

OREGON LIQUOR CONTROL COMMISSION IMPACTS ON OREGON'S ECONOMY

HOUSE COMMITTEE ON ECONOMIC DEVELOPMENT AND TRADE

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Presented By

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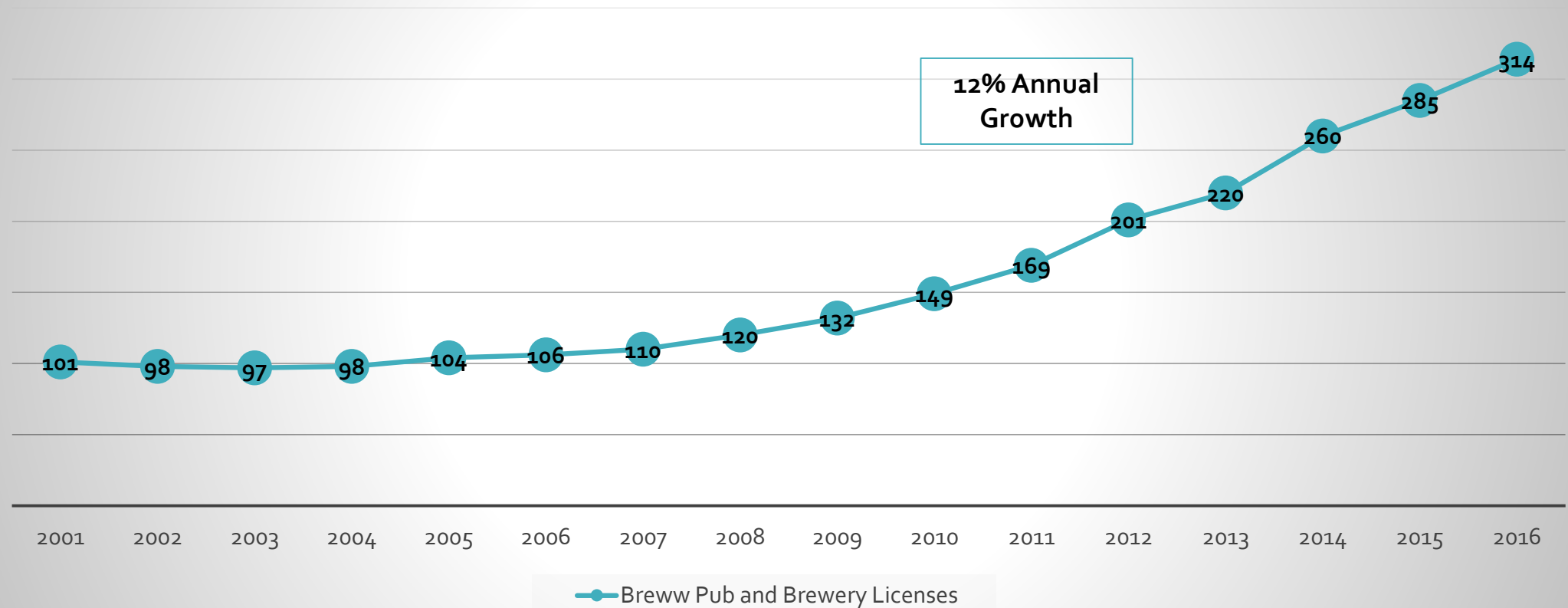
OLCC Impacts On Oregon's Economy

- Third largest revenue generator for the state
 - Supports jobs in police, education, and healthcare
- License and regulate businesses that sell and serve alcohol
- Issue service permits to trained alcohol servers
- Manage/distribute distilled spirits
- Regulate businesses that sell/serve alcohol
- License and regulate businesses that sell marijuana



