



2027 CANADA UPDATE

ISSUES & OPPORTUNITIES

July 21, 2026

PRESENTING TO:

EXPORT CONFERENCE 2026

CONTACT:

Danielle Giroux, Director Canada

Paula Oreskovich, Director, Communications and PR



Wine Institute: Canadian Advocacy

April 29: Quebec Premiere in Washington

May 5: BC Fact Sheet sent to media

May 14: Sec of AG California/Oregon/Washington met with BC.

May : WI & 14 winery members in Wash

June 1: P.A. to Min of Finance ONT discussion

June 3: 11 Members of Congress note to Premiere Frechette (QUE)

July 1 : CUSMA lapses

July 6 : Tenney : CANADA ACT

July 13/15 Cali Democrai Sen Adam Schiff / Mike Thompson

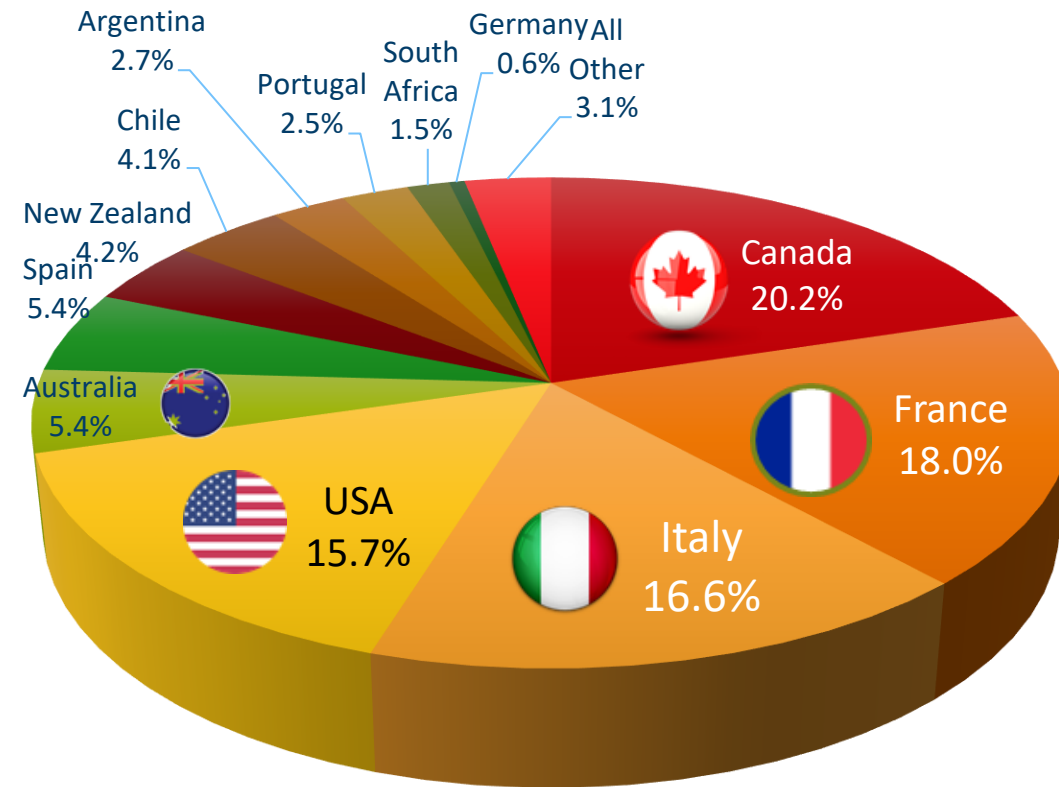
July 15 : WI met with Amb. Hoekstra in Ottawa

July 20th – US imposes 50% additional duties on a range of Cdn goods effective Aug 19

