



Oregon Wine Symposium



THE CATEGORY & CONSUMER (Part 1)

Danny Brager – Industry Analyst

Feb 3, 2026

PROGRAM PRODUCER **oregon wine** BOARD

TRADE SHOW PRODUCER



Oregon Winegrowers ASSOCIATION est. 1981



AZUR ASSOCIATES



- **BIG PICTURE**
- **OREGON**
- **WHAT'S WORKING; THINGS TO THINK ABOUT**



RTD's

TARIFFS



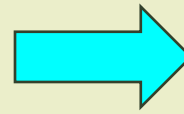
ECONOMY



BUY CANADIAN INSTEAD



ALCOHOL

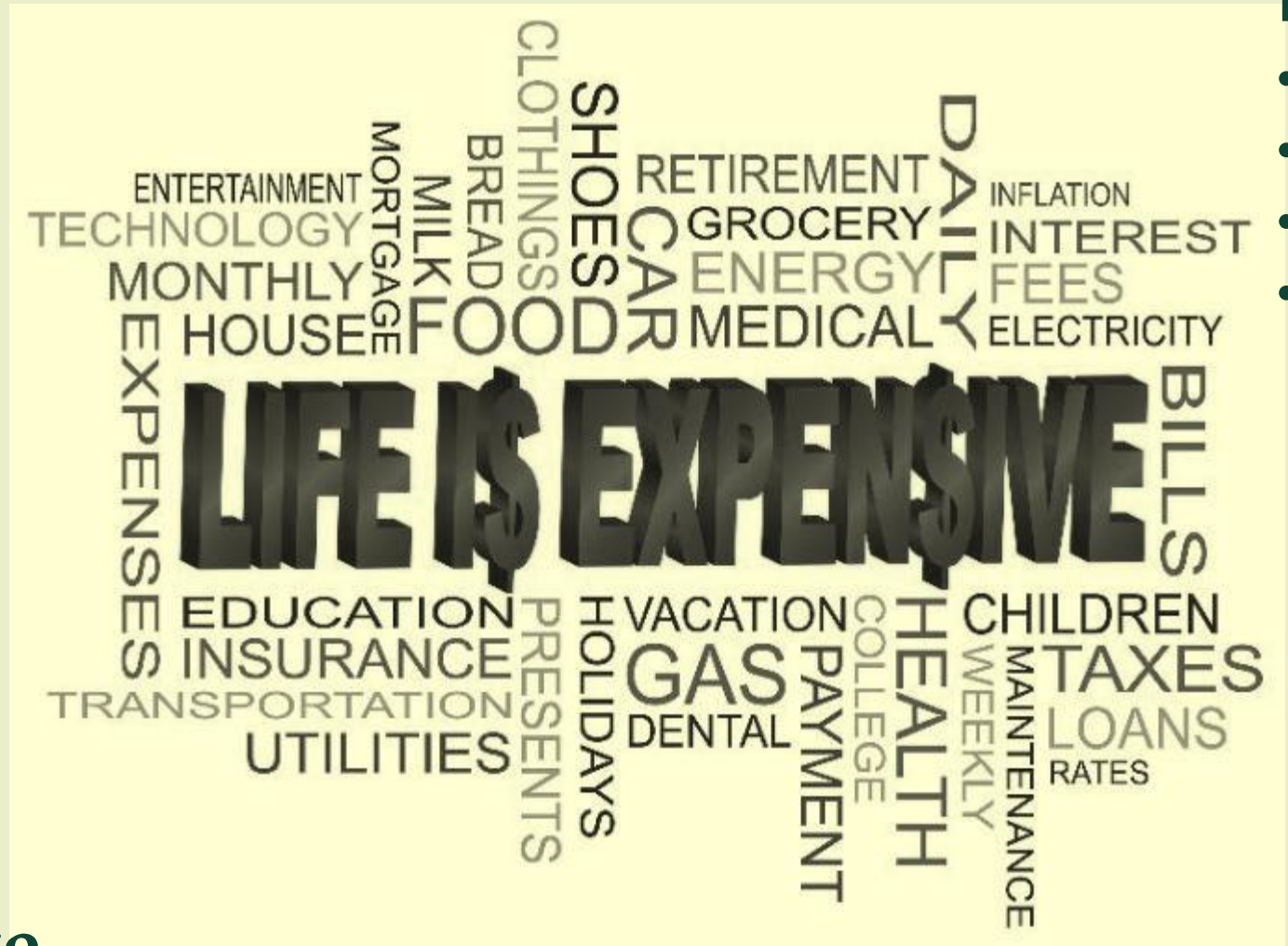


NECESSITIES

- Health Care
- Groceries
- Utilities
- Housing
- Gas
- Clothing
- Insurance
- Student Debt

LUXURIES

- Eating Out
- Travel
- Designer Goods
- Jewelry



Groceries are almost **30%** more expensive now than in 2020

PREMIUMIZATION LEVELS FALLING

Affordability Impacting Wine Choice?

