



WOFA GLOBAL TALKS

CANADA | 7 de Mayo | 16hs.





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AGENDA

- **COVID-19 GENERAL OVERVIEW**
 - **CANADA**
 - **KEY PROVINCES**
- **RETAIL / MONOPOLY SALES (BY PROVINCE)**
- **UPCOMING WOFA RETAIL PROGRAMS & THEMATICS (BY PROVINCE)**
- **LICENSEE SALES / CONSIGNMENT SALES**
- **HOSPITALITY INDUSTRY INITIATIVES**
- **INDUSTRY EVENTS UPDATE**
- **OPPORTUNITIES**
- **POST-COVID POSSIBILITIES & CONSIDERATIONS**
- **QUESTIONS?**



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COVID-19

Canada Overview

CANADA COVID-19 TIMELINE:

- **January 15** – First case of COVID-19 reported in Canada (in Toronto); linked to travel (Wuhan).
- **March 2** - Spring Break holiday in Quebec; increased international and domestic travel.
- **March 4** – PM Trudeau creates COVID-19 cabinet committee to deal with the outbreak
- **March 9** - Spring Break holiday in Ontario, B.C., Alberta and Atlantic Canada.
- **March 12** - Schools across Canada announce closures. Major events & sports seasons are cancelled. Panic buying begins.
- **March 16** - Canada closes its borders to most people who aren't Canadians or permanent residents.
- **March 17** – BC and Ontario declare states of emergency with remaining provinces following suit. All non-essential businesses are closed. #StayHome #PlanktheCurve in full force, nationally.
- **March 21** – Canada-US border closed to non-essential traffic in both directions.
- **March 25** - Emergency aid bill passes in legislature. Mandatory 14-day quarantine for returning travelers.
- **April to today** - Many provinces remain under states of emergency. Multiple government stimulus and support bills in place for affected Canadians. Some temporary disruption ongoing in grocery supply chains (ie: COVID outbreaks in production facilities) to impact pricing & availability.



