



WINE & SPIRITS
WHOLESALERS
OF AMERICA

WSWA
WOMEN'S
LEADERSHIP
COUNCIL

EDUCATE. ELEVATE. EMPOWER



WSWA Strategic Priorities

Philana Bouvier, WLC Chair, Young's Market Company

Jessica Cyr, WLC Vice Chair, Martignetti Companies

Michelle Korsmo, President and CEO, WSWA

September 11, 2019

What Does the Future Hold?

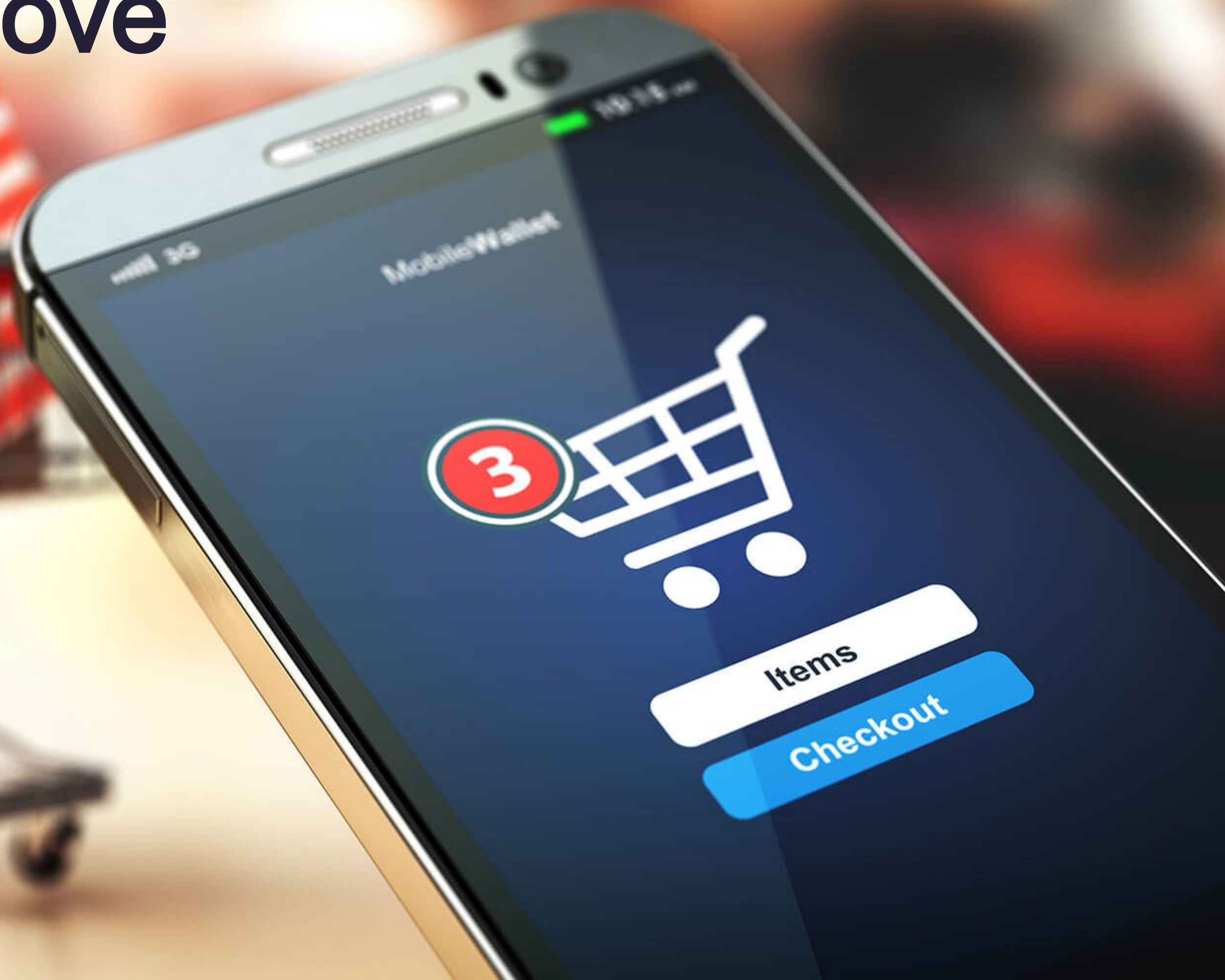




**The Future is Already Here....It's
Just Not Evenly Distributed**

—William Gibson

Consumers Love E-commerce





Day 2 is stasis. Followed by irrelevance.
Followed by excruciating, painful
decline. Followed by death. *And that is
why it is always Day 1.*

