

2011 B.C. WineGrape Acreage Report

August 1, 2011



View facing north between Oliver and Osoyoos

It has been three years since the last compilation of information from independent growers and wineries for a B.C. wine grape acreage report. The following report was compiled in May, June & July of 2011 and comprises acreage up to and including 2011 plantings. We have endeavoured to gather information from as many vineyards as possible in B.C. and estimate the data comprises 95% of the B.C. wine grape acreage. The information presented is for the use of all grape growers and wineries for future planning. If you have any questions in regards to this report please feel free to contact Mount Kobau Wine Services (bremmer@MtKobau.bc.ca), the B.C. Wine Institute (info@winebc.com) or the B.C. Grape Growers Association (bcga@nethop.net). The report will also be available on the B.C. Wine Institute and B.C. Grape Growers web sites: www.winebc.com or www.grapegrowers.bc.ca



OVERVIEW

August 1, 2011

- There are 9,866.52 acres (3,946 hectares) of wine grapes+ in B.C.;
- 48 % White grapes / 52 % Red grapes;
- 95.7 % Vinifera grapes / 4.3 % hybrids;
- Most planted varieties in order of acres:
 - Merlot
 - Pinot Gris
 - Chardonnay
 - Pinot Noir
 - Cabernet Sauvignon
 - Gewurztraminer
 - Syrah
 - Cabernet Franc
 - Riesling
 - Sauvignon Blanc
- There are 210 licensed grape wineries in B.C. and 24 additional growers indicated they will start a winery in the future.
- There are 864 vineyards in B.C. (both winery and independently owned), with acreage distributed as follows:
 - 81.7 % in the Okanagan Valley
 - 7.0 % in the Similkameen Valley
 - 8.3 % in the Coastal Areas
 - 3.0 % in Other areas of B.C.
- 61.7 % of wine grape acreage is winery owned or controlled and 38.3 % is owned by independent grape growers.
- Average winery vineyard size is 28.97 acres.
Average independent grower vineyard size is 6.6 acres.



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B.C. WHITE WINE GRAPES

August 2011

WHITE VARIETY	ACREAGE	% of WHITES	% of TOTAL GRAPES
Pinot Gris	1,065.67	22.54 %	10.80 %
Chardonnay	916.68	19.39 %	9.29 %
Gewurztraminer	706.64	14.95 %	7.16 %
Riesling	439.27	9.29 %	4.45 %
Sauvignon Blanc	392.70	8.31 %	3.98 %
Pinot Blanc	265.92	5.63 %	2.70 %
Viognier	204.01	4.32 %	2.07 %
Ortega	70.90	1.50 %	0.72 %
Ehrenfelser	70.52	1.49 %	0.71 %
Blattner Whites	62.66	1.33 %	0.64 %
Muscats	59.47	1.26 %	0.60 %
Bacchus	51.97	1.10 %	0.53 %
Semillon	47.28	1.00 %	0.48 %
Auxerrois	43.58	0.92 %	0.44 %
Siegenerrebe	43.30	0.91 %	0.44 %
Vidal	35.32	0.75 %	0.36 %
Kerner	28.13	0.59 %	0.29 %
Schonburger	26.57	0.56 %	0.27 %
Chenin Blanc	18.00	0.38 %	0.18 %
Muller Thurgau	16.59	0.35 %	0.17 %
Madeleine Angevine	16.35	0.35 %	0.17 %
Madeleine Sylvaner	15.40	0.33 %	0.16 %
Optima	14.01	0.30 %	0.14 %
Chasselas	12.87	0.27 %	0.13 %
Roussanne	12.86	0.27 %	0.13 %
Reichensteiner	11.50	0.24 %	0.11 %
Sovereign Opal	7.00	0.15 %	0.07 %
Marsanne	6.48	0.14 %	0.06 %
Trebbiano	5.00	0.10 %	0.05 %
Oraniensteiner	4.00	0.08 %	0.04 %
Traminer	1.74	0.04 %	0.02 %
Verdelet	1.50	0.03 %	0.01 %
Sylvaner	0.50	0.01 %	0.01 %
Miscellaneous Whites	52.85	1.12 % -	0.53 %
TOTAL WHITE HYBRIDS (acres):	127.98	2.71 %	
TOTAL WHITE VINIFERA (acres):	4,599.26	97.29 %	
TOTAL WHITE GRAPES (acres):	4,727.24	100.00 %	47.91 %