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COVID-19

Canada Overview

63,375 confirmed cases as of May 6, 2020

COVID-19 cases in Canada

Cumulative total, starting with day of 100th case

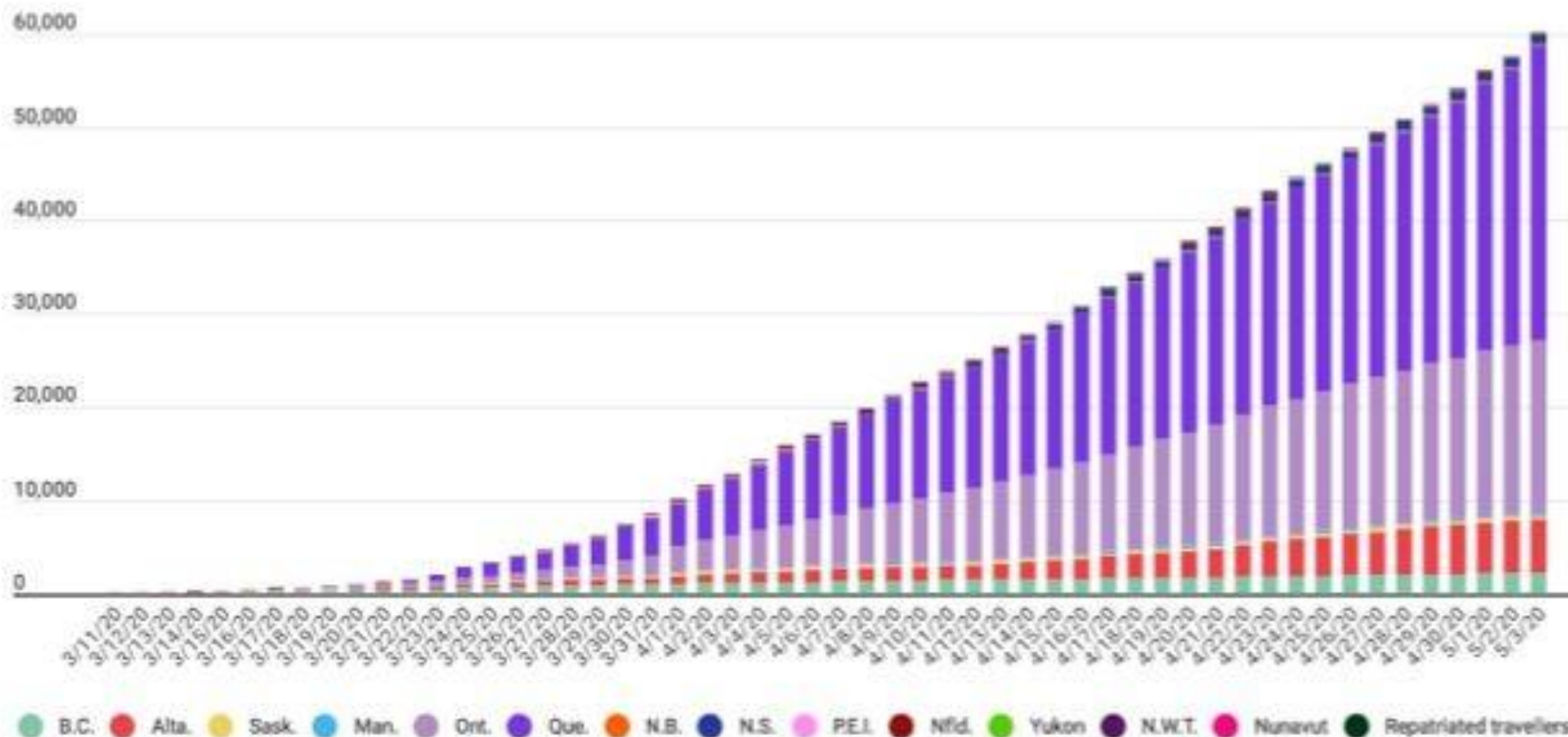
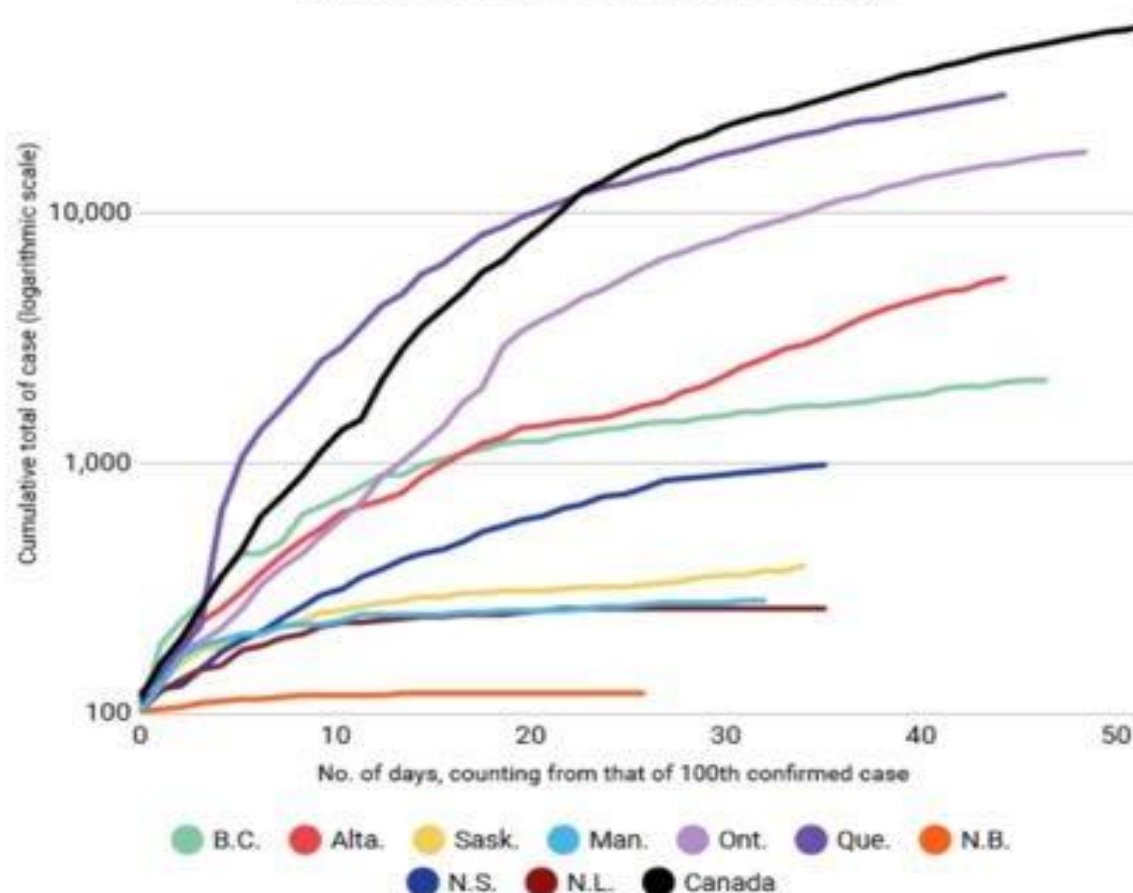


Chart by Patricia Treble and Lauren Cattermole - Source: Canadian federal and provincial coronavirus updates

Increase in COVID-19 cases in Canada

Jurisdictions with at least 100 cases, as of May 1





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COVID-19

Canada Overview

CANADIAN GOVERNMENT SUPPORTS & SUBSIDIES:

- **Expanded Employment Insurance (EI)** benefits to include broader categories of workers
- **Canada Emergency Response Benefit (CERB)** for contractors / gig workers and entrepreneurs and others who have lost wages due to COVID (\$2,000/month)
- **Canada Emergency Wage Subsidy (CEWS)** covers 75% of employee salaries to encourage employers to keep workers on the payroll (up to \$847/wk per employee)
- **Canadian Student Emergency Fund (CSEF)** provides monthly benefits for post-secondary students unable to find seasonal employment during the pandemic (\$1,250/month)
- **Canada Emergency Rent Assistance (CERS)** for small businesses lowers rent by 75% for small businesses affected by COVID-19 (ie: restaurants) to July 1. CERA can be combined with \$40k small business loan program that offers 25% forgiveness.



