



Oregon Wine Symposium

THE STATE OF WHOLESALE DISTRIBUTION

A Candid Conversation with Distributors

PROGRAM
PRODUCER

oregon
wine BOARD

TRADE SHOW
PRODUCER



Oregon
Winegrowers
ASSOCIATION EST 1981

Feb 3, 2026

Panelists



Danny Brager
Beverage Alcohol
Industry Analyst
Azur Associates
3 Tier Beverages



Aileen Sevier
Marketing Director -
Upper Left
Winebow



Briana Seeley
Executive Vice
President, General
Manager
Republic National
Distributing Company



Ryan Fitzinger
Vice President of
Sales
Northwest Wines Ltd

Distribution Insights & Level Setting

Danny Brager

Azure Associates - 3 Tier Beverages

Challenging Macro Environment – All At One Time

All Beverage Alcohol categories are in decline

- Economic/geo-political backdrop is challenging
- Consumer attributes (lifestyles/demographics) are changing - impacting consumption habits and trends
- Anti Alcohol voices are fanning the flames
- Drinking (and other) choices – within and beyond Beverage Alcohol – are expanding/exploding
- Commercial environment is being squeezed

Retail Realities for Wine



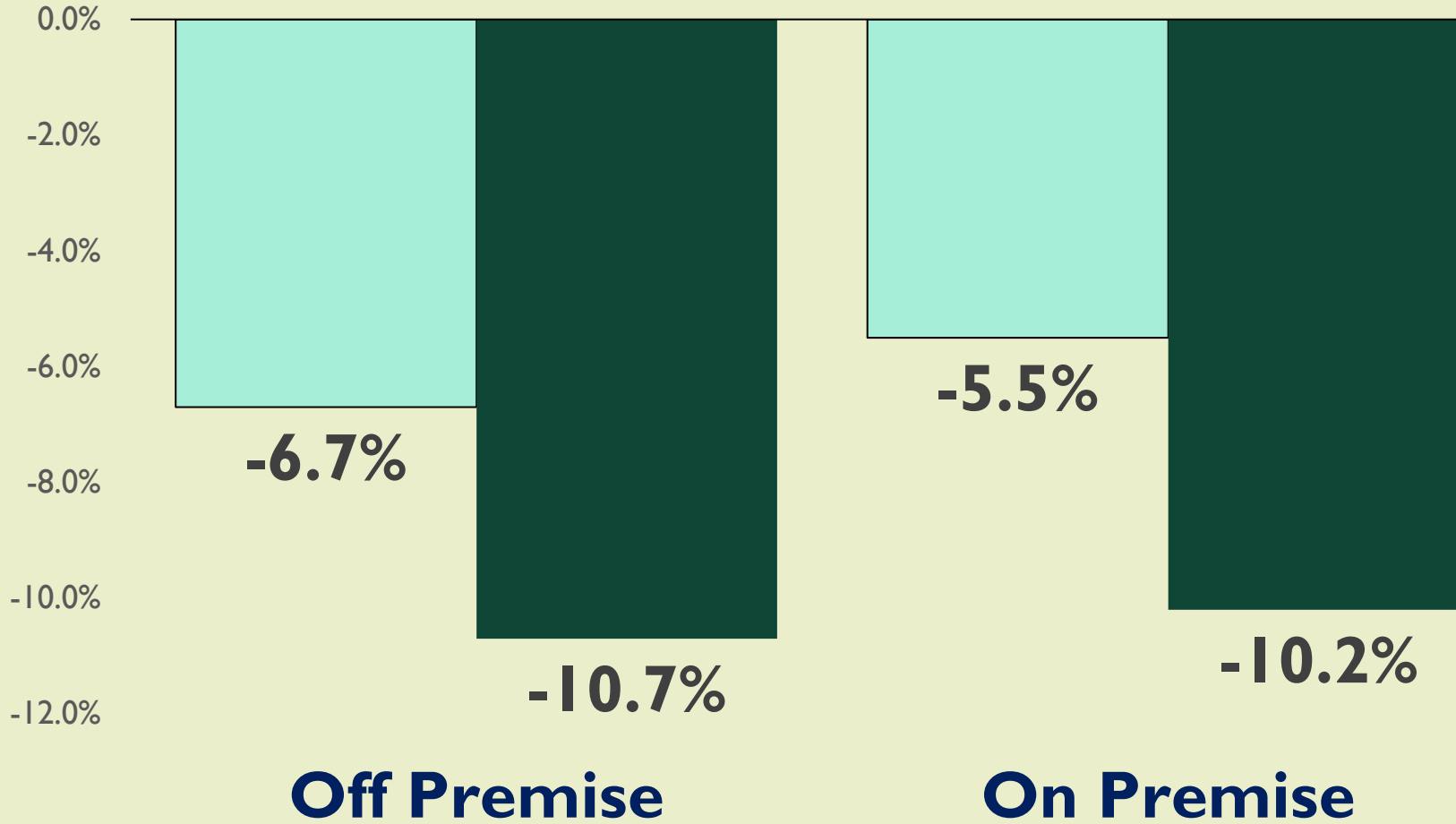
*How many items of
category/segment xxxxx
do I REALLY need to satisfy
consumer demand?
And which items?*



