



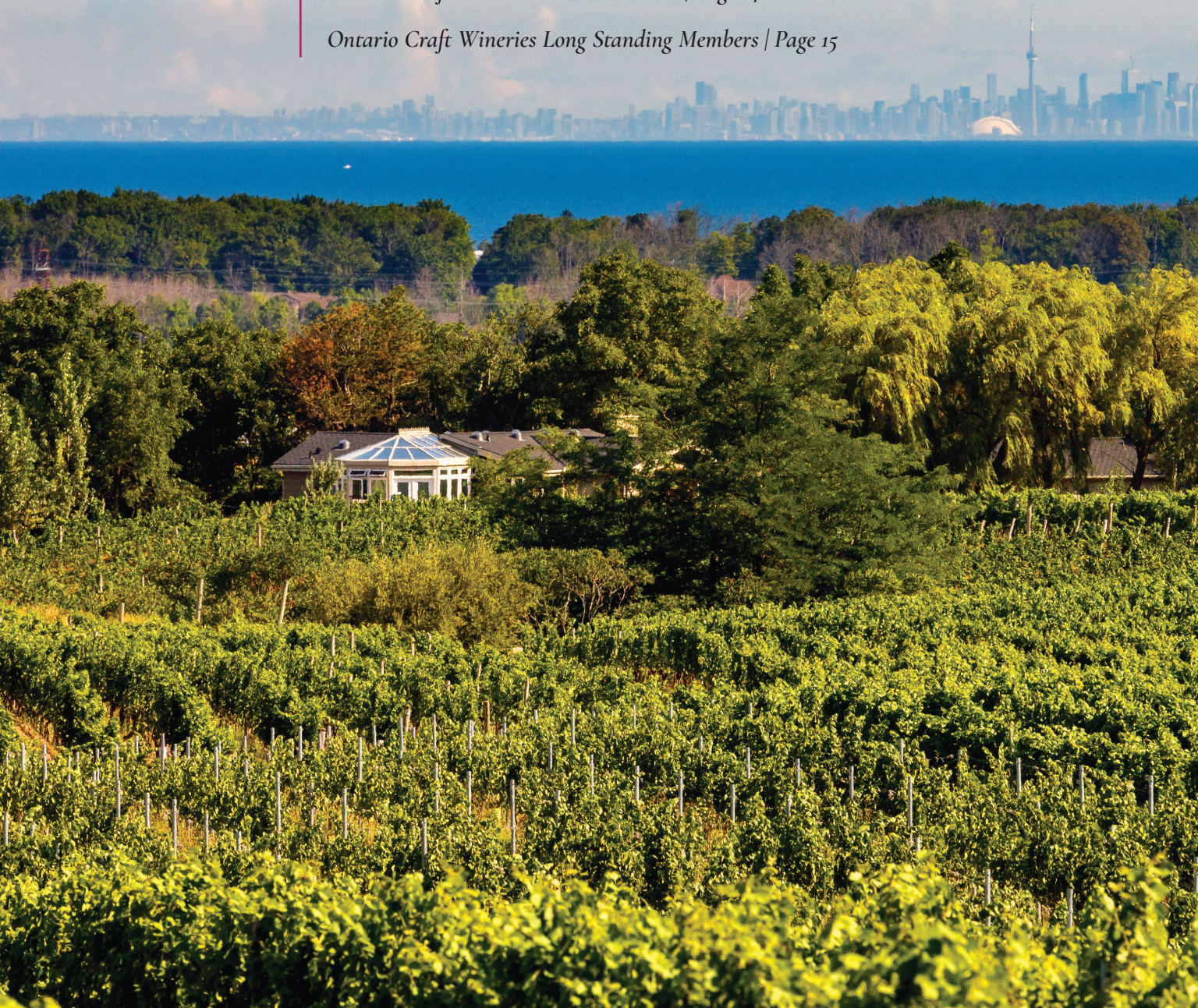
ONTARIO
CRAFT
WINERIES



ANNUAL REPORT
Year Ending March 31, 2023

Table of Contents

| | |
|---|--------------------|
| <i>Ontario Craft Wineries Members</i> | <i> Page 3</i> |
| <i>Ontario Craft Wineries Board & Staff</i> | <i> Page 4</i> |
| <i>Ontario Craft Wineries Committees</i> | <i> Page 5</i> |
| <i>Messages from Ontario Craft Wineries Chair & President</i> | <i> Page 6-7</i> |
| <i>Ontario's VQA Wine and Grape Industry - 2030 Vision</i> | <i> Page 8</i> |
| <i>Ontario Craft Wineries Year in Review</i> | <i> Page 9-10</i> |
| <i>Government Meetings</i> | <i> Page 11</i> |
| <i>Ontario Craft Wine Conference</i> | <i> Page 12</i> |
| <i>Sustainable Winegrowing Ontario Certified</i> | <i> Page 13</i> |
| <i>Ontario Craft Wineries Trade Members</i> | <i> Page 14</i> |
| <i>Ontario Craft Wineries Long Standing Members</i> | <i> Page 15</i> |