Average Price per Serving



\$3.60 **\$3.17** **\$2.65**
5 oz serving



\$1.54 **\$1.33**
12 oz serving



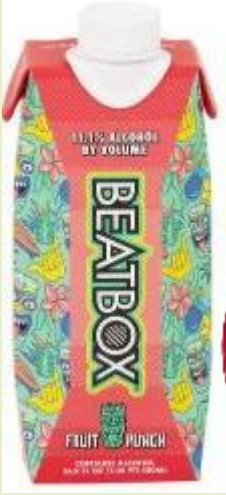
\$1.25 **\$1.40**
1.5 oz serving



\$1.60
12 oz serving



\$2.25
12 oz serving



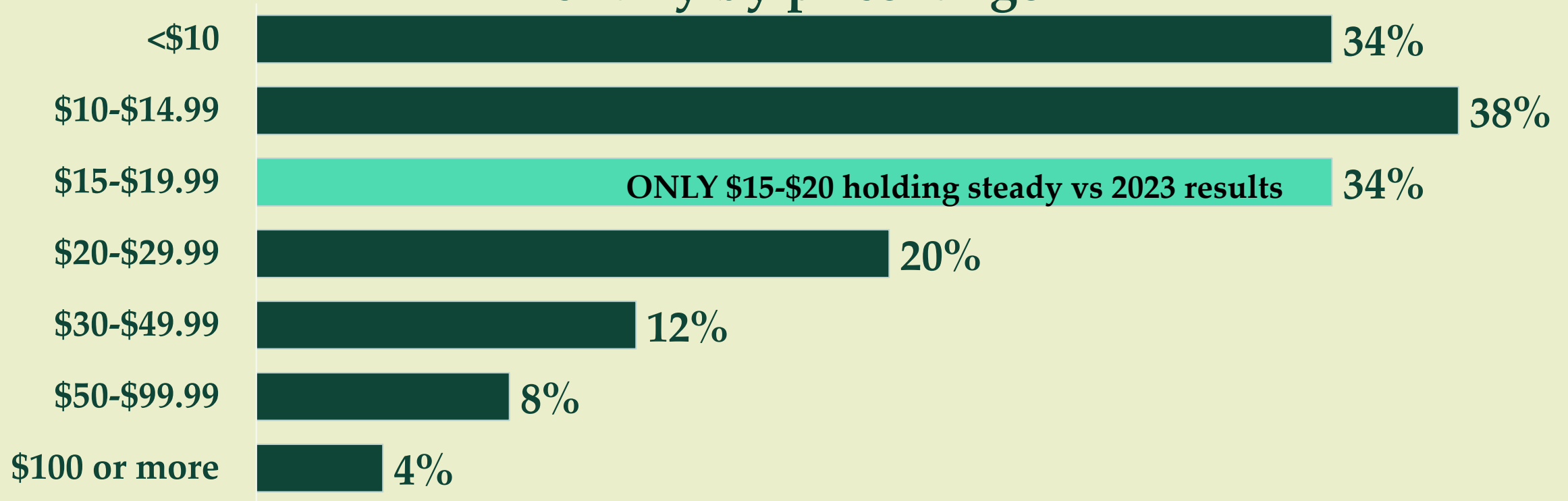
\$1.20
5 oz serving



\$3.00
5 oz serving

Wine Buying Audience Drops Quickly >\$20

% Who Buy Wine in a 750 ml bottle at Retail at least Monthly by price range

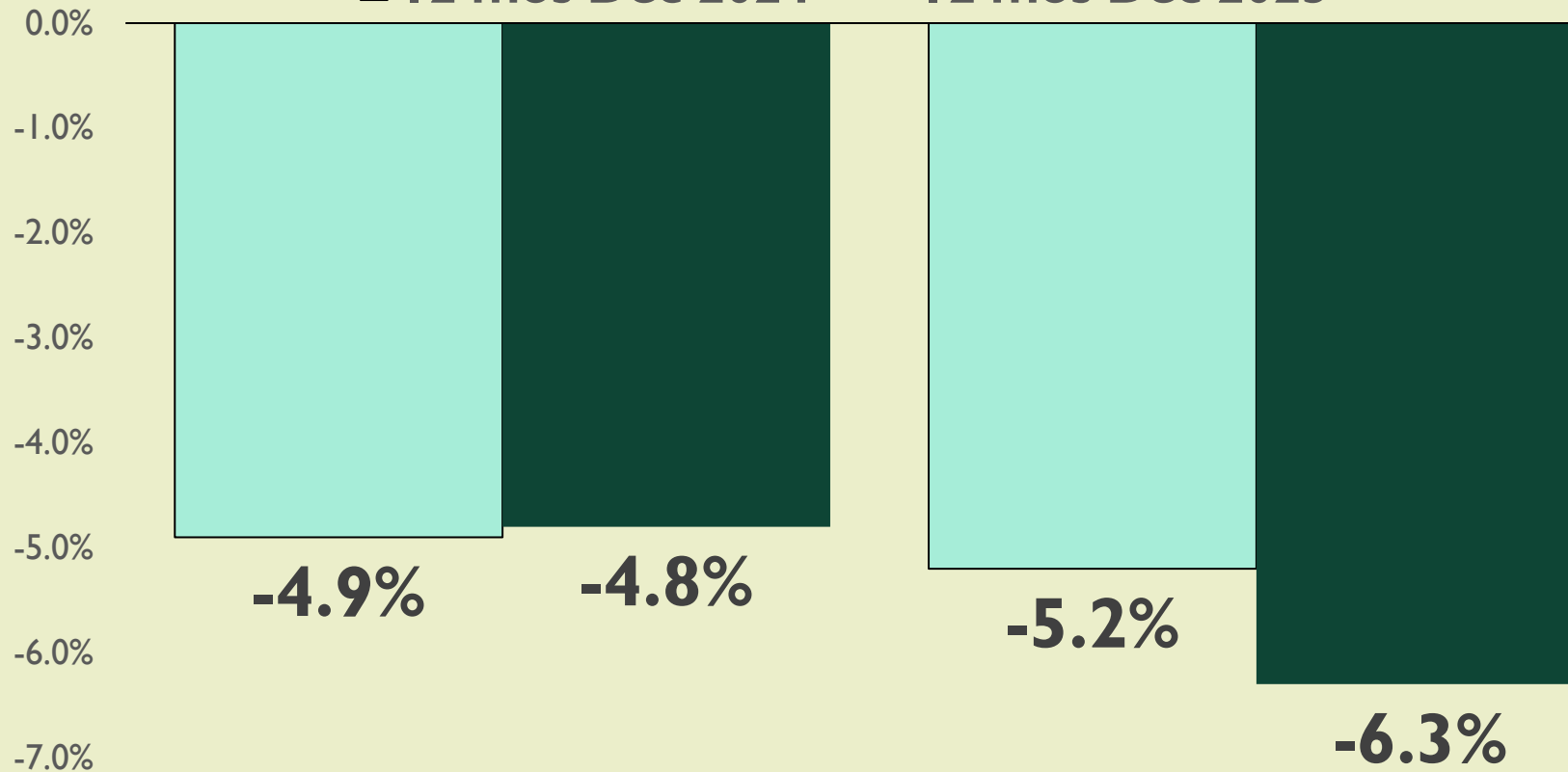


ONLY \$15-\$20 holding steady vs 2023 results

Wine Space & Assortment Shrinking

WINE PODS* – Pct Change vs Year Ago

■ 12 mos Dec 2024 ■ 12 mos Dec 2025



Off Premise

On Premise



Consumer Choice Has And Will Continue To Explode



gon
npc

RTD Explosion

26% of Spirits*
8% of Wine*

Flavors
Format
Function
Financial (price)

*VOLUME

Just A Few Of The Really Big RTD Drink Disruptors

HIGH NOON



\$818 MM

~24MM* cases (2025)
#1 Spirits Brand
 (by Volume)

SHANKEN
 NEWS Daily

NIQ

BEATBOX



\$396 MM



\$2.3 Billion



\$1.4 Billion

BuzzBall



\$764 MM

- Barefoot \$888MM
- Josh \$866MM
- Sutter Home \$536MM
- La Marca \$489MM
- K Jackson \$344MM
- Decoy \$240MM
- Meiomi \$226MM

Oregon Wine Symposium

Source: Off Premise Measured Channels; 52 weeks ending Dec 27, 2025

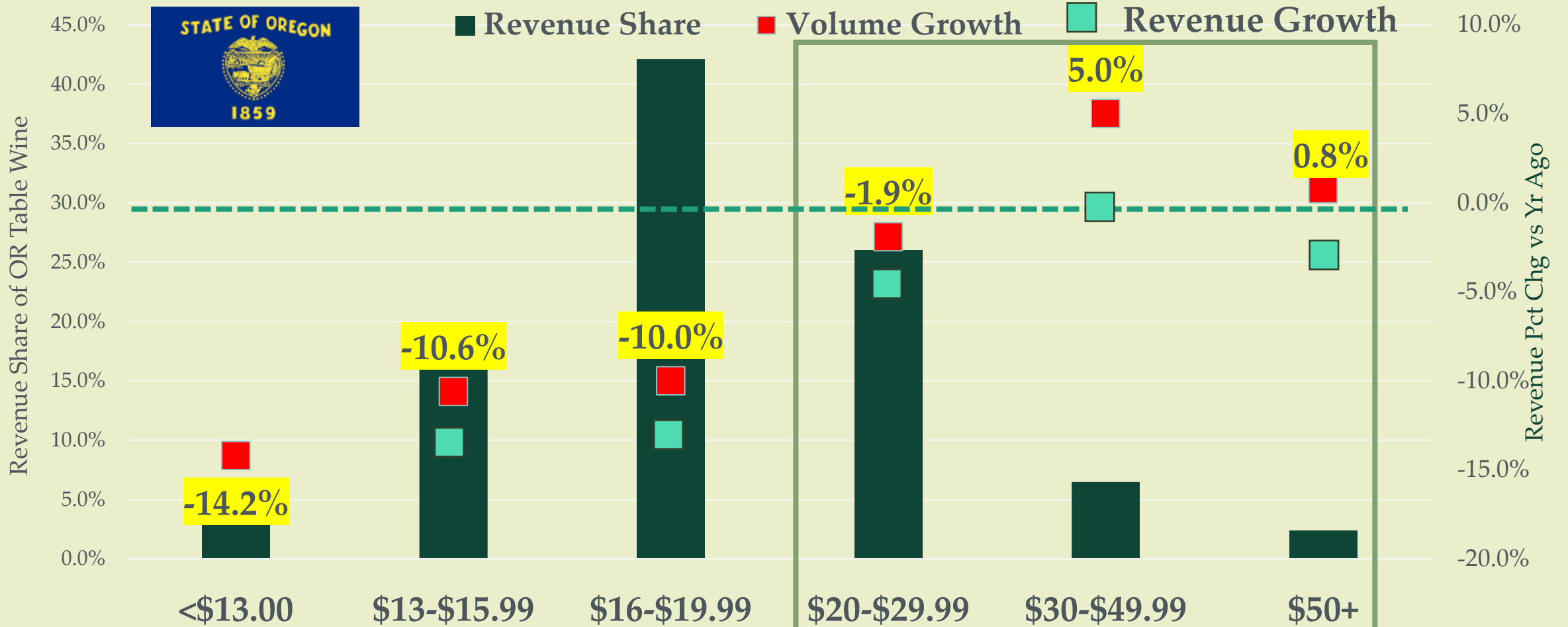
OREGON

3 TIER WHOLESAL

OREGON P Noir - Clear Growth Divide at \$20

OR Pinot Noir – by Price Tier (Off + On Premise)