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COVID-19

ONTARIO Overview

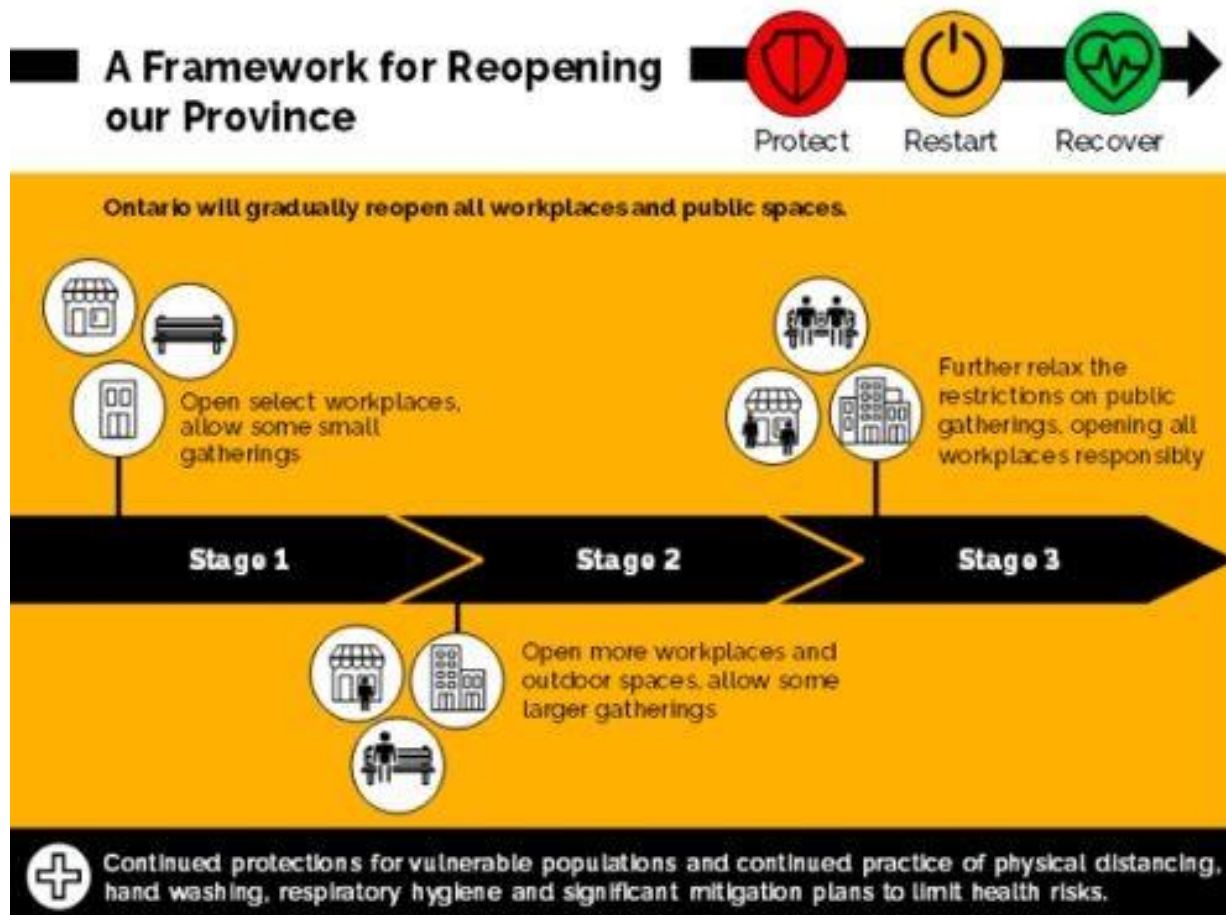
Ontario cases as of May 6: 18,722 confirmed | 13,222 recovered | 1,429 deaths

Determining When to Ease Public Health Measures

Ontario's Chief Medical Officer of Health will consider the following criteria to advise when the province can begin to ease public health measures:

			
Virus spread and containment	Health system capacity	Public health system capacity	Incidence tracking capacity
Ensures loosening of measures is appropriately timed with the progression of the epidemic in Ontario.	Ensures there is an effective response to any potential case resurgence.	Ensures there is an effective public health response to any potential case resurgence.	Ensures that any potential resurgence in cases can be identified promptly.

Ontario cases as of May 6: 18,722 confirmed | 13,222 recovered | 1,429 deaths





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COVID-19

QUEBEC Overview

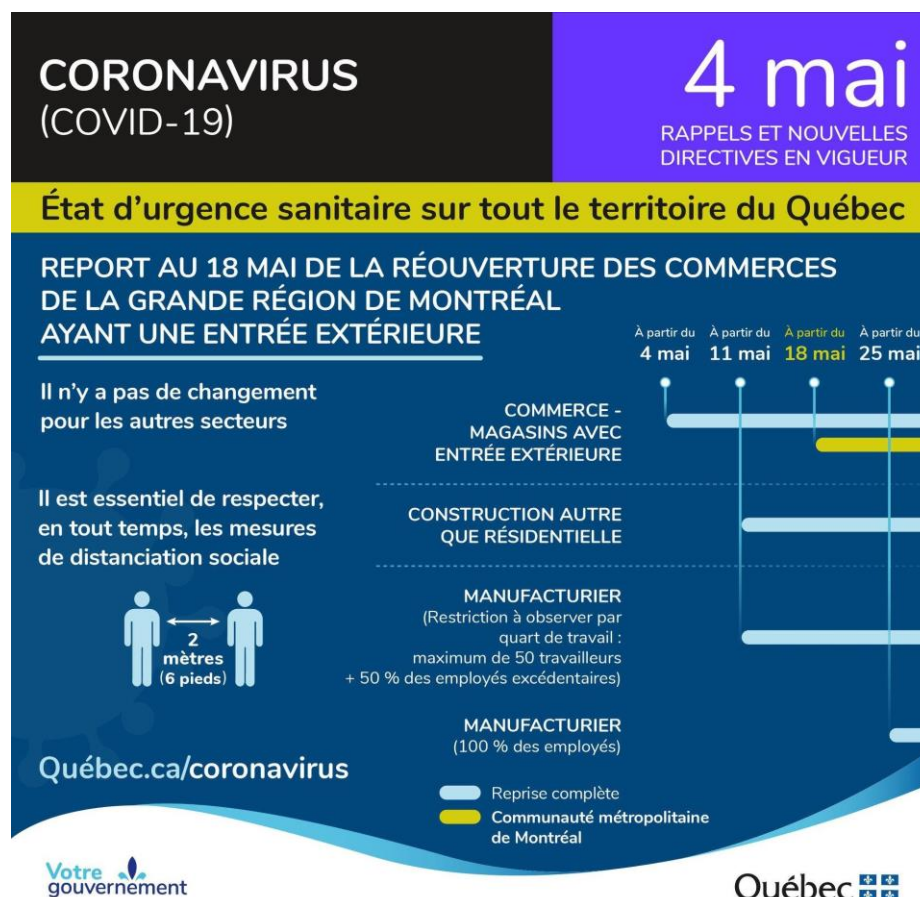
Quebec cases as of May 6: 34,327 confirmed | 2,510 deaths