Strategy Innovation



Vision
Creativity

Support

**Businesses That Know and
Use Data Well
will be More Competitive**

Solution

SIPSOURCE IS DATA AND INSIGHTS

SipSource, the only source for aggregated **distributor depletion data**

Built from the individual store and item-level

Featuring rolling 12-month trends and share — **updated quarterly**

Both a **report** and interactive **online data tool**

Product Segmentation*

View trends by category, class, size, domestic/import, package size

Premise and Channels*

Drill down to on- and off-premise channels including: grocery, dining wholesale/club, bar/nightclub, etc.

Account Types*

Gather insights into national, regional, independent retail share and trends

Top Brand Lists

Track top brands by category, class, aggregated national accounts

Industry Survey

Comprehensive Industry Leaders Sentiment Survey

*Available in iDIG

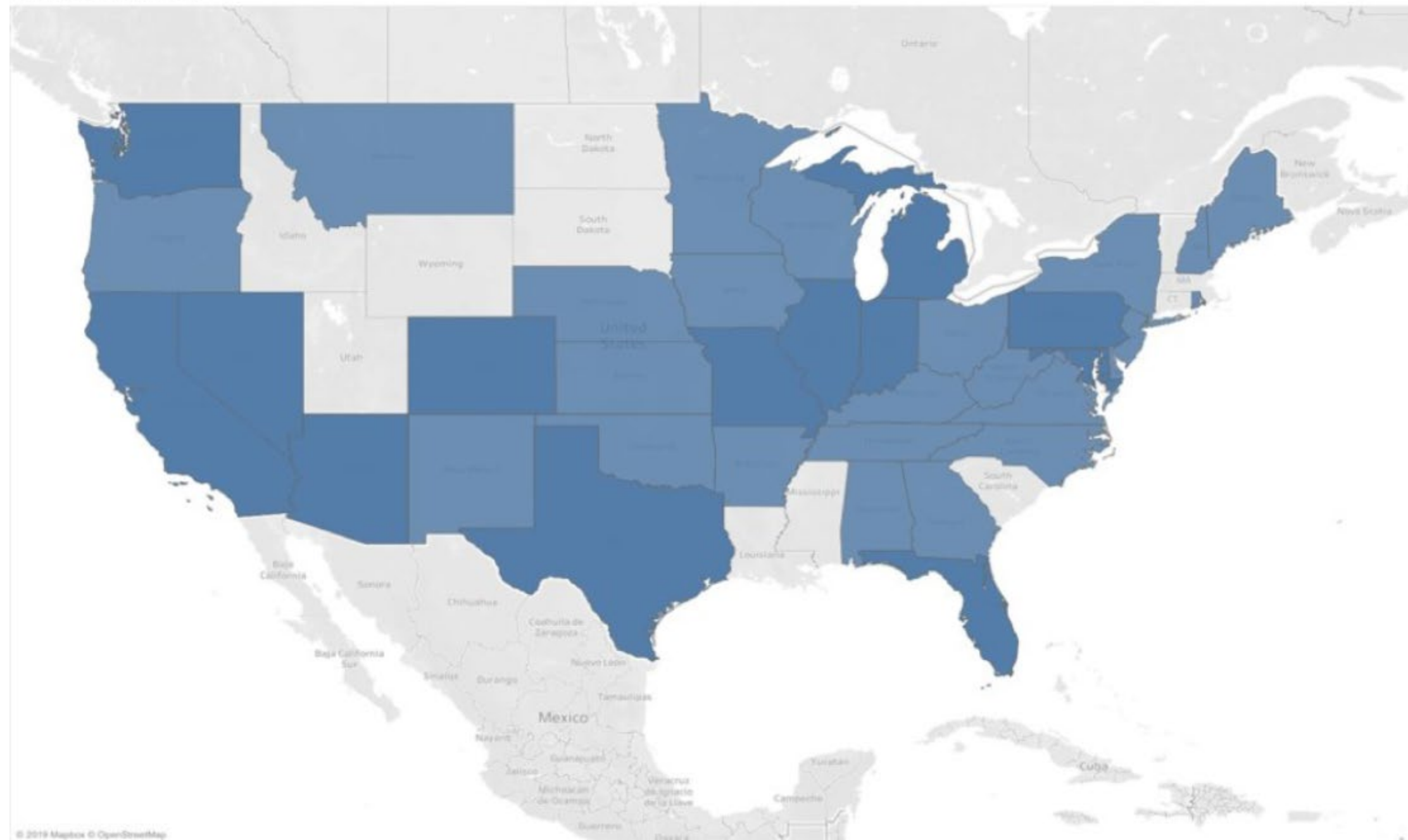
More to Come...