Latest 12 mos thru Dec 2025

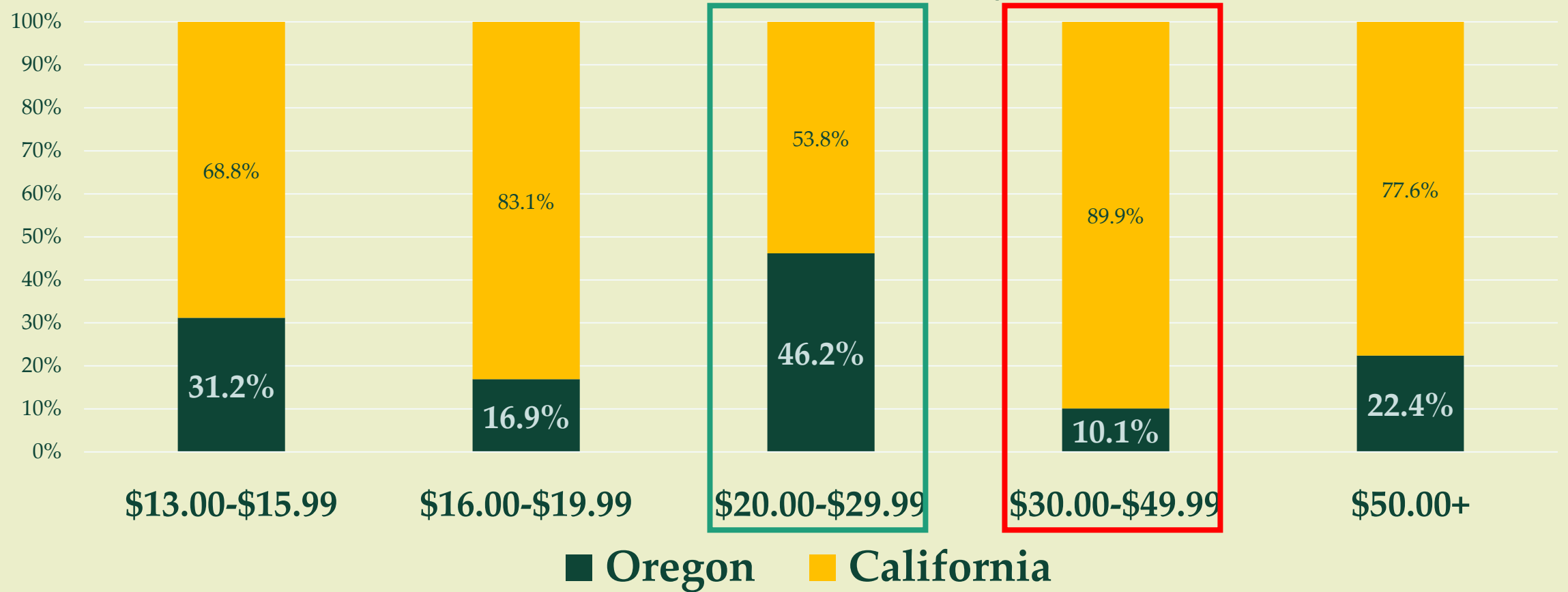


Period ending Dec 2025 ; REVENUE



We Share \$20-\$30 Price Tier With CA, But We're Less Competitive in the \$30-\$50 Range

OR vs CA Share of P Noir – by Price Tier



Oregon Varietals/Price Tiers Growing

OR VARIETAL	\$ share	\$9-\$13	\$13-\$16	\$16-\$20	\$20-\$30	\$30-\$50	\$50+
P Noir	69.7%						
P Gris	16.5%						
Rose'	4.2%						
Chardonnay	3.7%						
Red Blends	2.2%						
Cab Sauv	1.6%						
Sauv Blanc	0.5%						
White Blends	0.3%						
Merlot	0.2%						

>17,500 Brands/
~500 Oregon Brands

NIQ →

data

- Grocery stores
- Liquor stores (chains and indep)
- Drug stores
- Convenience stores
- Mass Merchants

36% of Top 50 OR Brands Growing in Scan

OR brands in top 50 growing (\$) in Scan Off Premise

1-10						King Estates				Stoller
11-20		Elk Cove		Ken Wright						Domaine Drouhin
21-30	Inscription	Craftwell					Roserock		Kings Ridge	
31-40	Cloudveil	Resonance	Planet Oregon	Siduri	Benton Lane			Cristom		
41-50		Anne Amie		Lange		Averaen				

