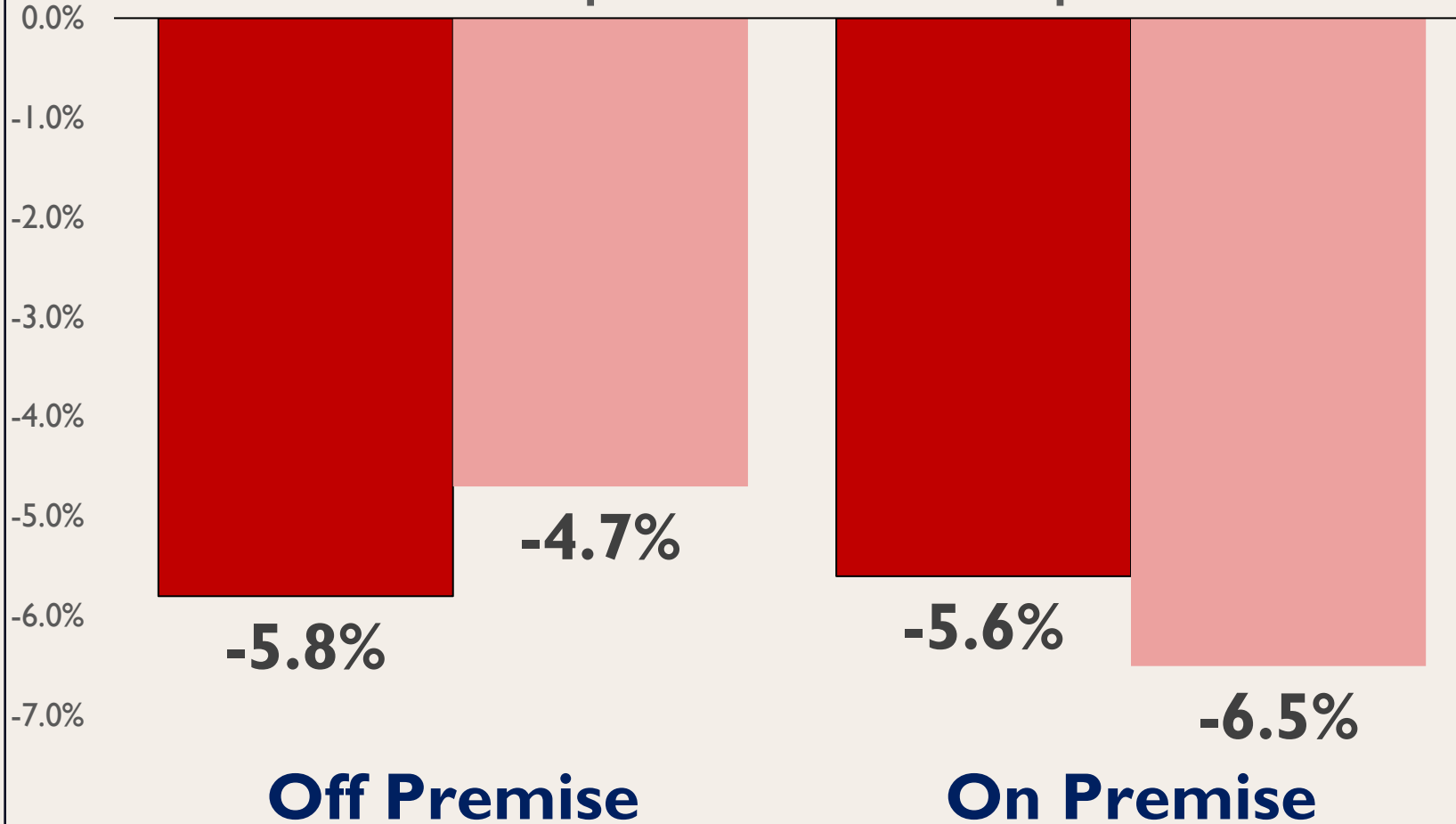
*How many items of  
category/segment xxxxx  
do I REALLY need to satisfy  
consumer demand?  
And which items?*



# WINE ASSORTMENT SHRINKING

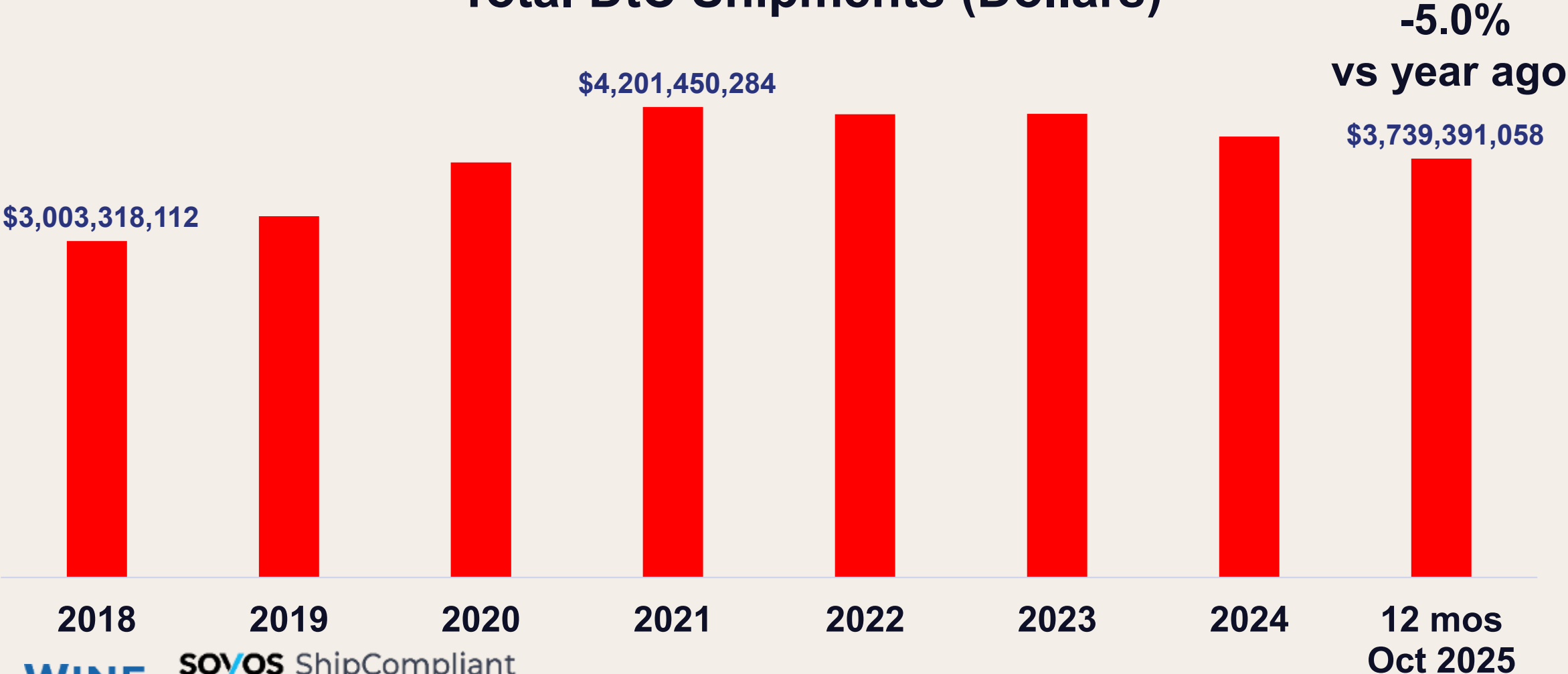
## PODS – Percent Change vs Year Ago

■ 12 mos Sep 2024 ■ 12 mos Sep 2025



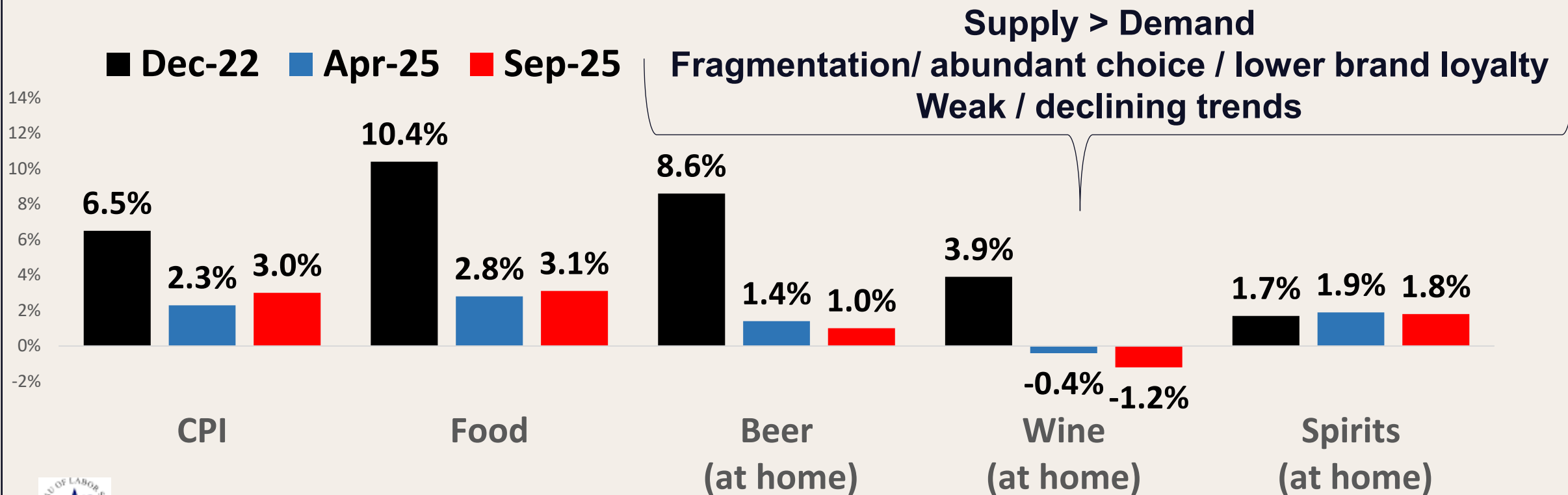
# DTC CHANNEL FOR WINE SIMILARLY DECLINING

## Total DtC Shipments (Dollars)



# CUMULATIVE INFLATION IMPACTFUL

Food prices	Nov 2022	Dec 2023	Dec 2024	Sep 2025	Alcohol prices	Nov 2022	Dec 2023	Dec 2024	Sep 2025
At Home	12.0%	1.3%	1.8%	2.7%	At Home	4.5%	1.2%	1.0%	0.3%
Away from Home	8.5%	5.2%	3.6%	3.7%	Away from Home	7.1%	4.6%	1.9%	4.1%