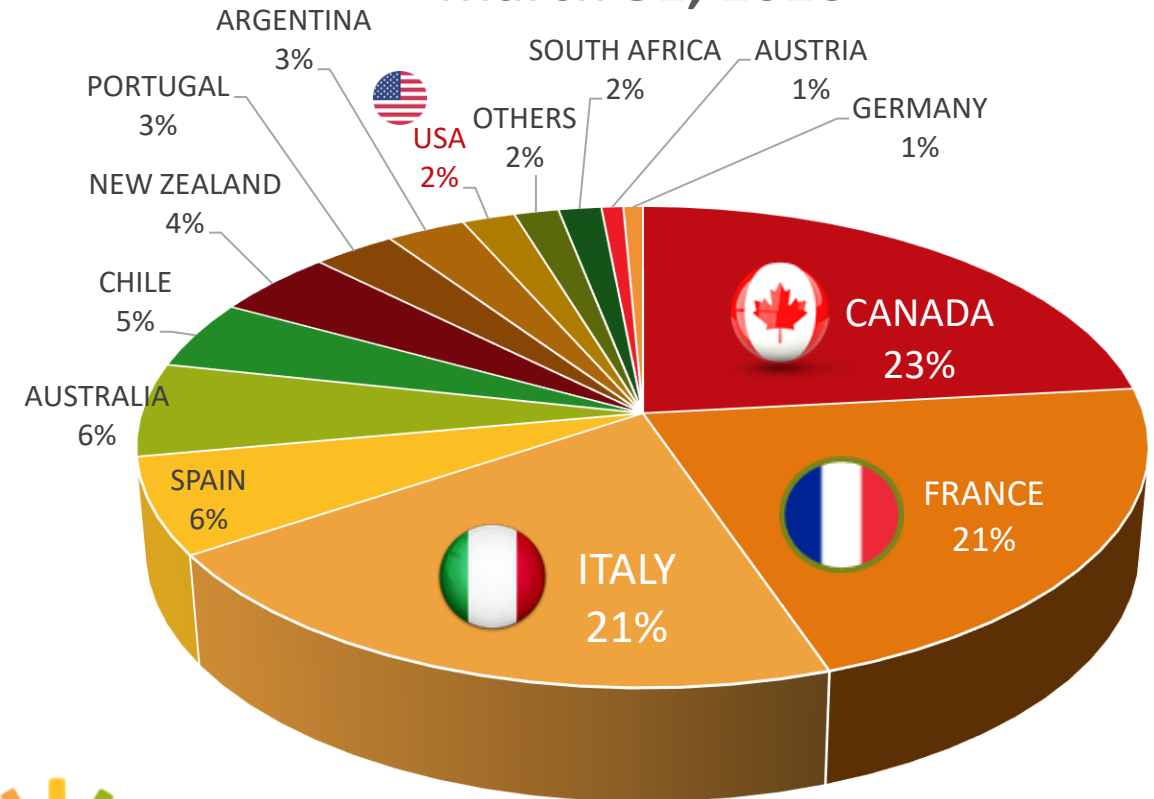
What is next?