Oregon labeled only

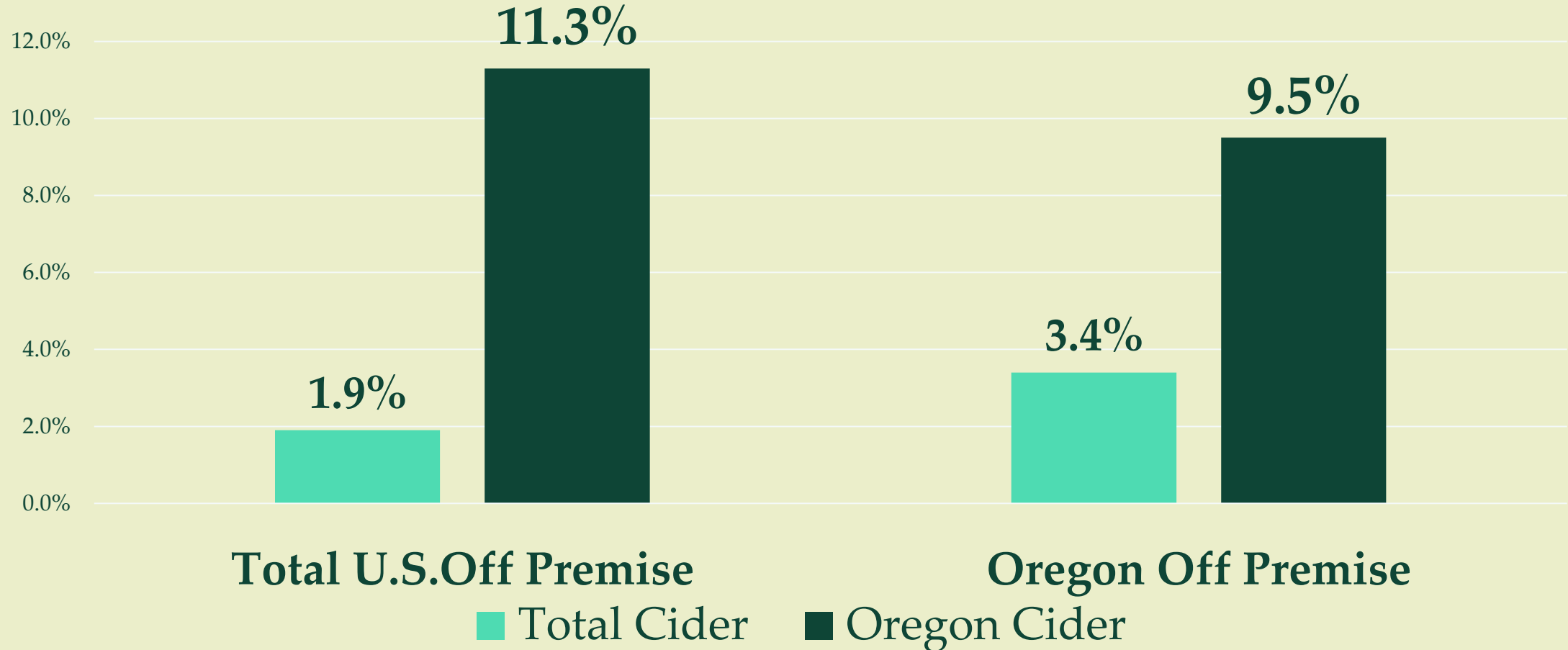


Off-Premise Measured Channels; 52 w.e Dec 27, 2025



OR Cider Growth is Impressive – with Much More Potential Beyond the Pac NW

Total U.S.: Cider Pct Growth Rates - Dollars



Source: Off Premise Measured Channels; 52 weeks ending Dec 27, 2025



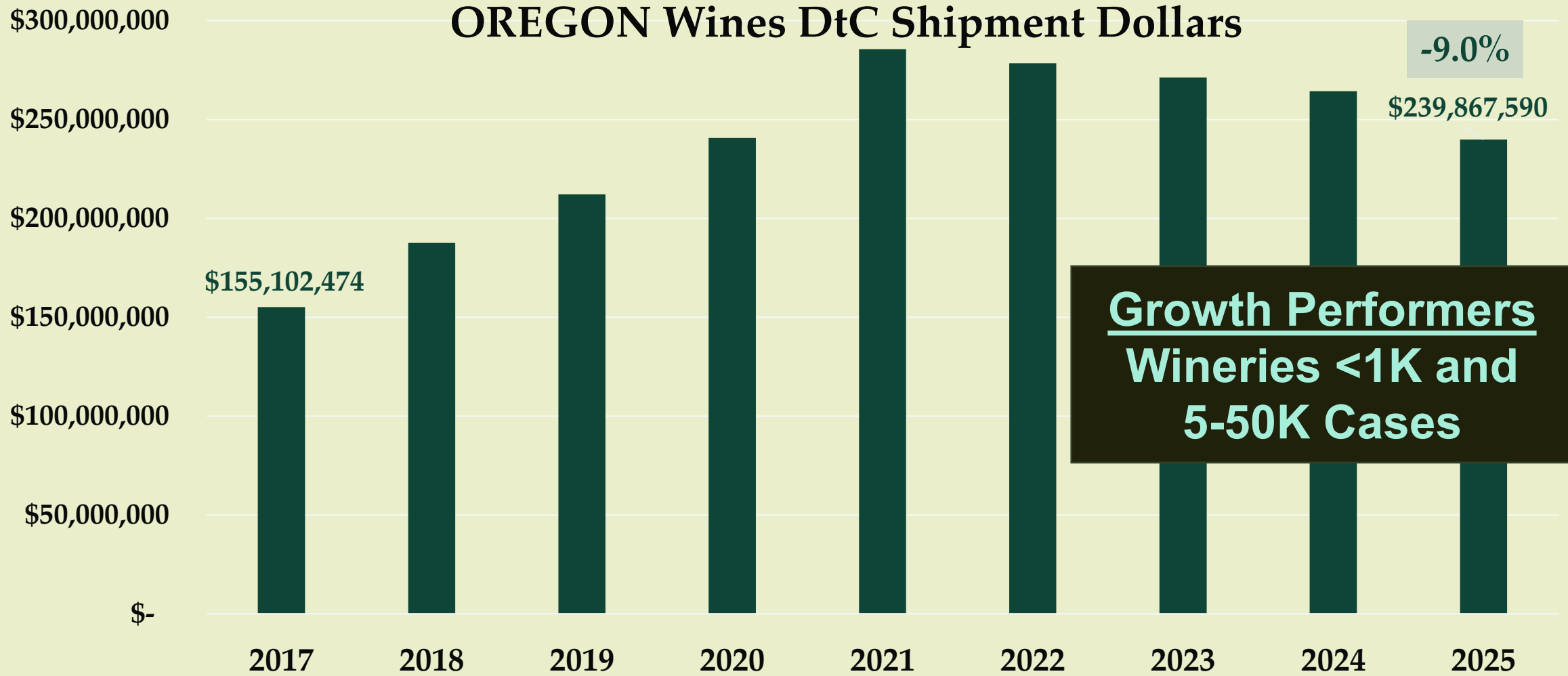
OREGON

DtC CHANNEL

 **CommunityBenchmark**™

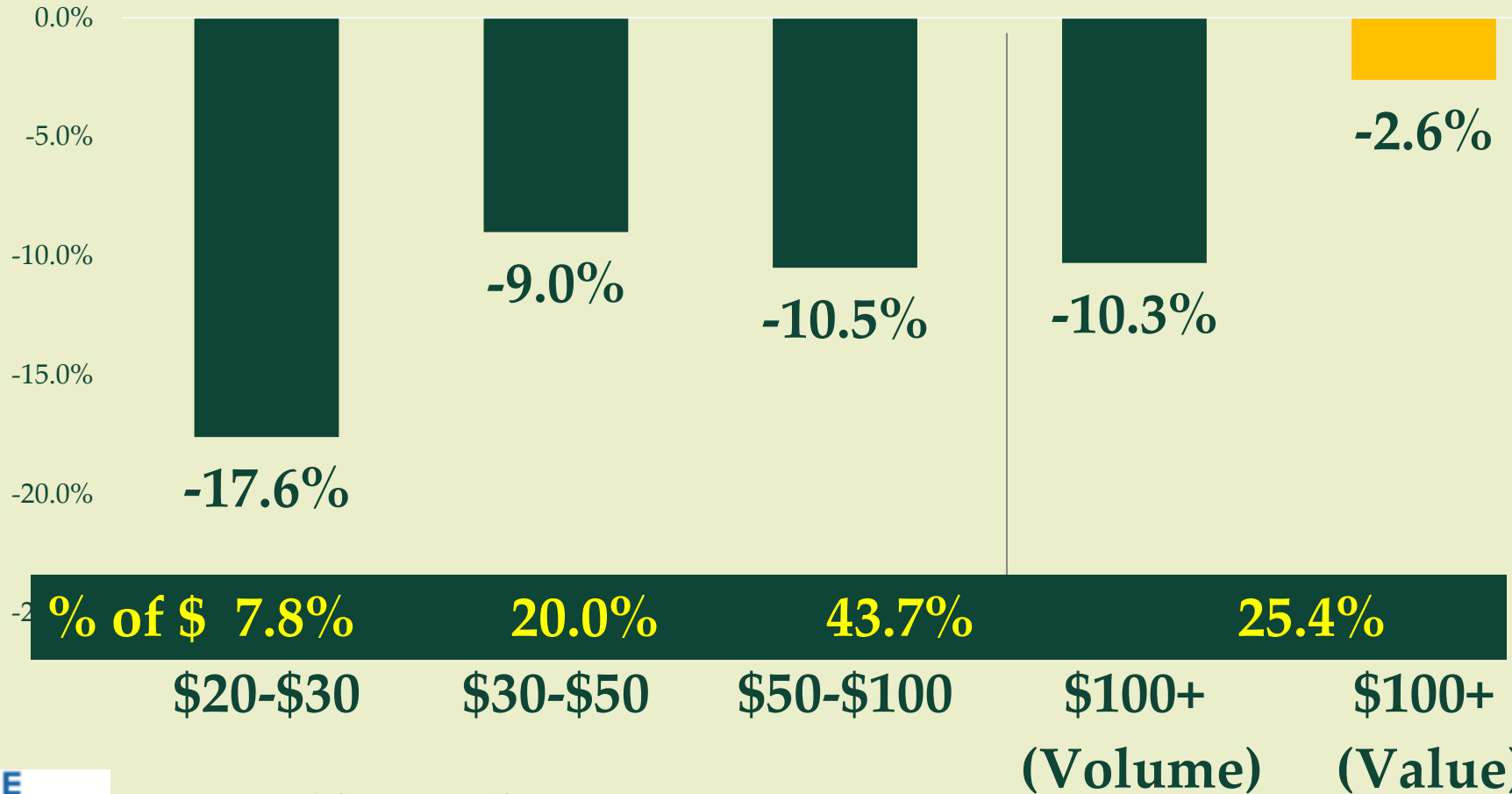
**39% of Oregon
Wineries grew in 2025**