Certainties: Death, Taxes, and Political Maneuvering



HOUSE RESOLUTION 285 – RECOGNIZING 85 YEARS OF SUCCESSFUL STATE-BASED ALCOHOL REGULATION

H.Res.285 Cosponsors



PROMOTING AND PROTECTING AMERICAN, FAMILY - OWNED BUSINESSES



Tax Issues:

- 20% Deduction
- Estate Tax
- Last In, First Out (LIFO)



Funding
the
Beverage
Alcohol
Industry's
Federal
Regulator



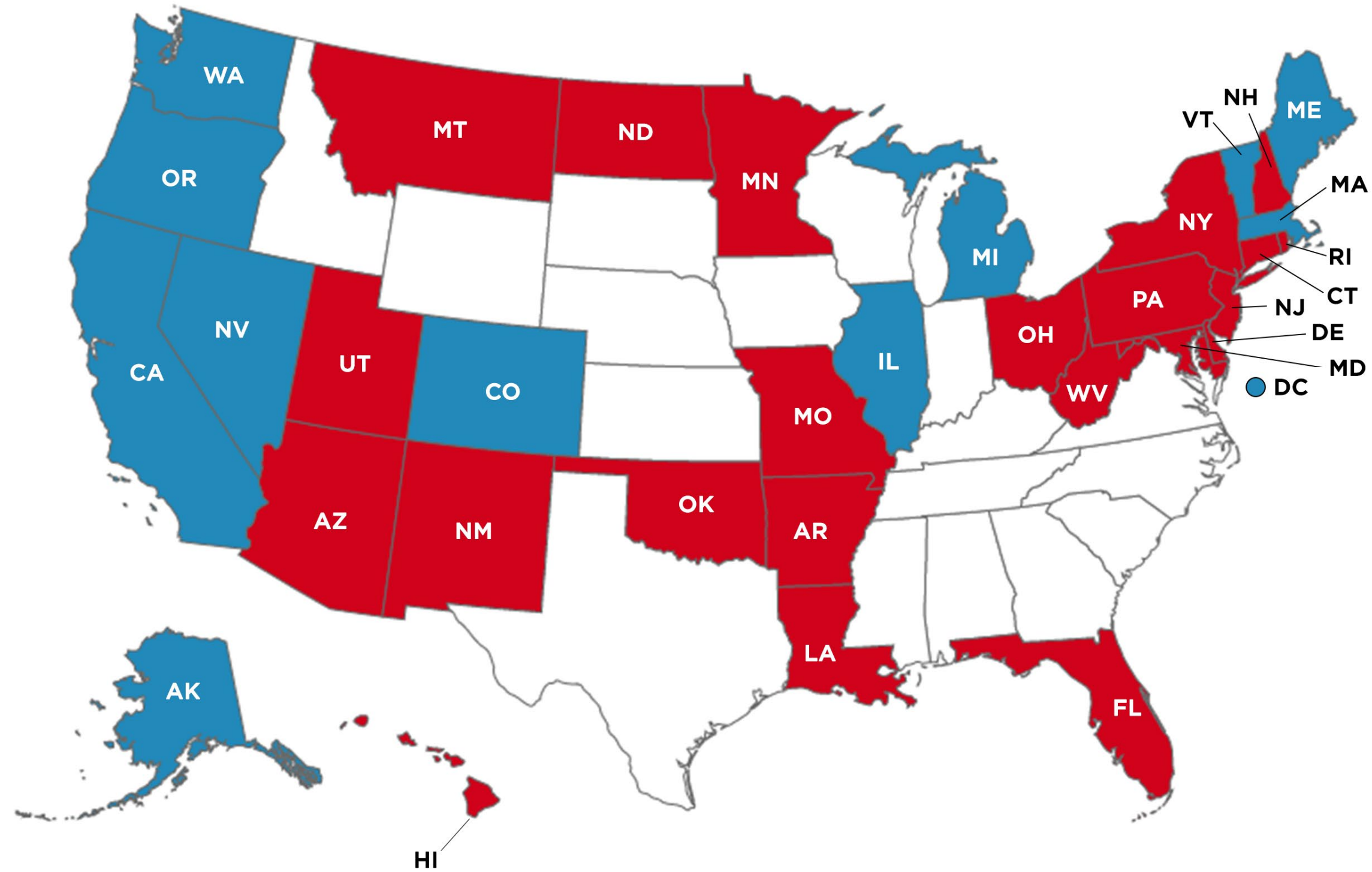
Helping
Elected
Officials
Understand:
Schedule a
Warehouse
Tour