B.C. RED WINE GRAPES

August 2011

RED VARIETY	ACREAGE	% of REDS	% of TOTAL GRAPES
Merlot	1600.90	31.15 %	16.23 %
Pinot Noir	948.71	18.46 %	9.62 %
Cabernet Sauvignon	755.17	14.69 %	7.65 %
Syrah (Shiraz)	546.50	10.63 %	5.54 %
Cabernet Franc	517.45	10.07 %	5.24 %
Gamay Noir	153.73	2.99 %	1.56 %
Marechal Foch	137.30	2.67 %	1.39 %
Blattner Reds	97.29	1.89 %	0.99 %
Malbec	95.96	1.87 %	0.97 %
Petit Verdot	65.58	1.28 %	0.67 %
Zweigelt	41.72	0.81 %	0.42 %
Zinfandel	18.84	0.37 %	0.19 %
Pinotage	14.90	0.29 %	0.15 %
Tempranillo	13.91	0.27 %	0.14 %
Baco Noir	12.45	0.24 %	0.13 %
Pinot Meunier	11.33	0.22 %	0.12 %
Lemberger	10.10	0.20 %	0.10 %
Sangiovese	8.17	0.16 %	0.09 %
Leon Millot	7.20	0.14 %	0.07 %
Chancellor	7.10	0.14 %	0.07 %
Dunkelfelder	6.16	0.12 %	0.06 %
Agria	5.71	0.11 %	0.06 %
Castel	5.32	0.10 %	0.05 %
Carmenere	4.43	0.09 %	0.04 %
Grenache	4.18	0.08 %	0.04 %
Mourvedre	3.82	0.07 %	0.04 %
Dornfelder	3.17	0.06 %	0.03 %
Barbera	3.13	0.06 %	0.03 %
Rotberger	2.95	0.06 %	0.03 %
Michurinetz	1.00	0.02 %	0.01 %
St.Laurent	0.90	0.02 %	0.01 %
Nebbiolo	0.50	0.01 %	0.01 %
Miscellaneous Reds	33.70	0.66 %	0.34 %
TOTAL RED HYBRIDS (acres):	280.46	5.5 %	
TOTAL RED VINIFERA (acres):	4,858.82	94.5 %	
TOTAL RED GRAPES (acres):	5,139.28	100.00 %	52.09 %

B.C. VINEYARDS / GRAPE ACREAGE by REGION

August 2011

<u>REGION</u>	<u># of VINEYARDS</u>	<u>ACRES</u>	<u>% of TOTAL</u>
Oliver	174	3,543.18	35.9 %
Osoyoos	99	1,509.62	15.3 %
Kelowna / West Kelowna	82	904.46	9.1 %
Penticton / Naramata	176	897.74	9.1 %
Similkameen Valley	44	691.44	7.0 %
Okanagan Falls	32	538.81	5.5 %
Vancouver Island	59	431.87	4.4 %
Peachland / Summerland	57	354.67	3.6 %
Lower Mainland / Fraser Valley	27	263.45	2.7 %
Lake Country / Vernon	29	196.43	2.0 %
Gulf Islands	14	115.64	1.2 %
Kaleden	26	115.29	1.2 %
Spallumcheen / Shuswap	17	97.00	1.0 %
Kamloops area	5	66.25	0.7 %
Lillooet / Lytton	7	54.20	0.5 %
East Kootenays (Creston)	6	51.02	0.5 %
West Kootenays (Trail/Castlegar)	4	17.80	0.2 %
Grand Forks area	4	14.00	0.1 %
Other B.C. Regions	2	3.65	0.0 %
	864 vineyards	9,866.52 acres (3,946 hectares)	100.00%

