

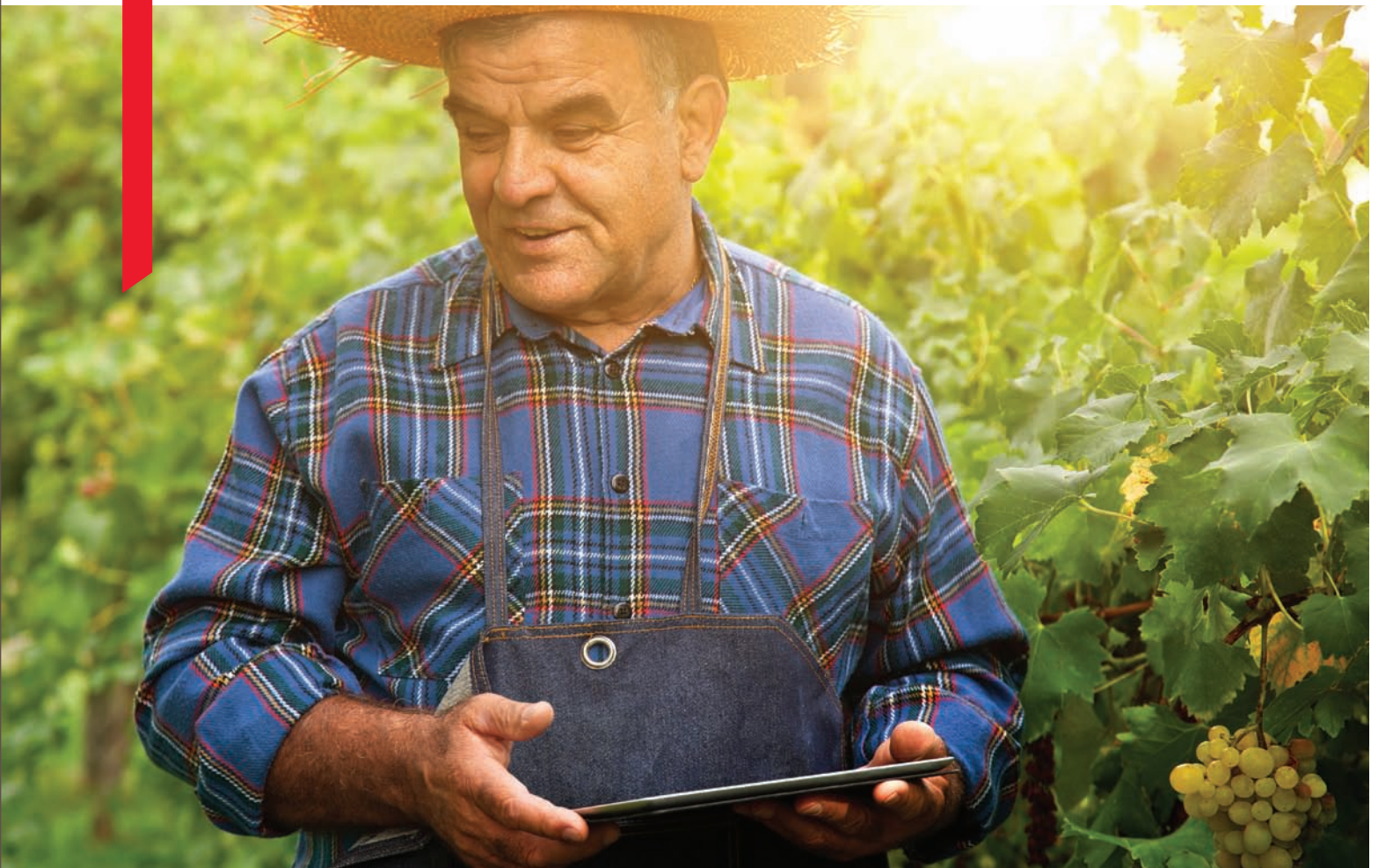
THE BRITISH COLUMBIA WINE GRAPE

CROP REPORT 2012



Prepared by: BDO Canada LLP with thanks to the British Columbia Wine Institute, BC Grapegrowers' Association, the BC Wine Authority and the BC Wine Grape Council for their assistance.





