



2023 - 2024 REGION OVERVIEW & STRATEGY

Canada

JULY 20, 2023

PRESENTING TO:

**EXPORT PROGRAM ANNUAL
MEETING**

CONTACT:

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MARKET DYNAMICS



Market Dynamics = The Perfect Storm

The State of the Canadian Economy



Market Dynamics = The Perfect Storm

Influence on California Wines in Canadian Market



Key Consumer Trends In Beverage Alcohol



**better
for you**

Lighter Choices
Sober Curious



**GOOD FOR YOU,
GOOD FOR THE PLANET**

Organic/ Bio dynamic
Sustainable?
Natural / Low Intervention



RTD's &
**COCKTAIL
CULTURE**

INNOVATION



PEACH MANGO
WEE BENDER
VODKA WATER
7% Alc./Vol.
500 mL

LOLA
PINOY BIGIO VQA
7% Alc./Vol.
500 mL

JOY
LIVE FOR TODAY
7% Alc./Vol.
500 mL

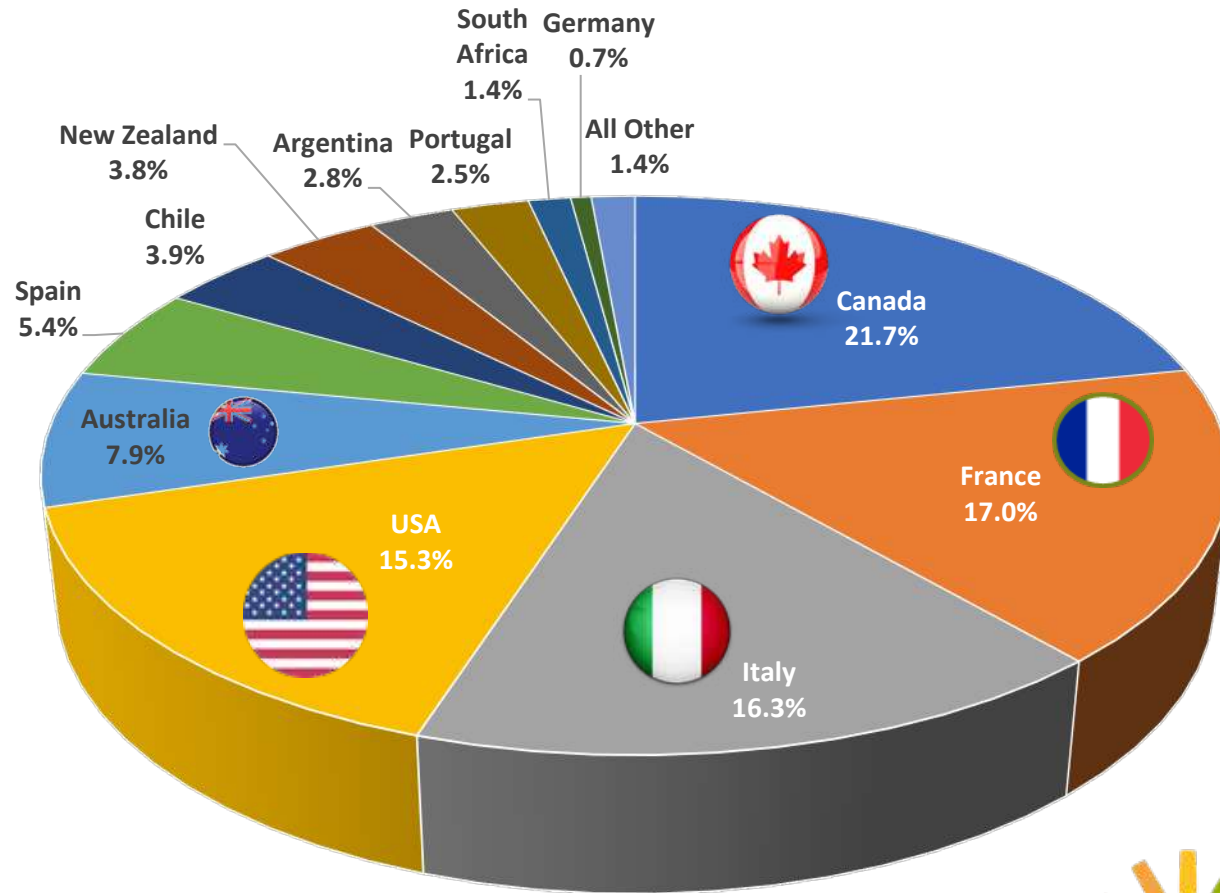
Pralle Glas

Rosé
SOUTH OF FRANCE
1.5L

Hope is on the Horizon...