Source: Bureau of Labor Statistics

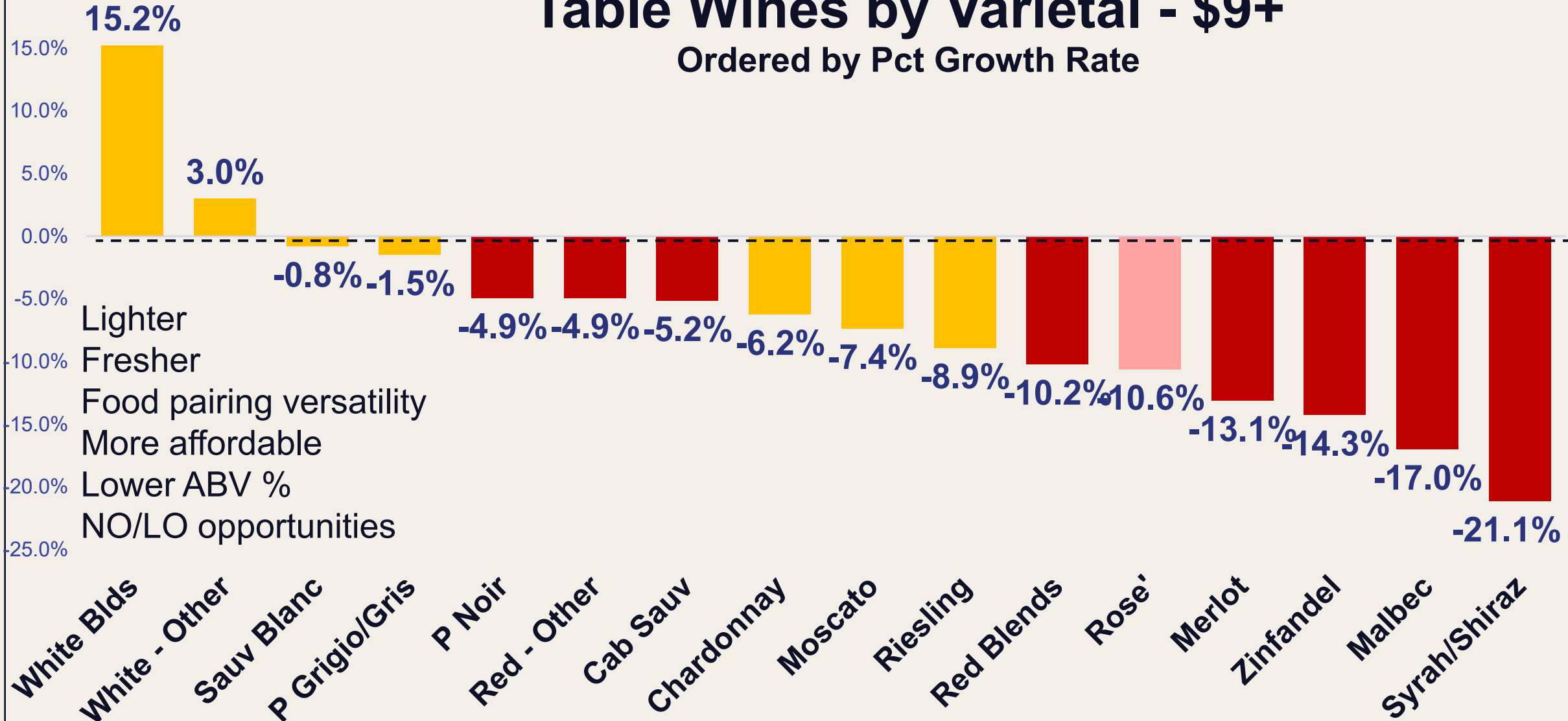
CONSUMER CHOICE HAS EXPLODED



# WHITE VARIETALS GENERALLY OUTPERFORMING REDS/PINKS

## Table Wines by Varietal - \$9+

Ordered by Pct Growth Rate



- Lighter
- Fresher
- Food pairing versatility
- More affordable
- Lower ABV %
- NO/LO opportunities

# WHITE BLEND EXAMPLES



\$13-\$14  
215K



\$17-\$18  
40K



\$13-\$14  
83K



\$14-\$15  
50K



\$12-\$13  
6.3K / **New**



\$9-\$10  
38K



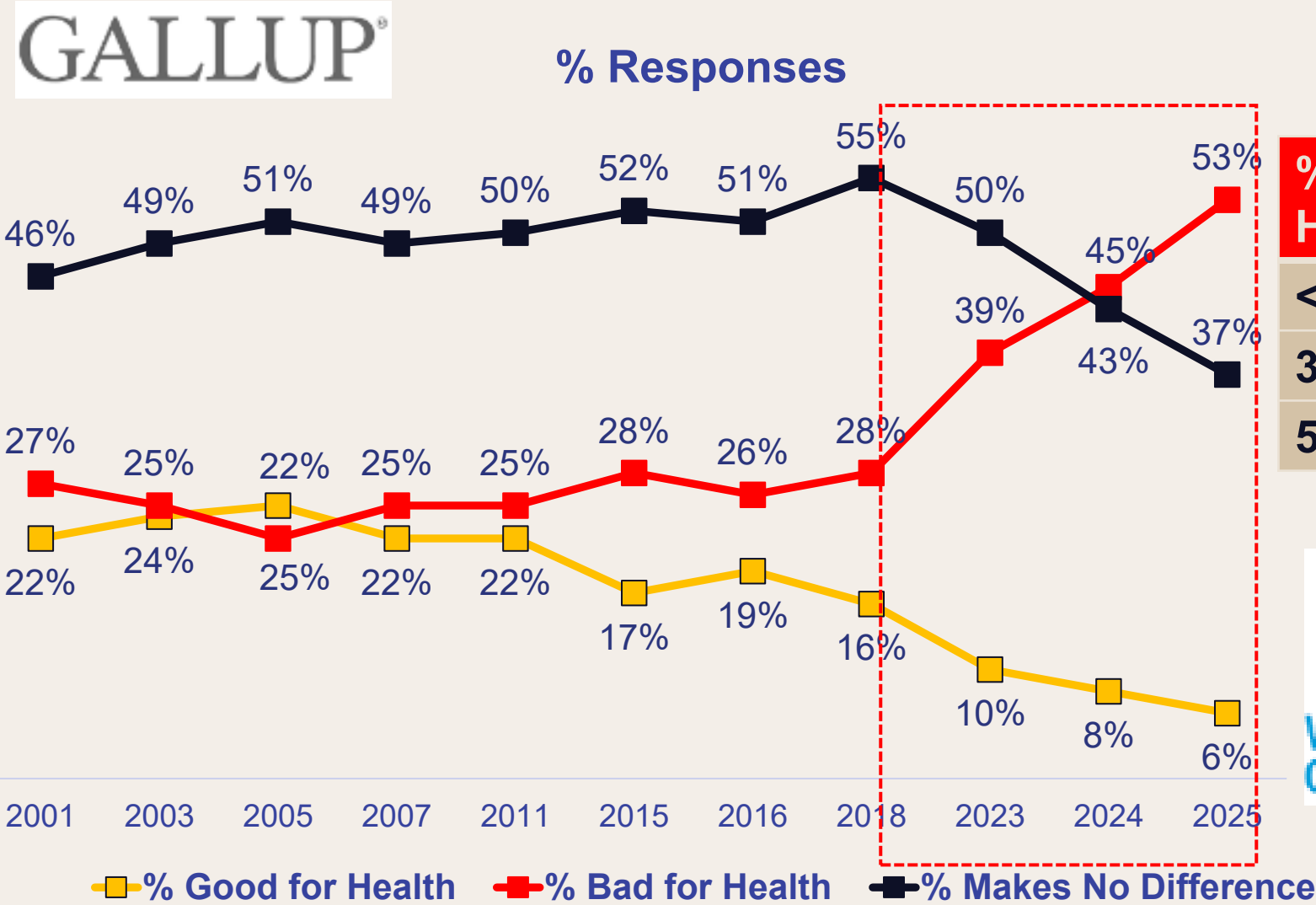
\$25-\$26  
4.5K



\$14-\$15  
1.4K / **New**  
1 Liter



# MAJORITY OF AMERICANS SAY ALCOHOL IS UNHEALTHY



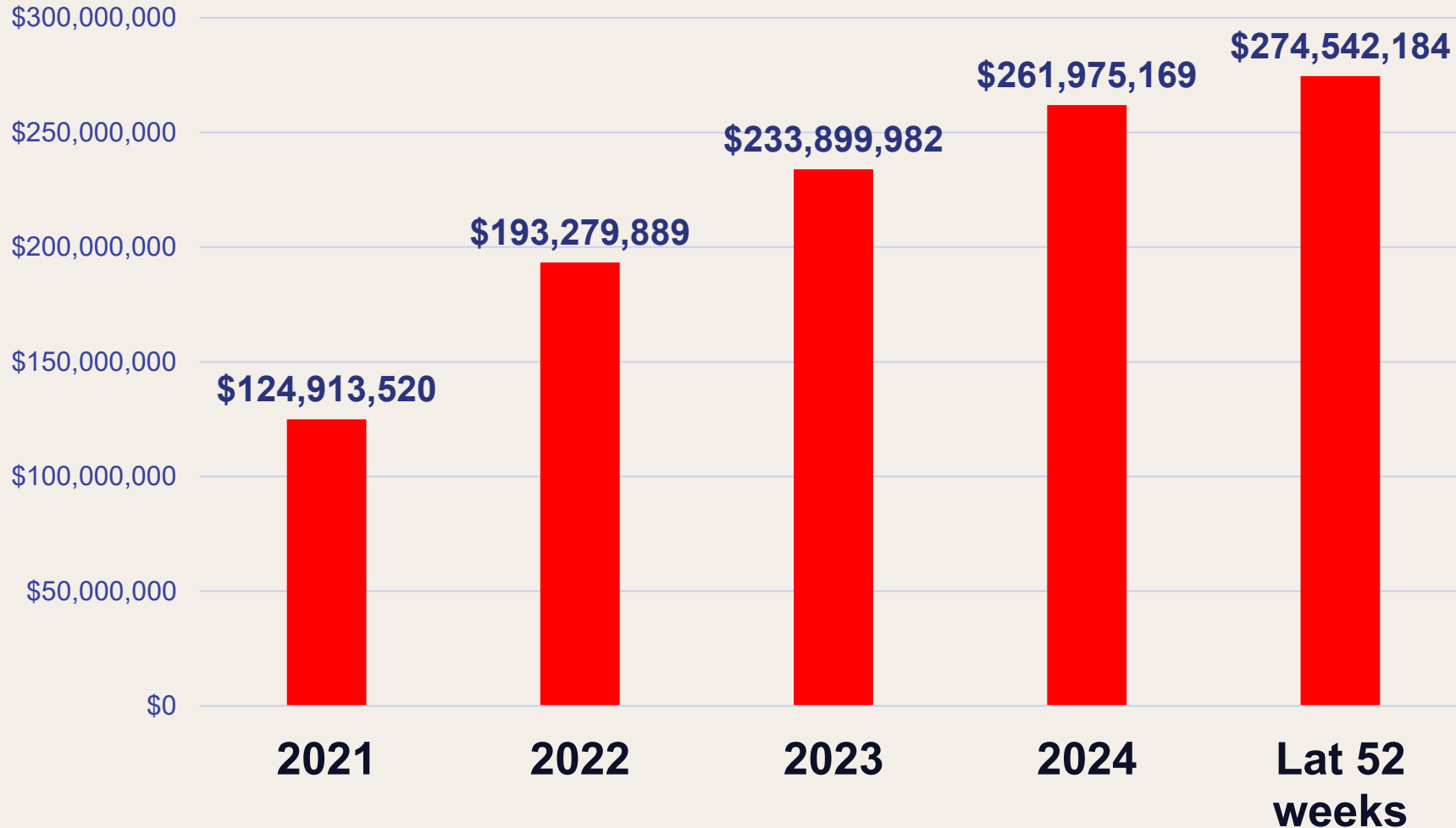
% Bad for Health	2018	2023	2024	2025
<34	34%	52%	65%	66%
35-54	26%	39%	37%	50%
55+	26%	29%	39%	48%



Do you, personally, think drinking in moderation -- that is, one or two drinks a day : is good for your health, makes no difference or is bad for your health? (2025 as of July 7-21, 2025 survey)

# “BFY” BRANDS (JUST THOSE BELOW) NOW CLOSE TO \$275MM ANNUALLY – SOME HITS/SOME MISSES

**Selected Better for You Brands – Annual Dollars**  
Total U.S. Measured Off Premise



**SELECTED BFY BRAND LIST**

1. Akira
2. Avaline
3. Barefoot Bright & Breezy
4. Bev
5. Black Box Brilliant Collection
6. Bota Box Breeze
7. Brancott Flight Song
8. Butter Light
9. Cavid Cloud 90
10. Chateau St Michelle Light
11. Cupcake Light Hearted
12. Decoy Featherweight
13. Fetzer Lo & Behold
14. Fit Vine
15. FF Coppola Diamond Vibrance
16. Kendall Jackson Low Calorie
17. Kim Crawford Illuminate
18. Lifevine
19. Liquid Light
20. Matua Lighter
21. Meiomi Bright
22. Menage a Trois Light
23. Mind & Body
24. Rancho La Gloria Skinny
25. Simi Brightful
26. Simple Grape
27. Simply 65
28. Starborough Starlite
29. Sunny with a Chance of Flowers
30. Woodbridge Sessions
31. Yealands Lighter
32. Yellow Tail Pure Bright
33. AND MORE...