BDO IS PROUD TO WORK WITH THE BRITISH COLUMBIA WINE INSTITUTE, THE BC WINE GRAPE COUNCIL, THE BC WINE AUTHORITY AND THE BRITISH COLUMBIA GRAPEGROWERS ASSOCIATION TO PRODUCE THE ANNUAL WINE GRAPE CROP SURVEY.

We appreciate the hard work and determination of BC's grape growers, winemakers, and proprietors, and hope that the information in this report will be useful to your operations.

BDO is committed to working with winery businesses like yours in the Okanagan and across British Columbia.

People who know, know BDO.SM

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NUMBER OF WINERIES THAT RESPONDED, ACCORDING TO SIZE

Year	Large Winery	Medium Winery	Small Winery	Total
2012	3	24	83	110
2011	3	21	95	119
2010	3	17	106	126
2009	3	18	101	122
2008	3	18	107	128

RESPONSE RATE FOR THE WINE GRAPE CROP SURVEYS 2008 to 2012

Year	No. of Wineries Responded	Total No. of Grape Wineries in BC	% of Total
2012	110	206	53.40%
2011	119	193	61.66%
2010	126	193	65.28%
2009	122	166	73.49%
2008	128	152	84.21%

PERCENTAGE OF VINIFERA, HYBRID AND LABRUSCA PRODUCTION

	Vinifera/Hybrid/Labrusca	% of Total Production	
		2012	2011
White	Vinifera	99.50%	98.92%
	Vinifera/Hybrid	0.50%	1.08%
	Unspecified	0.00%	0.00%
	Labrusca	0.00%	0.00%
Red	Vinifera	97.27%	97.93%
	Vinifera/Hybrid	2.73%	2.07%
	Unspecified	0.00%	0.00%
	Labrusca	0.00%	0.00%
Total	Vinifera	98.35%	98.42%
	Vinifera/Hybrid	1.65%	1.58%
	Unspecified	0.00%	0.00%
	Labrusca	0.00%	0.00%

2012 BC WINE GRAPE TONNAGE BY VARIETAL - TOP 25

Rank	Varietal	Total Tons	Total Combined Value
1	Merlot	5636.91	\$13,404,926.46
2	Chardonnay	2979.63	\$5,932,942.72
3	Pinot Gris	2787.56	\$5,751,982.16
4	Pinot Noir	1980.85	\$4,767,313.77
5	Cabernet Sauvignon	1964.37	\$5,022,754.11
6	Gewürztraminer	1512.59	\$2,993,985.88
7	Sauvignon Blanc	1434.53	\$2,588,682.45
8	Cabernet Franc	1370.85	\$3,336,744.67
9	Syrah/Shiraz	1327.74	\$3,392,522.33
10	Riesling	1309.39	\$2,589,992.35
11	Pinot Blanc	1187.60	\$1,911,929.77
12	Gamay Noir	461.58	\$882,497.48
13	Viognier	435.78	\$995,217.95
14	Malbec	203.88	\$568,980.95
15	Ehrenfelser	203.62	\$371,749.25
16	Semillon	178.56	\$325,379.89
17	Petit Verdot	162.79	\$396,539.74
18	Maréchal Foch	153.71	\$261,691.97
19	Auxerrois	152.05	\$274,773.45
20	Bacchus	151.47	\$305,036.92
21	Cabernet Libre	130.43	\$265,791.76
22	Chenin Blanc	109.80	\$173,570.02
23	Chasselas	-	-
24	Muscat	87.36	\$199,998.93
25	Kerner	73.29	\$140,504.52
26-82	Remaining Varieties Reported	1260.87	\$2,519,823.88
	Total Red & White	27257.23	\$59,375,333.38

(-) indicates that data has been suppressed for reasons of confidentiality



Note: Participation in this survey is voluntary and unaudited, therefore the tonnages and prices reported may differ from actual industry results and are meant as a guide only.