May 11 : reopening of small businesses outside the Great Montreal as well as primary schools and kindergarten
Residential construction work can start again

May 18 : reopening of small businesses in the Great Montreal as well as primary schools and kindergarten

May 25 : other industries should be able to start

No date for now for bars and restaurants





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COVID-19

BRITISH COLUMBIA Overview

British Columbia cases as of May 5: 2,232 confirmed | 1,472 recovered | 121 deaths

- B.C. may have had an easier time with COVID 19 because
 - Our Spring break had not yet started
 - The rest of the country was returning from Spring break travels
- Reopening plans are being announced May 6 at 3pm
 - Primary schools may reopen by end of May
 - Slow reopening of businesses over the coming months
 - Large events, over 50 people, cancelled for the entire summer



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COVID-19

ALBERTA/ MAN/ SASK Overview

Alberta cases as of May 5: 5,893 confirmed | 3219 recovered | 106 deaths

- Timing for reopening could be as early as May 14th
- Self Isolation for any travellers for 14 days upon return

Saskatchewan cases as of May 5: 487 confirmed | 6 deaths

- Saskatchewan will begin Phase 1 of the Re-Open Saskatchewan plan on Monday, May 4, 2020, gradually and slowly lifting selected restrictions related to the COVID-19 pandemic.
- Phase 1 of the plan allows public access to previously restricted medical services: dentistry, optometry, physical therapy, optician services, podiatry, occupational therapy and chiropractic treatment.
- It also provides specific guidelines related to parks and campgrounds, boat launches, fishing and golf courses.

Manitoba cases as of May 5: 282 confirmed | 7 deaths

- Reopening has started
- Some services will be reopening, such as hair salons, malls and dentists, they must do so under strict rules that have been mandated by the province.
- No public gatherings of 10 or more



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RETAIL OVERVIEW

By Key Market



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RETAIL OVERVIEW

By Key Market: ONTARIO

LCBO IN-STORE:

- Reduced hours / closed on Mondays
- Rotating store closures
- Long line-ups
- Social distancing – one-way traffic in store aisles
- Increased sanitation practices
- Less interaction with Product Consultants
- Head office staff have been deployed to stores

LCBO ONLINE:

- March / April: fulfillment issues, long wait times for delivery
- Additional resources now allocated to meet demand
- Pre-COVID = 200-400 orders/day; now = 2,000+ orders/day

LCBO COVID-19 updates for trade: <https://trade.lcbo.com/>
LCBO's dedicated trade website: <http://www.doingbusinesswithlcbo.com/>



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RETAIL OVERVIEW

By Key Market: ONTARIO

WINE CATEGORY UPDATE FROM MARIE CUNDARI & KATHY CANNON (LCBO DIRECTORS):

- Trends are changing daily – challenging to forecast
- Wine subsets: Price band sales
 - Under \$10 = Growing
 - Under \$15 = Growing
 - Under \$25 = Flat
 - Over \$50 = declining (31%); Over \$100 = -37%
- Resurgence back to New World Wines and “Big Brands”
- Increased sales on Large Formats, 1.5L and Boxed Wine
- Vintages releases - consumers are not browsing or shopping >> Vintages Front Line Releases are softening; downward forecast for the short term
 - Front Line Release distribution to top 50 stores in April + May 2 release; 68% of the inventory for the past 2 releases were forced out to stores. Remaining residual inventory is being forced out the 2nd week after the release
 - Distribution will increase to 100 stores May 16 + 30 release.
- Classics was up 30% in April, mainly online as store draw is down.
- Champagne softening – lack of licensee business



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RETAIL OVERVIEW

By Key Market: ONTARIO

COVID-19 LCBO SALES IMPACT: ARGENTINA CATEGORY

P13 (ending March 28) ****COVID-19 pantry loading driving incredible growth****

- Argentina LCBO Wines \$5,995,009 (+34.65%)
- Argentina Vintages \$1,824,255 (+42.26%)

P1 (ending April 25) ****Wine subset growth + Vintages softening not reflected in Argentina?****

- Argentina LCBO Wines \$3,060,470 (-11.12%)
- Argentina Vintages \$1,149,998 (+6.51%)

Rolling 6 Periods (from P9/2019 – P1/2020) ****COVID-19 has reversed negative growth trend****

- Argentina growth +1.09% versus last year but still underperforming versus total wines (+5.68%)
 - *Note: Rolling 13 as of P10/2019 -7.71%*
- Argentina driving 8% of total Vintages growth in \$15 – \$25 bands

Looking Ahead: P05 Argentina Brand Spotlight (July 19 to Aug. 15)



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RETAIL OVERVIEW

By Key Market: QUEBEC

Situation in the SAQ stores:

SAQ Stores remains opened with reduced hours. Closed on Sundays. Long line-ups to enter because of social distancing.

