

# THE BRITISH COLUMBIA WINE GRAPE

## CROP REPORT 2011



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.

With three offices in the Okanagan and 13 across BC, BDO is committed to working with, and providing value to, all of those involved in the wine industry. BDO. More than you think.

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<b>NUMBER OF WINERIES THAT RESPONDED, ACCORDING TO SIZE</b>			
<b>Year</b>	<b>Large Winery</b>	<b>Medium Winery</b>	<b>Small Winery</b>
2011	3	21	95
2010	3	17	106
2009	3	18	101
2008	3	18	107

<b>RESPONSE RATE FOR THE WINE GRAPE CROP SURVEYS 2008-2011</b>			
<b>Year</b>	<b>No. of Wineries Responded</b>	<b>Total No. of Grape Wineries in BC</b>	<b>% of Total</b>
2011	119	193	61.66%
2010	126	193	65.28%
2009	122	166	73.49%
2008	128	152	84.21%

<b>PERCENTAGE OF VINIFERA, HYBRID AND LABRUSCA PRODUCTION</b>			
	<b>Vinifera/Hybrid/Labrusca</b>	<b>% of Total Production</b>	
		<b>2011</b>	<b>2010</b>
<b>White</b>	Vinifera	98.92%	97.26%
	Vinifera/Hybrid	1.08%	1.44%
	Unspecified	0.00%	1.26%
	Labrusca	0.00%	0.00%
<b>Red</b>	Vinifera	97.93%	96.84%
	Vinifera/Hybrid	2.07%	1.91%
	Unspecified	0.00%	1.25%
	Labrusca	0.00%	0.00%
<b>Total</b>	Vinifera	98.42%	97.07%
	Vinifera/Hybrid	1.58%	1.67%
	Unspecified	0.00%	1.26%
	Labrusca	0.00%	0.00%



<b>2011 BC WINE GRAPE TONNAGE BY VARIETY - TOP 25</b>			
<b>Rank</b>	<b>Variety</b>	<b>Total Tons</b>	<b>Total Combined Value</b>
1	Merlot	4,829.7	\$11,450,372
2	Chardonnay	2,480.9	\$4,848,864
3	Pinot Gris	2,331.0	\$4,699,221
4	Cabernet Sauvignon	1,693.5	\$4,183,242
5	Sauvignon Blanc	1,425.8	\$2,580,733
6	Pinot Noir	1,416.9	\$3,563,819
7	Gewürztraminer	1,261.8	\$2,453,941
8	Pinot Blanc	1,173.1	\$2,072,961
9	Cabernet Franc	1,060.9	\$2,598,725
10	Riesling	1,010.9	\$1,907,989
11	Syrah/Shiraz	872.7	\$2,263,161
12	Gamay Noir	388.7	\$694,865
13	Viognier	340.0	\$820,108
14	Petit Verdot	309.9	\$481,714
15	Maréchal Foch	219.2	\$430,306
16	Auxerrois	145.4	\$253,909
17	Semillon	142.2	\$246,985
18	Ehrenfelser	133.5	\$258,906
19	Malbec	123.3	\$363,216
20	Bacchus	121.7	\$234,604
21	Marsanne	116.5	\$204,006
22	Sovereign Opal	-	-
23	Icewine Merlot	65.8	\$170,650
24	Muscat	63.4	\$134,337
25	Chasselas	62.9	\$125,700
26-77	Remaining Varieties Reported	933.1	\$1,894,575
	<b>Total White and Red</b>	<b>22,722.6</b>	<b>\$48,936,909</b>