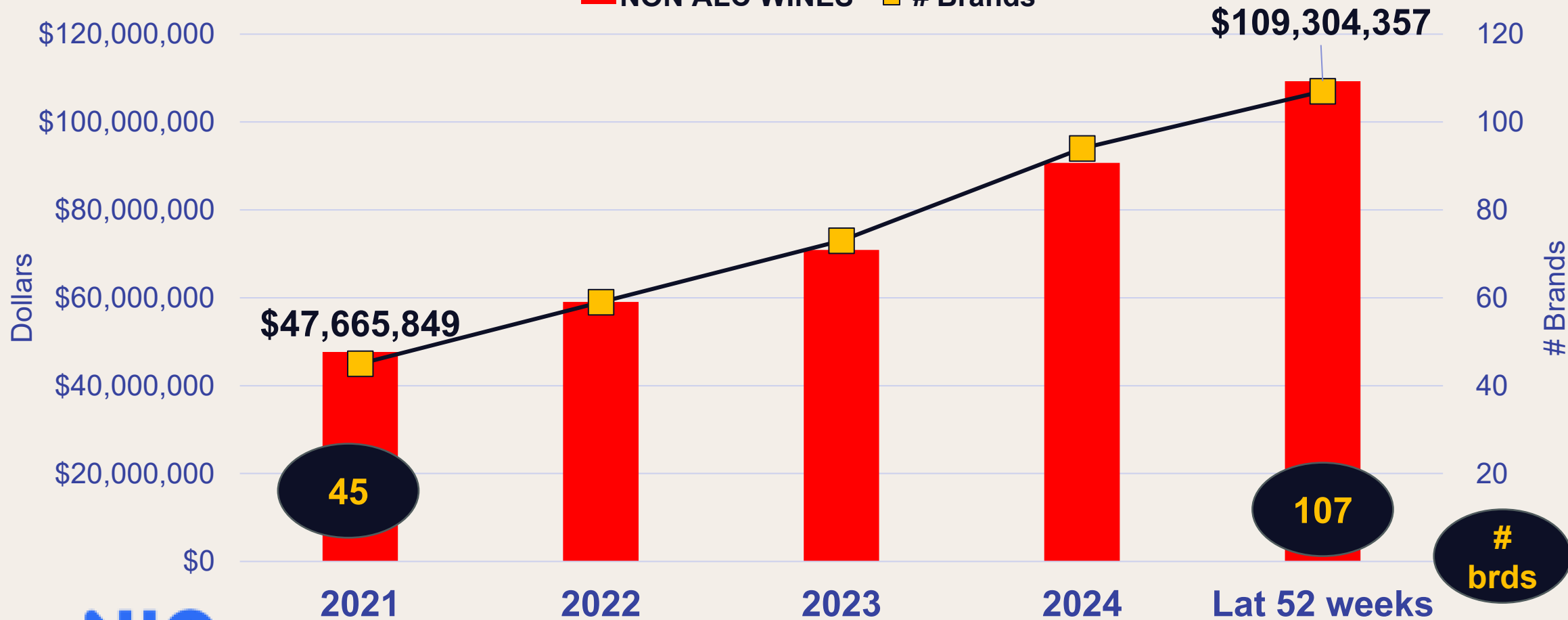
Off Premise Measured Channels – period ending Oct 4, 2025 (Dollars)

# NA WINES – OVER \$100MM JUST IN NIQ OFF PREMISE CHANNELS – STILL SMALL (0.5% SHARE)

## Non Alcoholic Wines – Annual Dollars

Total U.S. – NielsenIQ Measured Off Premise **+22%**

■ NON ALC WINES ■ # Brands



Off Premise Measured Channels – period ending Oct 4, 2025 (Dollars)

# brds

# THE NA OPPORTUNITY

**~80% of those who drink NA Wine also drink mainstream Wine**

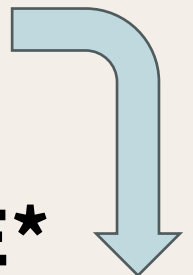


Omnishopper Panel; 52 w/e 10/4/2025



## Opportunity...

- Ages - young to old
- Multiple Occasions
- Places - widens playing field



## OFF PREMISE\*

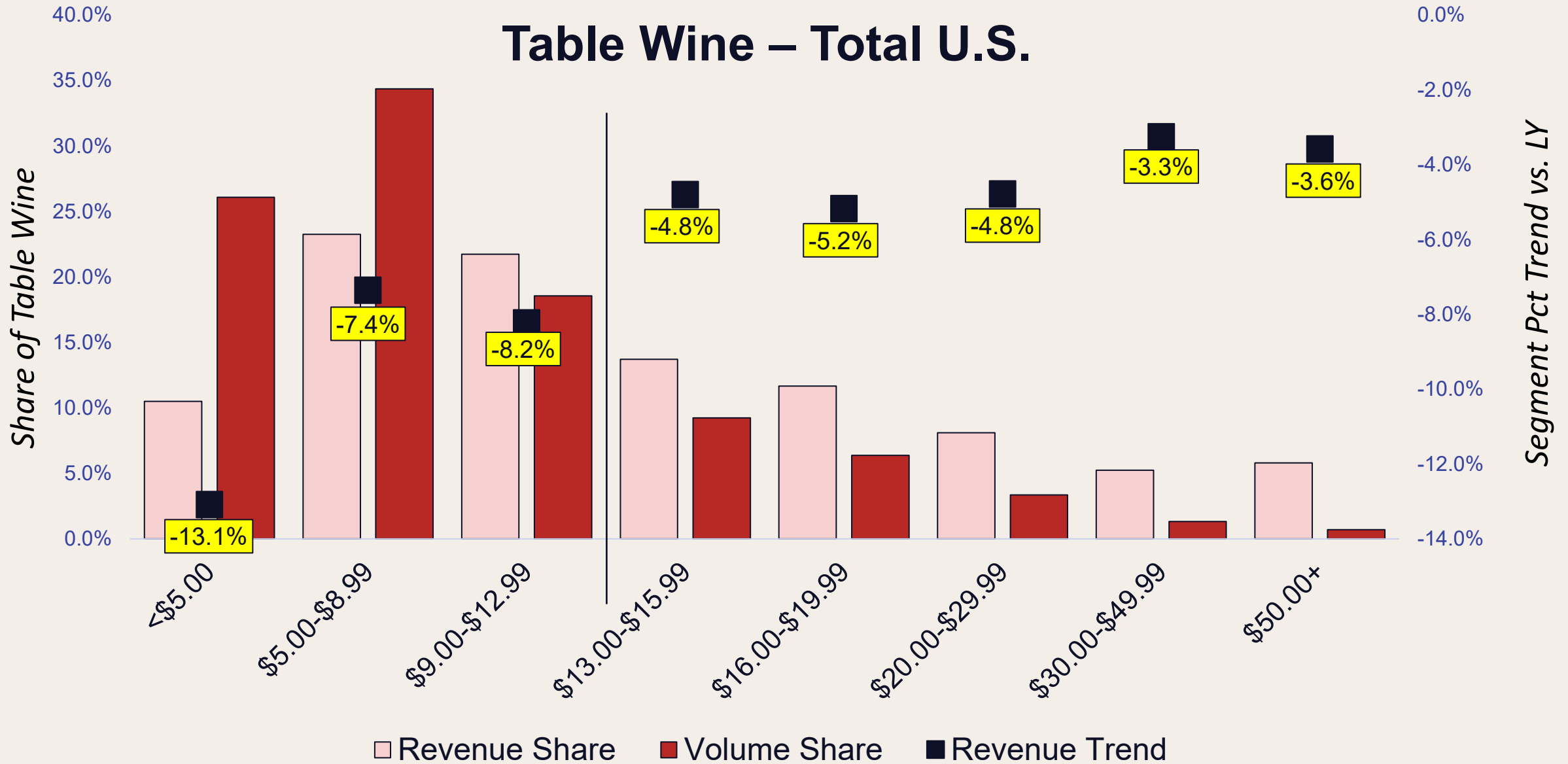
- **Total Outlets: 389K**
- Alcohol (any): 247K
- Wine outlets: 184K
- Spirits outlets: 92K



TDLinx – Jan 2025

# PRICE SEGMENTS \$13+ FARING RELATIVELY BETTER

## Table Wine – Total U.S.



A close-up photograph of a person's hands pouring red wine from a bottle into a glass. The wine is captured mid-pour, creating a thin stream. In the foreground, a wooden wine barrel is visible, slightly out of focus. The background is dark and blurred, suggesting an indoor setting like a winery.

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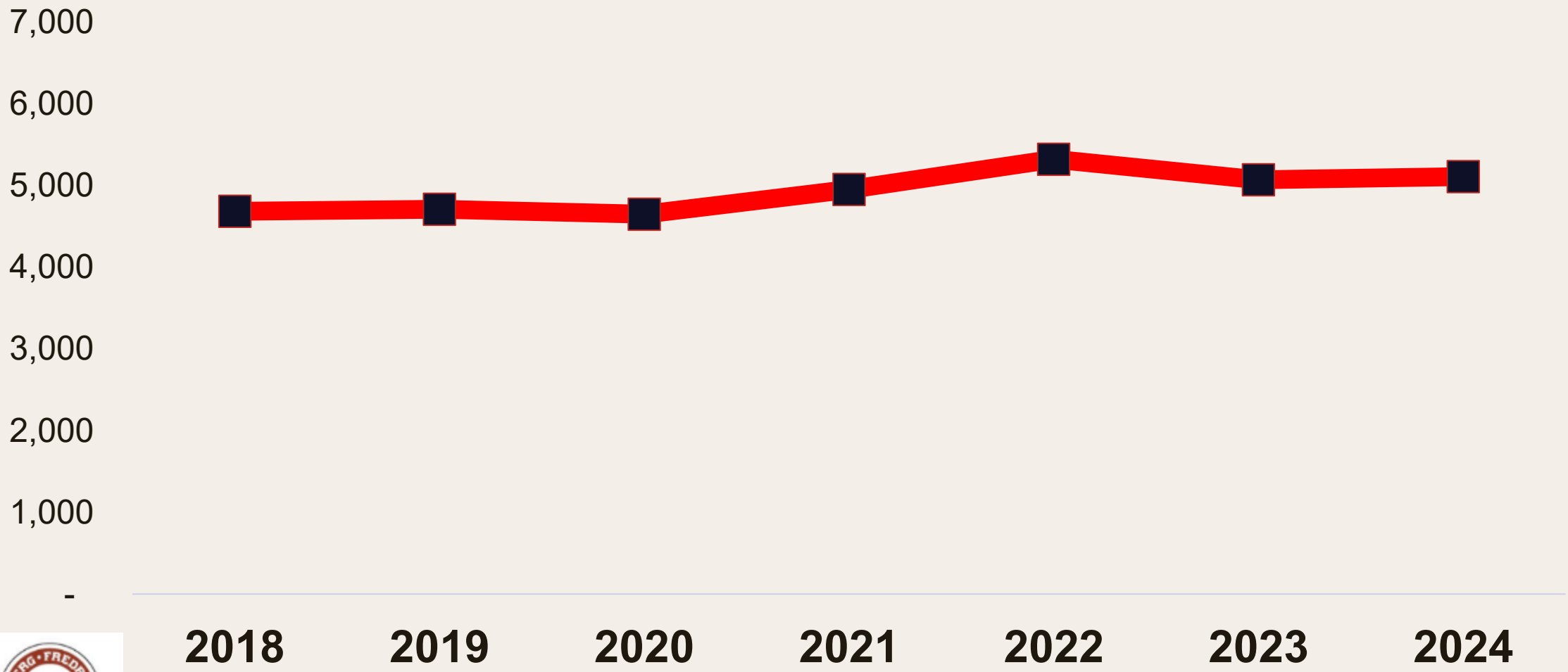
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**THE  
OREGON  
PICTURE**



# OREGON VOLUME

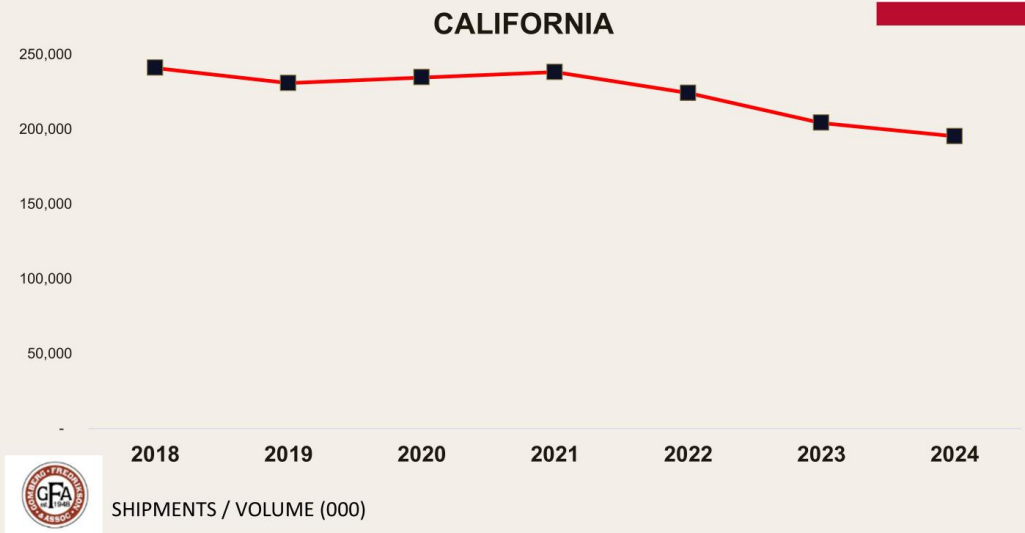
## OREGON (Shipments - 000)