Members of the Ontario Craft Wineries

Niagara-on-the-Lake

Bella Terra Vineyards
Between the Lines Estate Winery
Big Head Wines
Caroline Cellars Limited
Colaneri Estate Winery
Ferox by Fabian Reis
Five Rows Craft Winery
Frogpond Farm
Hinterbrook Estate Winery
Icellars Estate Winery
Konzelmann Estate Winery
Lailey Winery Limited
Lundy Manor Winery
Marynissen Estates Winery

Niagara College Teaching Winery
Palatine Hills Estate Winery
Ravine Vineyard Estate Winery
Reif Estate Winery Inc.
Reimer Vineyards
Riverview Cellars Winery
Southbrook Vineyards
Stratus Vineyards Limited
Strewn Inc. Winery
Sunnybrook Farm Estate Winery
The Hare Wine Co.
Two Sisters Vineyards

Niagara Escarpment

13th Street Wine Company
16 Mile Cellar
2027 Cellars
Angel's Gate Estate Winery
Bachelder Wines
Calamus Estate Winery
Cave Spring Vineyard
Cloudsley Cellars
Cornerstone Estate Winery
Domaine Queylus
Featherstone Estate Winery
Fielding Estate Winery
Flat Rock Cellars
Good Earth Vineyard & Winery, The
GreenLane Estate Winery
Harbour Estates Winery
Henry of Pelham Family Estate Winery
Hernder Estate Wines
Hidden Bench Vineyards & Winery
Kacaba Vineyards
King's Court Estate Winery Ltd.
Leaning Post Wines

London Born Wine Company
Malivoire Wine Company
Mountain Road Wine Company
Niagara Custom Crush Studios
One-Eighty Wines Inc.
Organized Crime Winery
Puddicombe Estate Farm Winery
Redstone Winery Inc.
Rennie Estate Winery
Ridgepoint Wines Inc.
Rockway Vineyards
Royal DeMaria Wines Company Ltd.
Sue-Ann Staff Estate Winery
Tawse Winery
The Foreign Affair Winery
Vieni Estates Inc.
Vineland Estates Winery
Wending Home
Westcott Vineyards

Prince Edward County

Black Prince Winery
Broken Stone Winery
Closson Chase Vineyards
Harwood Estate Vineyards
Hinterland Wine Company
Huff Estates Winery
Lacey Estates Winery
Rosehall Run
Sugarbush Vineyards
The Grange of Prince Edward
Trail Estate Winery
Waupoos Estates Winery

Lake Erie North Shore

Colchester Ridge Estate Winery
Dancing Swallows Vineyard
Mastronardi Estate Winery
Muscedere Vineyards
Oxley Estate Winery
Pelee Island Winery Inc.
Sprucewood Shores Estate Winery
Vivace Estate Winery

Emerging Regions

Burning Kiln Winery
Coffin Ridge Boutique Winery
Cornerfield Wine Co.
Dark Horse Estate Winery
Gallucci Winery Inc.
Generations Wine Company Ltd.
Georgian Hills Vineyards Inc.
Potter Settlement Artisan Winery
Quai Du Vin Estate Winery
The Creemore Hills Winery
The Roost Wine Co.
Therianthropy Inc.
Willow Springs Winery (2010) Limited
Windrush Estate Winery, LP

Ontario Craft Wineries Board of Directors

June 2022-2023

Carolyn Hurst, Chair
Westcott Vineyards

Allan Schmidt, Director
Vineland Estates Winery

Paul Speck, Director
Henry of Pelham Family Estate Winery

Daniel Lafleur, Director
Tawse Winery

Stephen Gash & Shiraz Mottiar, Directors
Malivoire Wine Company

Erin MacInnis, Director
Closson Chase Vineyards

Ed Madronich, Director
Flat Rock Cellars

Dan Sullivan, Vice-Chair
Rosehall Run Vineyards

Ilya Senchuk, Director
Leaning Post Wines

Steve Mitchell, Director
Sprucewood Shores Estate Winery

Suzanne Janke, Director
Stratus Vineyards

Darryl MacMillan, Director
Pelee Island Winery

Faik Turkmen, Director
Lailey Winery

Len Pennachetti, Director
Cave Spring Vineyard

Thank you to our OCW Board of Directors for your commitment and dedication to Ontario's wine and grape industry. OCW Board of Directors meet monthly to review Ontario Craft Wineries' operational performance to ensure the longevity and prosperity of the organization.

Ontario Craft Wineries Staff

- ♦ Richard Linley, President
- ♦ Anna Murre,
Director of Finance
- ♦ Alison Oppenlaender, Projects &
Communications Manager

New OCW Members for 2024

- ♦ Alton Farms Estate Winery
- ♦ De Simone Vineyards
- ♦ Dobbin Estate
- ♦ Front Road Cellars
- ♦ Hessenland Inn and Schatz Winery
- ♦ Hillier Creek Estates
- ♦ KIN Vineyards
- ♦ Last House Vineyard
- ♦ Morandin Wines
- ♦ Shale Ridge Estate Winery & Cidery
- ♦ Urban Tractor Farm
- ♦ Villa Romana Estate Winery Inc.

Ontario Craft Wineries Committees

The OCW is thankful to our members who volunteer on committees to help plan and produce programming that benefits the entire Ontario wine and grape industry.

