

ONTARIO'S VQA WINE & GRAPE INDUSTRY

2030 VISION



VQA WINES OF
ONTARIO



ONTARIO
CRAFT
WINERIES

The Opportunity

Building and nurturing a vibrant Ontario VQA wine industry

By 2030 Ontario's wine consumers will confidently choose our VQA wines over imported alternatives.

Ontario's opportunity is to leverage our history, to embrace our future, our climate and the preference local and global consumers have for the types of wines we make here in Ontario, to increase sales and to gain market share over imported wines.

To accomplish this, we will invest in and nurture our vibrant Ontario wine culture. Two foundational factors will drive our evolution over the coming eight years:

- First, we will be successful when the consumer is our singular focus, exceeding their wants and their needs.
- Second, we will re-create a unified industry voice to advocate for improved consumer and producer outcomes - with governments, with regulators and with our sales channel partners.

These two VQA industry initiatives are the foundation that will support our success in having a more engaged consumer, delivering increased sales and a more financially sustainable and successful VQA industry.



The Foundation of our Success | Ontario's VQA Appellations & Sub-Appellations

Producing world-class Ontario VQA wines all starts with planting and growing grapes.

Being terroir focused on Ontario's land is the foundation of our 2030 success.



Emerging Regions

Norfolk and Haldimand Counties
Central Ontario and Georgian Bay
Huron Shores
Eastern Ontario



Lake Erie North Shore

South Islands



Niagara Peninsula

Beamsville Bench
Creek Shores
Four Mile Creek
Lincoln Lakeshore
Niagara
Lakeshore

Niagara River
Short Hills Bench
St. David's Bench
Twenty Mile
Bench
Vinemount Ridge



Prince Edward County

CONNECTED. SUSTAINABLE. PROSPEROUS. CELEBRATED.

2030 Success



- We are recognized for our vibrant wine culture that wine consumers want to be a part of.
- Our VQA wines are sought out and confidently celebrated by consumers.
- Sales of our VQA wines have increased across all channels.
- Our growth and economic contribution to Ontario's economy has been unleashed.
- We are recognized as important stewards of Ontario's prime agricultural lands.
- Governments have implemented structural changes reducing regulatory and tax burdens creating growth, jobs and investment in the province.
- Our industry is an attractive place to invest and attracts new capital into the sector.
- We are recognized for our leadership in sustainability.
- Industry stakeholders are unified, working together for the success of the industry.

Growth in Ontario's VQA Wine Industry | By 2030

Creating jobs, generating rural economic growth, attracting tourists and protecting Ontario's agricultural heritage.

Jobs	VQA Market Share	Total VQA Sales
Over the past 8 years, Ontario has seen a 50% increase in jobs in the wine industry. Over 22,000 jobs were supported in 2019. By 2030, the industry will employ, directly and indirectly, over 40,000 Ontario workers.	Ontario's VQA Wine Industry holds a 7.7% market share in the LCBO and a 13% market share across all channels... with the right support, by 2030 VQA's share of the Ontario wine market will grow by over 20%.	Ontario's VQA Wine Industry sells \$385 million of wine in the province. Increased market share will drive VQA sales to over half a billion dollars by 2030.
Acres Under Vine	Capital Investment	Tourist Visitors
As market share and sales increase, so will Ontario's need to increase grape production. From 18,000 acres today, by 2030 Ontario's grape and wine industry will need to plant 4 million new vines in over 20,000 acres.	Increased market share, acres under vine and critically, changes to the sector's tax and regulatory regime, will attract new external capital and increase capital expenditure in the industry to an estimated \$700 million by 2030 - a 75% increase over current estimates.	Ontario's VQA Wine Industry will attract 3,000,000 tourist visitors annually by 2030 , up from 2,600,000 today.

Realizing our Vision | 3 Strategic Pillars



Our Brand & Demand Connected to our consumers

- Build and promote Ontario's vibrant and inclusive VQA wine culture and brand
- Generate consumer demand across each channel to increase sales of our VQA wines
- Work with industry stakeholders to ensure Wine Country Ontario delivers a consistent, top-tier tourism experience
- Create, enhance and implement Ontario VQA wine education to showcase Ontario's contribution to the global wine market



Our Winemaking Connected to our land

- Ensure our industry vineyard decisions support the growth strategy for Ontario's VQA wines
- Invest in industry initiatives as well as viticultural and winemaking research to enable innovation, create operational efficiencies, implement sustainable practices, and address the challenges and opportunities related to climate change
- Increase our industry's contribution to the province of Ontario by increasing our economic contribution, providing high-quality jobs and protecting agricultural lands



Our Industry Relationships Connected to each other

- Create a unified voice to support our advocacy efforts for a regulatory and tax framework that supports success
- Collaborate with our channel partners, bringing one industry voice, to drive growth in the sales of our wines
- Increase winery participation and engagement in our industry initiatives

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