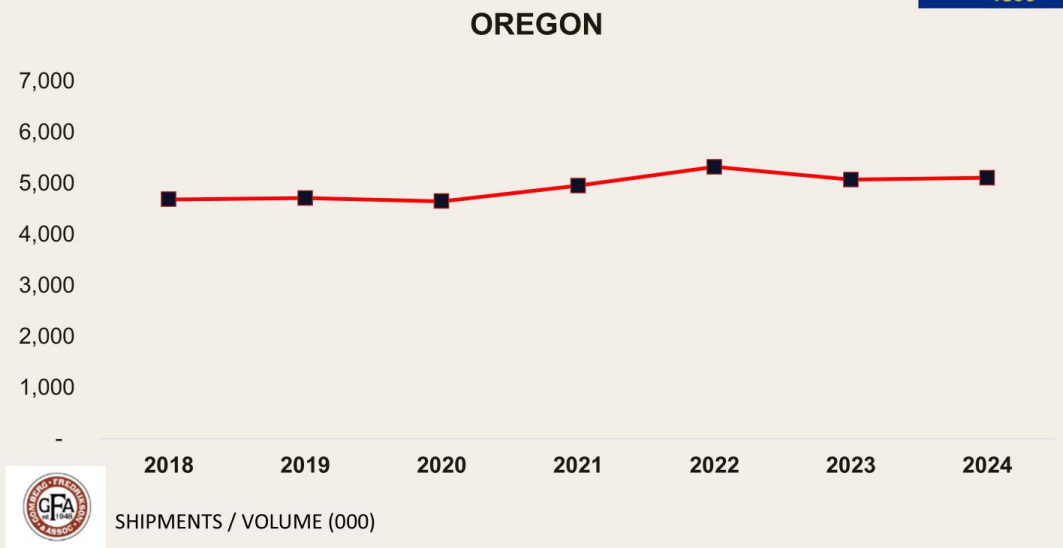
SHIPMENTS / VOLUME (000)



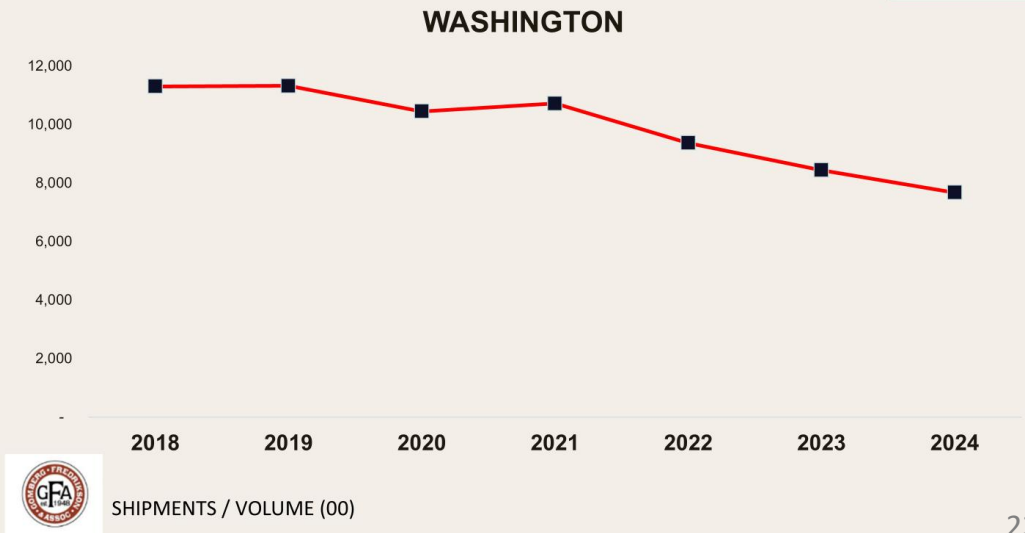
### CALIFORNIA VOLUME



### OREGON VOLUME



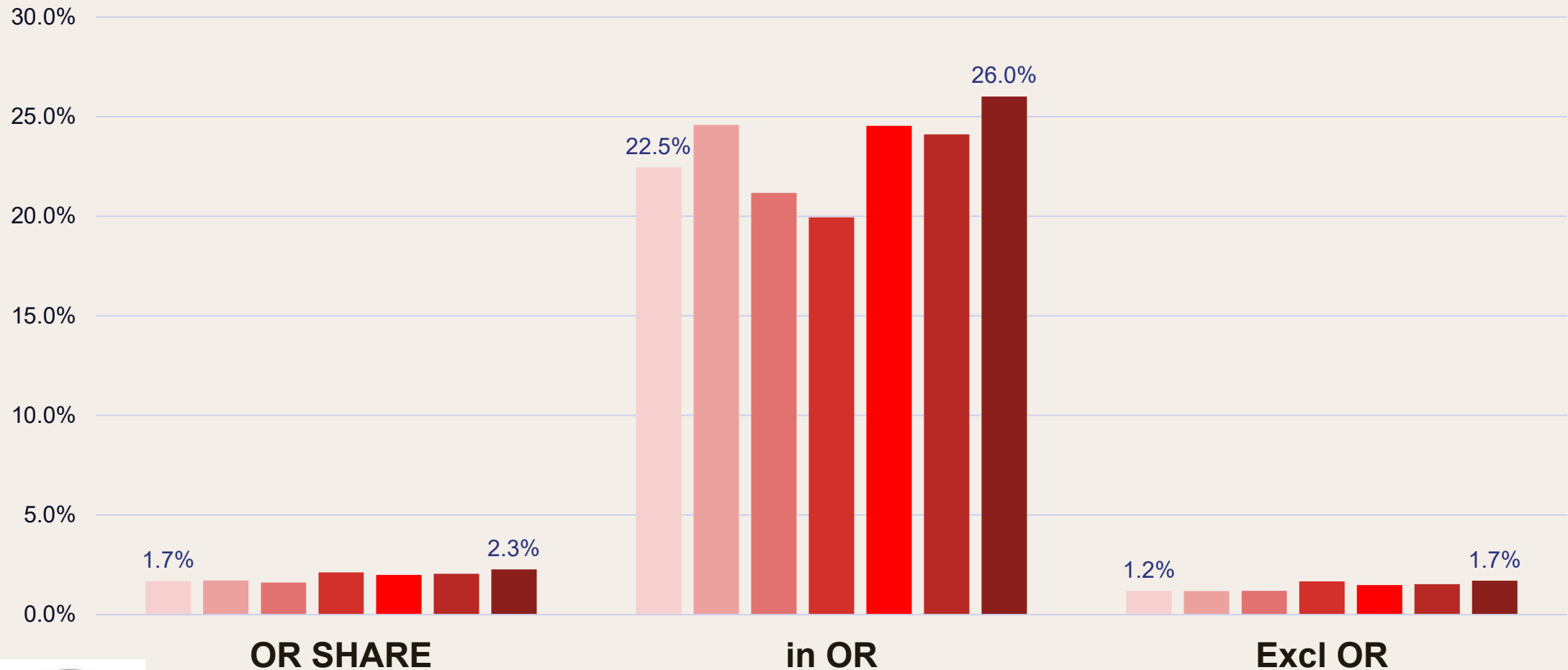
### WASHINGTON VOLUME



SHIPMENTS / VOLUME (000)