OCW Executive Committee

Carolyn Hurst,
Chair/Chair of Governance
Westcott Vineyards
Dan Sullivan, Vice-Chair
Rosehall Run Vineyards

Suzanne Janke, Secretary
Stratus Vineyards
Darryl MacMillan, Treasurer
Pelee Island Winery

Paul Speck
Henry of Pelham Family Estate Winery
Len Pennachetti
Cave Spring Vineyard (Ex-Officio)

Nominating Committee

Len Pennachetti, Chair
Cave Spring Vineyard (Ex-Officio)
Paul Speck
Henry of Pelham Family Estate Winery

Daniel Lafleur
Tawse Winery
Erin MacInnis
Closson Chase Vineyards

Ilya Senchuk
Leaning Post Wines

VQA Marketing Committee

Ed Madronich, Co-Chair
Flat Rock Cellars
Darryl MacMillan
Pelee Island Winery

Suzanne Janke
Stratus Vineyards
Paul Speck
Henry of Pelham Family Estate Winery

Tom Pennachetti
Cave Spring Vineyard

Ontario Craft Wine Conference Committee

Stephen Gash, Chair
Malivoire Wine Company
Ed Madronich
Flat Rock Cellars

Ilya Senchuk
Leaning Post Wines
J.J. Syer
Rosehall Run Vineyards

Kierstyn Pare
Pelee Island Winery
Suzanne Janke
Stratus Vineyards

Aaron Dobbin
Wine Growers Ontario

Sustainable Winegrowing Ontario Committee

Andrea Kaiser, Chair
Reif Estate Winery
Benjamin Whitty
13th Street Winery
Dave Hooper
Cave Spring Vineyard
JL Groux
Stratus Vineyards
Shiraz Mottiar
Malivoire Wine Company
Tobias Fiebrandt
Vineland Estates Winery
Nick Lemieux
Grape Growers of Ontario

Debbie Zimmerman
Grape Growers of Ontario
Erwin Wiens
Grape Growers of Ontario
Laurie MacDonald
Ontario Wine Appellation Authority
Peter Harris
Ontario Wine Appellation Authority
Sylvia Augaitis
Wine Marketing Association of Ontario
Magdalena Kaiser
Wine Marketing Association of Ontario

Audit Committee

Darryl MacMillan, Chair
Pelee Island Winery
Carolyn Hurst
Westcott Vineyards
Dan Sullivan
Rosehall Run Vineyards
Faik Turkmen
Lailey Winery

Chair's Message

As I look back on my third year as Chair of the Ontario Craft Wineries (OCW), I write knowing the pandemic is largely behind us. Through shared sacrifice these past few years, our industry weathered extraordinary challenges, adapted quickly and, as an industry, we have come out stronger on the other side. Ontarians are rediscovering our beautiful wineries and our internationally renowned wines are retaking centre stage. This gives us a renewed sense of hope and excitement.

The past year saw the official unveiling of Ontario's VQA Wine and Grape Industry 2030 Vision. The 2030 Vision was the culmination of a process that started last summer. The process began by reaching out through surveys and interviews from across the entire industry to capture a broad stakeholder perspective. This included the LCBO, governments, media, trade, critics, winemakers, winery owners, licensees, marketers, and so on. We then held a two-day workshop to develop our exciting Vision 2030 strategy. The result is a vision for our industry's growth and potential over the next 7 years, with clear objectives and corresponding strategies. By 2030 we envision our industry as connected, sustainable, prosperous and celebrated. The process showed what we can do as an industry when we come together in a spirit of cooperation and purpose. From Niagara to Prince Edward County to Lake Erie North Shore to the Emerging Regions, we are all committed to a common cause: the success and celebration of Ontario VQA wines.

When it came to advocacy, this past year also saw industry stakeholders unified, working together for the success of the industry. We worked hard to secure government support at all levels to remove roadblocks and barriers in our way. This resulted in a second year of funding for the Wine Sector Support Program, an expansion of the VQA Wine Support Program and the extension of the Winery Agritourism Economic Relief Grant. All of these programs help reduce our regulatory and tax burdens - creating growth, jobs and investment in our industry. A big thank you goes out to all our Members of Parliament as well as local Mayors and Councillors who have championed our causes and supported our advocacy initiatives.

We all know that collectively we have built a world class wine industry, thanks in part to the land we are blessed to call home, and equally to the innovation, strategic thinking and plain hard work of our winery members. On this note, I would like to thank my fellow Board Members for their time, commitment and sacrifice to the OCW this year. I would also like to thank our dedicated industry staff, the LCBO and our loyal customer base for their ongoing support of our local wineries.

I wish all our winery members a happy, exciting and prosperous year ahead.



Carolyn Hurst
Chair, Ontario Craft Wineries



President's Message

I am pleased to present the Ontario Craft Wineries' (OCW) 2022-2023 Annual Report.

This year marked the first year of business normalcy since the end of the COVID-19 pandemic. While the year turned out to be a good year for Ontario VQA wines, it was still marked by slower growth rates than we experienced as an industry in 2022 and 2021. The grape harvest also came in at just over 46,000 tons, making it the smallest harvest in over 15 years. Significant grapevine losses were due to extreme weather conditions in 2021-22, forcing our industry to be nimble and responsive to the ongoing impacts of climate change. On a positive note, the premium side of the wine business continued to deliver excellent growth at onsite retail and in direct-to-consumer channels. Premiumization remains a lasting effect from the past few years, but headwinds remain. We must work together as an industry to continue to generate consumer demand across all channels to increase sales of Ontario VQA wines.