B2B :

No meetings or tastings allowed with sales representatives since the lockdown. Virtual conferences might be the new way to reach the stores to respect social distancing

In-stores :

Some promotions non executed completely in some stores Some in-store promotions have been cancelled or postponed Booking for P-07 & P08 can proceed at the moment.
Pre-Booking for P-09-P10 has been postponed of 1 week

SAQ.com :

The SAQ will add about 100 SKUS on their website for sale. Only concerned agents will be contacted regarding this matter.



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RETAIL OVERVIEW

By Key Market: QUEBEC

Argentina Category

Sales YTD

Univers GPC	Catégorie dénombrement périodique (ds)	Type listing (ds)	Ventes 13 périodes \$	% croissance \$ 1 an	% croissance \$ 3 dernières Périodes	Ventes cs 9L 13 périodes	% croissance 9L 1 an
Vin rouge	Vin rg Argentine	Courant achat continu	23 693 875 \$	4,8%	1,4%	151 509	3,1%
		Spécialité achat continu	7 437 181 \$	16,7%	2,8%	35 058	15,9%
		Spécialité achat par lot	3 800 879 \$	-15,3%	16,4%	17 816	-23,8%
		Total Vin rouge		34 931 935 \$	4,4%	3,1%	204 383
Vin blanc	Vin bl Argentine	Courant achat continu	10 595 041 \$	17,9%	11,1%	69 257	15,8%
		Spécialité achat continu	2 245 497 \$	10,6%	13,1%	14 126	7,4%
		Spécialité achat par lot	711 410 \$	-32,0%	-39,0%	3 659	-41,0%
		Total Vin blanc		13 551 948 \$	12,4%	7,4%	87 042
Total général			48 483 883 \$	6,5%	4,3%	291 425	4,2%



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RETAIL OVERVIEW

By Key Market: QUEBEC

Argentina Category :
P-01 sales (march 29th-April 25th)
Analysis : WOFA promotion in 2019, + promotions in 2019
Big movement to buy local products

Univers GPC	Catégorie dénombrement périodique (ds)	Type listing (ds)	Vtes \$ P01 2020	Vtes CS 9L P01 2020	Vtes \$ P01 2019	Vtes CS 9L P01 2019	Variation \$	Variation CS 9L
Vin rouge	Vin rg Argentine	Courant achat continu	1 185 807 \$	7 339	1 664 157 \$	10 517	-29%	-30%
		Spécialité achat continu	391 090 \$	1 908	548 678 \$	2 560	-29%	-25%
		Spécialité achat par lot	264 405 \$	1 327	201 023 \$	1 077	32%	23%
		Total Vin rouge		1 841 301 \$	10 574	2 413 858 \$	14 154	-24%
Vin blanc	Vin bl Argentine	Courant achat continu	630 657 \$	3 965	799 053 \$	5 178	-21%	-23%
		Spécialité achat continu	150 472 \$	945	137 405 \$	911	10%	4%
		Spécialité achat par lot	42 211 \$	199	52 152 \$	333	-19%	-40%
		Total Vin blanc		823 340 \$	5 108	988 609 \$	6 422	-17%
Total général			2 664 641 \$	15 683	3 402 466 \$	20 576	-22%	-24%



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RETAIL OVERVIEW

By Key Market: ALBERTA

Quick takeaways – Overall wine:

- CIC strong growth mode – Data could sku the year with the large format panic buying pattern in March
- USA , ARG gaining ground back
- Portugal & NZ still in strong growth mode

Quick takeaways – ARG:

- Red ARG with 90% of the ARG wine sales
- White ARG sales dollars declining at a much higher rate than volume
- Brands: Trapiche dominates Volume & Growth for the category
- Malbec still dominates with 81% of ARG wine sales with +1% Volume Growth and FLAT on Dollar Sales R12
- Largest growth to category for size format is 3L bag in box
- Largest Volume & Dollar Price Segment is 15.00@17.49\$ with +2% growth R12
- Strong growth in 40.00@49.99\$ and 30.00@39.99\$ associated to 3L bag in box growth
- Strong growth in premium price point segment: G-25.00@29.99\$



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RETAIL OVERVIEW

By Key Market: SASKATCHEWAN

Quick takeaways – Overall wine:

- CIC strong growth mode – Data could sku the year with the large format panic buying pattern in March
- USA , ARG gaining ground back
- Portugal & NZ still in strong growth mode

Quick takeaways – ARG:

- Red ARG with 90% of the ARG wine sales
- White ARG sales dollars declining at a much higher rate than volume
- Brands: Trapiche dominates Volume & Growth for the category
- Malbec still dominates with 81% of ARG wine sales with +1% Volume Growth and FLAT on Dollar Sales R12
- Largest growth to category for size format is 3L bag in box
- Largest Volume & Dollar Price Segment is 15.00@17.49\$ with +2% growth R12
- Strong growth in 40.00@49.99\$ and 30.00@39.99\$ associated to 3L bag in box growth
- Strong growth in premium price point segment: G-25.00@29.99\$



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RETAIL OVERVIEW

By Key Market: MANITOBA

All Channel F20 Sales April 1, 2019 - March 31, 2020

Category Level 2 Description	Net Sales \$ Contrib %	YOY Net Sales \$ Growth %
	100.00%	4.02%
BLENDED AND BTLD IN CANADA	23.53%	3.59%
TABLE WINE-USA	15.24%	4.48%
TABLE WINE-AUSTRALIA	9.08%	-0.38%
TABLE WINE-ITALY	5.66%	-1.66%
TABLE WINE-CHILE	5.55%	-3.03%
SPARKLING WINE, CHAMPAGNE	4.49%	4.22%
TABLE WINE-CANADA VQA & OTHER	4.18%	2.63%
TABLE WINE-ARGENTINA	4.00%	1.98%
TABLE WINE-NEW ZEALAND	3.10%	7.72%
TABLE WINE-FRANCE	2.91%	8.37%
TABLE WINE-SPAIN	2.35%	41.87%



