

STATE RELATIONS DEPARTMENT

86th Annual Membership & Board of Directors Meeting

June 9, 2020

COVID-19 Resources: State-By-State Alcohol Beverage Licensee Information



State-by-State Closures:

- To assist with winery sales and business operations, Wine Institute has compiled a listing of state-by-state closures and other restrictions on restaurants, retailers, bars and other wine sales outlets.

Restaurant, Bar & Tasting Room Reopenings:

- Wine Institute is tracking the new rules being implemented as states begin to reopen their restaurants, bars and tasting rooms. This state-by-state listing is being updated each day as new information becomes available.

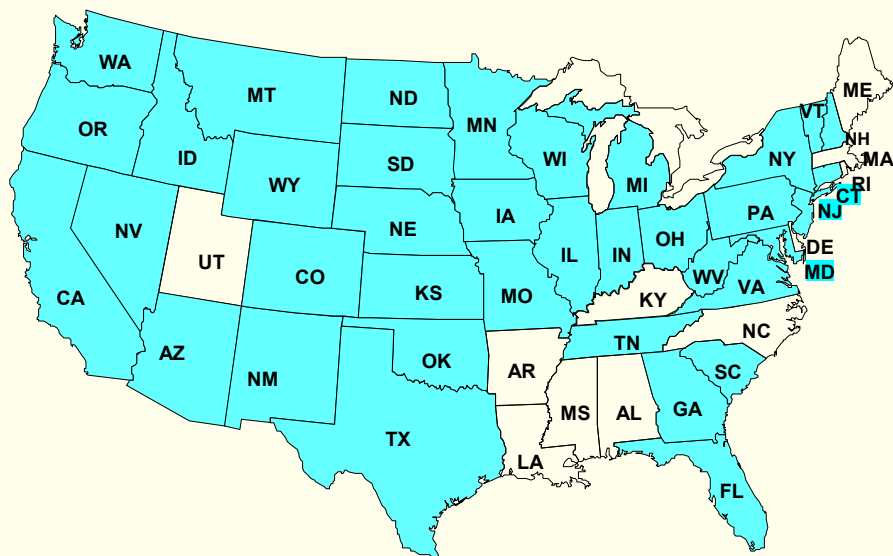
State-by-State Guidance for ABC Licensees:

- Wine Institute's State Relations Team has compiled a list of guidance documents from state ABC's in response to COVID-19.

Direct-to-Consumer Shipping



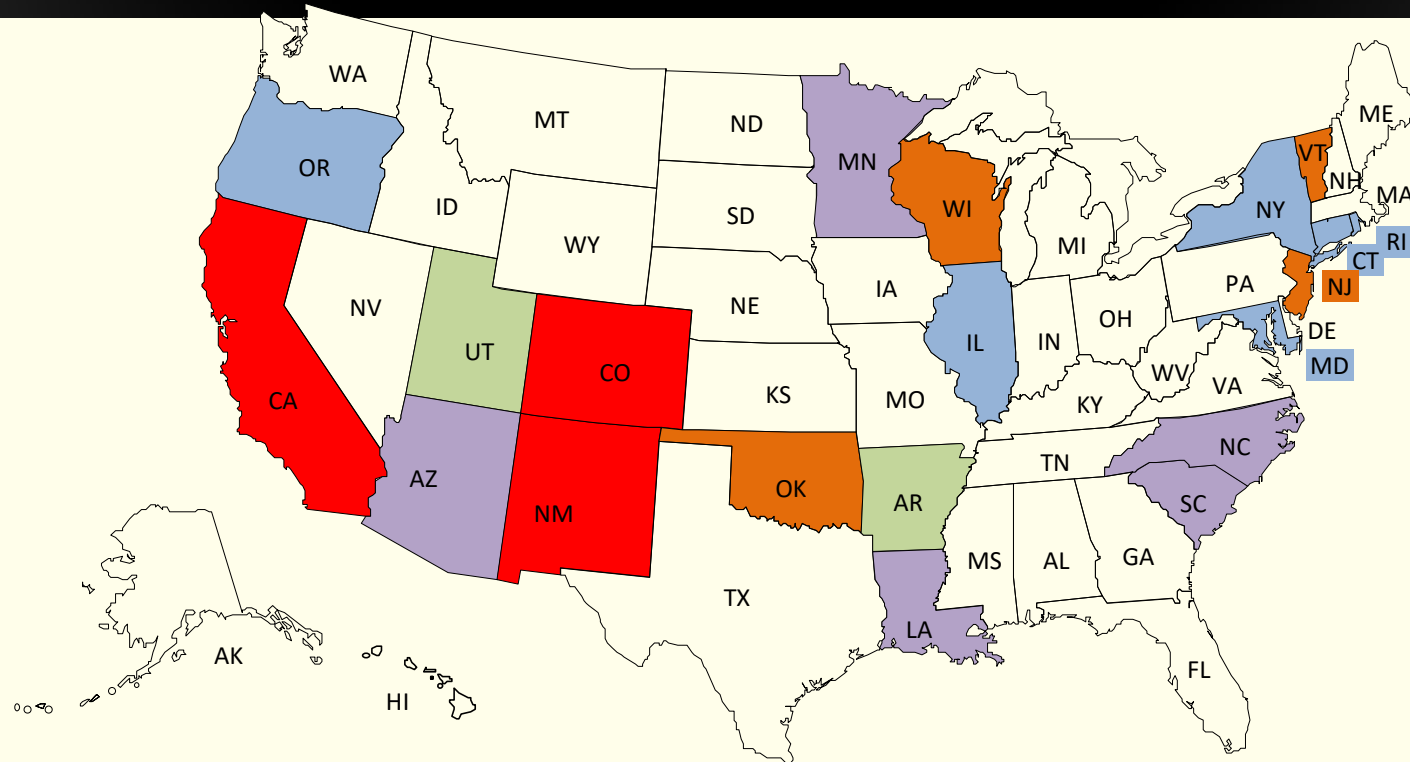
- Kentucky – becomes 46th DTC state on July 14, 2020
- Wine Institute worked with TTB, the CA ABC, and the states to approve small bottle formats for virtual tastings via the DTC channel.



38 states permit shipping of tastings samples subject to their current DTC regulations (as of June 2, 2020).

- Samples are reportable shipments applied to a customer's quantity limitations and are subject to taxes and all other requirements of DTC shipments in each state.

Anticipated State Budget Shortfalls May Lead to Excise Tax Threats



Revised Fiscal Year 2021 Revenue Declines (Source: NCSLA)

Down > 20%

Down 16-20%

Down 11-15%

Down 6-10%

Down < 5%