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



<b>2011 WHITE WINE GRAPE VARIETIES BY ORDER OF IMPORTANCE (VALUE)</b>			
<b>Variety</b>	<b>Tonnage</b>	<b>Est. Total Value</b>	<b>Percent of White</b>
Chardonnay	2,480.9	\$4,848,864	22.20%
Pinot Gris	2,331.0	\$4,699,221	21.51%
Sauvignon Blanc	1,425.8	\$2,580,733	11.81%
Gewürztraminer	1,261.8	\$2,453,941	11.23%
Pinot Blanc	1,173.1	\$2,072,961	9.49%
Riesling	1,010.9	\$1,907,989	8.73%
Viognier	340.0	\$820,108	3.75%
Ehrenfelser	133.5	\$258,906	1.19%
Auxerrois	145.4	\$253,909	1.16%
Semillon	142.2	\$246,985	1.13%
Bacchus	121.7	\$234,604	1.07%
Marsanne	116.5	\$204,006	0.93%
Muscat	63.4	\$134,337	0.62%
Icewine Riesling	46.9	\$134,265	0.61%
Chasselas	62.9	\$125,700	0.58%
Sovereign Opal	-		
Schönburger	55.4	\$103,950	0.48%
Siegerrebe	47.1	\$86,446	0.40%
Ortega	39.2	\$78,310	0.36%
Kerner	41.4	\$73,611	0.34%
Reichensteiner	38.7	\$63,497	0.29%
Icewine Vidal	-		
Madeleine Angevine	39.2	\$59,553	0.27%
Vidal	22.6	\$37,724	0.17%
Icewine Viognier	17.6	\$37,454	0.17%
Optima	18.2	\$36,936	0.17%
Madeleine Sylvaner	18.0	\$32,685	0.15%
Roussanne	12.8	\$31,535	0.14%
Icewine Pinot Gris	7.8	\$16,343	0.07%
Misc. White Vinifera*	6.2	\$10,097	0.05%
Icewine Chardonnay	-		
Icewine Muscat	-		
Icewine Gewürztraminer	-		
Verdelet	-		
Albarino	-		
Suppressed data total	97.7	\$198,433	0.91%
<b>Total</b>	<b>11,317.8</b>	<b>\$21,843,103</b>	<b>100.00%</b>

\*Indicates unspecified white varieties;

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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.

<b>2011 RED WINE GRAPE VARIETIES BY ORDER OF IMPORTANCE (VALUE)</b>			
<b>Varietal</b>	<b>Tonnage</b>	<b>Est. Total Value</b>	<b>Percent of Red</b>
Merlot	4,829.7	\$11,450,372	42.26%
Cabernet Sauvignon	1,693.5	\$4,183,242	15.44%
Pinot Noir	1,416.9	\$3,563,819	13.15%
Cabernet Franc	1,060.9	\$2,598,725	9.59%
Syrah/Shiraz	872.7	\$2,263,161	8.35%
Gamay Noir	388.7	\$694,865	2.56%
Petit Verdot	309.9	\$481,714	1.78%
Maréchal Foch	219.2	\$430,306	1.59%
Malbec	123.3	\$363,216	1.34%
Icewine Merlot	65.8	\$170,650	0.63%
Zweigelt	62.7	\$145,371	0.54%
Pinotage	45.8	\$100,196	0.37%
Icewine Cabernet Franc	34.2	\$84,013	0.31%
Pinot Meunier	35.9	\$67,842	0.25%
Misc. Red Vinifera*	32.6	\$67,445	0.25%
Chancellor	-		
Sangiovese	25.3	\$55,094	0.20%
Tempranillo	17.9	\$55,014	0.20%
Zinfandel	24.7	\$46,559	0.17%
Lemberger	19.5	\$38,328	0.14%
Icewine Pinot Noir	11.5	\$33,860	0.12%
Dunkelfelder	11.7	\$24,917	0.09%
Barbera	-		
Misc. Red Hybrids	9.1	\$18,180	0.07%
Mourvedre	5.7	\$12,394	0.05%
Alicante Bouschet	4.3	\$9,015	0.03%
Blattner	3.9	\$6,850	0.03%
Suppressed data total	79.6	\$128,659	0.47%
<b>Total</b>	<b>11,404.8</b>	<b>\$27,093,807</b>	<b>100.00%</b>

\*Indicates unspecified red varieties;