2012 WHITE WINE GRAPE VARIETIES BY ORDER OF IMPORTANCE (VALUE)

Varietal	Tonnage	Est. Total Value	Percent of White
Chardonnay	2979.63	\$5,932,942.72	22.87%
Pinot Gris	2787.56	\$5,751,982.16	22.17%
Gewürztraminer	1512.59	\$2,993,985.88	11.54%
Riesling	1309.39	\$2,589,992.35	9.98%
Sauvignon Blanc	1434.53	\$2,588,682.45	9.98%
Pinot Blanc	1187.60	\$1,911,929.77	7.37%
Viognier	435.78	\$995,217.95	3.84%
Ehrenfelser	203.62	\$371,749.25	1.43%
Semillon	178.56	\$325,379.89	1.25%
Bacchus	151.47	\$305,036.92	1.18%
Auxerrois	152.05	\$274,773.45	1.06%
Chasselas	-		
Muscat	87.36	\$199,998.93	0.77%
Chenin Blanc	109.80	\$173,570.02	0.67%
Kerner	73.29	\$140,504.52	0.54%
Optima	46.82	\$102,997.40	0.40%
Roussanne	33.46	\$100,190.46	0.39%
Icewine Pinot Gris	36.92	\$99,055.37	0.38%
Sovereign Opal	-		
Icewine Viognier	37.77	\$88,649.93	0.34%
Vidal	66.58	\$82,048.17	0.32%
Siegerrebe	37.39	\$71,026.32	0.27%
Müller Thurgau	46.28	\$70,103.19	0.27%
Icewine Riesling	35.03	\$67,494.76	0.26%
Icewine Chardonnay	37.50	\$63,104.22	0.24%
Madeleine Angevine	34.16	\$49,823.97	0.19%
Schönburger	26.49	\$49,791.54	0.19%
Madeleine Sylvaner	25.85	\$46,530.00	0.18%
Ortega	22.03	\$40,919.65	0.16%
Icewine Sauvignon Blanc	18.02	\$35,300.00	0.14%
Oraniensteiner	8.80	\$26,400.00	0.10%
Trebbiano	-		
Misc. White Vinifera	5.00	\$13,592.00	0.05%
Reichensteiner	-		
Albarino	-		
Scheurebe	-		
Icewine Muscat	-		
Icewine Ehrenfelser	-		
Pearl of C'saba	3.02	\$4,077.00	0.02%
Icewine Semillon	-		
Verdelet	-		
Icewine Gewürztraminer	-		
Marsanne	-		
Traminer	-		
Icewine Pinot Blanc	-		
Sylvaner (Silvaner)	0.08	\$106.58	0.00%
Suppressed Data Total	201.03	\$378,735.46	1.46%
Total	13325.48	\$25,945,692	100.00%

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Note: Participation in this survey is voluntary and unaudited, therefore the tonnages and prices reported may differ from actual industry results and are meant as a guide only.