Table Wines in Canada- Revenue Share by Country of Origin

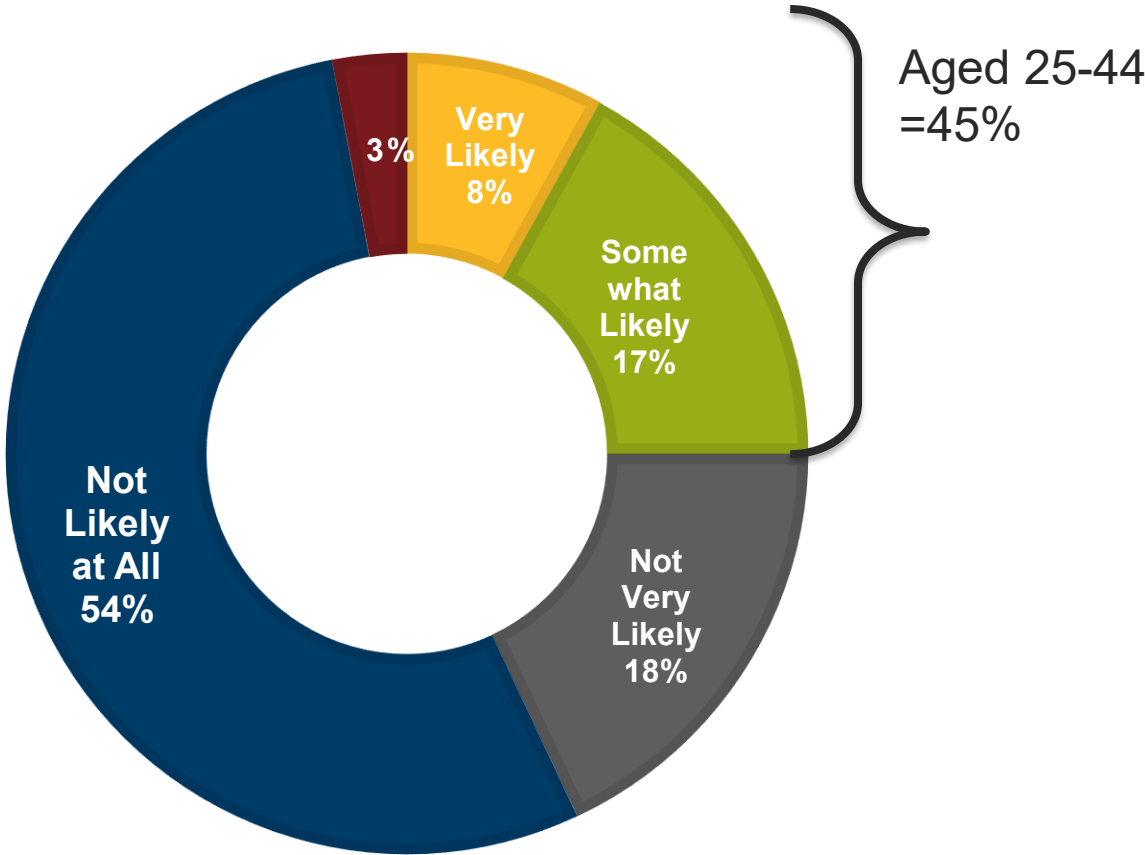
Dec 31, 2024



March 31, 2026