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<b>WHITE WINE GRAPE VARIETIES, ESTIMATED PRICE RANGE</b>				
<b>Variety</b>	<b>Est. Total Value</b>	<b>Min. Price/Ton</b>	<b>Max. Price/Ton</b>	<b>Average Price/Ton</b>
Chardonnay	\$4,848,864	\$1,400	\$6,000	\$1,954
Pinot Gris	\$4,699,221	\$1,400	\$3,030	\$2,016
Sauvignon Blanc	\$2,580,733	\$1,000	\$4,000	\$1,810
Gewürztraminer	\$2,453,941	\$1,400	\$5,586	\$1,945
Pinot Blanc	\$2,072,961	\$1,260	\$3,939	\$1,767
Riesling	\$1,907,989	\$1,257	\$2,617	\$1,887
Viognier	\$820,108	\$1,500	\$3,943	\$2,412
Ehrenfelser	\$258,906	\$1,400	\$2,500	\$1,939
Auxerrois	\$253,909	\$1,400	\$2,100	\$1,747
Semillon	\$246,985	\$1,445	\$2,924	\$1,737
Bacchus	\$234,604	\$1,530	\$2,200	\$1,928
Marsanne	\$204,006	\$1,500	\$3,400	\$1,751
Muscat	\$134,337	\$1,800	\$3,000	\$2,117
Icewine Riesling	\$134,265	\$2,209	\$4,599	\$2,866
Chasselas	\$125,700	\$2,000	\$2,000	\$2,000
Schönburger	\$103,950	\$1,400	\$2,300	\$1,876
Siegerrebe	\$86,446	\$1,400	\$1,850	\$1,834
Ortega	\$78,310	\$1,750	\$2,500	\$1,998
Kerner	\$73,611	\$1,700	\$2,200	\$1,778
Reichensteiner	\$63,497	\$1,600	\$1,900	\$1,639
Madeleine Angevine	\$59,553	\$1,400	\$1,800	\$1,519
Vidal	\$37,724	\$1,600	\$1,800	\$1,672
Icewine Viognier	\$37,454	\$2,000	\$2,600	\$2,124
Optima	\$36,936	\$1,892	\$2,200	\$2,027
Madeleine Sylvaner	\$32,685	\$1,723	\$2,000	\$1,815
Roussanne	\$31,535	\$2,000	\$3,000	\$2,466
Icewine Pinot Gris	\$16,343	\$1,400	\$2,300	\$2,106