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RETAIL OVERVIEW

By Key Market: BRITISH COLUMBIA

- **BC Liquor Stores**

- Open for Business
- Sales are up 40% in March & April 2020
- Have had some difficulty keeping inventory levels
- All in-store tastings and events have been canceled until October 2020
- Thematics are moving forward with some question on how displays will look
- NOT set up for online sales

- **Private Liquor Stores**

- Primarily wholesale and local products are being sold here
- Online sales are brisk and many report Christmas level of business
- Extended hours
 - They can legally open at 7am to 11 pm in order to assist with crowding
 - Not many have opened at 7am
- Many doing curbside pickup or deliveries
- This is one of the sectors that are hiring hospitality workers to assist



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RETAIL OVERVIEW

By Key Market: BRITISH COLUMBIA

Quick takeaways – Overall wine:

- Cellared in Canada (CIC) strong growth mode
- Canada VQA, France, New Zealand, Portugal & Chile all in positive numbers
 - Chile & Portugal with large format & boxed wines
 - Portugal & NZ still in strong growth mode

Quick takeaways – ARG:

- Down .4% in BCLS over the counter sales TY vs LY to March - all wines up 1.9% - cases
- Down 14.4% in Licensee sales TY vs LY to March - all wines down 3.4% - cases
- Down 1.9% in LRS sales TY vs LY to March - all wines up 7.4% - cases
- Down 2.6% in total sales cases TY vs LY to March - all wines up 3.2% - cases
- Down 3.9% in total sales dollars TY vs LY to March - all wines up 4.3% - dollars
- Market Share for ARG is 3.2% down from 3%
 - 39.2% CIC, 14.8% BC VQA, 10% USA, 7.2% Italy, 6.2% Australia, 5.7% Chile, 4.3% France, 3.2% NZ
 - Increases of .3% to .1% in market share to CIC, Chile, Spain & Portugal
 - Decrease in market share to Australia of -.4%



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RETAIL OVERVIEW

By Key Market: BRITISH COLUMBIA

Consumers are

- Drinking more
- Ordering online
- Supporting local wineries with home deliveries from the winery website

Restaurant sales

- Restaurants have been able to sell packaged alcoholic products with their take away items.
- For the most part this has been used to reduce inventory
- Restaurants are working with local wineries to include a selection of BC wine for take away



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UPCOMING WOFA RETAIL PROGRAMS & THEMATICS

By Key Market



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UPCOMING RETAIL PROGRAMS & THEMATICS

By Key Market: BRITISH COLUMBIA

BC Liquor Stores Argentina Thematic

- August 2020 (August 2 – September 5)
- 12 skus, selected by BCLDB Category Manager Stephen Schiedel
- Displays in 60 BC Liquor Stores, province-wide
- Production of Double Backer Cards, Shelf Talkers, Floor Stand Dangers
- Press Drop to local media
- Open to all wines: bubbly, white, rosé, red
- Wines must be ongoing successful skus in the category
- Participation cost: USD 1300 per participating sku
- Additionally, wine samples for the press drop (optional) will be the responsibility of the agents & wineries
- **Deadline to apply is Friday, May 8, 2020**



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UPCOMING RETAIL PROGRAMS & THEMATICS

By Key Market: BRITISH COLUMBIA

STATS FROM PREVIOUS WOFA THEMATICS:

2019 – April Thematic – Combined with A LOT of activity for Malbec World Day

Participating skus up combined 73%, category up 6% over same month in previous year Rolling 12 months of participating skus up 5%, category down 5%

2018 – August Thematic

Participating skus up combined 15%, category down 2% over same month in previous year Rolling 12 months of participating skus down 2% category down 9%

2017 – August Thematic

Participating skus up combined 12%, category down 2% over same month in previous year Rolling 12 months of participating skus down 3% category down 4%

2016 – July Thematic

Participating skus up combined 19%, category up 18% over same month in previous year Rolling 12 months of participating skus up 9% category up 7



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UPCOMING RETAIL PROGRAMS & THEMATICS

By Key Market: BRITISH COLUMBIA

BCLS Temporary Display Guidelines – Effective immediately to October 31, 2020

Freestanding Displays

In order to create additional space for social distancing, they will be reduced in size or may not be implemented in all stores, space permitting

All In-Store Tastings and
Special Events
Cancelled until
October 31, 2020

Vendor Shelf talkers

Reps are not permitted to visit stores to deliver shelf talkers

Agents to mail approved talkers to each store they are listed in; store staff will apply them for the month they are approved



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UPCOMING RETAIL PROGRAMS & THEMATICS

By Key Market: BRITISH COLUMBIA

Argentina

**BCLS Wine
Invitation Contact
your agency**

Important Dates

May 22, 2020 - Sample deadline to
BCLS June 5, 2020 - Agency
notification
November 2, 2020 - Launch Date



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UPCOMING RETAIL PROGRAMS & THEMATICS

By Key Market: ONTARIO

ONTARIO: LCBO P05 ARGENTINA BRAND SPOTLIGHT (July 19 - Aug 15)

- 13 skus on offer (LTO's or Bonus Air Miles)
- In-store merchandising program in 135 stores – middle aisle nesting table
- LCBO.com extended product page / feature
- E-commerce contest (to drive online sales)
- Social / digital and radio advertising
- *In-store tasting program?*
- *Staff training opportunities?*
- ATL digital/influencer outreach





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UPCOMING RETAIL PROGRAMS & THEMATICS

By Key Market: ONTARIO

ONTARIO: VINTAGES EVENT SPONSORSHIP ARGENTINA SPOTLIGHT

- Vintages events April to mid-August have been cancelled.
- New, larger event on August 27 (target 600+ consumers); combined with California.
- While it is Vintages' goal to execute this event on August 27, they will continue to follow the directive of the government and public health officials regarding social/physical distancing and large gatherings.
- Event will feature 22 Argentina skus scheduled for Vintages Front Line Releases within 2-4 week of event (special feature + release in early August). Agents to pour.