# OR SHARE HAS GROWN LONG-TERM, IN & OUT OF STATE

## OREGON SHARE (Shipment /Volume)

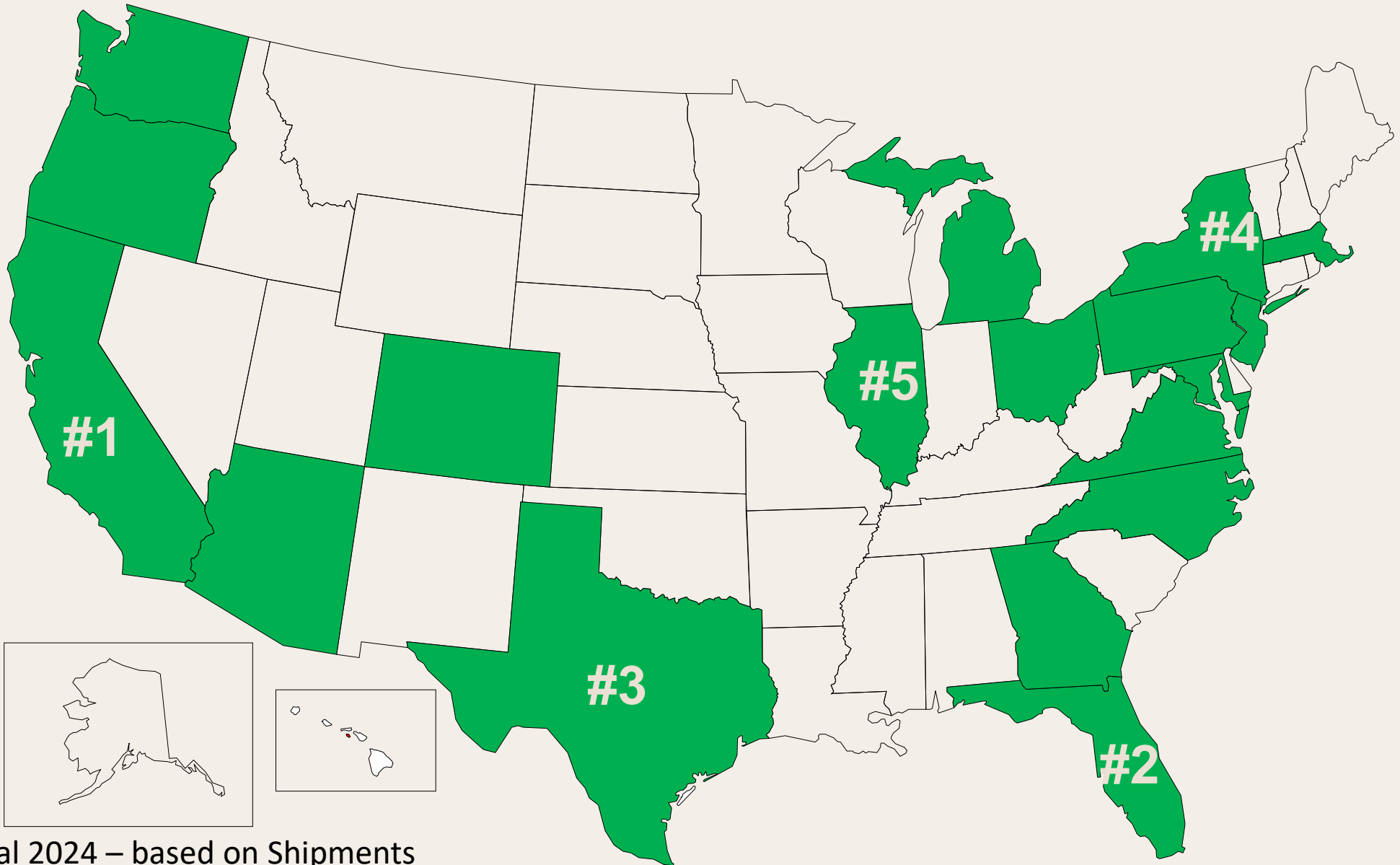


SHIPMENT VOLUME

2018 2019 2020 2021 2022 2023 2024

# DOMESTIC TABLE WINES

## TOP 18 STATES (80% OF TOTAL U.S. VOLUME)



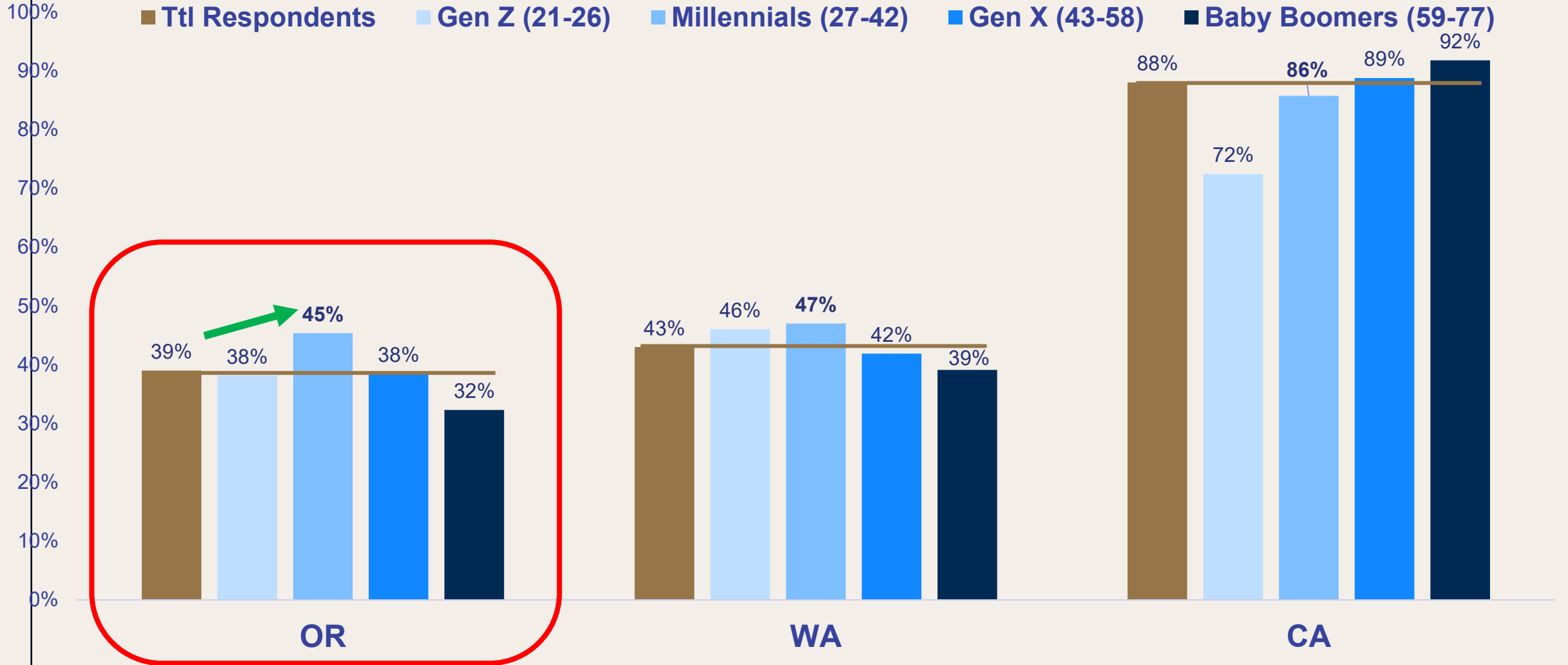
Annual 2024 – based on Shipments



# OREGON STANDS OUT POSITIVELY WITH GEN Z AND MILLENNIAL CONSUMERS



% of U.S. Wine Drinkers Who Regularly or Occasionally Drink Wines from....





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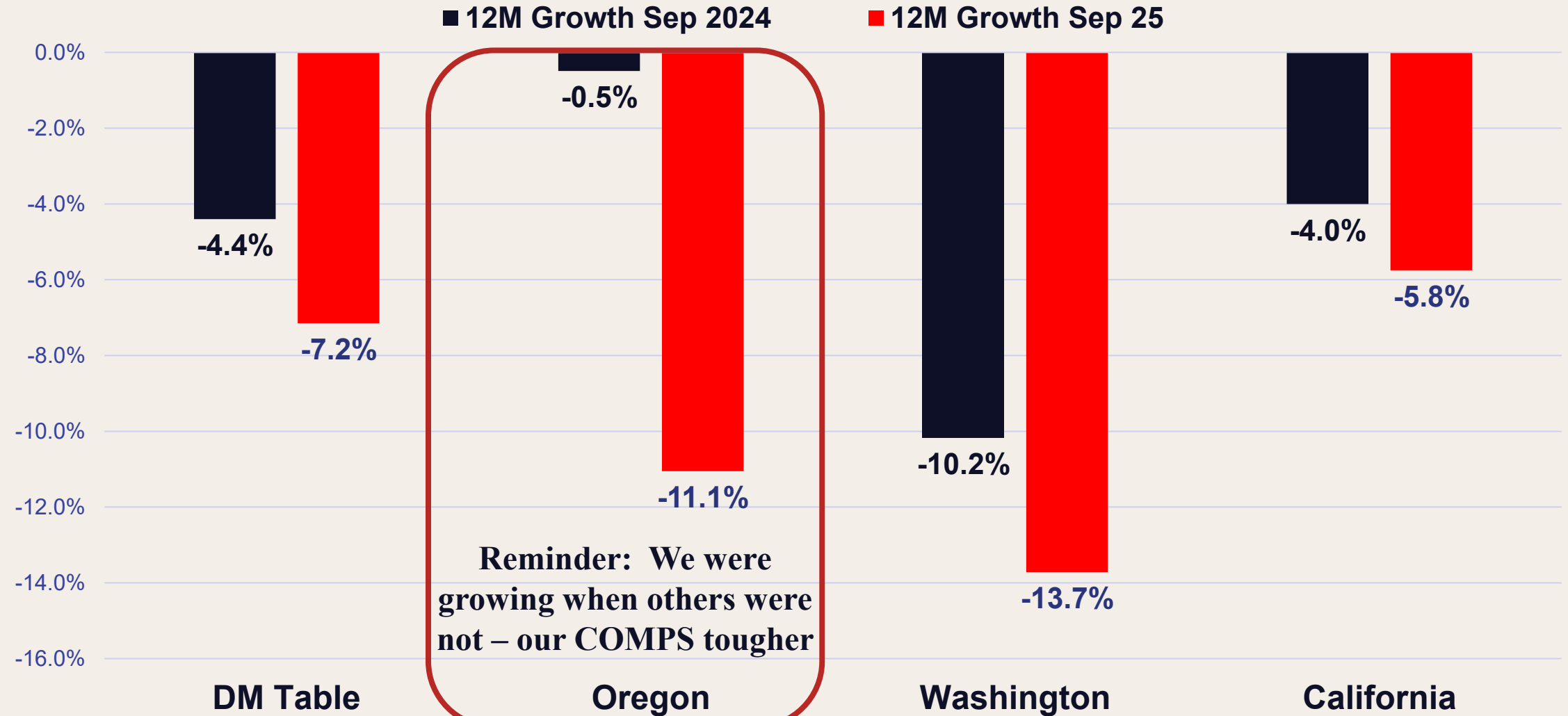
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3 TIER

# OVERALL OREGON DEPLETIONS, LIKE OTHERS - ARE DECLINING - BUT LET'S DIG DEEPER

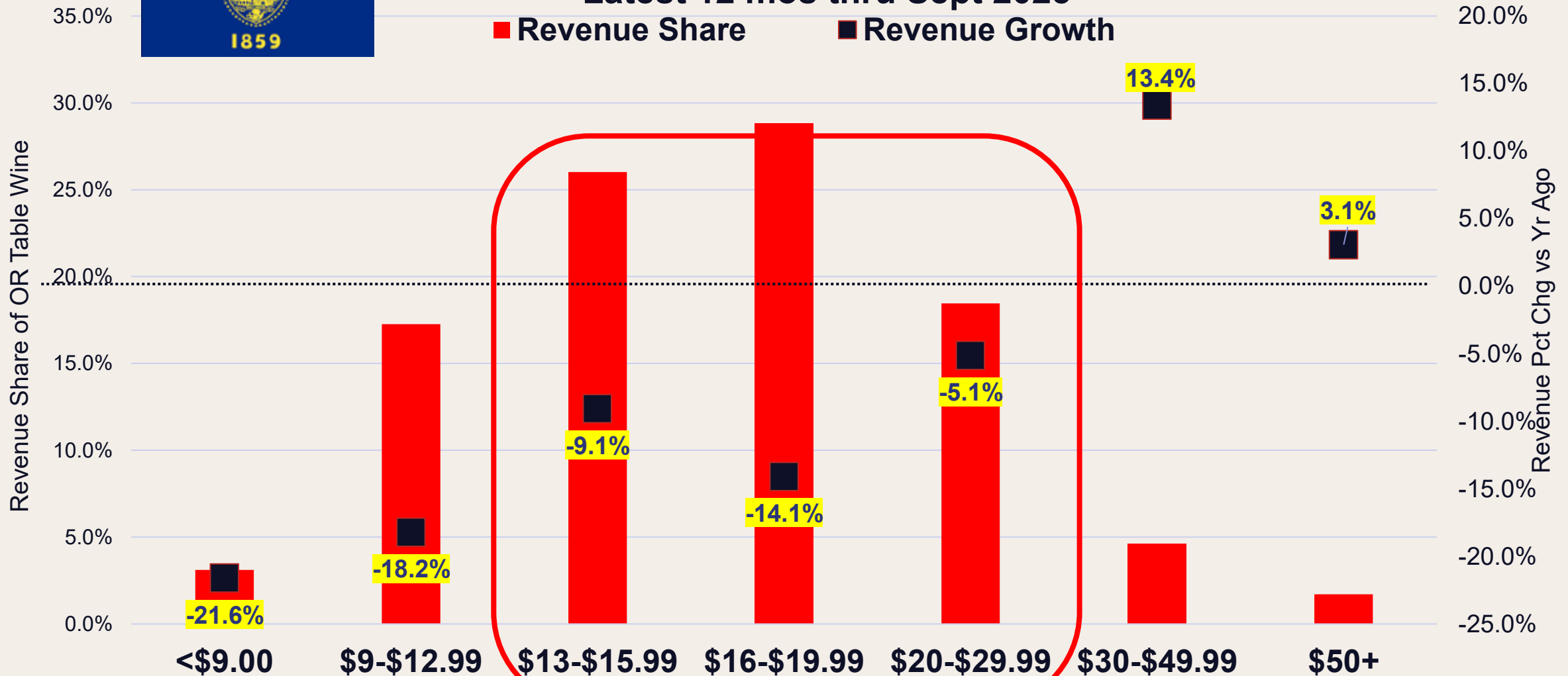
## Table Wine Percent Change – through Sept 2025