Our mission to champion and advocate for the growth and success of Ontario VQA wine producers remained paramount this year, securing close to fifty million in combined industry supports at federal and provincial levels of government. In addition, the OCW saw record participation in the Sustainable Winegrowing Ontario Certified program, which featured 24 wineries and 53 vineyards who took their environmentally-friendly practices one step further. The Ontario Craft Wine Conference also achieved new heights, with record winery and trade attendance at the April conference and fabulous international speakers who brought fresh new perspectives to our winemakers and farming community.

And last, but not least, we developed an aspirational consumer-centric 2030 Vision to grow Ontario's VQA wine and grape industry. The result was accomplished through a highly collaborative process with industry partners, Wine Growers Ontario and the Wine Marketing Association of Ontario. The 2030 roadmap will support our success in having a more engaged consumer, delivering increased sales and a more financially sustainable and successful VQA industry. Central to this vision is a united voice, with our entire industry working together to achieve collective success. But it is crucial for all wineries to get involved and remain engaged in the process in order to keep building our world-class industry.

In closing, this has been a challenging past year, if not few years for our industry. Summer does give us a renewed sense of hope and excitement, as does our new 2030 Vision. To this end, I want to thank our Chair, Carolyn Hurst, and our Board of Directors, staff, government and all stakeholders in the beverage alcohol system for their feedback and support over the past year. Importantly, thank you to our winery members for your confidence in the OCW team and the continued opportunity to advocate on your behalf.

Sincerely,

A handwritten signature in black ink, reading "Richard Linley". The signature is fluid and cursive, with a large, stylized 'R' and 'L'.

Richard Linley
President, Ontario Craft Wineries

Ontario's VQA Wine and Grape Industry - 2030 Vision

Many of the world's premiere wine regions have developed their craft over centuries. Ontario's wine industry pre-dates Prohibition, but Ontario's VQA wine and grape industry ("our industry") is only decades old. Building on that history, our industry and the wineries that craft the product have an amazing story to tell.

Over the past four decades, our industry has grown in quality, producing a vibrant product offering, which is exciting consumers. Our local and global impact is significant. Benefiting from a superior "terroir" – a supportive mix of sun, rain and soil - we create some of the world's finest wines. Many consumers today favour wines produced in cooler climates and Ontario's appellations produce premium wines that rival or exceed the quality and taste of any wine on the world stage. Ontario has 18,000 acres under vine and has grown to 191 VQA wineries, concentrated in the Niagara Peninsula, Prince Edward County and Lake Erie North Shore. A changing climate and improved agricultural technologies now support emerging wine regions across the province of Ontario in Norfolk and Haldimand Counties, Central Ontario and Georgian Bay, Huron Shores and Eastern Ontario. Local wineries and their regional communities have become important destinations for tourists from near and far who are seeking to immerse themselves in Ontario's wine culture while discovering everything Ontario's wine country has to offer.

Today, our wine industry contributes \$5.5 billion annually to the province's economy. Economic clusters have formed in rural regions around the province based on an extensive complement of industries that support both winemaking and grape growing. In 2019, twenty-two thousand full-time equivalent jobs were supported in the agriculture, food and beverage, hospitality, tourism, education and research sectors. Over 2.69M visitors came to wine country in the same year. Planting wine grapes that become VQA wines produces the highest value-added return from an acre of agricultural land in Ontario. We play a critical role in protecting Ontario's prime agricultural lands. Despite the broad global trend of declining wine sales as a percentage of overall alcohol sales, our VQA wines have maintained their market share in a declining market.

At the heart of our industry is our people, known for their passion, creativity, resilience, and entrepreneurship. It is broadly acknowledged that Ontario's VQA wine and grape industry has arrived, and we need to celebrate this success as our industry has faced no shortage of challenges. We have set the foundation for the next stage of our growth.

By 2030, we envision our industry as connected, sustainable, prosperous and celebrated. We will be known for our vibrant wine culture and our wines will be respected globally while being enjoyed and recognized locally.

Our 2030 Strategic Priorities



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

Ontario Craft Wineries Year in Review

State of the Ontario VQA Wine Industry

The Ontario VQA wine industry saw wine sales continue to soften while customer purchasing habits continued to return to pre-pandemic shopping patterns. This was not unique to Ontario. European wines and New World wines also declined, as wines consumption is declining nationally and globally. Inflationary and economic pressures, post-pandemic stress along with alleged health risks associated with beverage alcohol have been "top of mind" for consumers resulting in overall reduced consumption.

Specifically, there have been changing behaviours in key Ontario wine segments with erosion in important price bands (GL < \$17.95, Vintages \$18-\$24.95); ongoing market share loss to Ready-to-Drink and Spirits; and the moderation movement or "Less but Better" approach continues to result in premiumization, but the growth rate is slowing as economic pressures continue to impact shopping behaviour. Increased emphasis on health and well-being is leading consumers to desire moderation and seek out lighter options including low sugar and low alcohol by volume. For example, a number of dry events have become popular, such as Dry January and Sober September. Celebrity and Lifestyle brands also continue to be popular, especially among younger customers.