PRINCIPAL VARIETIES by REGION

(according to acreage)

REGION	PRINCIPAL VARIETIES	ACRES
SIMILKAMEEN	1. Merlot 2. Cabernet Sauvignon 3. Cabernet Franc 4. Chardonnay	131.79 80.93 65.35 62.05
OSOYOOS	1. Merlot 2. Cabernet Sauvignon 3. Syrah 4. Cabernet Franc	452.26 278.74 208.92 130.98
OLIVER	1. Merlot 2. Pinot Gris 3. Chardonnay 4. Cabernet Sauvignon	718.17 404.67 400.29 340.59
OKANAGAN FALLS	1. Chardonnay 2. Gewurztraminer 3. Pinot Noir 4. Pinot Gris	103.11 91.24 86.35 76.93
KALEDEN	1. Merlot 2. Gewurztraminer 3. Chardonnay 4. Pinot Noir	27.07 17.83 16.42 16.38
PENTICTON / NARAMATA	1. Merlot 2. Pinot Gris 3. Chardonnay 4. Pinot Noir	159.44 131.44 95.34 93.88
SUMMERLAND / PEACHLAND	1. Gewurztraminer 2. Pinot Gris 3. Pinot Noir	78.37 74.63 71.61
WESTBANK / KELOWNA	1. Pinot Noir 2. Gewurztraminer 3. Pinot Gris 4. Riesling	212.83 158.59 121.48 91.95
LAKE COUNTRY / VERNON	1. Pinot Gris 2. Pinot Noir 3. Riesling 4. Gewurztraminer	41.42 39.19 30.14 25.67
SPALLUMCHEEN / SHUSWAP	1. Ortega 2. Foch 3. Siegerebe	18.85 17.85 14.75
LOWER MAINLAND	1. Blattner Reds/hybrids 2. Blattner Whites/hybrids 3. Pinot Noir 4. Bacchus	55.00 42.25 32.75 24.50
VANCOUVER ISLAND / GULF ISLANDS	1. Pinot Noir 2. Pinot Gris 3. Ortega	108.64 101.98 45.15
OTHER AREAS OF B.C. Grand Forks, Kamloops, Lillooet- Lytton, West & East Kootenays, etc.	1. Pinot Noir 2. Blattner Reds/hybrids 3. Riesling	33.39 25.78 22.63

GEOGRAPHICAL INDICATIONS for B.C. WINES of DISTINCTION

August 2011

<u>REGION</u>	<u># of VINEYARDS</u>	<u># of WINERIES</u>	<u>ACRES</u>	<u>% of TOTAL ACRES</u>
Okanagan Valley	675	129	8,060.20	81.7 %
Similkameen Valley	44	12	691.44	7.0 %
Vancouver Island	59	29	431.87	4.4 %
Fraser Valley	27	16	263.45	2.7 %
B.C. Gulf Islands	14	9	115.64	1.2 %
Province of B.C.	45	15	303.92	3.0 %

B.C. WINERIES by REGION

REGION	LICENSED WINERIES
Penticton / Naramata	36
Vancouver Island	29
Oliver	27
Kelowna/West Kelowna	23
Summerland / Peachland	18
Lower Mainland/Fraser	16
Similkameen	12
Okanagan Falls	11
Gulf Islands	9
Shuswap/Spallumcheen	8
Lake Country / Vernon	6
Osoyoos	6
Creston	3
Kaleden	2
Kamloops	1
West Kootenays-Trail	1
Lillooet	1
Pemberton	1
TOTALS:	210