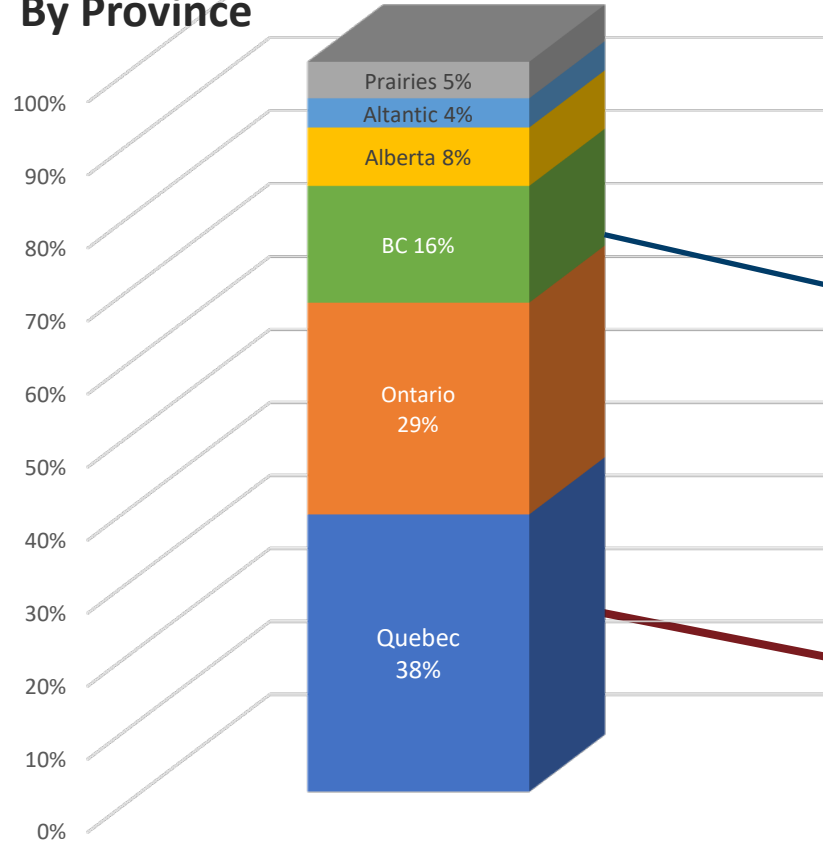
Canada is a Profitable and Important Export Market



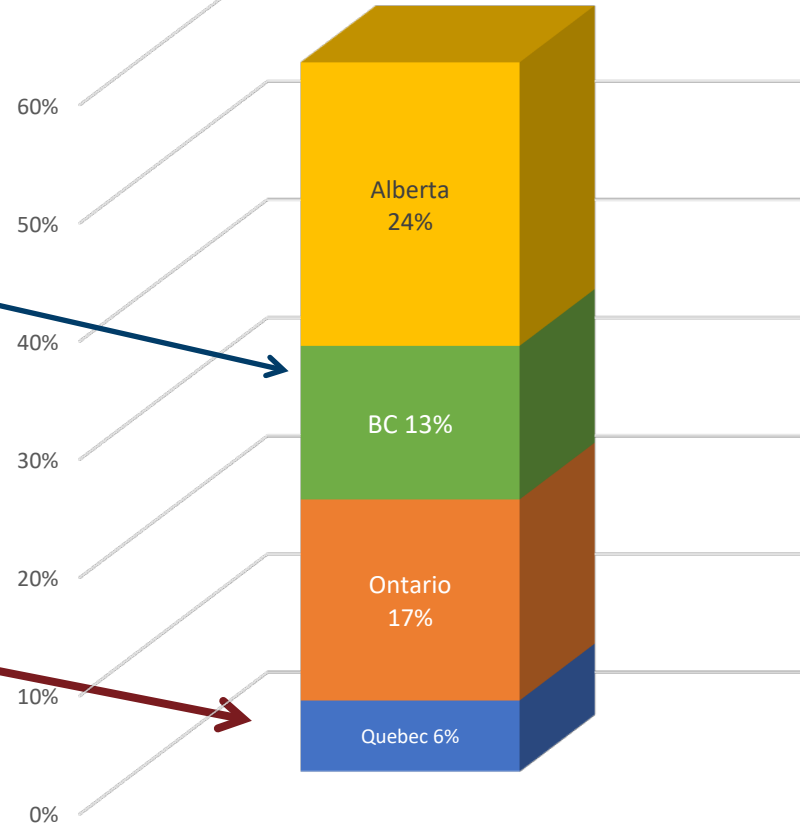
California Wines in Canada is
\$1.1 Billion in Revenue
&
5.7 Million 9 L Cases!