With these popular trends, the past year taught us that consumers are leaving lower-priced segments in favour of better-quality products. Volume growth in wine is flattening while premiumization is still a trend, which presents an upside for Ontario wineries. However, we must ensure premium wine growth does not slow to the point of decline. When it comes to consumer cohorts, our category demand problem extends beyond millennials. Younger consumers, in general, consume and purchase less beverage alcohol than older consumers and tend to purchase products across all beverage categories. We must adapt and find new ways to generate excitement around wine and gain additional sales growth. Especially in a soft economy, we need to continuously remind customers that they can buy fantastic, more sustainable VQA wines right here in their own backyard.

In sum, VQA wines increased +0.8% by value and decreased -0.5% by volume through all channels in fiscal year 2023 over 2022. Moving ahead, it is clear that customer shopping patterns and wine consumption will not be as predictable given the variable factors outlined above. The lingering effect of the recent short-crop could also result in a challenging year for VQA as a category. As an industry, it is critical that we continue to collaborate with the Wine Marketing Association of Ontario on all marketing efforts to support the growth of Ontario VQA wines. Given the unknowns of the economy and softening consumption, we must continue to work together to generate consumer demand across all channels.

| VQA Wine Sales in Ontario | FY2023 | % Growth Over FY2022 |
|--|------------------|----------------------|
| LCBO, WRS, & Licensee to Mar. 31, 2023 | | |
| Value (net of HST) (\$000) | | |
| LCBO & Grocery - Wines and Vintages | \$168,839 | -6.3% |
| Direct Sales to Licensees | \$57,391 | 57.5% |
| WRS - Onsite & Offsite | \$165,422 | -3.8% |
| Total | \$391,652 | 0.8% |
| Volume (000 L) | | |
| LCBO & Grocery - Wines and Vintages | 9,446.6 | -9.3% |
| Direct Sales to Licensees | 3,705.8 | 66.2% |
| WRS - Onsite & Offsite | 6,759.4 | -8.3% |
| Total | 19,912 | -0.5% |
| Value per L (net of HST) | \$19.67 | 1.3% |

Source: LCBO Quarterly Scorecard Summary, Fourth Quarter, 2022-23

The Ontario Grape and Wine Industry Performance Study

The eighth annual Ontario Grape and Wine Industry Performance Study (2022) conducted by the Ontario Ministry of Agriculture, Food and Rural Affairs was finalized earlier this year. In previous years it was administered by the Ontario Wine Appellation Authority and conducted by Deloitte. This year's study provides an extensive overview of the state of the industry based on a comprehensive study of active Ontario wineries.

Similar to previous years, wineries were asked to rank the top five challenges impacting their business. Taxation, government regulation and cost of compliance, gross margins on LCBO sales, access to viable retail markets and property taxation/zoning/municipal infrastructure were the top challenges identified by wineries in the 2022 winery benchmarking survey. The study continues to help inform policy discussions with the Ontario government and industry partners and OCW will advocate to resume the study for 2023.

Government Advocacy

OCW has made progress towards the Ontario VQA wine industry's objective of a tax and regulatory environment that supports the financial viability of its members and the industry more broadly. But what has been accomplished is only a down payment on the structural changes required that would benefit all the stakeholders in the Ontario wine eco-system. The north star for the OCW remains a regulatory environment that is compatible with all winery business models and creates the market conditions for our members, grape growers, retailers and consumers to each achieve successful outcomes.

Like any other business, Ontario wineries need stable and predictable pro-growth government programs and policies to ensure our sustainability and to grow to our potential. In response, the Ontario government extended the Ontario Wine Fund for 2023-24 and 2024-25. In addition, the government provided another \$10 million in agri-tourism support to our winery members. The funding will provide wineries with on-site store sales with financial stability and ongoing transitional support.

The industry greatly appreciates the much-needed financial certainty. However, the industry continues to face structural issues as well as uncertain climatic conditions that continue to hinder the growth of the industry and threaten its long term success. We continue to encourage the Ontario government to take a page from other Canadian jurisdictions that have created the necessary conditions for their wineries to thrive, compete and reinvest in their operations. The best way to make that possible is to stop hindering our industry in two important retail channels and adopt the following priorities for the industry:

Eliminate the 6.1% Basic Wine Tax Charged on VQA/100% Ontario Grown Wines

This is a punitive tax measure imposed only on Ontario wineries that sell their own wine from their cellar doors. None of our regional competitors pay this type of tax. This is a tax on Ontario jobs, Ontario small businesses, Ontario farm families and agri-tourism. The elimination of the 6.1% Basic Wine Tax would improve margins, particularly for wineries dependent on farmgate sales, and would help retain and create jobs as the province's economy continues to rebound from the pandemic period.

Align Supports with the Quality Enhancement Program in British Columbia

Bringing Ontario's industry supports in line with British Columbia with a fully funded, revamped and permanent VQA Wine Support Program would provide stability and permit adequate long-term business planning for Ontario wineries. A fully funded and permanent program will encourage further investment in the local Ontario industry, similar to what has been experienced in B.C. An uncapped, permanent VQA Wine Support Program will lead to a number of key outcomes beneficial to both our industry and the government, including new investment in marketing, labour, capital, and grape purchases. An uncapped VQA Support Program will also drive domestic investment in promotion and marketing at the LCBO, leading to improved market share for our domestic industry, which has been stagnant at the LCBO. Such a program will truly allow us to make the LCBO an agent of meaningful change.