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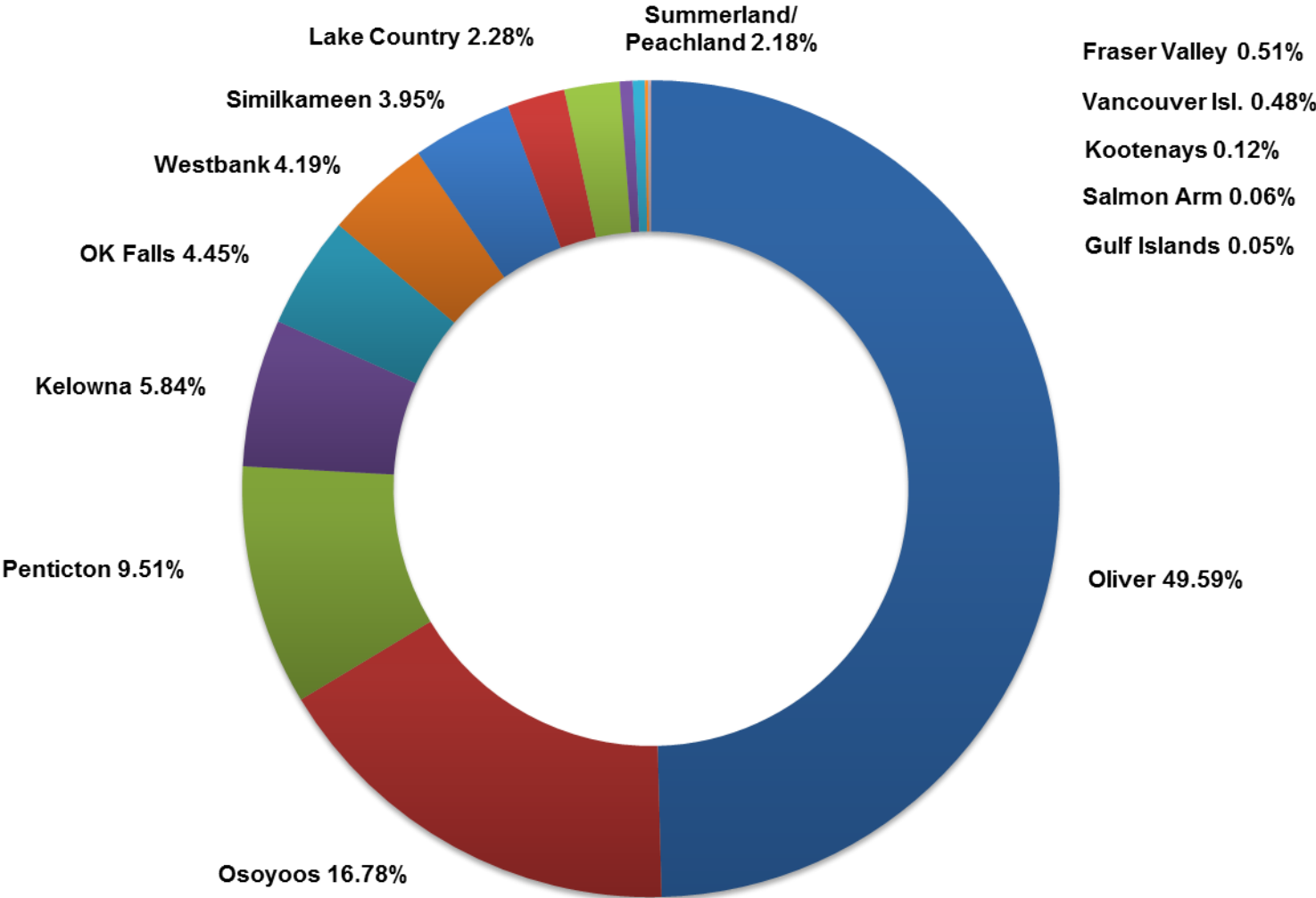
<b>RED WINE GRAPE VARIETIES, ESTIMATED PRICE RANGE</b>				
<b>Variety</b>	<b>Est. Total Value</b>	<b>Min. Price/Ton</b>	<b>Max. Price/Ton</b>	<b>Average Price/Ton</b>
Merlot	\$11,450,372	\$800	\$6,000	\$2,371
Cabernet Sauvignon	\$4,183,242	\$1,110	\$6,000	\$2,470
Pinot Noir	\$3,563,819	\$1,500	\$5,600	\$2,515
Cabernet Franc	\$2,598,725	\$1,600	\$6,000	\$2,449
Syrah/Shiraz	\$2,263,161	\$450	\$6,000	\$2,593
Gamay Noir	\$694,865	\$1,330	\$2,700	\$1,788
Petit Verdot	\$481,714	\$1,186	\$6,000	\$1,554
Marechal Foch	\$430,306	\$1,400	\$2,500	\$1,963
Malbec	\$363,216	\$2,000	\$6,000	\$2,945
Icewine Merlot	\$170,650	\$2,500	\$2,700	\$2,595
Zweigelt	\$145,371	\$1,500	\$2,800	\$2,317
Pinotage	\$100,196	\$2,050	\$2,800	\$2,188
Icewine Cabernet Franc	\$84,013	\$2,400	\$2,500	\$2,454
Pinot Meunier	\$67,842	\$1,600	\$2,500	\$1,890
Misc. Red Vinifera	\$67,445	\$1,641	\$3,290	\$2,069
Sangiovese	\$55,094	\$1,975	\$2,300	\$2,176
Tempranillo	\$55,014	\$3,000	\$3,500	\$3,080
Zinfandel	\$46,559	\$1,850	\$2,500	\$1,889
Lemberger	\$38,328	\$1,700	\$2,200	\$1,961
Icewine Pinot Noir	\$33,860	\$2,800	\$3,100	\$2,957
Dunkelfelder	\$24,917	\$1,700	\$2,800	\$2,121
Mourvedre	\$12,394	\$2,160	\$2,700	\$2,180
Alicante Bouschet	\$9,015	\$2,000	\$2,750	\$2,116
Blattner	\$6,850	\$1,700	\$1,850	\$1,760



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**REPORTED TONNAGE BY PRODUCTION AREA**



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