# OR \$20+ FARING BEST; GROWTH AT UPPER END



OR Table Wine – by Price Tier (Off + On Premise)  
Latest 12 mos thru Sept 2025

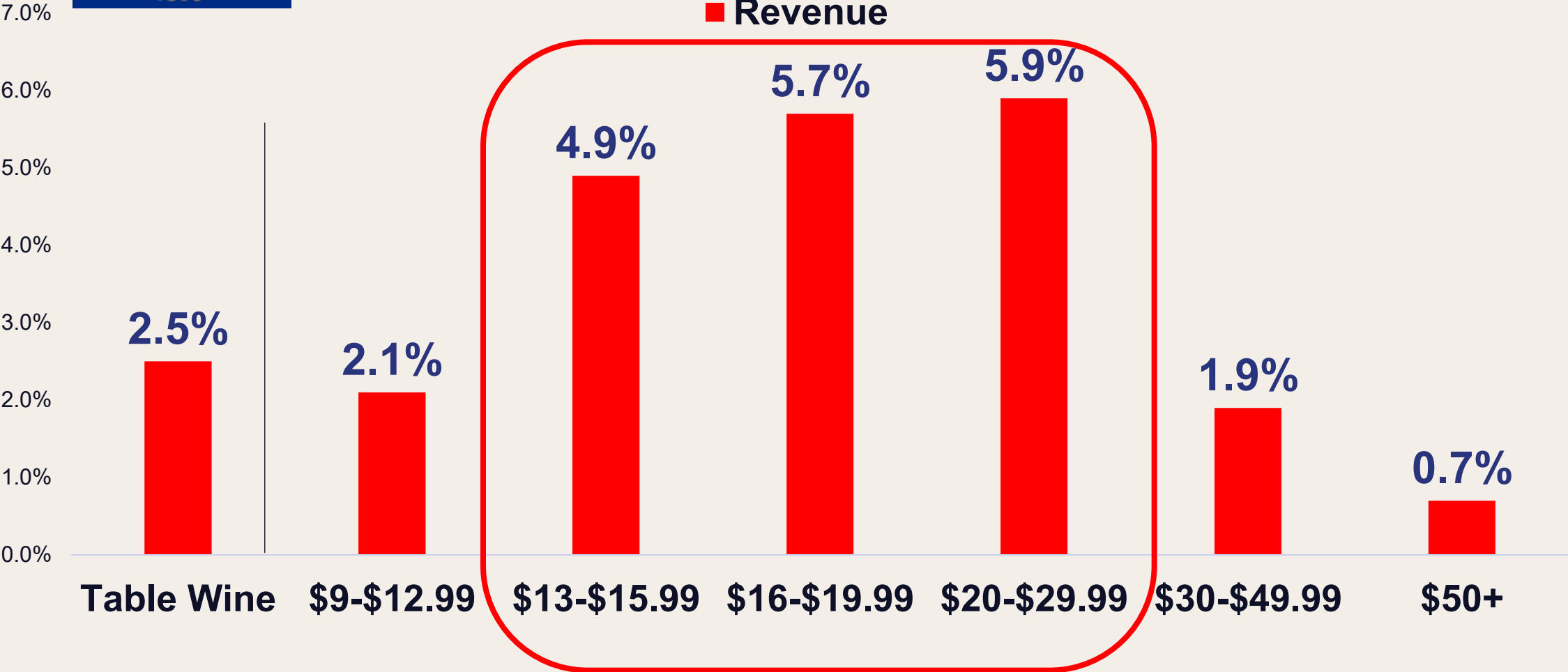


# OR WINES COMPETE BEST IN THE \$13-\$30 RANGE



## Oregon Share of Domestic Table Wine - by Price Tier

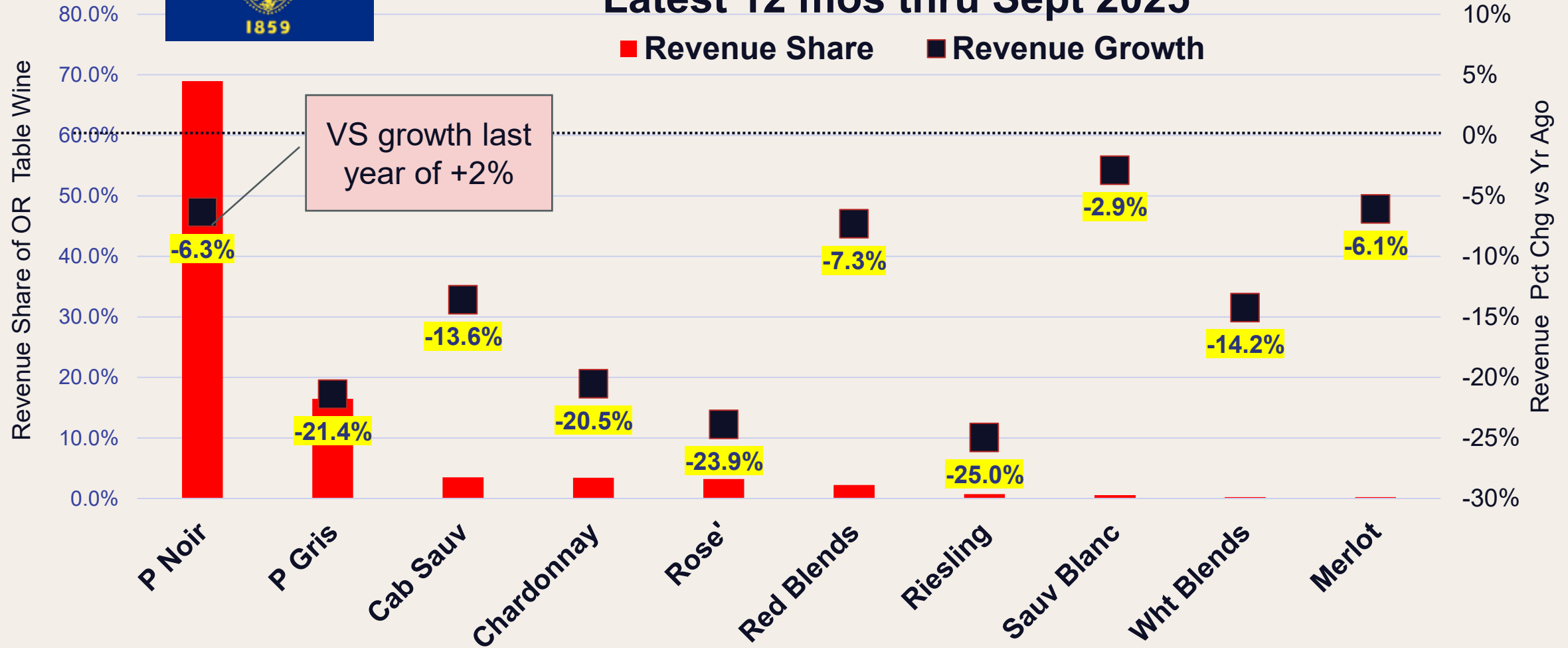
■ Revenue



# OR P NOIR DOWN MID SINGLE DIGITS (VS GROWTH YR AGO)



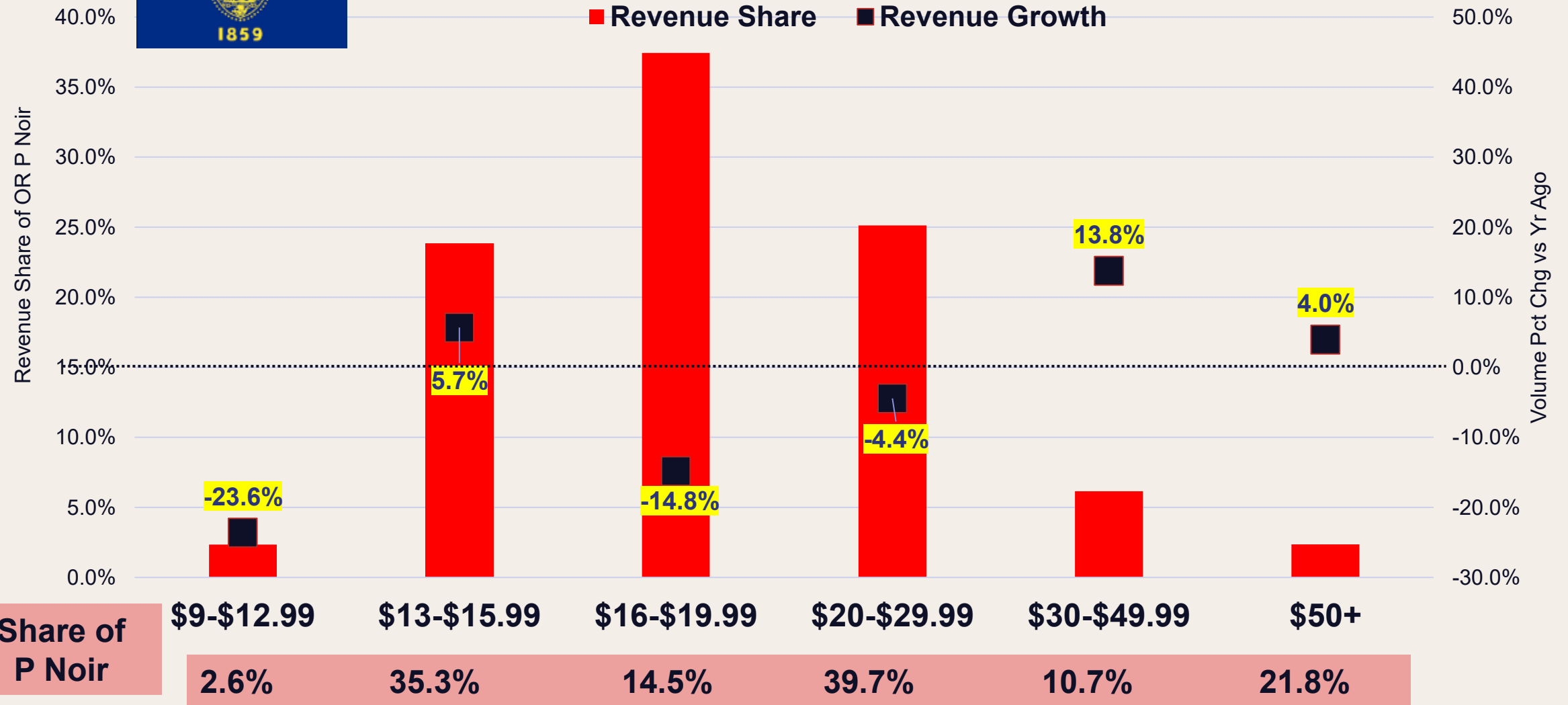
## OR Table Wine – by Varietal (Off + On Premise) Latest 12 mos thru Sept 2025



# OR P NOIR – GROWTH AT SEVERAL PRICE TIERS



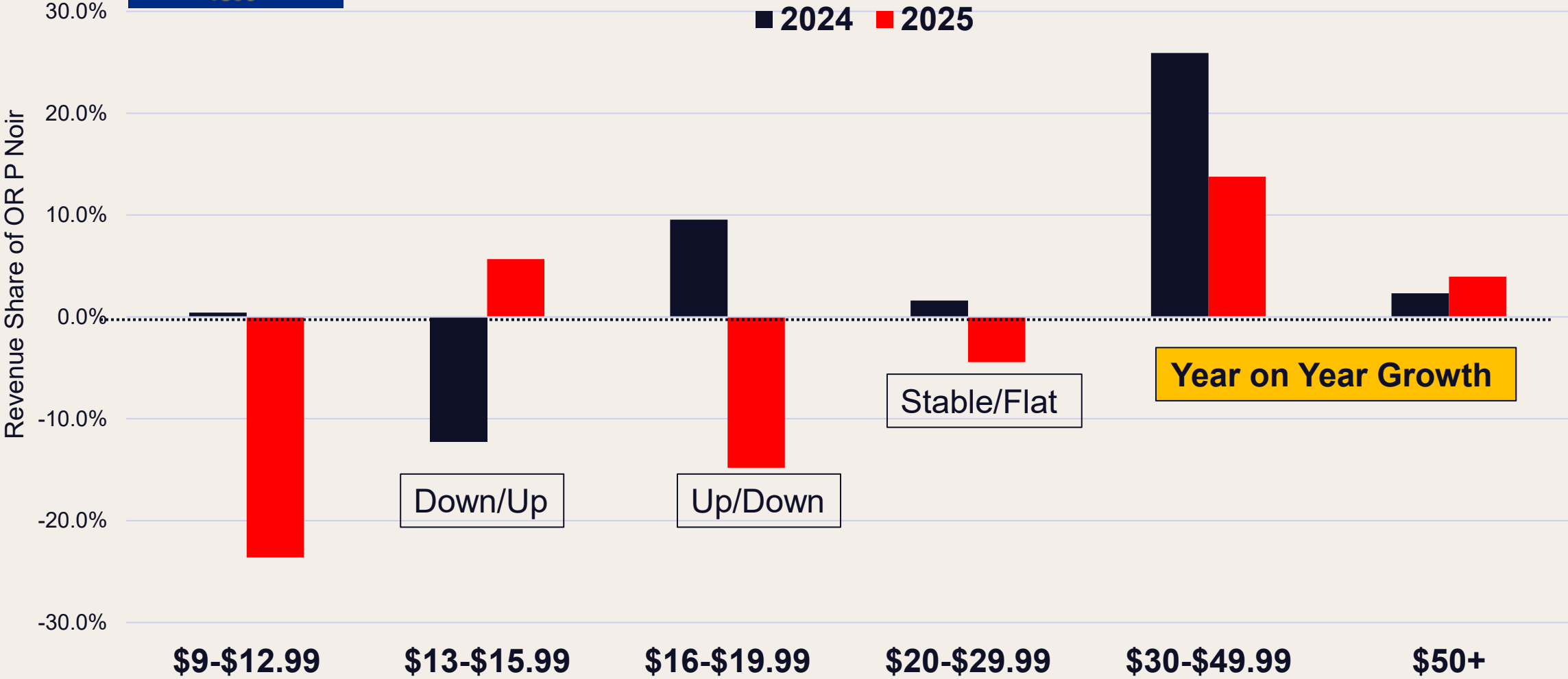
OR P Noir – by Price Tier (Off + On Premise)  
Latest 12 mos thru Sept 2025