Reconvene the Government-Industry Steering Committee

Building on the critical foundational supports above, and to ensure a sustainable and successful industry, we have requested that the government reconvene the Government-Industry Steering Committee (previously the Wine and Grape Secretariat) to strengthen the collaboration between the government and our sector. The Committee ought to reconvene to address key issues facing the wine and grape industry to create long-term growth with measurable targets and improved margins for wineries at the farmgate and in wholesale channels.

Looking ahead, OCW continues to meet regularly with members of the federal and provincial governments, the LCBO, the AGCO and industry stakeholders to ensure continual dialogue on the priorities of our winery membership and those of our industry partners.

Over the past year, the OCW membership met with the following government partners:

- ◆ Honourable Marie-Claude Bibeau, Minister of Agriculture and Agri-Food, Canada
- ◆ MP Chris Bittle, Parliamentary Secretary to the Minister of Canadian Heritage
- ◆ MP Vance Badawey, Parliamentary Secretary to the Minister of Indigenous Services
- ◆ Honourable Doug Ford, Premier of Ontario
- ◆ Honourable Lisa Thompson, Minister of Agriculture, Food and Rural Affairs
- ◆ Honourable Peter Bethlenfalvy, Minister of Finance
- ◆ Honourable Prabmeet Singh Sarkaria, President of the Treasury Board
- ◆ Honourable Neil Lumsden, Minister of Heritage, Sport, Tourism and Culture Industries
- ◆ Honourable Kaleed Rasheed, Minister of Public and Business Service Delivery
- ◆ Honourable Todd Smith, Minister of Energy
- ◆ Honourable Charmaine A. Williams, Associate Minister of Women's Social and Economic Opportunity
- ◆ MPP Trevor Jones, Parliamentary Assistant to the Minister of Agriculture, Food and Rural Affairs
- ◆ MPP Rob Flack, Parliamentary Assistant to the Minister of Agriculture, Food and Rural Affairs
- ◆ MPP Ric Bresee, Parliamentary Assistant to the Minister of Natural Resources and Forestry
- ◆ MPP John Fraser, Vice-Chair, Standing Committee on Government Agencies
- ◆ MPP Wayne Gates, Critic, Long-Term Care, Retirement Homes and Home Care
- ◆ MPP Jennifer Stevens, Critic, Veterans, Legions and Military Affairs, Sport and Tourism
- ◆ MPP Jeff Burch, Critic, Municipal Affairs
- ◆ MPP Ernie Hardeman, Chair, Standing Committee on Finance and Economic Affairs
- ◆ MPP Sam Oosterhoff, Parliamentary Assistant to the Minister of Red Tape Reduction
- ◆ MPP Anthony Leardi, Parliamentary Assistant to the Minister of Mines
- ◆ MPP Rick Byers, Parliamentary Assistant to the Minister of Finance
- ◆ MPP Stephen Crawford, Parliamentary Assistant to the Minister of Finance
- ◆ MPP Mike Schreiner, Vice-Chair, Standing Committee on the Interior

OCW met with and actively worked alongside the following groups this past year:

- ◆ Drinks Ontario
- ◆ Food and Beverage Ontario
- ◆ Grape Growers of Ontario
- ◆ Greater Niagara Chamber of Commerce
- ◆ Napa Green
- ◆ Ontario Chamber of Commerce
- ◆ Ontario Craft Brewers
- ◆ Ontario Craft Cider Association
- ◆ Ontario Craft Distillers Association
- ◆ Ontario Wine Appellation Authority
- ◆ Quebec Wine Council
- ◆ Sustainable Winegrowing British Columbia
- ◆ Wine Marketing Association of Ontario
- ◆ Wine Growers Canada
- ◆ Wine Growers Ontario
- ◆ Regional, Municipal and Local Governments



Ontario Craft Wine Conference & Trade Show



The fifth annual Ontario Craft Wine Conference & Trade Show (OCWC23) took place in person at the Niagara Falls Convention Centre on Tuesday, April 18, 2023. After three years apart and two virtual events, the conference brought together Ontario's VQA wine and grape industry leaders and professionals for a full day of education, networking, and business building.

OCWC23 welcomed over 500 attendees under the theme, "Forging A Sustainable Future", drawing close to 90 wineries from across Ontario. Winery representatives attended from all areas of the business, including owners, winemakers, growers, senior management, sales, and retail. The conference also welcomed business partners, government officials, industry stakeholders and wine enthusiasts.

We are very proud of the agenda we built for this year's conference. There were 12 outstanding education sessions, featuring over 30 local, national, and international speakers on everything from sustainability, marketing to operations, and viticulture. The sessions were enlightening, the speakers engaging and thought provoking, leading to valuable takeaways beneficial for winery businesses. Of note, keynote speakers, Gaia Gaja of Gaja Winery and David Francke of Chappellet Winery, provided fascinating insights into the history and growth of their respective brands as well as practical, tangible business advice on how wineries of all sizes can succeed in the future. OCWC23 also held the only wine industry trade exhibition of its kind in Ontario and featured 60 exhibitors from all types of businesses and supplier industries.