Wine Space & Assortment Shrinking

OREGON PODS – Pct Change vs Year Ago

■ 12 mos Dec 2024 ■ 12 mos Dec 2025





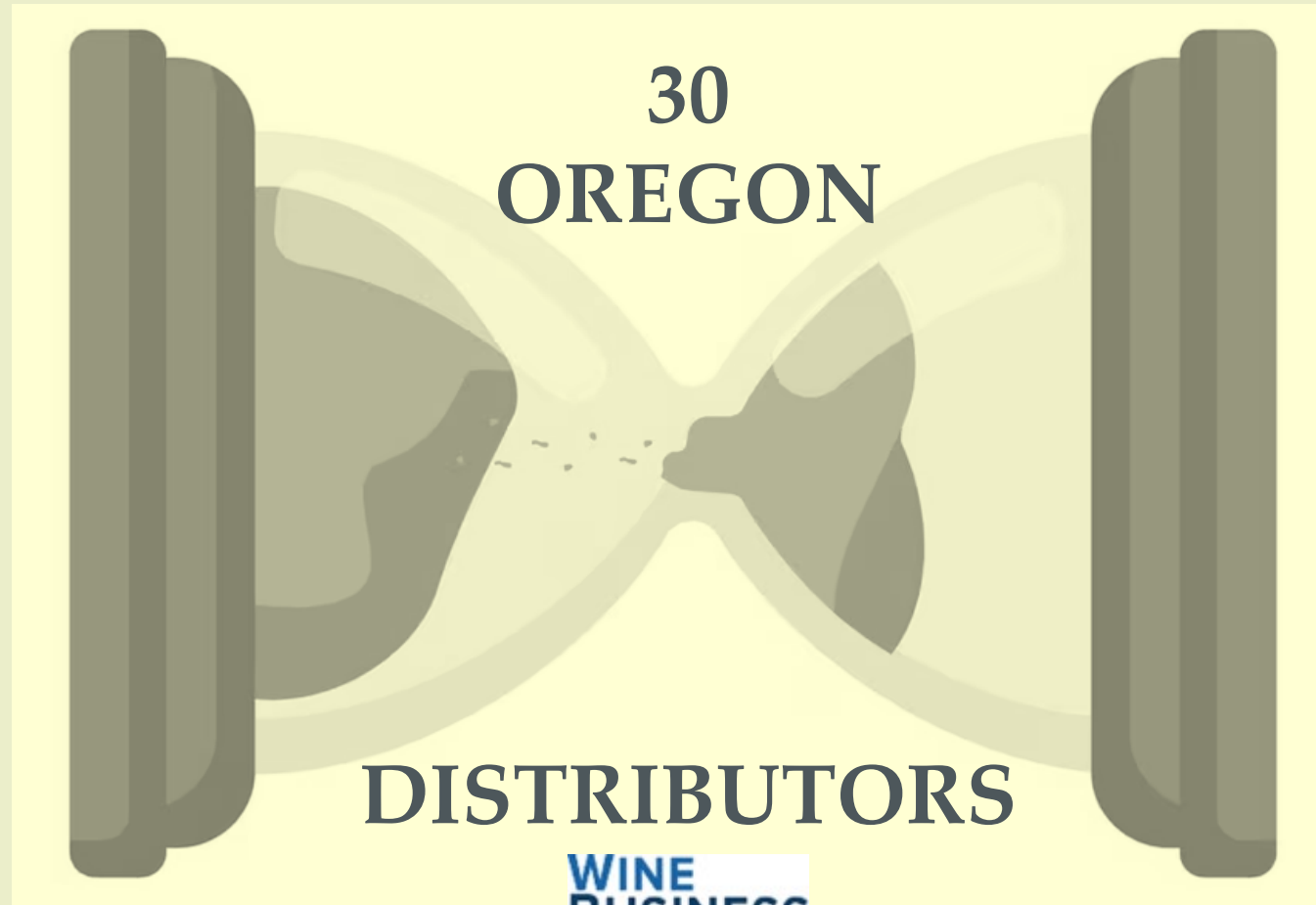
RTD's

3 TIER CHANNEL HOURGLASS - OREGON

868
OR
WINERIES

**WINE
BUSINESS**