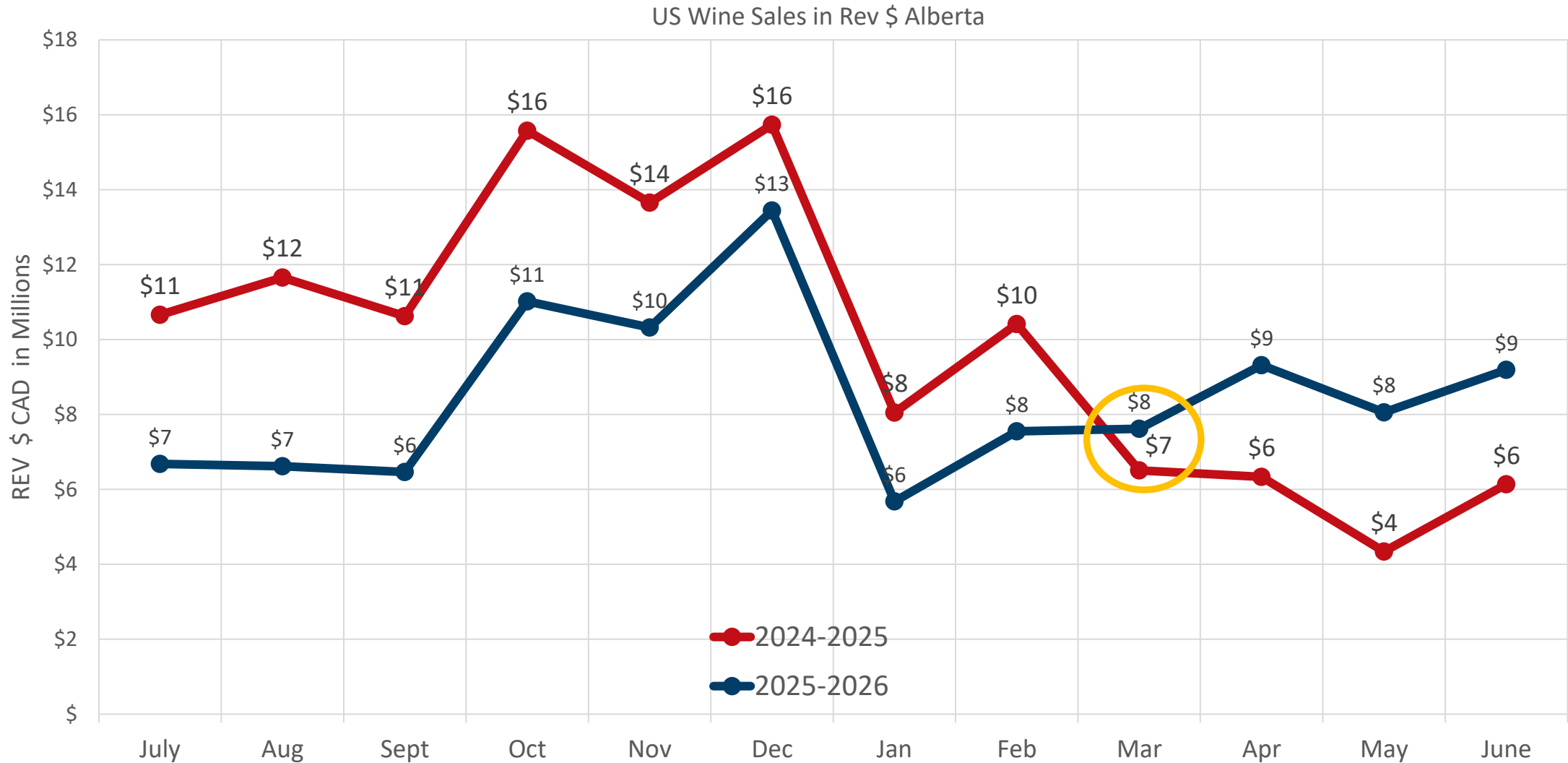
Likelihood of buying American alcohol if it were put back on the shelves