Oregon's Beer Industry

Oregon Brew Pub and Brewery Licenses



Oregon's Beer Industry

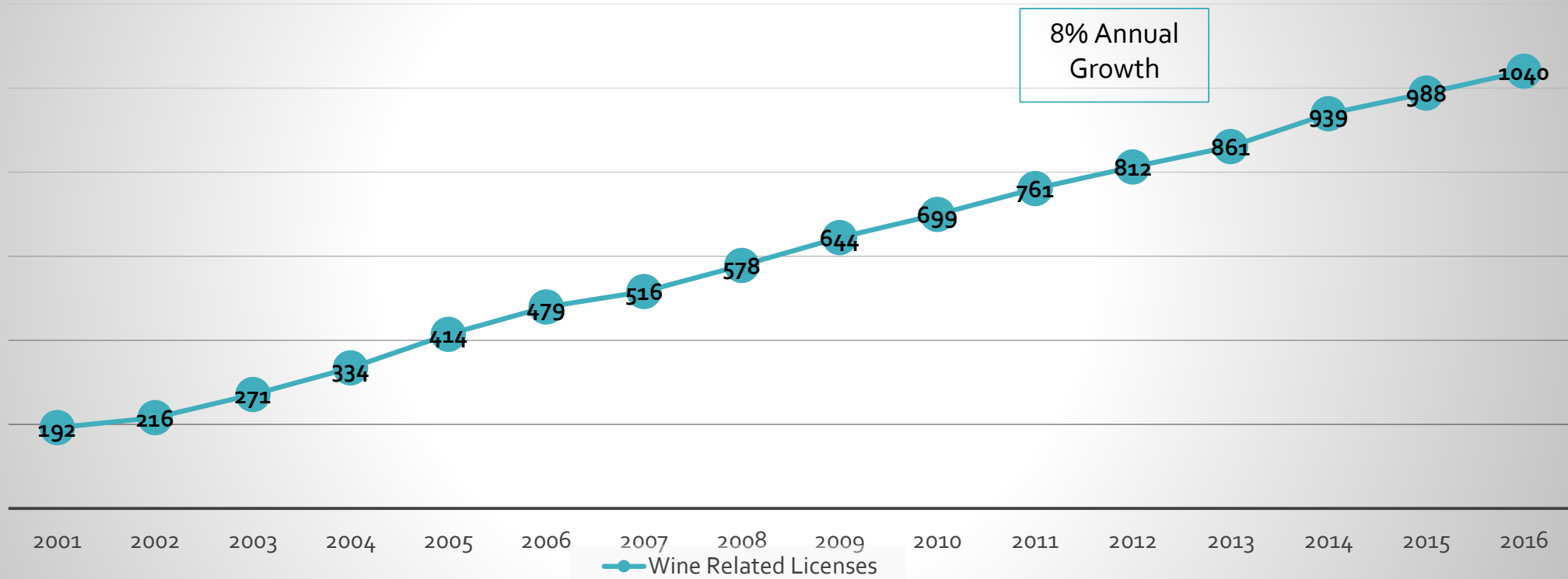
- 332 Brewery/Brewpub Licenses
- In 2014, Oregon's brewing companies employ more than 6,600 employees
- 43.1 Million Gallons Produced in Oregon in 2013; 63% of production exported
- Total economic impact of \$2.83 billion on Oregon's economy



(OLCC Licensing Data 2017; Beer Institute Data 2014)