OR DtC Shipments Had Grown Substantially Long Term; Declines Since the 2021 High



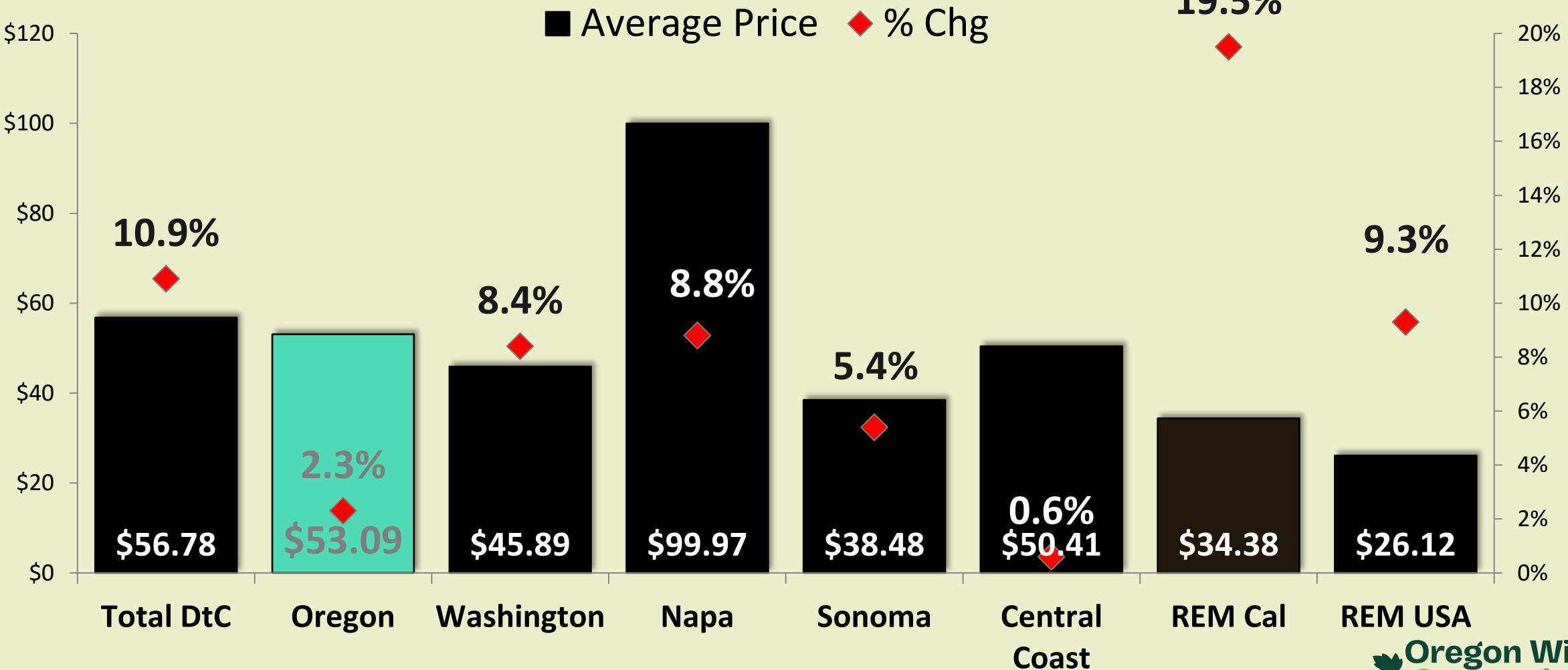
Best Growth: >\$100 on Dollars

Total OR DtC Shipments - Pct Chg vs Yr Ago
Annual 2025 (Volume)



OR DTC Pricing Averagely in the Mid-Range; Lower Year on Year Increases than Others

DtC Average Prices/Pct Chg vs Yr Ago



SEEKING GROWTH

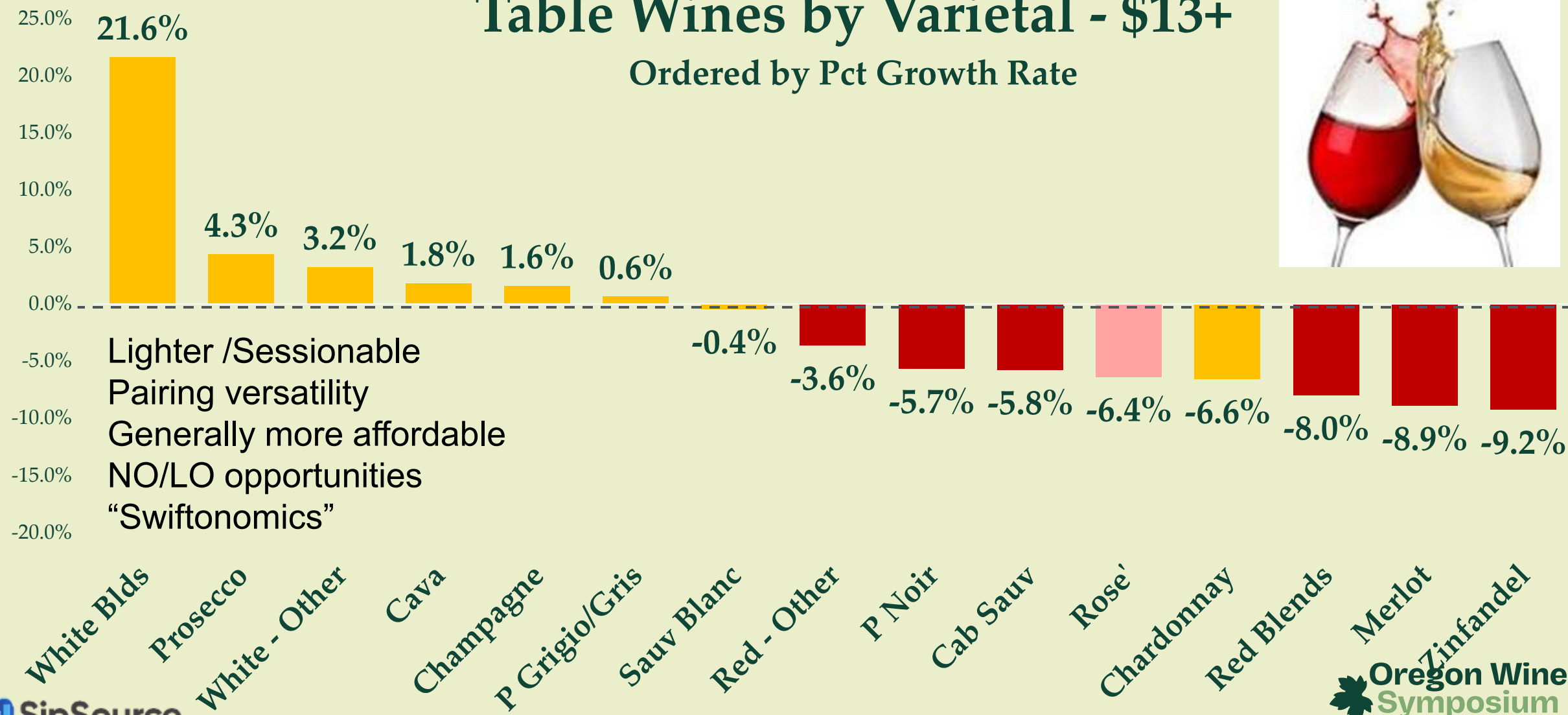
WHERE TO NEXT?

Flavors – Can we Play Here?