Not Very Likely / Not Likely at all	Quebec (n=601)	Ontario (n=601)	BC (n=403)
	83%	63%	65%
	Women (n=832)	25 to 44 (n=942)	65 plus (n=784)
	78%	52%	90%

Q – If US wines were fully back on shelves tomorrow but the current trade disputes/tariffs were still ongoing how likely would you be to purchase US wines tomorrow (BC/ON/QUE = 1,605

Spotlight: Alberta – Open Market



FY'26 Recap Strategy & Activities...

In time of Uncertainty

FY'26 ACTIVITIES

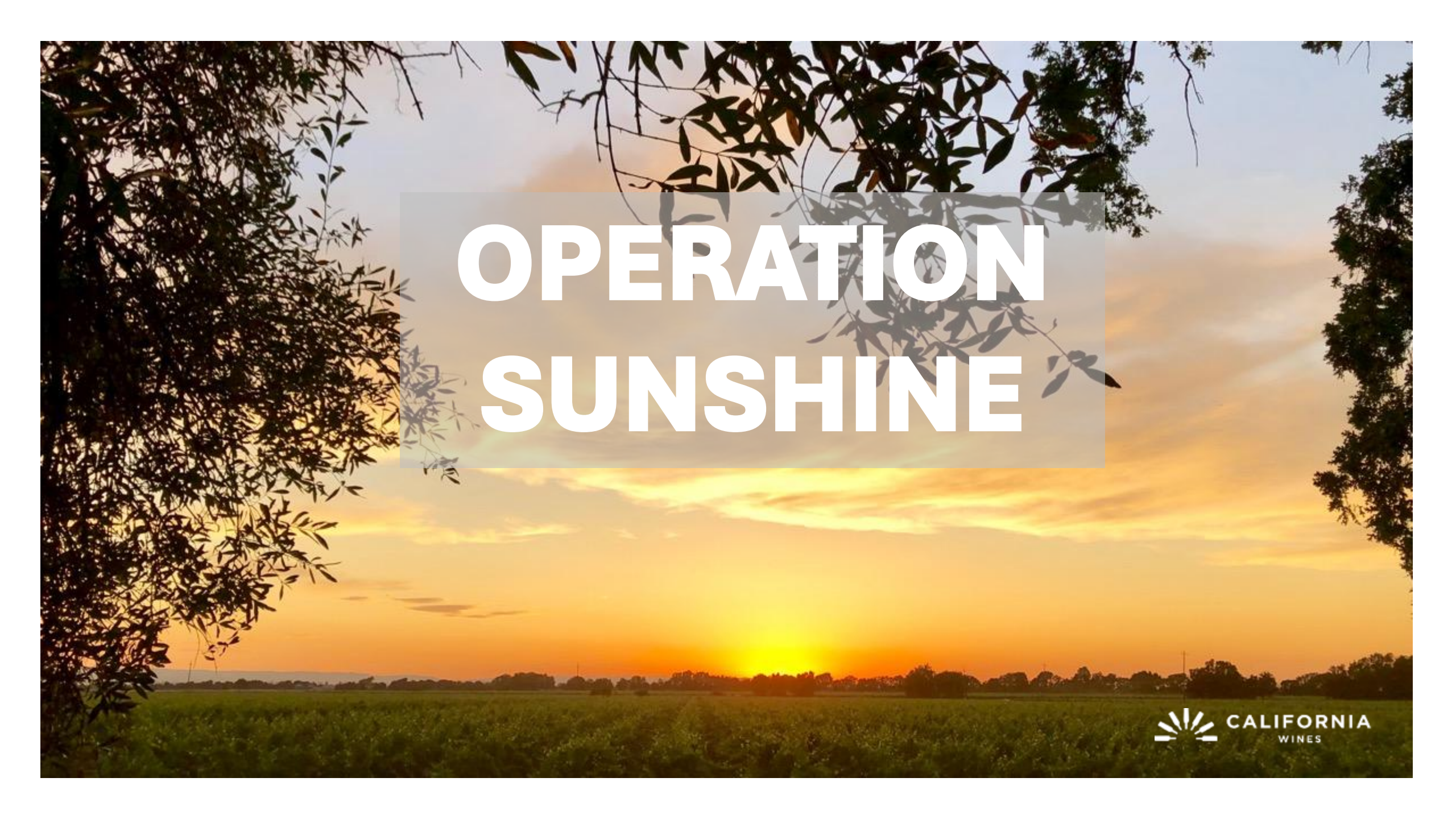


GOLDEN STATE SPEAKEASY
TASTE THE BANNED



FY'27 Strategy and Plans



A scenic photograph of a sunset over a vineyard. The sun is a bright yellow orb on the horizon, casting a warm orange glow across the sky. The foreground is a lush green vineyard. The sky is filled with soft, wispy clouds. The scene is framed by dark, silhouetted tree branches in the upper corners. A semi-transparent grey rectangle is centered over the image, containing the text "OPERATION SUNSHINE" in white, bold, sans-serif capital letters.

OPERATION SUNSHINE

OBJECTIVES & STRATEGIES



Trade Retail

Rebuild and grow back share

1. Stakeholder Engagement
2. Re-Ignite Consumer Demand
3. Secure Category Promotions
4. Buying trips to California
5. Leverage CAPSTONE training

Trade On-Premise

Reignite confidence and restore wines to prominence

1. "Reunion" Events
2. On Premise Promotions
3. Staff Training : CAPSTONE
4. Immersive Trips to California
5. Sponsorship Support "California Gives Back"

Media / Content Creators

Repair and rebuild reputation

1. Collaborations with content creators
2. Immersive trips to California
3. Focus on compelling social media content
4. Media & Consumer Sentiment Monitoring



OBJECTIVES & STRATEGIES

ZILLENNIAL CONSUMER

Inspire the next generation

1. Launch Taste the Sunshine Campaign
2. Host Content Creator events
3. Show Up where they are – Wine Truck



CORE CONSUMER

Reconnect with our loyalists
Win-back those who have strayed

1. Consumer Insights
2. Phased approach to advertising and communications
3. Work with trusted voices: Hear it from the experts:
4. Back in consumers mouths: Drive Trial
5. Re-Engage in Promotional Cycles



CALIFORNIA WINES ROAD TRIP



**Bringing California to Canada's
Next Gen Wine Drinkers**

Summer 2027

Ontario focus

Zillennial consumers.



🎵 Music Festivals | 🌙🌟 Night Markets | 🍷 Wine Events | 🎥 Arts & Culture | ☀️ Summer



FY'27 PLANNED ACTIVITIES

PROGRAMS	DATES
Alberta Influencer and Social Media Campaign	Summer 2026
Sponsoring wine bar at BCHF Fundraiser	July 22
CAPS Sponsorship Alberta	Fall 2026
Calgary Rocky Mountain Food & Wine (9k pp)	Sept 18/19
EUREKA NYC (25 guests)	Sept 20/21
Sobeys Retail Promotion Alberta and Sask	Oct 2026
Edmonton Calgary Rocky Mountain Food & Wine	Nov 6/7
Grape Escapes Calgary (6K pp)	Nov 20/21
VIWF (if ban lifted)	Mar 10-13 2027
Top Drop Calgary & Vancouver	May 2027