Provincial Overview: Challenges and Opportunities

**Table Wine Share of Mkt
By Province**



California Wine Share by Province



Quebec remains the single biggest opportunity for California Wines followed by British Columbia



STRATEGIC FOCUS



STRATEGIC PRIORITIES

Key Pillars to Sustain and Hold Position for FY24

WIN AT
RETAIL

INCREASE
BRAND
AFFINITY &
AWARENESS

STRENGTHEN
TRADE
RELATIONS



MAJOR PROGRAMS



Key Activities

WIN AT
RETAIL

Key LDB Promotions

- LCBO: 2 x per year
- SAQ : 2 x per year
- **NEW:** SAQ Central Coast Tasting 30 wines
- BCLS: 2 x per year



Key Activities

WIN AT
RETAIL

In Store Tastings

- SAQ: 75 stores 2 x year
- BCLS: May / Sept 35 stores
- LCBO: May 50 stores



FAM Tours LDB's

- SAQ May 2024



Key Activities

INCREASE
BRAND
AFFINITY &
AWARENESS

Wine Shows and Events 2023-24

EVENT	Timing	Attendance
• Wine Fest Toronto	July	5,000
• Saguenay Wine Fest	July	40,000
• Victoria Wine Fest	Sept	3,000
• Moncton Wine Fest	Nov	3,000
• VIWF	Feb	10,000
• Eureka	April	1,000
• Calgary April 9		
• Toronto April 22		
• Montreal April 24		



Key Activities

INCREASE
BRAND
AFFINITY &
AWARENESS

Advertising and Social Media



ACTIVITY

Impressions

❖ SOCIAL MEDIA:

▪ Video Reels / Photography 30M

❖ Co-Op Ad Opportunities: 45M

▪ ELLE/F&D/TASTE/100 BEST/ National Post

▪ Influencer Campaign – Super Wine Girl

Key Activities

STRENGTHEN
TRADE
RELATIONS

CAPSTONE Workshops

- SAQ Product Consultants 150 per year 2/yr
- **LCBO Product Consultants NEW ALL PC's**
- BCLS Product Consultants 100 per year 2/yr
- CAPS Sommeliers 100 Per year 2/yr
- Atlantic Best Sommelier in Canada Competition Nov 15



Key Activities



Trade Shows 2023-24

• Moncton Wine Fest	Nov 3	200	
• Vancouver Wine Festival	Mar 3	3500	
• Eureka Calgary	April 9		200
• Eureka Toronto	April 22		300
• Eureka Montreal	April 24		275

Leverage CWI In Market Activities

• GBM	Nov	12	
• Sustainability FAM Tour	Jan	3	
• CAPSTONE Ambassador Trips	Apr	3	



CALIFORNIA
WINES

THANK YOU

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CALIFORNIA
WINES

PROGRAM PLANS 2023-2024

INCLUDE TITLE HERE

- Call out key programs and activities for the upcoming year or 18 months
- List in chronological order – month & year. Specific dates not required
- Focus on key activities that you want members to know about and participate in
- Programs should tie back specifically to major strategies
- Include projected outcomes or targets
- For repeat programs, include new features

USE THIS SLIDE TO TALK THROUGH THE KEY STRATEGIES FOR YOUR MARKET/REGION BASED ON THE MARKET DYNAMICS THAT YOU JUST SHARED.

NO MORE THAN 5 STRATEGIES – PER MARKET/REGION

WHAT ARE YOUR INSIGHTS BASED ON YOUR KNOWLEDGE AND EXPERIENCE?

HOW WE CAN POSITION CALIFORNIA WINES RELATIVE TO THE COMPETITION IN THE MARKET?

HOW CAN WE LEVERAGE THE MARKET DYNAMICS TO OUR ADVANTAGE?