Oregon Wineries

Oregon Winery Type Licenses



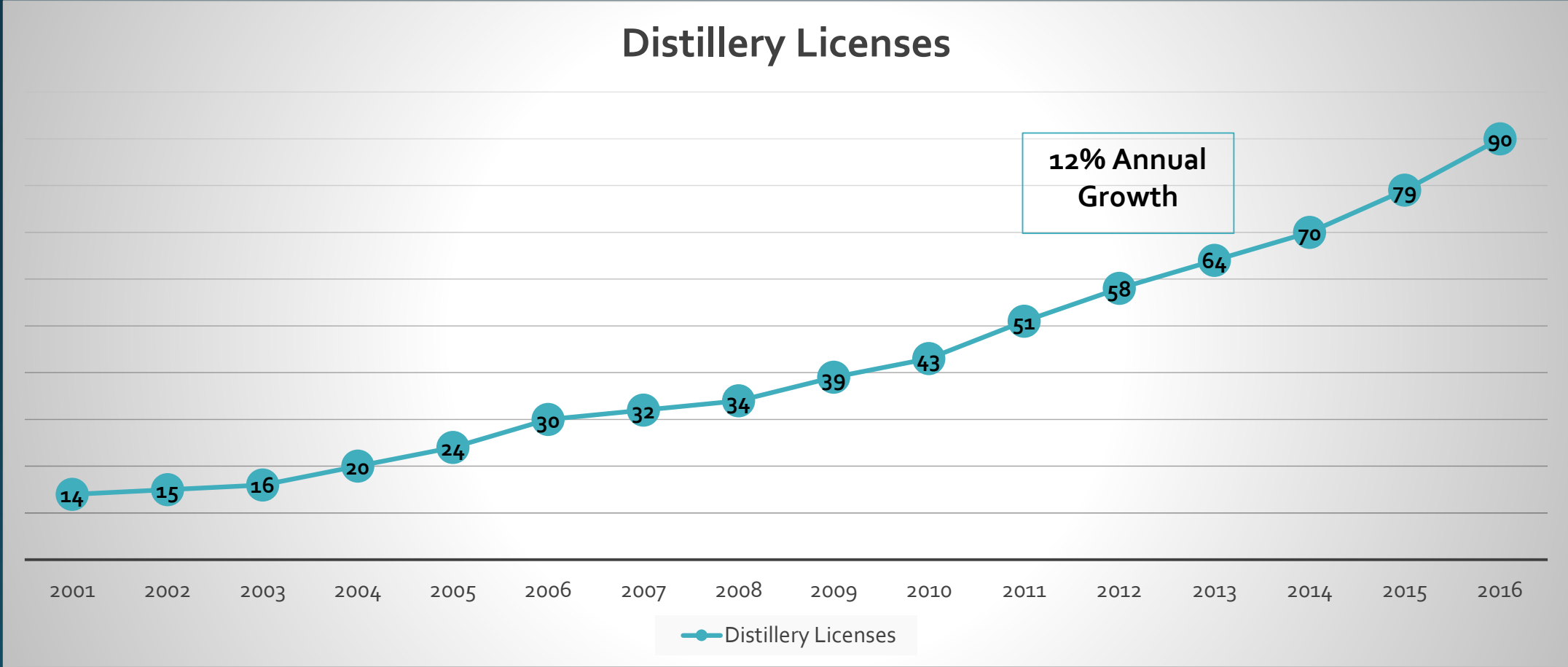
Oregon's Wine Industry

- 1,110 Oregon winery licenses
 - 702 Producing wineries in 2015
 - Includes cider producers and wine storage facilities
- In 2013, the wine industry directly employed more than 17,100 people
 - Many are rural Oregon jobs
- Related wages topped \$527 million
- In 2013 wine-related tourism contributed \$207.5 million in revenues to the Oregon economy
- Oregon wine industry worth \$3.35 billion to state economy

(The Economic Impact of the Wine and Wine Grape Industries on the Oregon Economy , January 2015, Full Glass Research, OLCC licensing data)