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UPCOMING RETAIL PROGRAMS & THEMATICS

By Key Market: QUEBEC

SAQ Online Promotion (open to all wines from Argentina - 5 days promotion)

Postponed from **July 30th to August 5th**: The period is still good if we compare the 2019 SAQ sales:
August (61 M\$) vs April (54 M\$) : + 6M\$

Window stores program will be postponed at the same period. Waiting to be able to contact the SAQ stores for booking.





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LICENSEE & CONSIGNMENT SALES



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LICENSEE & CONSIGNMENT SALES

LICENSEE SALES

- Restaurants are CLOSED across Canada due to COVID-19; 800,000+ restaurant workers unemployed; \$20B decline in 2nd quarter revenue (source: Restaurants Canada)
- More than 50% of hotels are closed and many are at 10% occupancy
 - no changes expected until August
- Conventions cancelled
- Tourism is drastically reduced
- Restaurants in most provinces can offer take-out/delivery and can sell wine, beer and cider with a food purchase
- Quebec does NOT allow beverage-alcohol purchases with take-out/delivery
- Licensee customers are NOT buying wine for the foreseeable future (sales = \$0)
- Many licensees are feeding the homeless and frontline workers with grant money from nonprofits



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LICENSEE & CONSIGNMENT SALES

CONSIGNMENT SALES

- Agents are marketing their consignment portfolios direct-to-consumer via:
 - **Full case sales:**
 - Example from Ontario agent: Pre-COVID = 50 cases per week; today = 400 cases per week; many agents offering free delivery
 - **Mixed case sales** via third party (Ontario)
 - WineAlign.com Wine Exchange programs (overview on next slide)
- In Quebec - agents can sell mixed cases
- BCLS is no longer doing single pick bottles
- BCLS wholesale division has shown poor delivery systems for the past 2+ years
 - licensees waiting often 2+ months for deliveries of wholesale items
 - deliveries were just starting to get better late 2019



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LICENSEE & CONSIGNMENT SALES

LOCAL PRODUCERS - beer, wine, cider and spirits

- Direct-to-consumer (online order for pick-up / delivery).
- Avoid retail line-ups & delivery delays
- No or small minimum orders; many offering free shipping across Canada
- Restaurants in BC are partnering with local wineries to do take away
- Local producers are partnering with nonprofits and charities that are supporting
 - hospitality workers
 - front line workers
 - food banks



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LICENSEE & CONSIGNMENT SALES



DISCOVERY

BLACK

AGENCY CASES

GCWE

SPECIAL OFFERS

FAQ



- **The WineAlign Exchange:** 2,000% increase in demand, predict 10k cases w/in 2-3 months
- Approx. 20 **agency mixed cases** currently available
- **Restaurant Relief Cases:** a collaboration launched by Ontario wine agencies and restaurants. A portion of the proceeds donated to participating restaurants and Community Food Centres Canada.
- **Passport Series:** mixed regional cases (paid opportunity)



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ON-PREMISE INDUSTRY INITIATIVES



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HOSPITALITY INDUSTRY INITIATIVES

SAVEHOSPITALITY.CA

- Industry advocacy group comprised of more than 1,000 stakeholders, representing 40,000+ laid-off workers. Created a detailed proposal for government support and have been lobbying all levels of government (city, provincial and federal)
- Canadian Professional Bartenders Relief Measures

RESTAURANTSCANADA.ORG

- Industry lobby. Provides health & safety support (COVID-19) and resources

QUEBEC - [Montreal restaurant workers relief fund](#)

British Columbia

- BC Hospitality Foundation
- Mind the Bar
- Vancouver Food & Beverage Community Relief Fund



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INDUSTRY EVENTS UPDATE



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INDUSTRY EVENTS UPDATE

CANADA:

- All regional wine fairs scheduled for Spring/Summer 2020 have been cancelled or postponed
- Some regional associations have *tentatively* scheduled large-scale tasting events for October/November 2020

QUÉBEC :

- April : Printemps dézippé (Private imports wine Trade Tasting - Postponed
- May : SIAL (Food & Wine fair)- Postponed to end of September
- July : Saguenay Wine festival - Cancelled
- November : La Grande Dégustation : Cancelled

ONTARIO:

- May: Terroir Symposium - Postponed to September
- July: WineFest Toronto - Cancelled
- July: i4C - International Cool Climate Chardonnay Celebration - Cancelled
- November: Gourmet Food & Wine Expo - Cancelled. Post-Media Events division has folded due to COVID-19
- March - mid-August: All LCBO Vintages events cancelled until August 27



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INDUSTRY EVENTS UPDATE

Winnipeg Wine Festival 2020

- Originally scheduled for April/ May 2020
 - Have September 2020 dates held for festival
 - Back-up date of November 2020
 - Could take place in May 2021
 - Realistically could be September 2021
- This date change will take the festival away from competing events like
 - NHL hockey playoffs
 - Beer and Whisky festivals in Manitoba



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INDUSTRY EVENTS UPDATE

Vancouver International Wine Festival 2021

- Scheduled for late February 2021
- Theme regions often see as much as a 30% increase in sales
- South America is the Theme Region
 - Theme region run by festival organizers in order to be cost effective
- Questionnaire going out to agencies this week or next for feedback on how to move forward
 - If it moves forward applications for participation will open in June 2020
 - Please contact your agency and let them know your thoughts on participating or not



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OPPORTUNITIES

What can wineries do
to support the market?