ANALYTICS

Feb 2026



**WINE
BUSINESS**
ANALYTICS

LOCATIONS
2,879
Off Premise

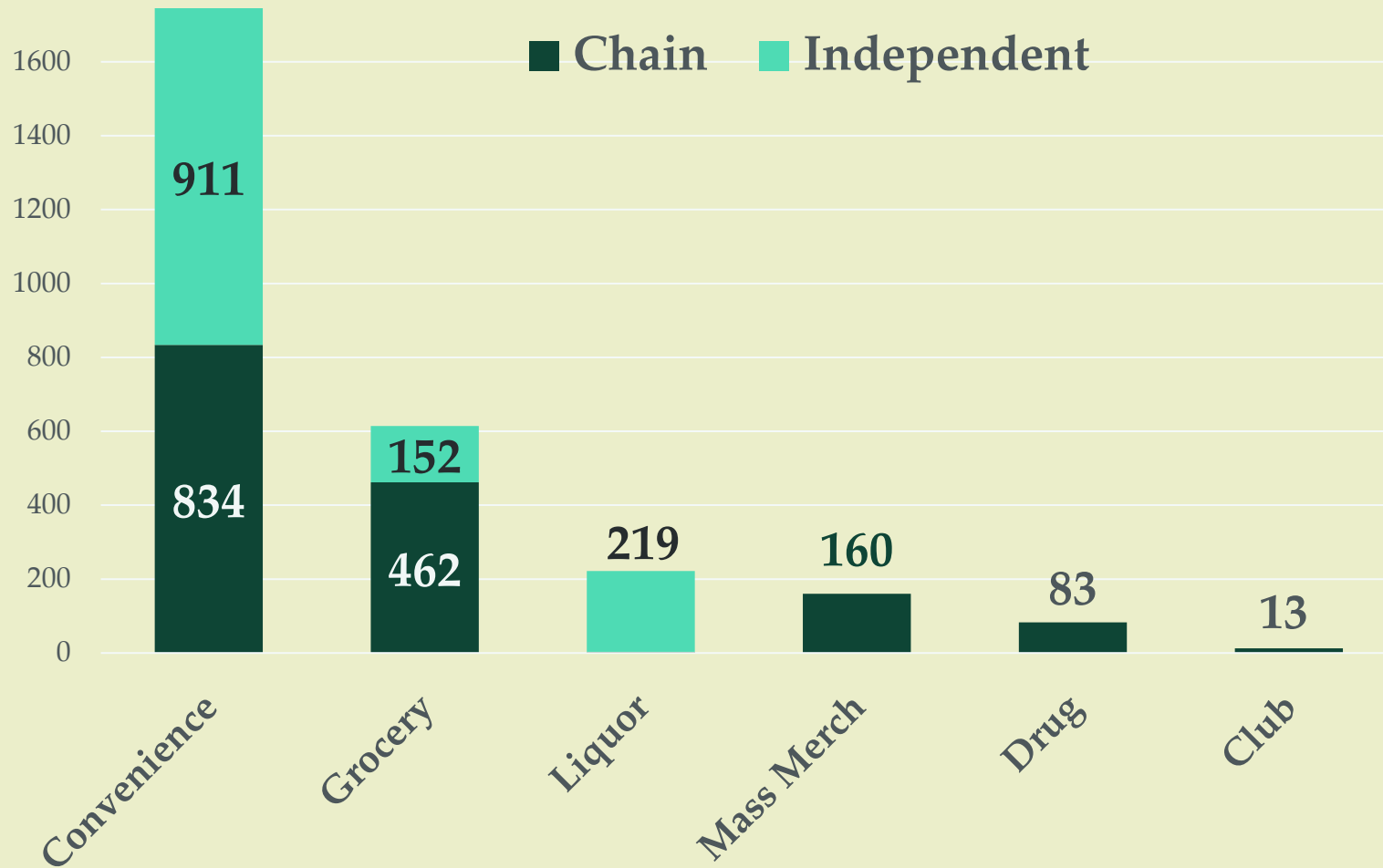
7,080
On Premise

NIQ TDLinx – Dec 2025

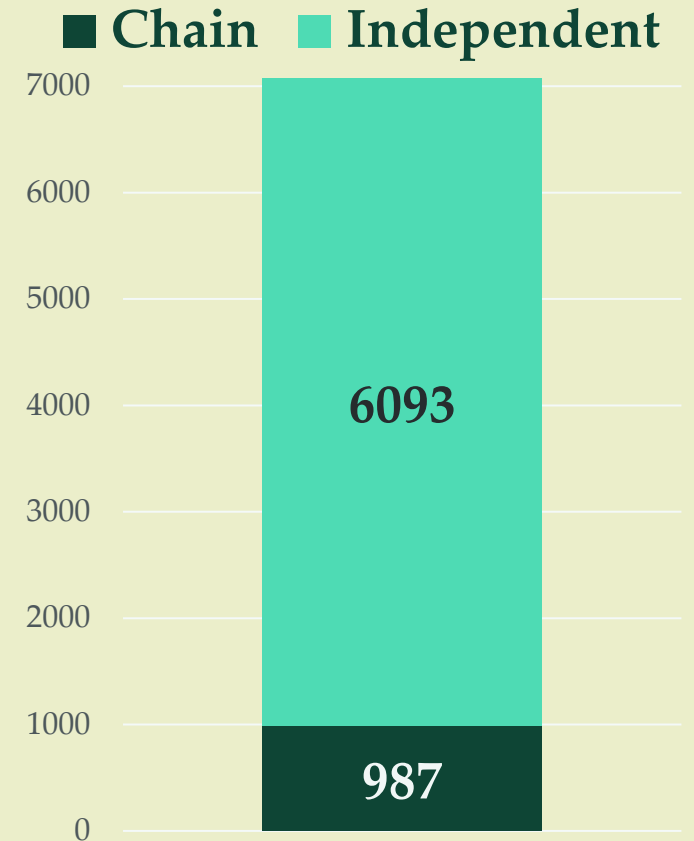
 Oregon Wine
Symposium