B.C. WINERY CONTROLLED ACREAGE vs INDEPENDENT GROWERS

<u>ACRES</u>	<u>NUMBER</u>	<u>ACRES</u>	<u>% of TOTAL</u>
B.C. Winery Owned/Operated Vineyards	336 *	6,083.77	61.66 %
B.C. Independent Grower Vineyards	460 *	3,782.75	38.34 %

*NOTE: many wineries & growers own 2 or more vineyard sites

B.C. WINERY SIZE by VINEYARD ACRES OWNED / LEASED

August 2011

VINEYARD SIZE	NUMBER of WINERIES	% by NUMBER of WINERIES	TOTAL ACRES by VINEYARD SIZE	% by ACREAGE
0.00 - 3.00 acres	26	12.4 %	49.63	0.8 %
3.01 - 5.00 acres	20	9.5 %	85.42	1.4 %
5.01 - 10.00 acres	66	31.4 %	476.72	7.8 %
10.01 - 20.00 acres	45	21.4 %	660.64	10.9 %
20.01 - 40.00 acres	29	13.8 %	847.53	13.9 %
Over 40.00 acres	24	11.5 %	3,963.83	65.2 %
TOTALS:	210		6,083.77	

NOTE: Average winery owned/leased acreage = 28.97 acres

DISTRIBUTION of WINERY OWNED/LEASED ACREAGE by REGION

REGION	ACREAGE	NUMBER of VINEYARDS	AVERAGE VINEYARD SIZE
Oliver	2,131.91	61	34.9
Osoyoos	1,011.44	33	30.6
Kelowna/West Kelowna	620.67	34	18.2
Okanagan Falls	456.02	17	26.8
Penticton / Naramata	409.15	63	6.5
Vancouver Island	353.72	34	10.4
Similkameen	314.07	17	18.5
:Lower Mainland/Fraser	223.25	16	14.0
Summerland/Peachland	184.39	22	8.4
Lake Country / Vernon	119.78	11	10.9
Gulf Islands	97.70	9	10.9
Spallumcheen/Shuswap	57.50	8	7.2
Creston area	40.50	3	13.5
Kaleden	34.22	5	6.8
Lillooet/Trail/Kamloops	29.45	3	9.8
TOTALS:	6,083.77	336	18.1

B.C. INDEPENDENT GROWER VINEYARDS by SIZE

August 2011

VINEYARD SIZE	NUMBER of VINEYARDS	% by NUMBER of VINEYARDS	TOTAL ACRES by VINEYARD SIZE	% by ACREAGE
0.00 - 3.00 acres	179	33.9 %	316.89	0.8 %
3.01 - 5.00 acres	134	25.4 %	532.18	1.4 %
5.01 - 10.00 acres	140	26.5 %	1,034.48	7.8 %
10.01 - 20.00 acres	51	9.7 %	655.90	10.9 %
20.01 - 40.00 acres	15	2.8 %	513.70	13.9 %
Over 40.00 acres	9	1.7 %	729.60	65.2 %
TOTALS:	528		3,782.75	

NOTE: Average independent grower owned/leased acreage = 6.60 acres

DISTRIBUTION of B.C. INDEPENDENT GROWERS by REGION

REGION	ACREAGE	NUMBER of VINEYARDS	*AVERAGE VINEYARD SIZE
Oliver	1,411.27	115	9.7
Osoyoos	498.18	66	7.5
Penticton / Naramata	488.59	109	4.5
Similkameen	377.37	27	14.0
Kelowna/West Kelowna	283.79	47	6.0
Summerland/Peachland	170.28	34	5.0
Okanagan Falls	82.79	15	5.5
Kaleden	81.07	21	3.9
Vancouver Island	78.15	26	3.0
Lake Country / Vernon	76.65	19	4.0
Kamloops area	63.50	4	12.7
Lower Mainland/Fraser	40.20	13	3.1
Spallumcheen/Shuswap	39.50	9	4.4
Lillooet / Lytton	34.00	6	5.7
Gulf Islands	17.94	5	3.6
Grand Forks	14.00	4	3.5
West Kootenays	11.30	3	3.8
Creston area	10.52	3	3.5
Other B.C. areas	3.65	2	1.8
TOTALS:	3,782.75	528	6.6

*NOTE: to calculate average vineyard size in Oliver a very large vineyard has been omitted in the calculations so as not to skew the average size.