White Varietals Generally Outperforming Reds/Pinks

Table Wines by Varietal - \$13+
 Ordered by Pct Growth Rate



Lighter /Sessionable
 Pairing versatility
 Generally more affordable
 NO/LO opportunities
 "Swiftonomics"



12 mos period ending Dec 2025 (volume)

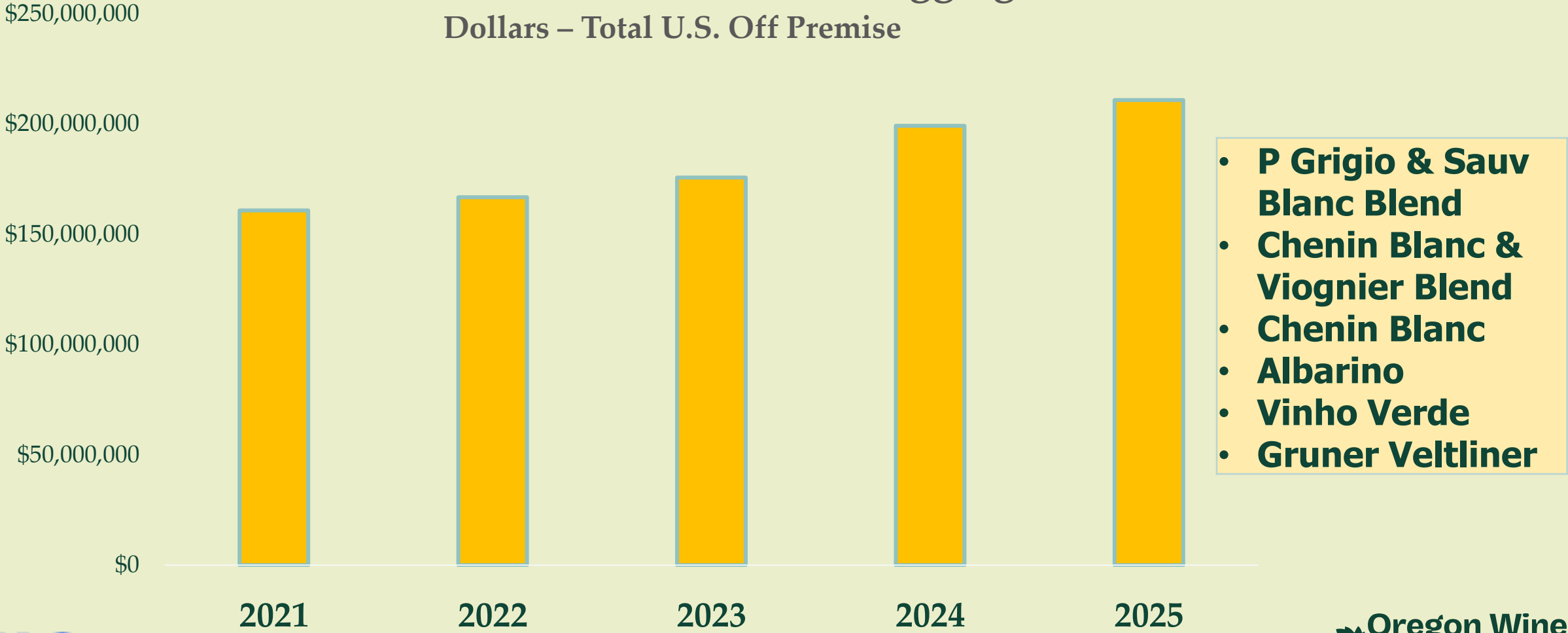


White Blends Examples



“Other” Whites Contributing To Growth

Selected “OTHER” Whites – in Aggregate
Dollars – Total U.S. Off Premise

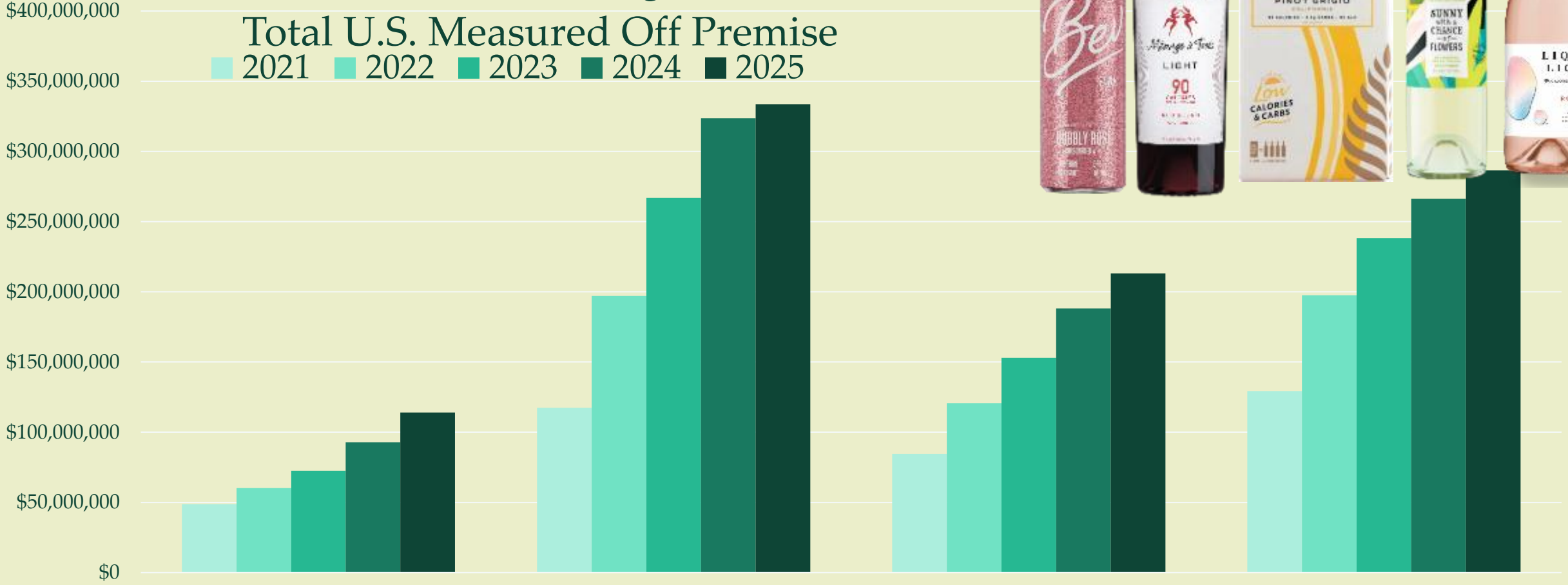


Source: Off Premise Measured Channels; 52 weeks ending Dec 27, 2025



“Better for You” Segments Increasing

Selected “Better” for You Segments – Dollars



Source: Off Premise Measured Channels; 52 weeks ending Dec 27, 2025



Most NA Wine Drinkers Also Drink Mainstream Wine

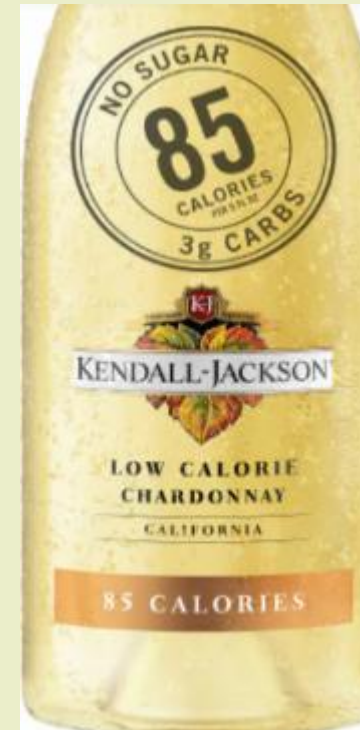
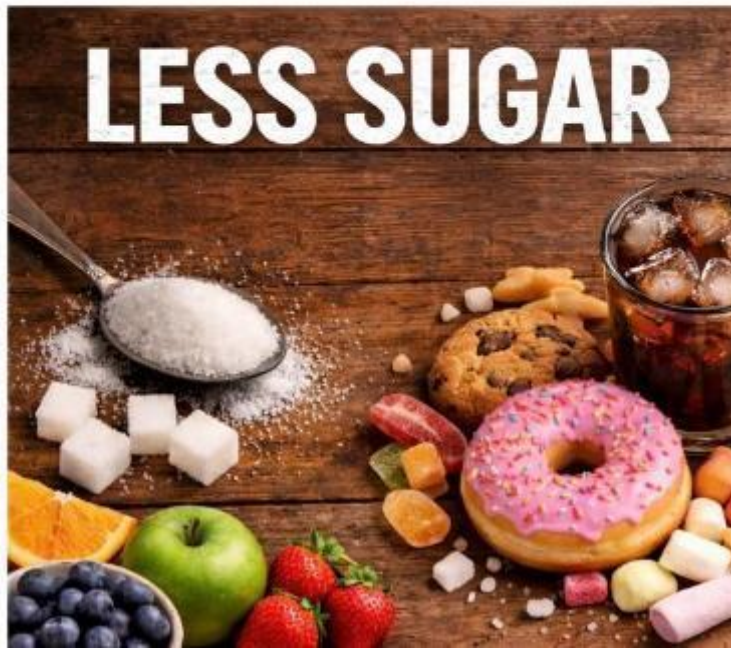
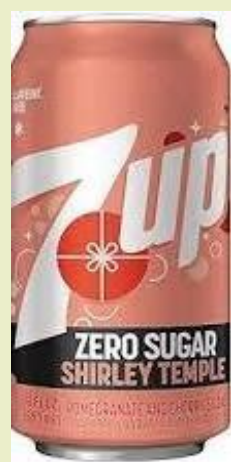
- On Different Occasions