CANADA | 7 de Mayo | 16hs.



OPPORTUNITIES

What can wineries do ?

Canada remains a stable market - guaranteed payment by monopolies; orders will continue.

Government programs and subsidies aim to ease businesses and consumers through the financial impact of the COVID-19 crisis.

WOFA Canada is counting on your support of our programs in Canada.



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OPPORTUNITIES

What can wineries do ?

And, your agents need your support.

- Stay in regular contact. Understand your agent's key challenges.
- Discuss your consignment inventory status – how can you help your agents move product?
- Ensure your agency is dropping samples to media
 - Canadian representatives can assist in this regard for a fee
- IE: Ontario - WineAlign “Passport Series”
 - Argentina has been approached to fund a mixed case. Currently in negotiation.
 - Suppliers/agents would need to pay to participate (low margin; key benefits = quick way to move consignment inventory + regional profile).
- As noted in Phil Crozier's UK presentation...
 - Provide online education tools, storytelling assets & content.
 - Connect your winemakers / personalities with influencers in Canada (ie: Instagram Live, webinars, interviews, virtual tastings)
 - Update your websites - tech sheets, importer database (current).
 - Communicate what you are doing in Argentina to support your staff and essential workers.



CANADA | 7 de Mayo | 16hs.



OPPORTUNITIES

Canadian trade, media and wine students are invited to attend WofA Canada's online expert panel discussion on May 12.

- moderated by Véronique Rivest
- sommelier, media and educator panelists from across Canada
- event will be recorded and shared with wineries & agents

The poster for "WINE MUSINGS" features a large, vibrant pink circle in the center. Inside the circle, the words "WINE MUSINGS" are written in a bold, white, sans-serif font. Below this, the text "THE PROSPECTS FOR ARGENTINE WINE IN CANADA" is written in a smaller, white, sans-serif font. To the right of the circle, the words "PRESENTED BY" are written in a small, black, sans-serif font, followed by the Wines of Argentina logo. The background of the poster is a light gray with several overlapping, semi-transparent circles in shades of pink, blue, and yellow. Below the main graphic, the text "JOIN Véronique Rivest" is written in a bold, black, sans-serif font. To the right of this, the text "PANELISTS ACROSS CANADA:" is written in a bold, black, sans-serif font. Below these, the names of the panelists are listed in a black, sans-serif font: Carl Villeneuve Lepage, Christopher Waters, DJ Kearney, Jose Luis Fernandez, and Matt Landry. At the bottom, the date and time are listed in a bold, black, sans-serif font: "Date: May 12 11 am PST / 2 pm EST".

WINE MUSINGS
THE PROSPECTS
FOR ARGENTINE WINE
IN CANADA

PRESENTED BY

JOIN Véronique Rivest

2nd World's Best Sommelier ASI 2013,
and a panel of Canadian sommeliers,
media and educators who will share
first-hand accounts of what's happening
in Argentina today and what they hope
is heading our way.

PANELISTS ACROSS CANADA:
Carl Villeneuve Lepage
Christopher Waters
DJ Kearney
Jose Luis Fernandez
Matt Landry

Date: May 12 11 am PST / 2 pm EST

RSVP to Karen@danalee.blz by May 11
(once you have registered, we will provide you with the Zoom meeting link information)



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POST-COVID-19

POSSIBILITIES & CONSIDERATIONS



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POST-COVID-19 POSSIBILITIES & CONSIDERATIONS

RESTAURANTS & BARS

- Social distancing measures until treatment/vaccine
- Industry expects up to half of independently owned restaurants will not re-open (*Restaurants Cda*)
- Government measures to support small business will hopefully help save some
- Will the restaurants who survive COVID also survive at -50% capacity?

EVENTS

- Social distancing (2 meters) and other public health measures?
- What will wine events *look like*?
- On-premise trade events - when will they *buy* again?
- Consumer events - ticket sales?

DIGITAL

- More online sales
- Increased education online
- Social Media activity
- Virtual wine club tastings



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POST-COVID-19 POSSIBILITIES & CONSIDERATIONS

TRAVEL

- U.S. / Canada border remains closed. Some speculation it will re-open within weeks
- Cruise ship season is basically cancelled in BC
- Conventions are looking to reschedule in 2022
- International travel timeline impossible to predict. Each jurisdiction will have different regulations for travelers (ie: quarantines)
- Preference for domestic vs international travel in post-COVID era?

THE POST-COVID-19 CONSUMER

- General confidence in resuming *normal* social activities?
- Ongoing, increased support for local, independent producers & businesses (ie: wineries, farms)?
- Respect of social & physical distancing (fines / penalties in place)

MEDIA + SOMMS

- The landscape of media will change
 - perhaps bloggers/ influencers have an upperhand?
- Watch for sommeliers and wine personalities to gain more online influence



CANADA | 7 de Mayo | 16hs.



QUESTIONS / DISCUSSION

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¡MUCHAS GRACIAS!