A special thank you goes out to the planning committee who attended our biweekly meetings and put together our amazing sessions: Ed Madronich, Ilya Senchuk, J.J. Syer, Kierstyn Pare, Suzanne Janke and Aaron Dobbin. Our behind the scenes team also included OCW staff and our event planners, Jenny and Christine Mulkins from Boost Events. Thanks also to the staff at the Wine Marketing Association of Ontario offices who helped facilitate ongoing logistics. Lastly, the conference was made possible by the generous support of 15 sponsors and industry trade partners. Their continued support of the OCWC is greatly appreciated.

Thank you to all of you, our winery members, trade partners and the industry for supporting this important gathering. We look forward to seeing everyone in person at OCWC24.

Respectfully,

A stylized, handwritten signature in black ink.

Stephen Gash
Chair, 2023 Ontario Craft Wine Conference & Trade Show



Sustainable Winegrowing Ontario Certified

It has been an honour and a pleasure to work again with the Sustainable Winegrowing Ontario (SWO) Certified Committee over the past year, as 2022 marked the second year of the newly merged program, SWO Certified. With the support of the Grape Growers of Ontario, the evolution of the SWO Certified program to include both winery and vineyard certification has ensured that the complete grape-to-glass cycle is sustainable. At its core, the merged program is formed around the three core pillars of sustainability – environment, economy, community – all of which reflect how our wineries and growers are invested in building socially responsible and sustainable businesses.



This past year saw record participation in the program as many Ontario winemakers and grape growers chose to take their environmentally-friendly practices one step further by participating in the program. In 2022, there were 24 wineries and 53 vineyards who certified as part of this year's program. With new wineries in the program, you can now look for the SWO Certified logo on more of your favourite Ontario VQA wine bottles, starting with the 2021 and now the 2022 vintages.

In addition to our dedicated SWO Certified website, the SWO Certified program continues to share regular monthly posts on Facebook, Twitter, LinkedIn and Instagram, featuring our SWO Certified wineries and growers as well as highlighting best practices amongst our wineries and growers. We have also continued our work with the Wine Marketing Association of Ontario and LCBO to highlight our wineries' sustainable practices through collective marketing initiatives and ongoing LCBO promotional activities.

Lastly, I am pleased to report that SWO Certified and Sustainable Winegrowing BC are embarking on a joint application to the federal AgriAssurance fund this year. If successful, the funding would facilitate greater integration of industry sustainability assurance systems, create efficiencies and coordinate programming nationally. It would also advance best management practices between wine regions while boosting consumer confidence in our programs across the country.

As always, I am thankful and appreciative for the opportunity to serve as Chair of the SWO Certified Committee. I look forward to working with my colleagues and industry staff to advance the program this year.

Sincerely,

Andrea Kaiser

Committee Chair, Sustainable Winegrowing Ontario Certified



2022 Sustainable Winegrowing Ontario Certified wineries:

- | | | |
|--|----------------------------------|----------------------------|
| ◆ 13th Street Winery | ◆ Icellars Estate Winery | ◆ Riverview Cellars |
| ◆ Andrew Peller Limited | ◆ Leaning Post Wines | ◆ South Brook Vineyards |
| ◆ Cave Spring Vineyard | ◆ Malivoire Wine Company | ◆ Stratus Vineyards |
| ◆ Château des Charmes | ◆ Niagara College | ◆ Strewn Winery |
| ◆ Ferox Estate Winery | ◆ Teaching Winery | ◆ Thirty Bench Wine Makers |
| ◆ Flat Rock Cellars | ◆ Oxley Estate Winery | ◆ Trius |
| ◆ Henry of Pelham Family Estate Winery | ◆ Pelee Island Winery & Pavilion | ◆ Vineland Estates Winery |
| ◆ Hidden Bench Estate Winery | ◆ Peller Estates | ◆ Wayne Gretzky Estates |
| | ◆ Reif Estate Winery | |

OCW Trade Membership

OCW's Trade Membership program continues to be a valuable addition to the OCW, as it aims to benefit OCW members and local businesses by connecting wineries with suppliers that offer products and services to the wine and grape industry. Trade members range from business consulting services, financial services, insurance, law, manufacturing, to printing and promotional services, retail suppliers, warehousing and logistics and software companies. Winery members are encouraged to take advantage of the offerings presented by our OCW trade membership. Thank you to our trade members for their continued support.