POTENTIAL B.C. WINE PRODUCTION

- Actual plantings prior to 2008 = 7,190.57 acres
- 2008 actual plantings = 1,185.94 “
- 2009 actual plantings = 414.23 “
- 2010 actual plantings = 415.00 “
- 2011 actual plantings = 660.78 “
- 2012 Growers estimated plantings = 530.00 “
- 2013 estimated plantings = 400.00 “

YEAR	ACREAGE at FULL PRODUCTION + THREE YEAR OLD + TWO YEAR OLD	POTENTIAL TONNAGE Full Prod. @ 4 tons/acre Three year @ 3 tons/acre Two year @ 1.5tons/acre	POTENTIAL LITRES of WINE @ 550 litres/short ton
2011	7,190.57 + 1,185.94 + 414.23	32,941	18,117,550
2012	8,376.51 + 414.23 + 415.00	35,372	19,454,600
2013	8,790.74 + 415.00 + 660.78	37,399	20,569,450
2014	9,205.74 + 660.78 + 530.00	39,600	21,780,000
2015	9,866.52 + 530.00 + 400.00	41,656	22,910,800

NOTE: i.) Percentage increases in newly planted acreage is predicted to be lower in the Okanagan region due to scarcity of premium grape growing land and the expense of replacing Orchard land.

ii) The Similkameen, Lower Mainland/Fraser Valley and other B.C. areas (Grand Forks, West & East Kootenays, Lillooet/Lytton, Kamloops areas) are expected to expand their grape acreages.

B.C. Grape Industry Comparisons to Other Areas

	B.C. (2011)	Washington State (2010)	California (2010)	Ontario (2009)
Acres	9,867	40,000	535,000	15,074 (67% vinifera / 21% hybrids / 12% labrusca)
# of Growers	864	350	4,600	500
# of Wineries	210	655	3,364	146
Principal Varieties - Reds	Merlot Pinot Noir Cab.Sauvignon	Cab.Sauvignon Merlot Syrah	Cab. Sauvignon Merlot Pinot Noir	Cabernet Franc Merlot Cab.Sauvignon
Principal Varieties - Whites	Pinot Gris Chardonnay Gewurztraminer	Riesling Chardonnay Pinot Gris	Chardonnay French Colombard Sauvignon Blanc	Vidal Chardonnay Riesling

COMPARISON of B.C. GRAPE / WINE STATISTICS 1999 to 2011

	1999	2004	2006	2008	2011
Acres of Wine Grapes	4,184	5,462 (30.5% increase)	6,632 (21.4% increase)	9,066 (36.7% increase)	9,854 (8.7 % increase)
White Grape Acreage	53.69 %	50.56 %	48.29 %	49.01 %	47.91 %
Red Grape Acreage	46.31 %	49.44 %	51.71 %	50.99 %	52.09 %
Hybrid Grapes	4.08 %	2.50 %	2.20 %	2.88 %	4.30 %
Principal White Varieties	Chardonnay Gewurztraminer Pinot Gris Pinot Blanc Riesling	Chardonnay Pinot Gris Gewurztraminer Pinot Blanc Riesling	Chardonnay Pinot Gris Gewurztraminer Pinot Blanc SauvignonBlanc	Pinot Gris Chardonnay Gewurztraminer SauvignonBlanc Pinot Blanc	Pinot Gris Chardonnay Gewurztr. Riesling Sauv.Blanc
Principal Red Varieties	Merlot Pinot Noir Cabernet Sauv. Cabernet Franc Gamay	Merlot Pinot Noir Cabernet Sauv. Cabernet Franc Syrah	Merlot Pinot Noir Cabernet Sauv. Syrah Cabernet Franc	Merlot Pinot Noir Cabernet Sauv. Syrah Cabernet Franc	Merlot Pinot Noir Cab.Sauv. Syrah Cab.Franc
Number of Vineyards	262	371 (41.6% increase)	464 (25.1% increase)	710 (53.0% increase)	864 (21.7%increase)
Number of Wineries	61	90 (47.5% increase)	118 (31.1% increase)	144 (22.0% increase)	210 (45.8%increase)
Winery Owned Acreage	59.3 %	67.2 %	70.4 %	63.1 %	61.7 %
Average Size of Winery Vineyard	40.68	26.4	24.5	22.7	28.97
Average Size of Independent Vineyard	9.46	7.7	7.2	6.7	6.60