of OREGON WINE SELLING LOCATIONS

Off Premise



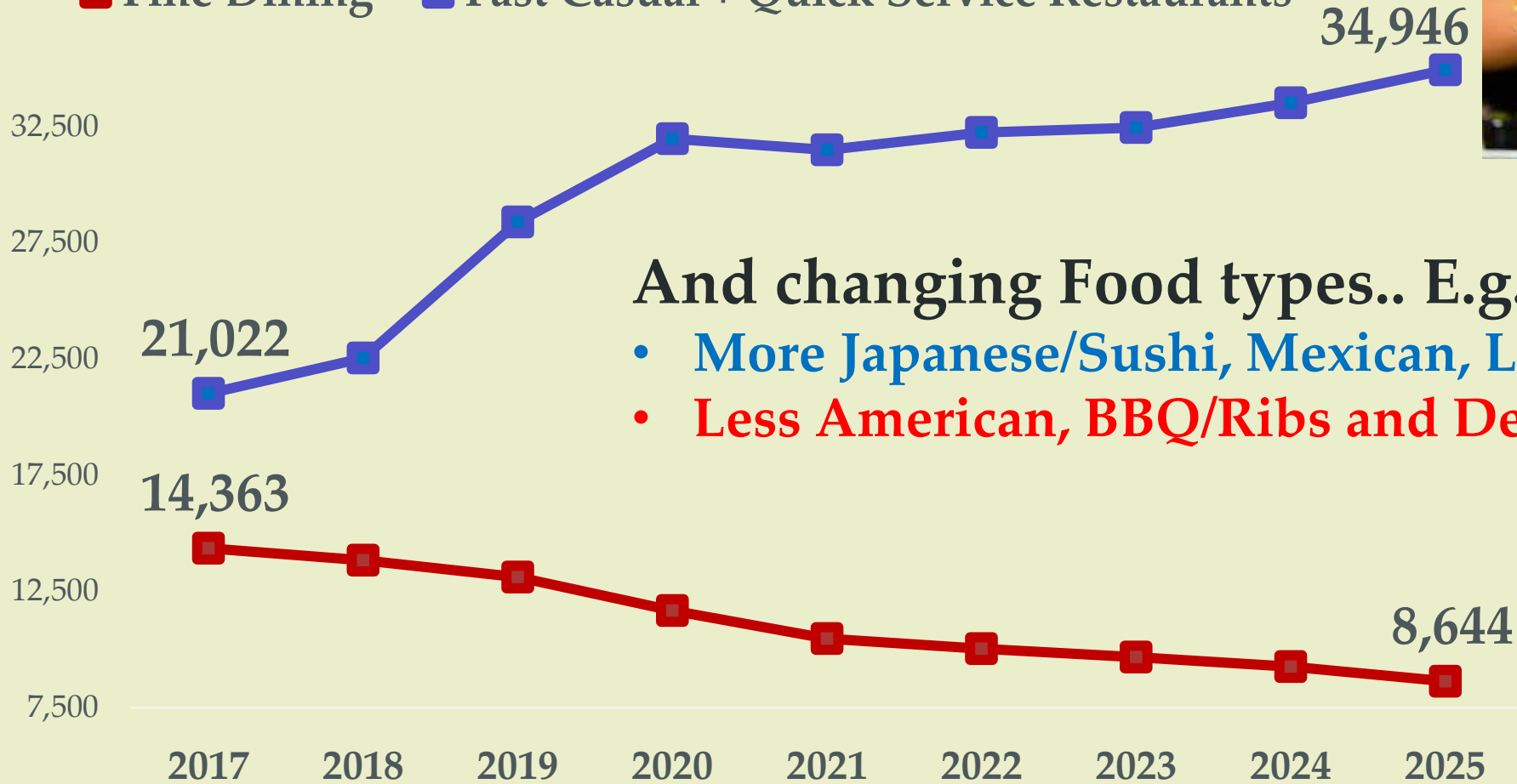
On Premise



'New' On Premise Realities

Wine Selling On Premise Locations – by Type

■ Fine Dining ■ Fast Casual + Quick Service Restaurants



And changing Food types.. E.g.

- More Japanese/Sushi, Mexican, Latin
- Less American, BBQ/Ribs and Deli



THANK YOU

Danny Brager – Industry Analyst
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Distributor Q & A