# OR P NOIR – GROWTH AT SEVERAL PRICE TIERS



## OR P Noir – by Price Tier (Off + On Premise) Current & Year Ago 12 mos Pct Chg - thru Sept



# OREGON WINES – VARIETAL/PRICE TIER \$9+

OR VARIETAL	\$ share	\$9-\$13	\$13-\$16	\$16-\$20	\$20-\$30	\$30-\$50	\$50+
P Noir	69.0%	X				X	X
P Gris	16.5%				X		
Cab Sauv	3.5%				X		
Chardonnay	3.4%	X				X	
Rose'	3.2%						
Red Blends	2.3%			X			
Sauv Blanc	0.5%	X					
Wht Blends	0.3%	X			X		

**GROWTH**  
Large volume base  
Within Varietal

**GROWTH**  
Small volume base  
within Varietal



# GROWTH BRANDS AMONG TOP OREGON WINES

Nielsen (NIQ) Measured Off Premise

41%

% of OR brands in top 100 are growing (\$) in Scan Off Premise

1-10							King Estate			Stoller
11-20				Ken Wright		La Crema*				Inscription
21-30		Roserock		Craftwell	Domaine Serene				Kings Ridge	Cloudveil
31-40		Resonance	Planet Oregon	Benton Lane	Siduri*					
41-50	Penner-Ash			Lange	Anne Amie		Browne*	Averaen		
51-60			Sokol Blosser					Foris		

# TOP OR WINE BRAND GROWERS (RANKED)

Latest 52 Weeks Vs Year Ago (Dollar Change)

Inscription	Roserock	Cloudveil	Craftwell	Lange	Ken Wright
Ninety +	Siduri	Kings Ridge	Arterberry Maresh	Stoller	1st Innocent
Westmount	Samuel Robert	Oregon Route	Penner-Ash	Purple Hands	Jolee
Anther & Bloom	Iron Feather	Benmar	Domaine Serene	Evening Land	Lingua Franca
Landmass	Browne	Domaine Loubejac	Averaen	Scenic Valley	

Top 50 OR  
Brand (\$)

Exclusive Private Label

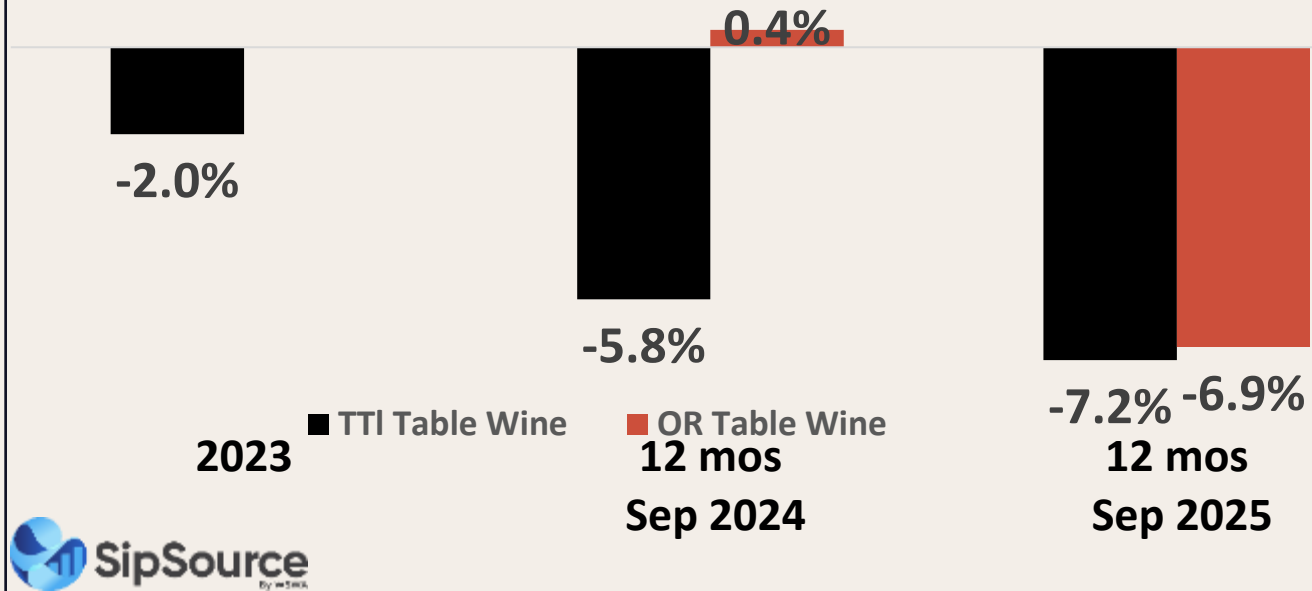
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THE  
OREGON  
PICTURE  
ON PREMISE



# ON-PREMISE PRESSURES



1. Inflation / Operating Costs/ Pricing mark-ups
2. Cocktails favor Spirits>Wine
3. Post COVID “Stay at Home” Behavior
  - Working from home; “Staying in” more often
4. Location Types Changing (2025 vs 2019\*)
  - **-4,880 less Casual Dining (-7%)**
  - **-3,848 less Fine Dining (-35%)**
  - **+5,169 more QSR + Fast Casual (+60%)**

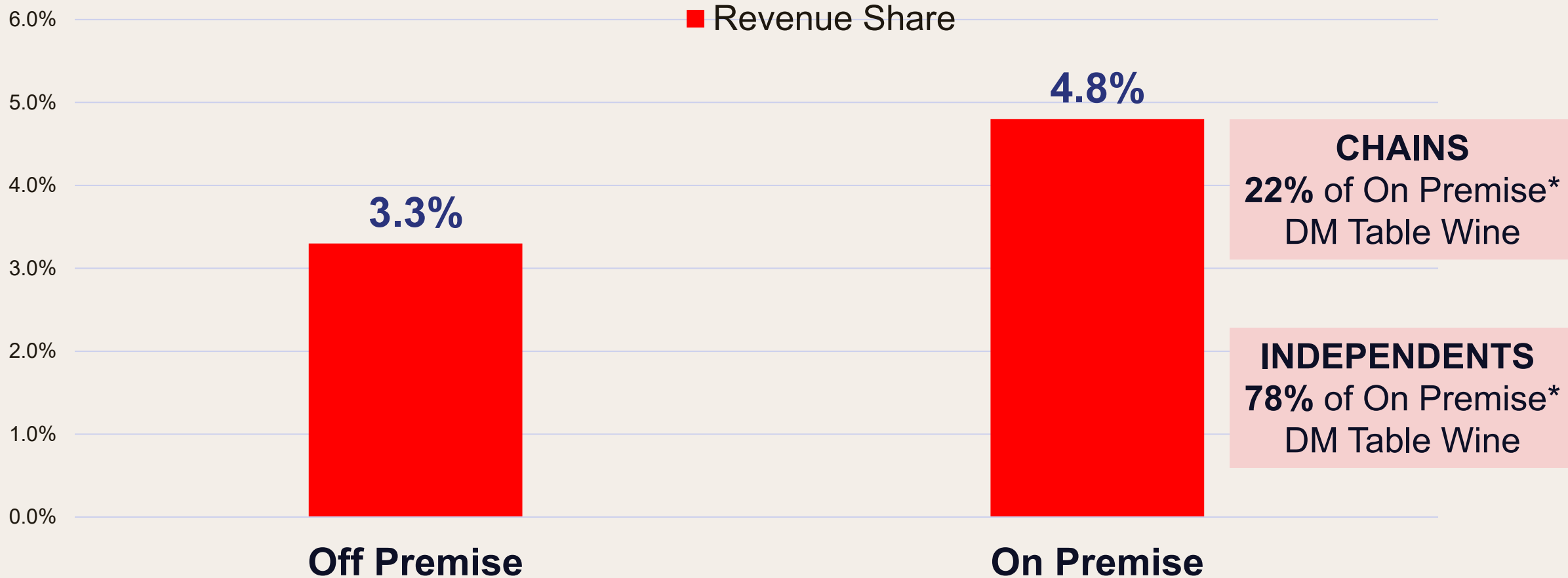
**NIQ** TDLinx (Jan of each year); Wine selling locations



# OR WINES PERFORM WELL COMETITIVELY ON PREMISE – A KEY ADVANTAGE IN INTRODUCING CONSUMERS TO OR WINES

## OREGON Wines

### Share of Domestic Table Wine \$9+ (based on retail price)





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DTC



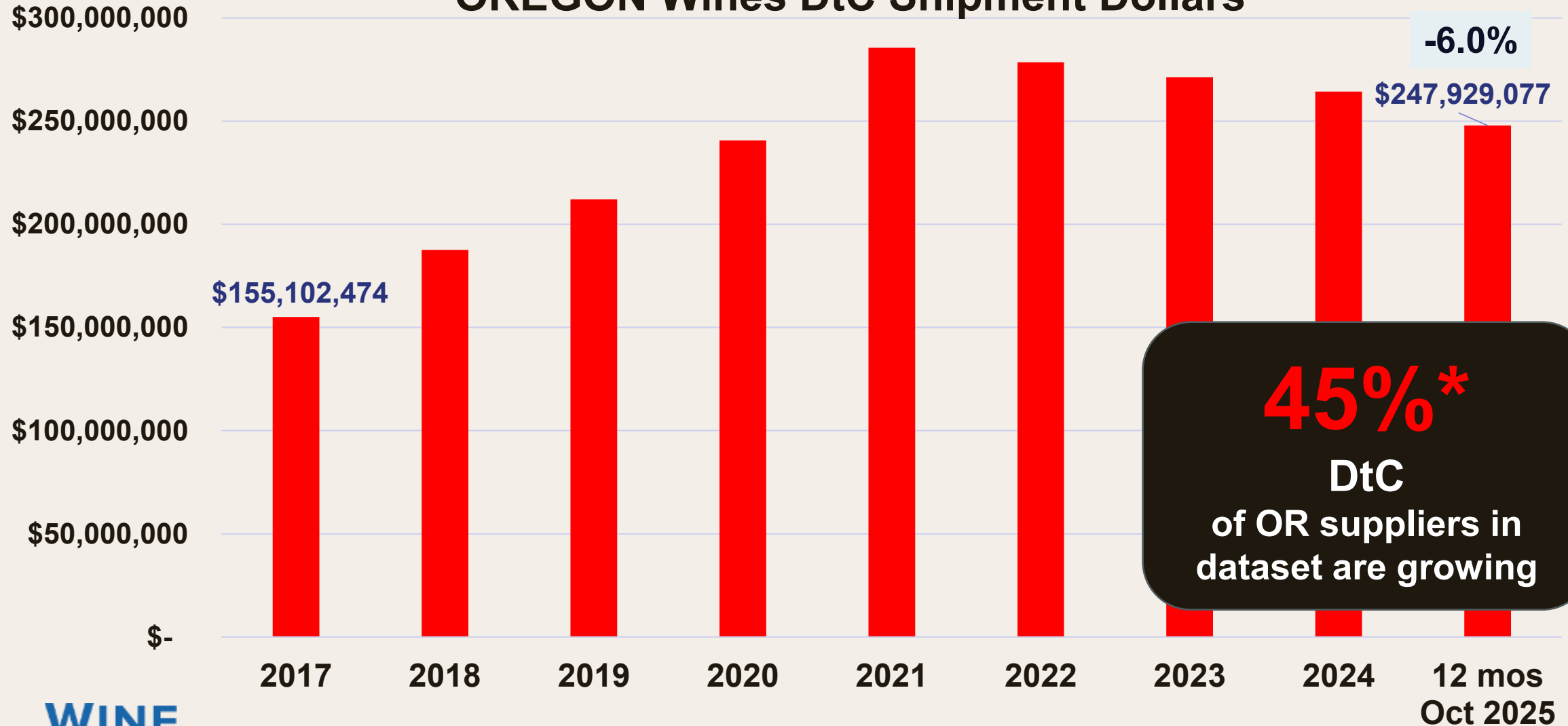
# OR STATE DTC SHIPMENTS HAVE GROWN SUBSTANTIALLY LONG TERM- DECLINES SINCE THE 2021 HIGHS