SUMMARY

August 2011

- The overall grape acreage in B.C. was limited in growth somewhat over the past 3 years due to two bad winters in a row which killed off a number of vines. Replacement of these vines or conversion to another variety on the same acreage has been common in the past 3 years.
- The greatest percentage increases in planted acres were in the Similkameen Valley, Vancouver Island, Lower Mainland/Fraser Valley, Lake Country, Kaleden and other non-traditional grape growing areas of B.C. (i.e. Kamloops / East and West Kootenays, Grand Forks, Lillooet/Lytton).
- Riesling has replaced Sauvignon Blanc as the fourth most planted white grape variety in B.C. Pinot Gris and Viognier also continue to increase in percentage planted. Both Sauvignon Blanc (due to winter kill) and Pinot Blanc have lower planting percentages.
- There is a notable slower growth in plantings of Merlot. There are increases in Pinot Noir and Cabernet Franc and decreases in Syrah (due to winter kill).
- Hybrid (mainly Blattner type) grapes are increasing due to increased plantings in 'Other' non-traditional grape growing areas of B.C.
- There is a slightly lower percentage of white grapes planted than in previous years and, paradoxically, an increase in white wine sales in 2010.
- Oliver and Osoyoos remain the main source of planted grape acreage and there is a shift from planted acreage in Penticton/Naramata area to the Kelowna/West Kelowna area.
- The Similkameen Valley and the Osoyoos area are predominantly red grape plantings and the Oliver area to Penticton/Naramata area are a split between red and white grapes with increasing white varieties further north in the Okanagan.
- Geographical Indication acreage for VQA wines have increased in the Similkameen Valley, Vancouver Island and Lower Mainland/Fraser Valley.
- The most common acreage for a winery is 5 to 10 acres. Twenty-four or 11.5% of wineries control or purchase 2/3rds of planted acreage in B.C. Most wineries purchase grapes from the Oliver-Osoyoos areas.
- There has been a proliferation of the most common independent grower size of 0.1 to 3.0 acres (34%) mostly in Penticton/Naramata, Kaleden, Vancouver Island, Lower Mainland/Fraser Valley and the Gulf Islands. Nine large independent vineyards control 2/3rds of planted independent acreage.
- The average vineyard holding for a winery has increased to 28.97 acres from 22.7 acres. As demand for a winery's product increases there is often a desire to be less dependent on independent growers for their grape supply thus prompting them to purchase vineyards in different areas to ensure a consistent supply of a variety of grapes grown in the best viticulture areas. This gives a winery more control over viticultural practices. As well, many of their 'independent' grower vineyards are establishing wineries themselves or are being sold. When purchasing grape land in the Okanagan it may not be profitable to remain a vineyard only and many opt for the value added a winery may offer them.
- The number of wineries and proposed wineries is still increasing with new options for growers wanting to market their own vineyard label without a large initial investment.
- The HST and new lower alcohol driving limits have decreased sales to licensees in B.C.
- Other B.C. regions are still in an exploratory phase at this time, experimenting with various grape varieties. It remains to be seen if these areas will be successful in establishing grape/wine industries.