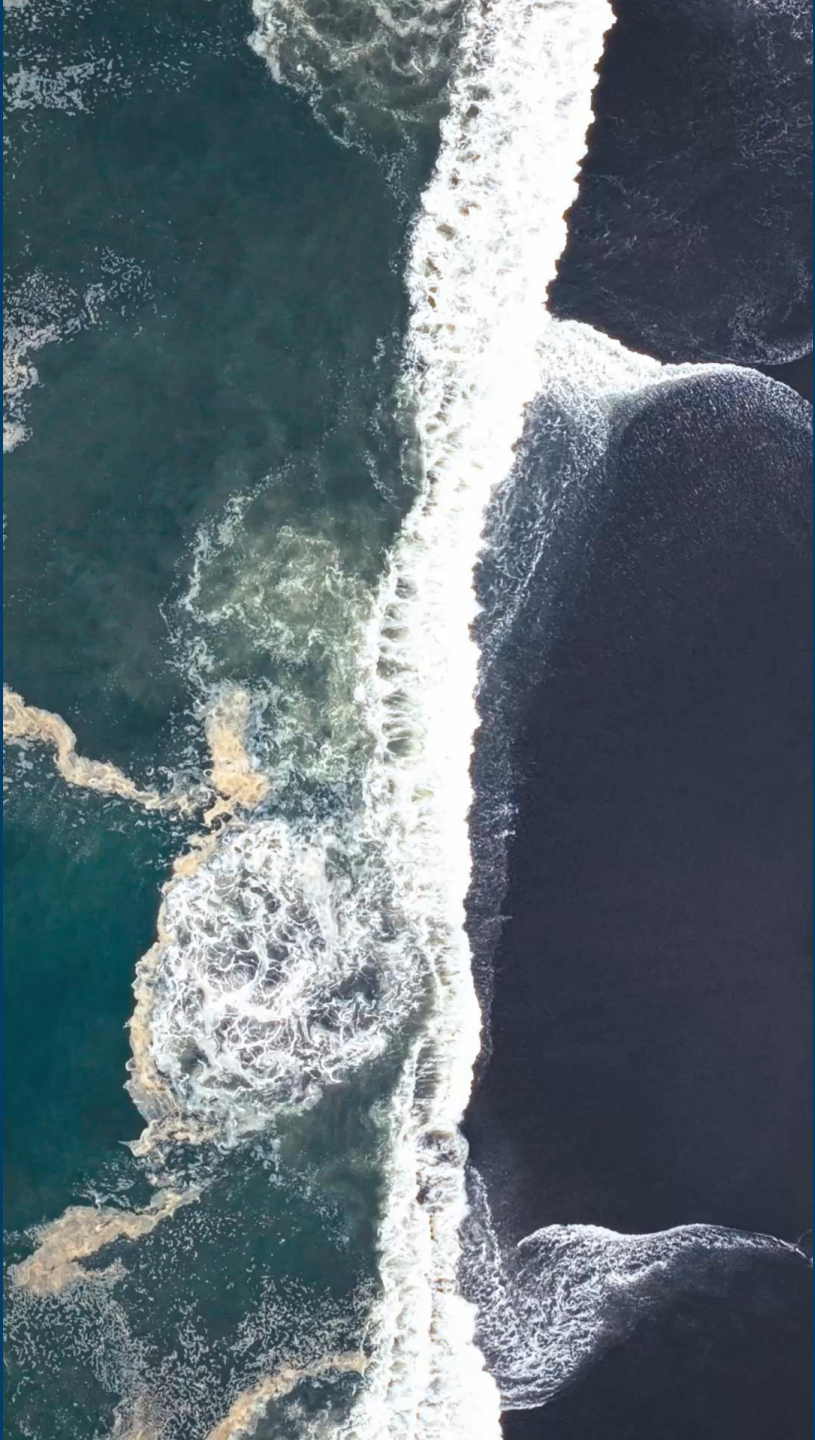
THE WINE RESISTANCE



Authentic Stories. Real People. The Heart of California Wine.

“People connect with people—not products.
Together, we're sharing the stories that will
help Canadians fall in love with California
Wines all over again.”





IMMEDIATE PRIORITIES



Once bans are lifted:



Top to Top Meetings

Engage directly with LDB's to share critical research and make the case for California Wines.



Kickstarter Program

Galvanize our agent network through targeted tastings and high-impact regional events.



National Campaign

Launch a comprehensive, multi-channel national initiative to actively win back the consumer.



Category Promotions

Secure widespread category promotions and coordinate immersive in-store consumer tastings.



Event Re-entry

Establish a strong physical presence by returning to major events in newly reopened markets.



Buyers Trip to CA

Organize an exclusive California experience, serving as a mini Grand Tasting (GBM) for Canada.





TOGETHER, LET'S REBUILD CALIFORNIA'S FUTURE IN CANADA

Our success depends on all of us. Here's how you can help.



STAY ENGAGED



**SUPPORT A
STRONG RE-ENTRY**



**INVEST IN THE
MARKETPLACE**



**SHOW UP
IN MARKET**



**TELL YOUR
STORY**



TOGETHER, WE CAN REBUILD CONFIDENCE,
RESTORE DEMAND AND MAKE **CALIFORNIA WINES**
CANADA'S MOST DESIRED WINE REGION ONCE AGAIN.

*Thank you for
your partnership
and commitment!*

MESSAGES OF HOPE





*The future of California Wines in Canada won't
be rebuilt by one campaign.
It will be rebuilt by all of us
—together.*





Thank You