## OREGON Wines DTC Shipment Dollars



# OR STATE DTC SHIPMENTS HAVE GROWN SUBSTANTIALLY LONG TERM- DECLINES SINCE THE 2021 HIGHS

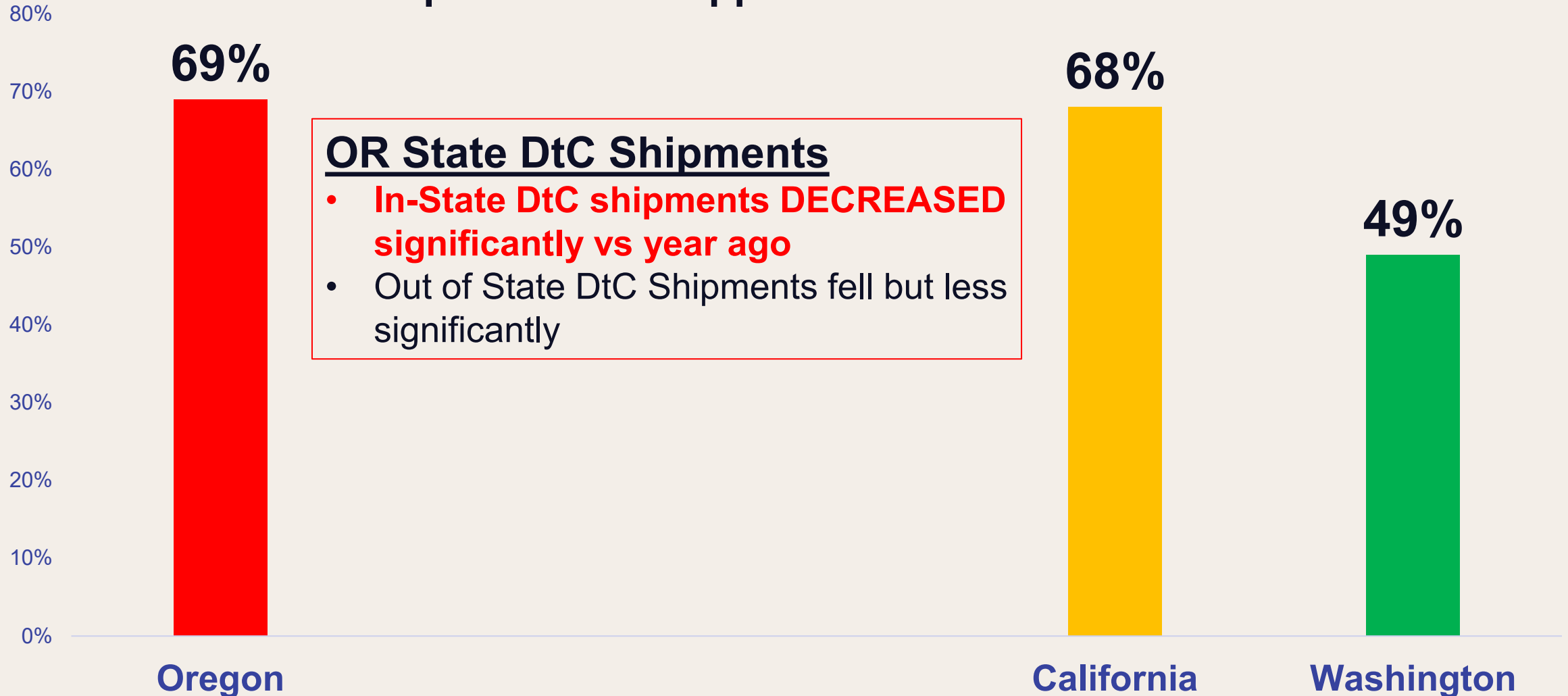
## OREGON Wines DTC Shipment Dollars



**45%\***  
DTC  
of OR suppliers in  
dataset are growing

# OR STATE DTC SHIPMENT % OUT OF STATE VS IN STATE MIRRORS CA

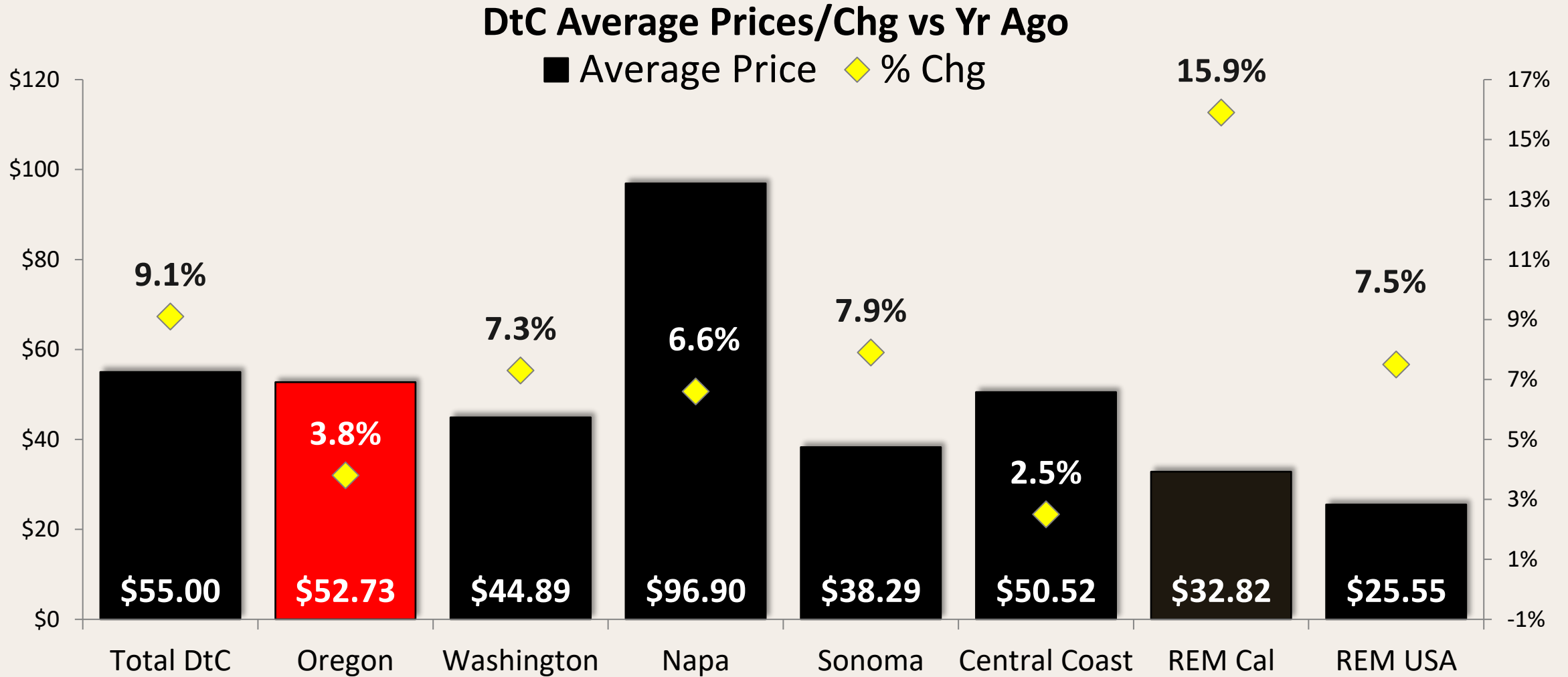
## DtC Shipments: % Shipped Out of State Dollars



### OR State DtC Shipments

- **In-State DtC shipments DECREASED significantly vs year ago**
- Out of State DtC Shipments fell but less significantly

# OR DTC PRICING AVERAGELY IN THE MID-RANGE; AVERAGE PRICE CONTINUES TO CLIMB



A close-up photograph of a person's hands pouring red wine from a bottle into a glass. The wine is a deep red color. In the foreground, a wooden barrel is visible, partially out of focus. The background is dark and blurred, suggesting an indoor setting like a winery or cellar.

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## **THE OREGON PICTURE SUMMARY**

# CONSUMER DRIVERS

1. Right product/package for the right occasion
2. Flavor forward
3. Importance of multi-cultural/diverse LDA's
4. Convenience seeking – what/where/how they buy
5. Wellness driven – for 'me' and 'we'
  - Social moderation (sessionability)/healthier lifestyles)
  - Sustainability/Planetary health
6. Increasingly 'cautious' about spending
7. Seeking: 1) Transparency; 2) Experiences; 3) Authenticity; 4) Simplicity
8. Experimentation – especially younger end
9. Genuine connections – From Brands to today's Consumer
10. Meet consumers 'where they are', not just where you want them to be



# MEET THEM WHERE THEY ARE



# SIMPLIFY THE MESSAGE

Bread & Butter Launches Playful, Data-Backed Advertising Campaign Speaking to a New Generation of Wine Drinkers



- Wine has a reputation - associated with swirling, sniffing, complicated jargon, and sometimes even the perception of being “snobby.”
- Bread & Butter Wines is unveiling a fresh new twist on its “Don’t Overthink It” - unapologetically flips the script on wine culture’s rituals, rules, and rigid expectations, speaking to younger consumers seeking great wine that’s easy to enjoy for all types of occasions.
- *“With so many young consumers believing wine feels complicated today, we see an opportunity to create something that offers approachability and joy no matter the occasion,” “Good wine should fit into your life—not the other way around—making every occasion a little more special.”*

# WINE | EMERGING AREAS OF GROWTH/OPPORTUNITY

Meet consumers on the right occasion with the right product for that occasion



## WHITE WINES

including blends that go with emerging cuisine and 'better for you' trends



## HIGH ABV

Ironically, SOME high ABV products are meeting their consumers with what they want, how they want it, and when



## PREMIUM ALTERNATIVE PACKAGING

(< than 750+ml, including Glass, Tetra, Cans - as well as Box, Bag >750 ml

**FORMAT follows OCCASION**



## “BETTER FOR YOU”

“**NO**” (Non-alcoholic) – small, but continued double digit growth with much more upside

- 0.5% share, +22% vs year ago (\$)
- Giesen 0.0 #2 brand

“**LOW**” – at least for some consumers, and for some of the time, but more nuanced (calories? ABV %? )

- Some hits, some misses



## WINE-BASED COCKTAILS/SPRITZERS

An opportunity to test and vigorously compete for this business. BOTH Off and On Premise

# CHALLENGING TIMES FOR WINE

1. Demand is VERY challenging – both cyclical & structural factors
2. Short to Medium term will remain negative; **MUST** bend the curve UP
3. The consumer condition remains volatile/fragile! economically stressed
4. Industry reacting to Market conditions – pressure on all tiers
  - Industry restructuring in process – picking up speed
  - More “collectives” and collaborative activities to share complementary resources
  - Pressure on POD’s and shelf space/assortment will continue
  - **LESS is MORE – FOCUS, FOCUS, FOCUS**
5. Industry hungry for Innovation
6. Sustainability has legs, but **ONLY** if the consumer understands it
7. Meet them where **THEY** are
8. **CONNECT** with the **CONSUMER** – and what resonates with them

# OREGON – WHICH WAY NOW?

## DEFENSE/PROTECT

- Pinot Noir
- Your OR home turf
- Your premium position – Quality/Value – but don't price yourself out
- Large Wine states where we have a “strong” share
- Core Boomer generation

## OFFENSE/ATTACK

- Expand White offerings
- Widen the ‘playing field’ beyond Oregon – large states where we have a small share
- Participate in growth segment (even if small today)
- Look at Collectives/ Collaboration opportunities
- FOCUS – Less is More
- Our industry needs to...
  - ✓ “WIN” more Beverage occasions’
  - ✓ Effectively engage with the Younger LDA Generation
  - ✓ MEET them where they ARE

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PREPARED BY:  
DANNY BRAGER  
BRAGERDANNY@GMAIL.COM



# QUANTITATIVE DATA SOURCES

**NIQ**

**SipSource**  
By WSWA

## Retail Sales Scan Data Selected Off Premise Channels

## Aggregated Depletions ALL Off AND On-Premise Channels

- Total U.S. (**xAOC**): Grocery, Drug, Club (BJ's, Sam's) Mass Merchandisers (Walmart, Target) & Military Exchanges
- Total U.S. Convenience
- Liquor channel: 31 (non control) states including Independents and 20+ Chains across the country in those states



- Product segment/price tier reporting
- Dollars and volume; distribution; retail pricing
- Geographic & **retailer level** reporting
- **Brand level reporting**

- Product segment/price tier
- Channel/geographic reporting
- Revenue and volume share & pct chg vs year ago
- Accounts Sold; PODS
- **No individual brand or retailer reporting**