- ~80% also drink mainstream Wine
- 200K more selling outlets than mainstream Wine



New US Dietary Guidelines urge Less Sugar, More Protein

January 7, 2026



 Oregon Wine Symposium

Wine Alternative Packaging – Liquid to Lips

375 ML



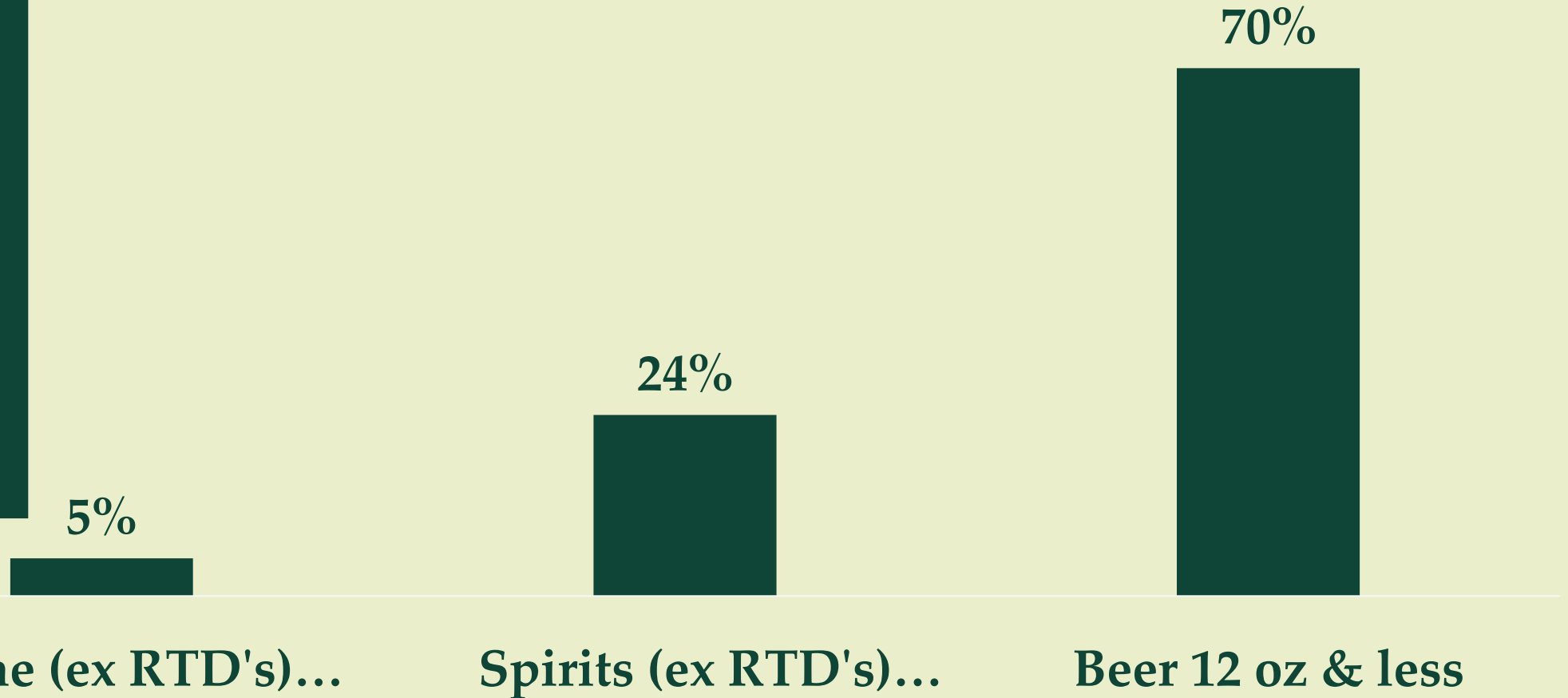
Right Package for the Occasion



Wine Way Behind in Smaller Package Size Contribution

% Contribution of Smaller Sizes to Category

Are we providing consumers with the choices that fit with the occasion?

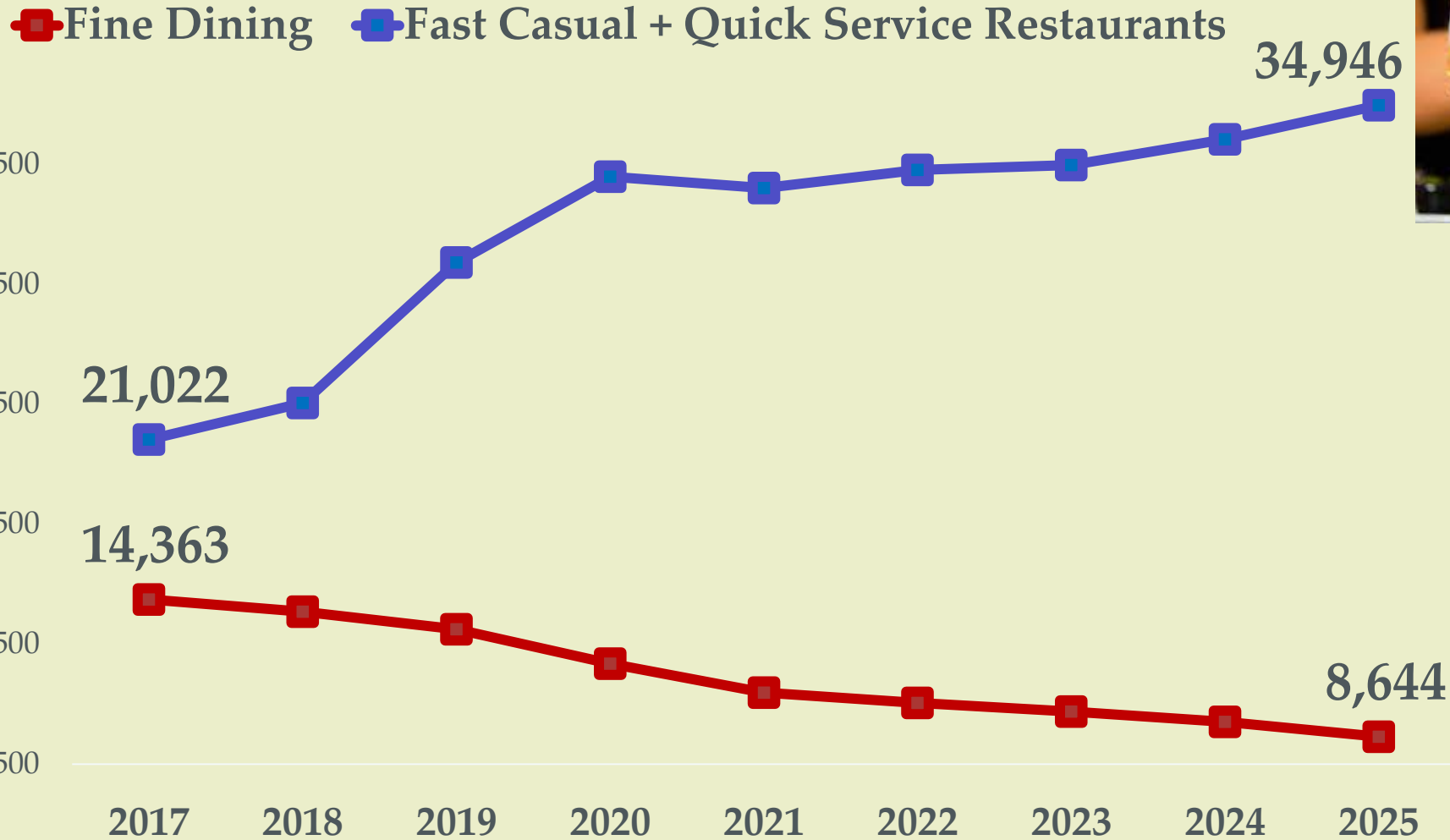


Total U.S. Measured Off Premise Channels 52 weeks (thru Dec 27, 2025 (Revenue))