Trend not a Fad

**State & Feds Must
Address Risks**

States Where Cannabis is Legal



-  Legalized recreational and medical cannabis
-  Legalized medical cannabis

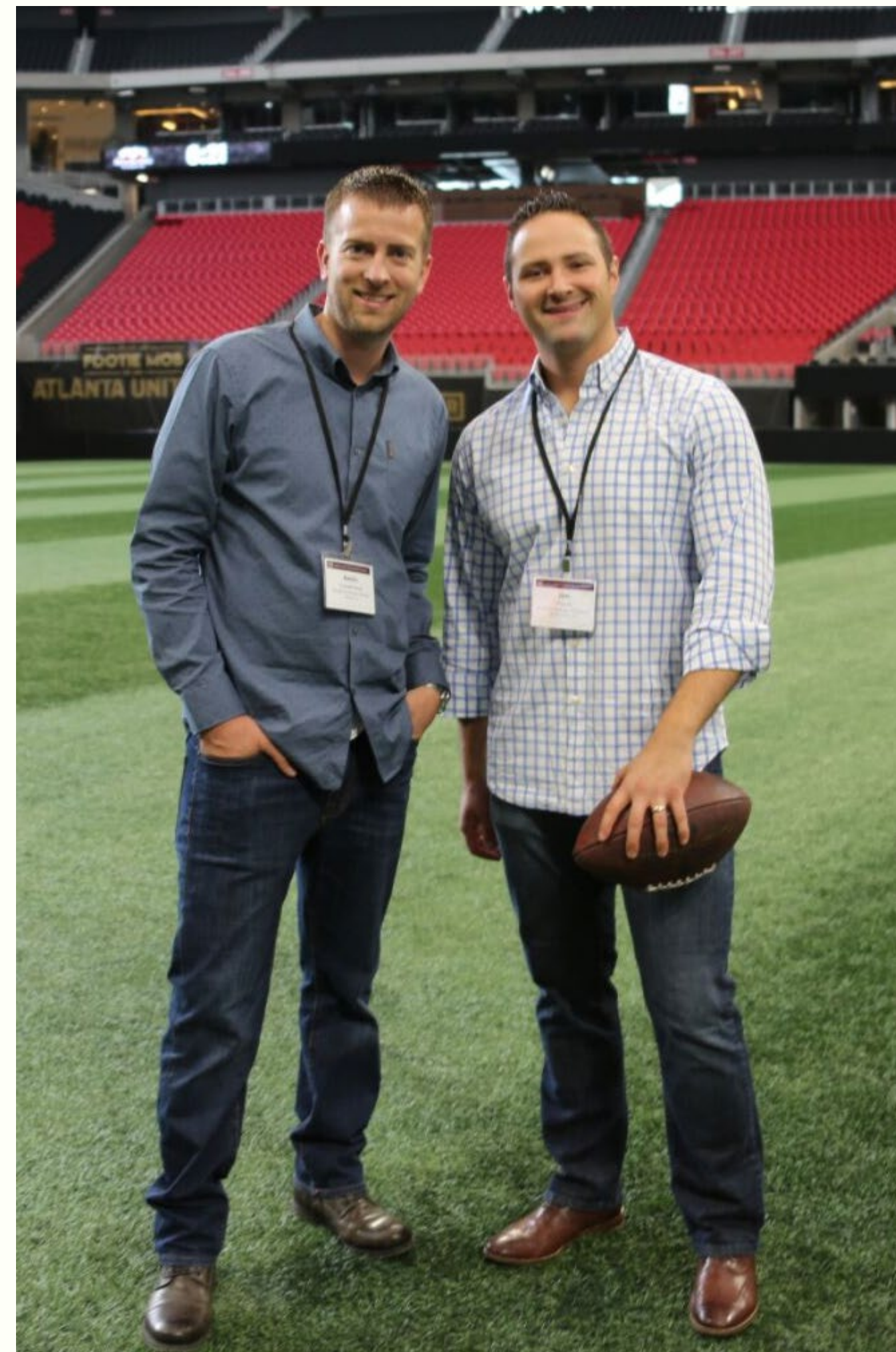


**Attracting Talent is a
Competition**



TALENT DEVELOPMENT AND DIVERSITY

- Council for Leadership Development (CLD)
- Women's Leadership Council (WLC)
- Women's Food Service Forum (WFSF) Survey
- Columbia University Women in Leadership (WIL) Program



A large industrial warehouse with high blue metal shelving units. The shelving units are arranged in long aisles, and a red automated guided vehicle (AGV) is visible in the center aisle. The text is overlaid in the center of the image.

**It's Up to Us to Explain
the Value of the
Three-Tier System**

“ It's not hard to make decisions
when you know what your
VALUES ARE.”

Roy Disney

(1893–1971)

Walt Disney's Elder Brother
and the Financier of his Efforts



**The Action will be
in States and in Courts**

SCOTUS DECISION IN TN WINE & SPIRITS RETAILERS ASSN. V. THOMAS

DECISION SUMMARY

- “Basic” three-tier system is still valid.
- Dormant Commerce Clause principal applies to all tiers.
- States may not pass “protectionist” laws with no valid policy justification.
- Out-of-state discrimination may be allowed upon “concrete evidence” of public health and safety or other legitimate state interest.

OPPORTUNITY TO DEFINE

- What is the “basic” three-tier system that is “unquestionably legitimate”?
- What are the boundaries of public health and safety state interests?
- What are “other legitimate state interests”?
- How much “concrete evidence” is enough to justify a challenged law?
- How much deference should courts give the states?

SCOTUS DECISION IN TN WINE & SPIRITS RETAILERS ASSN. V. THOMAS

WSWA LEGAL STRATEGY TASK FORCE

- Litigation
 - Out-of-state wine retailers fighting to ship wine into states that allow their in-state wine retailers to ship
 - Bevy of additional legal challenges
- Assess vulnerable laws



WSWA STRATEGIC THREATS COMMITTEE

- Surveys on various issues of interest
- Carrier reporting enforcement with AGs
- Third-party marketers and delivery
- Limiting winery-direct-to-consumer sales to of-your-own production

STAY CONNECTED

CEO WEEKLY UPDATE

Get weekly updates from me with my "Weekly Buzz" Newsletter.

To receive the "Weekly Buzz," create a member profile on WSWA.org (top right corner of the homepage).



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