2022 Ontario Craft Wineries Trade Members

Agriculture

Nuture Growth
Biofertilizer Inc.
www.nuturegrowthbio.com

Business Consulting

Accelerated Payments
www.acceleratedpayments.com
Bevalytics Consulting Group
www.bevalytics.com
DJB Human Resources
Advisory
www.djb.com
Flowmation Systems Inc.
www.flowmation.com
Last Call Analytics
www.lastcallanalytics.com
Lithica Wine Marketing
www.lithica.wine
MNP LLP
www.mnp.ca
NuVerge, Canada
www.nuverge.com/leanvintner
Signature Risk Partners
www.signaturerisk.com
SWIG – Spirits Wine
Information Company
www.spiritswineinfo.com
Vintrace
www.vintrace.com

Educational Services

Independent Wine Education
Guild (IWEG)
www.iweg.org

Financial Services

Desjardins Ontario
Credit Union
www.desjardins.com/agricultural

Industrial Services

Newark Bottling Inc.
www.newarkbottling.com
PaxNatura Limited
www.pax-nat.com

Insurance & Health Benefits

BeniPlus Inc.
www.beniplus.ca
Beverage Protect Powered
by BKIFG
www.beverageprotect.com
Reuter & Reilly Insurance
Brokers
www.reuter.on.ca

Law

Cases and Cases
www.casesandcases.ca
Sullivan Mahoney
www.sullivanmahoney.com

Manufacturing

A.O. Wilson
www.aowilson.ca
Claymore Designs &
Construction
www.instagram.com/claymore.dc
Delos Glass
www.delosglass.com
Deris International
www.derisinternational.com
Jane's Packaging Inc.
www.janepackaging.com
Lakeview Vineyard Equipment
www.lakeviewvineyardequipment.com
Prospero Equipment
Canada Corp.
www.prosperequipment.com

Saxco International
www.saxco.com

United Bottles & Packaging
www.unitedbottles.com

Printing & Promotional Services

Artcraft Label Inc.
www.artcraftlabel.ca
ASL Print FX Ltd.
www.aslprintfx.com
Minuteman Press
www.minuteman.com/ca/locations/on/st-catharines
The Printing House
www.tph.ca
Eye Candy Design
www.eyecandydesign.ca

Retail Supplies

Rosehill Wine Cellars
www.rosehillwinecellars.com
Zenan Glass
www.zenan.ca

Shipping, Warehousing & Logistics

ERUSH / PigeonShip
www.pigeonship.com
Fil Delivery Inc.
www.fildelivery.com
Flashbox
www.flashbox.com
GLS Canada Ltd
www.gls-canada.com
Swiftpost
www.swiftpost.com
Timax Inc.
www.timax.com

*The Ontario Craft Wineries would
like to acknowledge our long-standing members:*

40+ Years

Reif Estate Winery ♦ 41, since 1982

30+ Years

Pelee Island Winery ♦ 39, since 1984

Cave Spring Vineyard ♦ 37 years, since 1986

Stoney Ridge Estate Winery ♦ 36 years, since 1987

Henry of Pelham Family Estate Winery ♦
35 years, since 1988

Konzelmann Estate Winery ♦ 35 years, since 1988

Marynissen Estates Winery ♦ 32 years, since 1991

Southbrook Vineyards ♦ 32 years, since 1991

Joseph's Estate Wines ♦ 31 years, since 1992

Sunnybrook Farm Estate Winery ♦ 30 years, since 1993

25+ Years

Hernder Estate Wines ♦ 27 years, since 1996

Strewn Winery ♦ 26 years, since 1997

20+ Years

Royal DeMaria Wines Company Ltd. ♦
24 years, since 1999

Kacaba Vineards ♦ 23 years, since 2000

Harbour Estates Winery ♦ 23 years, since 2000

Malivoire Wine Company ♦ 23 years, since 2000

Puddicombe Estate Winery ♦ 22 years, since 2001

Lailey Winery ♦ 21 years, since 2002

Riverview Cellars Winery ♦ 21 years, since 2002

Rockway Vineyards ♦ 21 years, since 2002

Caroline Cellars ♦ 20 years, since 2003

20+ Years Continue

Grange of Prince Edward Vineyard & Winery ♦
20 years, since 2003

Niagara College Teaching Winery ♦ 20 years, since 2003

Palatine Hills Estate Winery ♦ 20 years, since 2003

Waupoos Estates Winery ♦ 20 years, since 2003

15+ Years

Flat Rock Cellars ♦ 19 years, since 2004

Ridgepoint Wines ♦ 19 years, since 2004

Stratus Vineyards ♦ 19 years, since 2004

Willow Springs Winery ♦ 19 years, since 2004

13th Street Winery ♦ 18 years, since 2005

Fielding Estate Winery ♦ 18 years, since 2005

Huff Estates Winery ♦ 18 years, since 2005

Colchester Ridge Estate Winery ♦ 17 years, since 2006

Frogpond Farm Organic Winery ♦ 17 years, since 2006

Mastronardi Estate Winery ♦ 17 years, since 2006

Tawse Winery ♦ 17 years, since 2006

Sprucewood Shores Estate Winery ♦ 16 years, since 2007

Muscudere Vineyards ♦ 16 years, since 2007

Rosehall Run Vineyards ♦ 16 years, since 2007

Hidden Bench Estate Winery ♦
16 years, since 2007

Black Prince Winery ♦ 16 years, since 2007



We acknowledge that our wineries and vineyards are on the territories of the: The Anishinabewaki, Attiwonderonk, Haudenosaunee, Mississauga and Mississaugas of the Credit First Nation land, Ojibwe, the Odawa, and the Potawatomi People. As a guest of this land, we thank Indigenous Peoples for caring and protecting the lands and waters we use to work and live. In the spirit of peace, friendship and respect to all Indigenous Peoples, we will continue to honour this place we call home.



ONTARIO
CRAFT
WINERIES

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