

OREGON LIQUOR AND CANNABIS COMMISSION LICENSING PROGRAM

Presented by:

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OLCC LICENSING PROGRAM

MISSION & VALUES

Stewards of Oregon's Alcohol & Cannabis Marketplace

License & Support Safe Oregon Businesses

- ✓ Support Oregon's Alcohol & Cannabis
- ✓ Provide excellent customer service
- ✓ Protect public health & safety



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REGULATE & SUPPORT



Alcohol (ORS 471)

- Businesses:
 - Manufacturers, Distributors, Importers, Retailers & Special Events
- Employees: Service Permittees



Marijuana (ORS 475C)

- Businesses:
 - Growers, Processors, Distributors, Retailers & Special Events
- Employees: Worker Permittees

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HOW WE LICENSE!

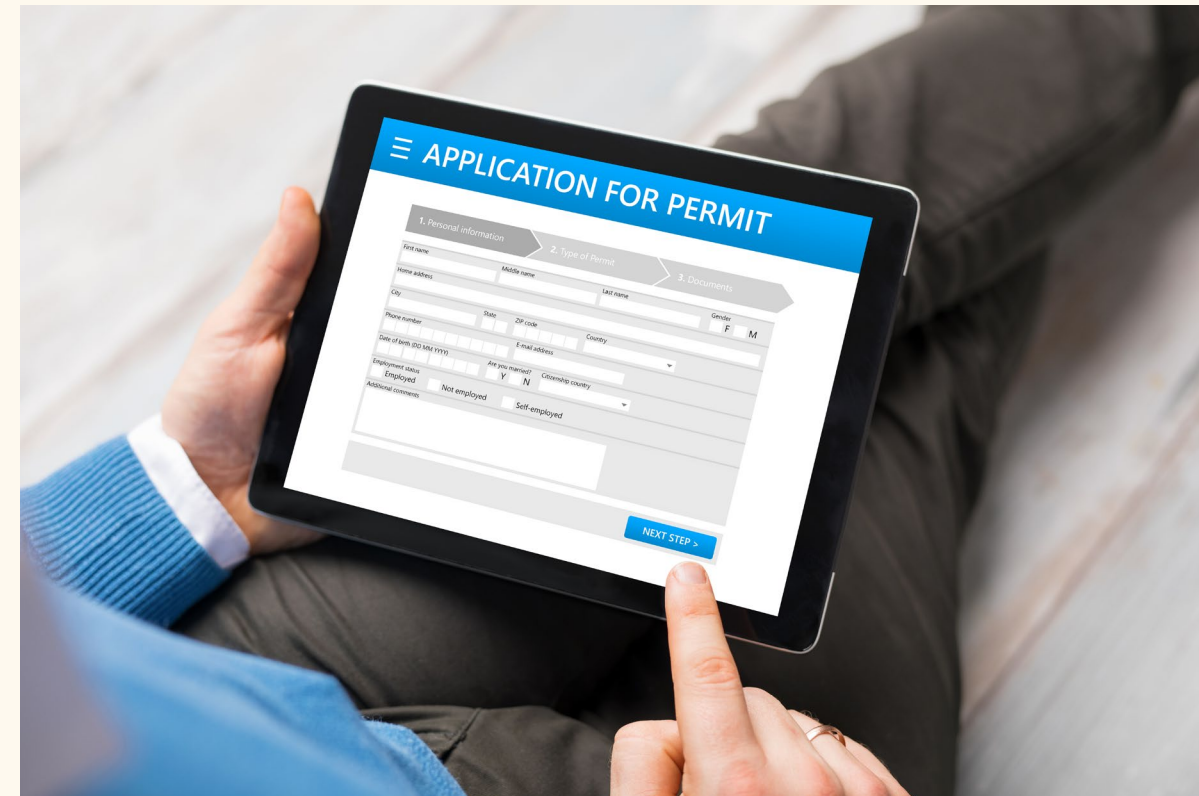
- **License investigations:**
 - **Proposed Business**
 - Local Government approval
 - Meets license type requirements
 - **Premises layout/security**
 - Access to the premises
 - Required security features
 - Marijuana vs Alcohol
 - **Business structure**
 - Who we are licensing?



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HOW WE PERMIT!

- **Alcohol Service Permits**
 - On-premises consumption
 - Bar tenders, Waiters and general managers
 - Retail (Off-premises)
 - Brochure: Service permit not required
- **Marijuana Worker Permits**
 - All persons employed in the recreational marketplace
 - Must be 21+
- **Largest OLCC Stakeholder**
 - 160k+ active permits



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OLCC MODERNIZATION

- **Digital Modernization**
 - One system for customer information
- **Holistic Licensee & Permittee profile**
 - All licenses, permits, investigations and violations
 - Has a fee or fine been paid?
 - Compliance History
 - Aligned file and processes
 - Information shared via CAMP
 - CAMP Centralizes public safety complaints
 - Public can submit directly to OLCC Compliance



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OREGON ALCOHOL INDUSTRY

Alcohol Licenses	#
Full-On Commercial	5,428
Limited	2,515
Off-Premises	3,812
Importer (Beer & Wine)	1,533
Importer (Distilled Spirits)	752
Warehouse	52
Wholesale Malt Beverage & Wine	151
Brewery	61
Brewery Public House	305
Winery	1,227
Grower Sales Privilege	30
Distillery	209
Total Annual Licenses	16,075
Special Events	9,843
<u>Service Permits</u>	<u>166,564</u>

2025 – 62,800+ licensing actions

- Ownership Changes
- Privilege Changes
- Business Structure Changes
- Premise Amendments
- License Renewals
- Service Permits (new and renewal)



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OREGON'S MARIJUANA MARKET

Marijuana Licenses	#
Retailer	764
Wholesaler	239
Processor	270
Laboratory	9
Micro Tier I	70
Mirco Tier II	57
Tier I	218
Tier II	1,011
Research Certificate	1
Total Annual Licenses	2,656
Worker Permits	51,800

2025 - 11,000+ licensing actions

- Ownership changes
- Location changes
- Business structure changes
- Premise amendments
- License renewals
- Worker Permits (new and renewal)



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ALCOHOL MARKETPLACE

- **Licensing is Dynamic**
 - Businesses change/evolve
- **Affordability of Oregon License**
 - Full On-Premises Commercial: \$400
 - 4th lowest cost barrier in the US
- **Where is the market going in 2026?**
 - Consolidation – but steady
- **Partnering with Licensees**
 - Tierra de Lobos
 - Trailblazers



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MARIJUANA MARKETPLACE

- **10 years of Marijuana Licensing!**
 - **2016** - “Bring everyone into the tent”
 - Open Licensing: Medical & Legacy
 - Overwhelming and Saturation
 - **2026 – Market Maturity**
 - License Limits (SB 218) & Secondary Sales
 - Wholesale license opening
- **Affordability & Challenges of Oregon Market**
 - Among the lowest license costs in the nation
 - Market Challenge: Price Point
- **Marijuana Licensing Success**
 - Backlog down





QUESTIONS?