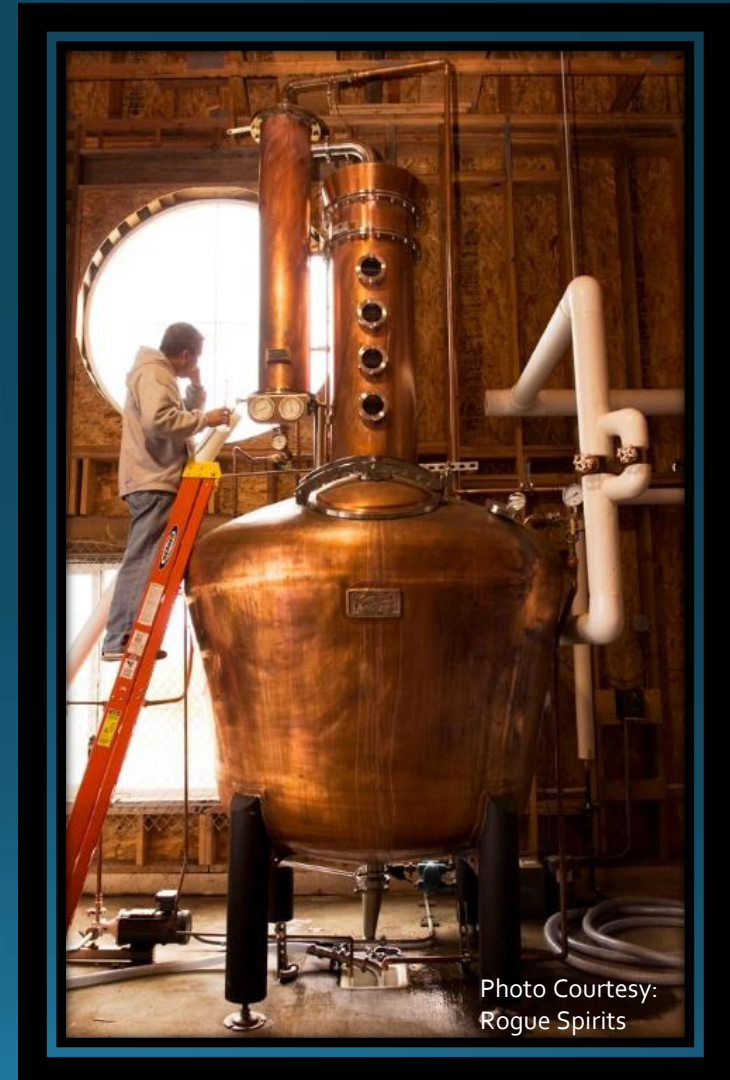


Oregon Distilleries



Oregon's Distilled Spirits Industry

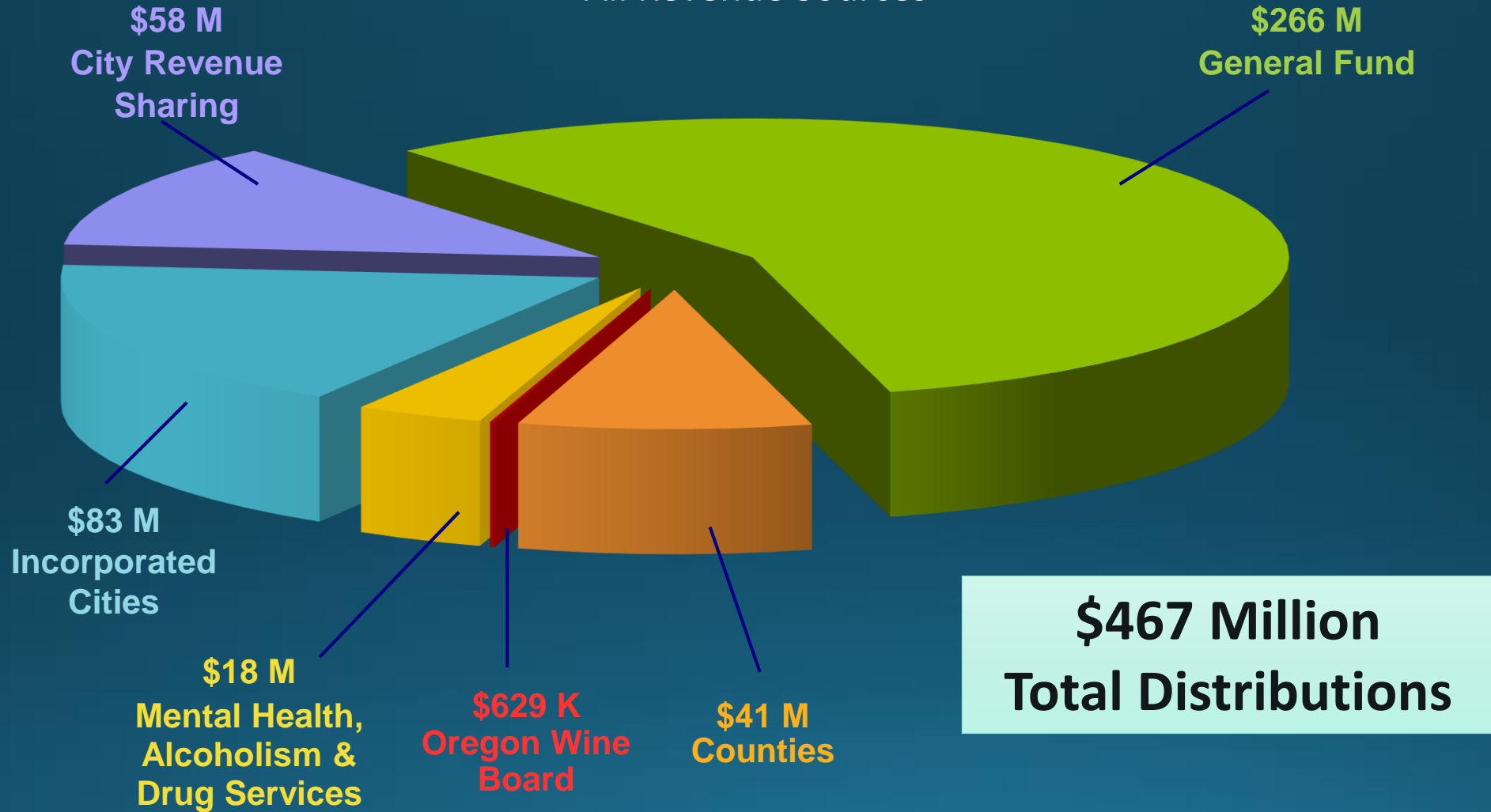
- 96 licensed Oregon distilleries
- 91 Distillery Retail Liquor outlet locations
- 500+ Oregon Distilled Spirits products available through OLCC
- Oregon products represent 12% of all liquor sales revenue