2012 RED WINE GRAPE VARIETIES BY ORDER OF IMPORTANCE (VALUE)

Varietal	Tonnage	Est. Total Value	Percent of Red
Merlot	5636.91	\$13,404,926.46	40.10%
Cabernet Sauvignon	1964.37	\$5,022,754.11	15.02%
Pinot Noir	1980.85	\$4,767,313.77	14.26%
Syrah/Shiraz	1327.74	\$3,392,522.33	10.15%
Cabernet Franc	1370.85	\$3,336,744.67	9.98%
Gamay Noir	461.58	\$882,497.48	2.64%
Malbec	203.88	\$568,980.95	1.70%
Petit Verdot	162.79	\$396,539.74	1.19%
Cabernet Libre	130.43	\$265,791.76	0.80%
Maréchal Foch	153.71	\$261,691.97	0.78%
Zweigelt	57.11	\$134,104.64	0.40%
Pinotage	53.00	\$129,129.24	0.39%
Pinot Meunier	50.34	\$98,499.99	0.29%
Tempranillo	31.19	\$85,905.68	0.26%
Zinfandel	41.11	\$85,857.38	0.26%
Icewine Cabernet Franc	33.37	\$72,871.04	0.22%
Baco Noir	47.92	\$65,276.87	0.20%
Icewine Pinot Noir	22.00	\$61,600.00	0.18%
Chancellor	-		
Dunkelfelder	22.28	\$50,665.06	0.15%
Icewine Merlot	20.33	\$47,999.94	0.14%
Sangiovese	19.36	\$38,502.48	0.12%
Rotberger	15.64	\$31,270.20	0.09%
Lemberger	15.97	\$28,276.98	0.08%
Barbera	-		
Icewine Zweigelt	-		
Mourvedre	9.49	\$26,378.80	0.08%
Carmenere	-		
Blaufrankisch	7.50	\$10,297.50	0.03%
Leon Millot	3.58	\$7,168.00	0.02%
Alicante Bouschet	-		
Misc. Red Vinifera	3.90	\$5,591.67	0.02%
Petit Syrah	-		
Dornfelder	-		
Grenache	-		
Suppressed Data Total	84.54	\$150,482.39	0.45%
Total	13931.75	\$33,429,641	100.00%

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2012 WHITE WINE GRAPE VARIETIES, ESTIMATED PRICE RANGE

Varietal	Est. Total Value	Min. Price/Ton	Max. Price/Ton	Average Price/Ton
Chardonnay	\$5,932,942.72	\$1,400.00	\$3,500.00	\$1,991.17
Pinot Gris	\$5,751,982.16	\$1,000.00	\$3,000.00	\$2,063.45
Gewürztraminer	\$2,993,985.88	\$1,200.00	\$3,200.00	\$1,979.38
Riesling	\$2,589,992.35	\$1,240.00	\$3,000.00	\$1,978.02
Sauvignon Blanc	\$2,588,682.45	\$1,200.00	\$3,000.00	\$1,804.55
Pinot Blanc	\$1,911,929.77	\$1,197.28	\$2,500.00	\$1,609.92
Viognier	\$995,217.95	\$1,200.00	\$3,800.00	\$2,283.77
Ehrenfelser	\$371,749.25	\$1,200.00	\$3,000.00	\$1,825.70
Semillon	\$325,379.89	\$1,200.00	\$2,900.00	\$1,822.21
Bacchus	\$305,036.92	\$1,750.00	\$2,200.00	\$2,013.80
Auxerrois	\$274,773.45	\$1,350.00	\$2,000.00	\$1,807.15
Muscat	\$199,998.93	\$1,200.00	\$3,385.00	\$2,289.28
Chenin Blanc	\$173,570.02	\$1,525.81	\$1,718.04	\$1,580.75
Kerner	\$140,504.52	\$1,200.00	\$2,425.08	\$1,917.01
Optima	\$102,997.40	\$2,200.00	\$2,200.00	\$2,200.00
Roussanne	\$100,190.46	\$2,200.00	\$6,160.83	\$2,994.39
Icewine Pinot Gris	\$99,055.37	\$1,400.00	\$5,563.00	\$2,683.19
Icewine Viognier	\$88,649.93	\$1,905.09	\$2,900.00	\$2,346.86
Vidal	\$82,048.17	\$1,102.18	\$1,750.00	\$1,232.31
Siegerrebe	\$71,026.32	\$1,834.00	\$1,950.00	\$1,899.39
Müller Thurgau	\$70,103.19	\$1,200.00	\$1,700.00	\$1,514.89
Icewine Riesling	\$67,494.76	\$1,400.00	\$2,086.53	\$1,926.62
Icewine Chardonnay	\$63,104.22	\$700.00	\$2,900.00	\$1,682.72
Madeleine Angevine	\$49,823.97	\$1,400.00	\$1,500.00	\$1,458.55
Schönburger	\$49,791.54	\$1,400.00	\$2,300.00	\$1,879.92
Madeleine Sylvaner	\$46,530.00	\$1,800.00	\$1,800.00	\$1,800.00
Ortega	\$40,919.65	\$1,750.00	\$1,998.00	\$1,857.45
Icewine Sauvignon Blanc	\$35,300.00	\$1,400.00	\$2,900.00	\$1,958.60
Oraniensteiner	\$26,400.00	\$3,000.00	\$3,000.00	\$3,000.00
Sylvaner (Silvaner)	\$106.58	\$1,200.00	\$1,350.00	\$1,261.30
Pearl of C'saba	\$4,077.00	\$1,350.00	\$1,350.00	\$1,350.00