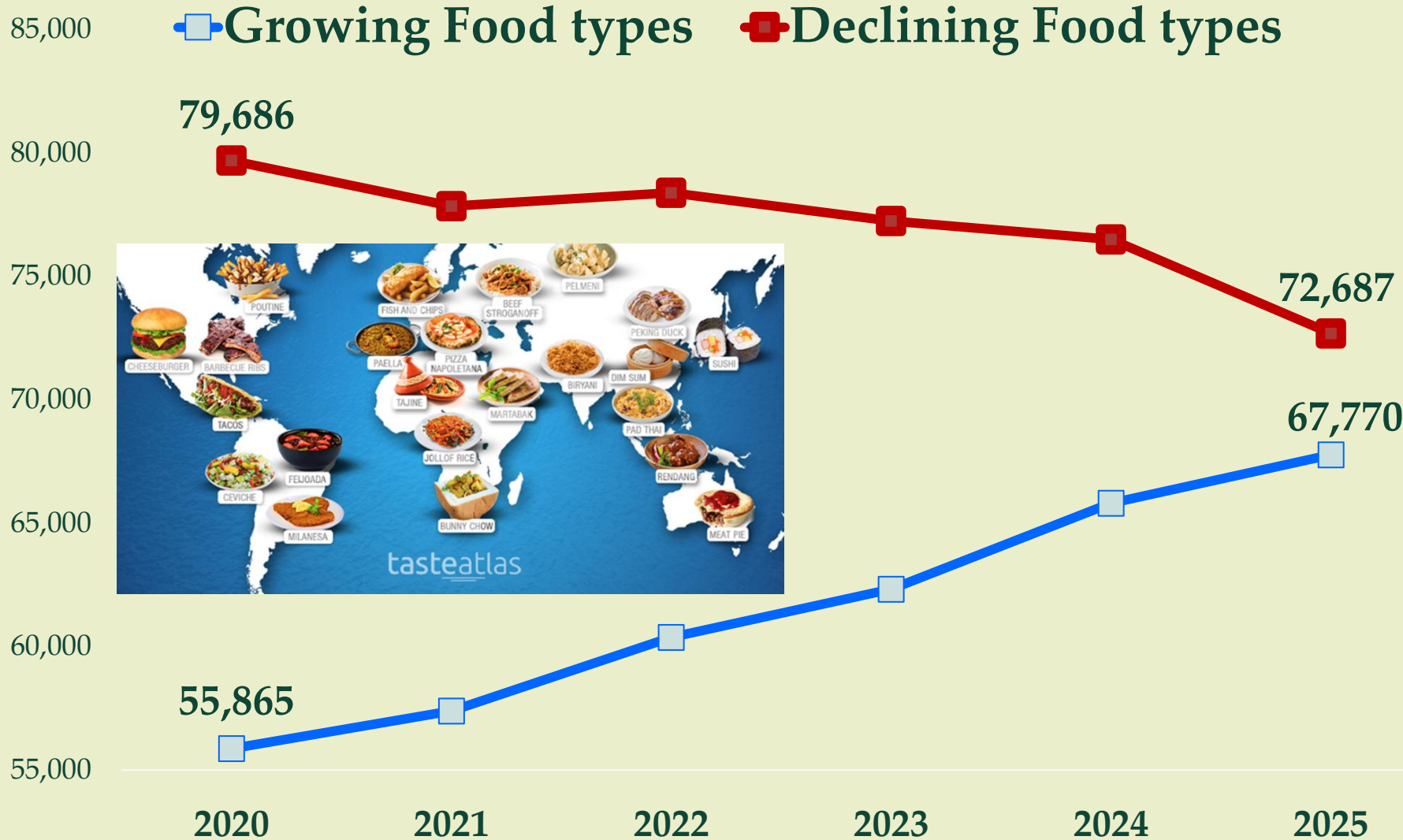
'New' On Premise Realities

Wine Selling On Premise Locations – by Type



Pairing Opportunities Beyond the Traditional Ones

Wine Selling On Premise Locations – by Food Type



Led by...

- American
- Deli
- BBQ/Ribs
- And more...

- + Japanese/Sushi
- + Mexican
- + Latin
- + Indian
- And more...

Or In My Case, As A Proud Canadian...



Wine in a Restaurant is Often Comparatively & Transparently Expensive

SPIRITS

\$15 cocktail

- *I don't really know what that might cost if I bought all the elements in store*
- *And then I'd have to make it myself if I did*



WINE

\$15 glass


- *I know that bottle costs ~\$20-\$25 in a store*
- *for exactly the same unaltered product*

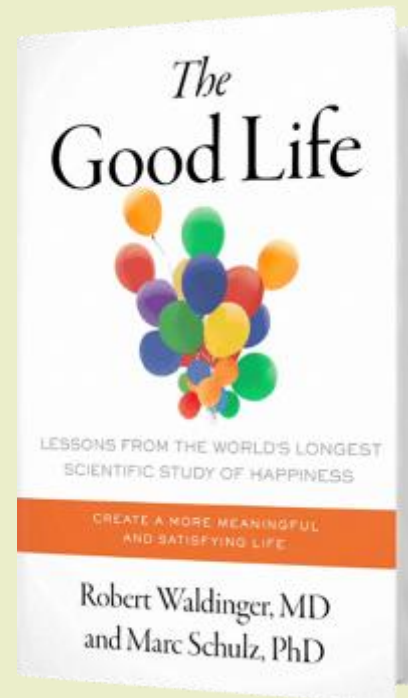


WINE COCKTAILS



More Generally, Where Do We Go From Here?

1. Participate in growth segments where relevant/possible for you
2. Format follows Occasion - Connect to that Occasion
3. Meet them when/where they are - & what they're doing
4. Partner/collaborate with others – within/beyond Wine
5. Tasting rooms as hospitality centers; choices beyond Wine
6. Reframe On Premise – Pricing, Cocktails, Food pairings
7. Innovation – flavor, format, and function and more
8. Focus – Less is More!
9. More on ramps for Gen Z- simplify & energize the message
10. Wine and its role in supporting Social Fitness 

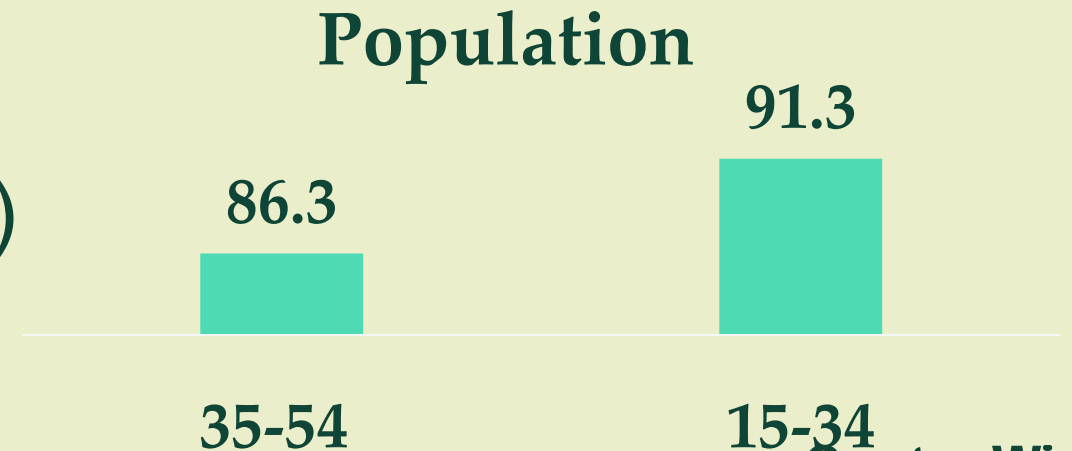


And a Couple Things to Look Forward to...

① Short term.. Special events



② Longer term...many more to enter peak earning years (35-54)





Oregon Wine Symposium

THANK YOU!!!

Category & Consumer



AZUR
ASSOCIATES

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PROGRAM
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TRADE SHOW
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Oregon
Winegrowers
ASSOCIATION est. 1981