Projected Alcohol Revenue Distribution

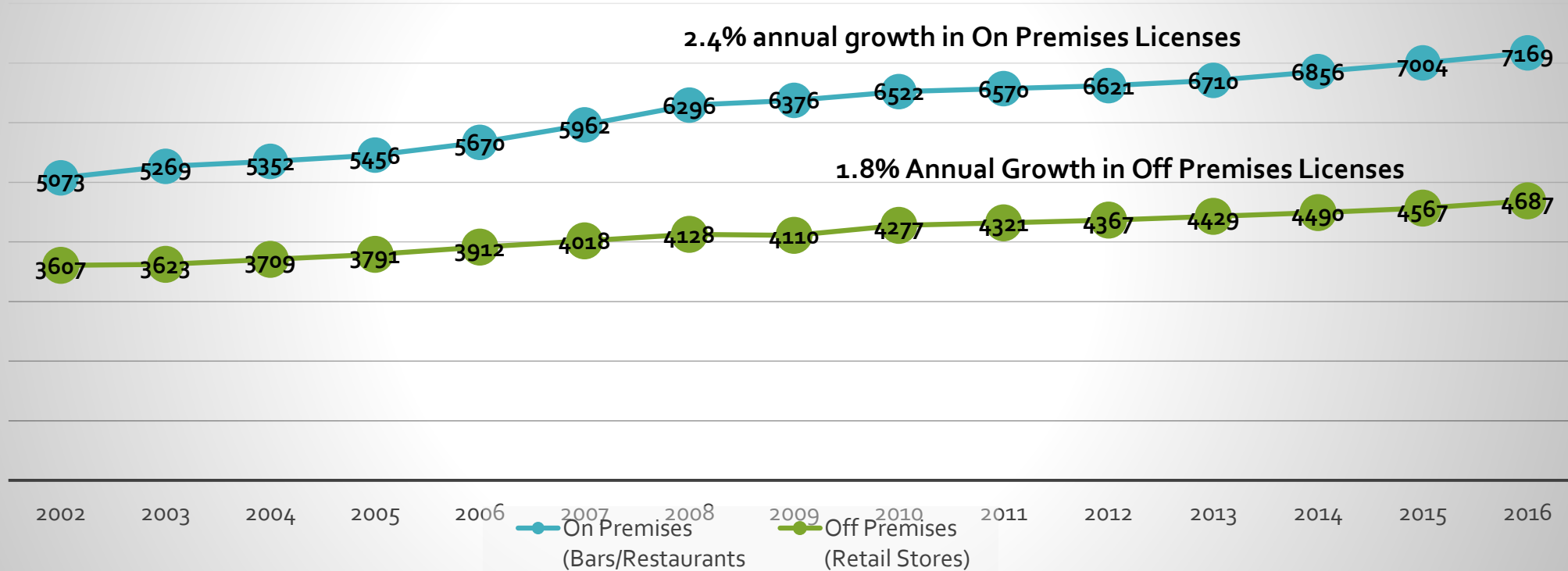
2015-2017 Biennium

All Revenue Sources



Retails Sales of Beer and Wine

Oregon Retail and Services Licenses for Alcohol



Liquor Licensing

13,192 Licensed business that sell and serve alcohol in Oregon, including:

7,404 Restaurants & Bars
On-premises licenses

4,783 Grocery/Convenience Stores
Off-premises licenses

2,997 Out-Of-State Certifications

218 Distributors/Wholesalers

8,900 Special Event Licenses per year

157,600 Alcohol Service Permit Holders

Totals as of January 27, 2017



Retail Liquor Locations

267 Retail Liquor Locations

- 122 Stand-alone stores (exclusive)
 - 142 Co-located with grocery or general goods (non-exclusive)
 - 3 Vacant
 - 91 Distillery Retail Outlets
- Open Recruitment expanding across the state



Totals as of January 30, 2017

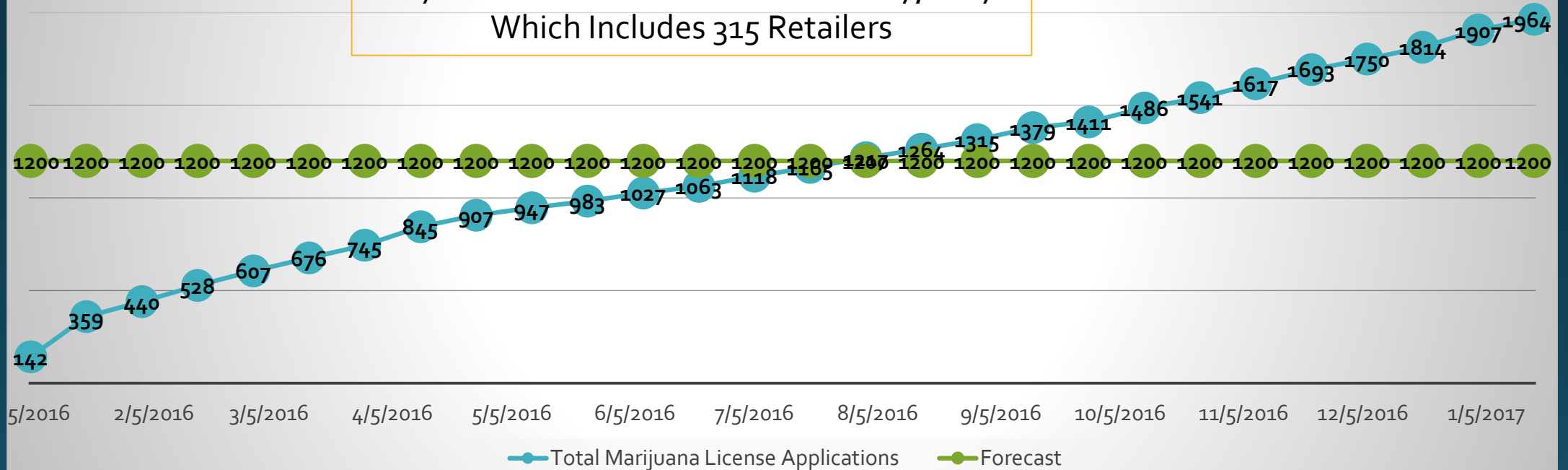
Phased Retail Expansion



Implementation of Recreational Marijuana

Total Marijuana License Applications by Date

867 Licensed Businesses as of Jan. 27, 2017
Which Includes 315 Retailers



Recreational Marijuana

867 Total Licenses Approved

19	Laboratory
66	Processor
415	Producer
315	Retailer
52	Wholesaler

9,548 Worker Permits Approved

Totals as of January 30, 2017



Auxiliary Businesses

Alcohol Industry Supports

- Bottle/Barrel manufacturing
- Glassware
- Leisure/Hospitality
- Tourism
- Entertainment
- Agriculture
- Marketing/Advertising
- Transportation

Marijuana Industry Supports

- Cameras/Security
- Construction
- Electrical
- Agricultural Supply
- Packaging
- Professional Services
- Legal Services
- Real Estate
- Marketing/Advertising
- Transportation

Working with Businesses

- Growlers
- Sunday & Holiday Liquor Sales
- Distillery Tasting Rooms
- Food Carts
- Alcohol at Movie Theaters
- Farmers' Markets



- OregonLiquorSearch.com
- Bottle Sales from Distilleries
- Robust Mixology Culture
- Mixed Drink Tastes at Liquor Stores
- Airport Distillery Sales

OLCC'S MISSION

Support businesses, public safety,
and community livability
through education and the enforcement
of liquor and marijuana laws.