2012 RED WINE GRAPE VARIETIES, ESTIMATED PRICE RANGE

Varietal	Est. Total Value	Min. Price/Ton	Max. Price/Ton	Average Price/Ton
Merlot	\$13,404,926.46	\$533.00	\$4,000.00	\$2,378.06
Cabernet Sauvignon	\$5,022,754.11	\$1,800.00	\$6,576.06	\$2,556.93
Pinot Noir	\$4,767,313.77	\$1,350.00	\$6,500.00	\$2,406.70
Syrah/Shiraz	\$3,392,522.33	\$1,800.00	\$4,912.00	\$2,555.12
Cabernet Franc	\$3,336,744.67	\$1,600.00	\$7,500.00	\$2,434.07
Gamay Noir	\$882,497.48	\$1,300.00	\$3,000.00	\$1,911.90
Malbec	\$568,980.95	\$2,000.00	\$7,200.00	\$2,790.71
Petit Verdot	\$396,539.74	\$1,000.00	\$7,200.00	\$2,435.93
Cabernet Libre	\$265,791.76	\$1,350.00	\$3,000.00	\$2,037.74
Maréchal Foch	\$261,691.97	\$1,100.00	\$2,099.05	\$1,702.48
Zweigelt	\$134,104.64	\$1,350.00	\$2,800.00	\$2,348.08
Pinotage	\$129,129.24	\$2,200.00	\$2,700.00	\$2,436.40
Pinot Meunier	\$98,499.99	\$1,600.00	\$2,500.00	\$1,956.83
Tempranillo	\$85,905.68	\$2,225.44	\$3,562.85	\$2,754.27
Zinfandel	\$85,857.38	\$2,039.41	\$3,000.00	\$2,088.48
Icewine Cabernet Franc	\$72,871.04	\$1,600.00	\$2,267.96	\$2,183.77
Baco Noir	\$65,276.87	\$1,250.00	\$1,800.00	\$1,362.21
Icewine Pinot Noir	\$61,600.00	\$2,800.00	\$2,800.00	\$2,800.00
Dunkelfelder	\$50,665.06	\$1,700.00	\$3,301.42	\$2,274.06
Icewine Merlot	\$47,999.94	\$2,177.25	\$2,800.00	\$2,361.04
Sangiovese	\$38,502.48	\$1,903.41	\$2,300.00	\$1,988.36
Rotberger	\$31,270.20	\$2,000.00	\$2,000.00	\$2,000.00
Lemberger	\$28,276.98	\$1,700.00	\$1,825.00	\$1,770.69
Mourvedre	\$26,378.80	\$2,600.00	\$3,000.00	\$2,778.62
Blaufrankisch	\$10,297.50	\$1,373.00	\$1,373.00	\$1,373.00
Leon Millot	\$7,168.00	\$2,000.00	\$2,000.00	\$2,000.00



REPORTED TONNAGE BY PRODUCTION AREA

