



Economic Information Observatory
a regional cooperation project between
Atlantic Canada and **Saint-Pierre and Miquelon, France**

CHEERS! THE WINE, BEER AND SPIRITS INDUSTRY



Atlantic Canada (p.1-4)

Saint-Pierre and Miquelon / France (p. 5-8)



Cheers! The Wine, Beer and Spirits Industry

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The Canadian grape and wine industry continues to grow in recent years; while there were 476 wineries in operation in 2011, there are over 600 today. Each year, this sector generates \$9 billion in annual revenues, and employs 37 000 persons across the country and in all of the various related subsectors.

It is further estimated that the grape and wine industry brings in \$1.7 billion in federal and provincial tax revenue. Wine-related tourism, meanwhile, represents another significant subsector for the Atlantic Canadian economies, and the provinces have increased their efforts to promote this industry. Experts estimate that wine-related tourism generates \$1.5 billion in revenue and employment, nationally.



Provincial laws and regulations

In Canada, the production and sale of alcoholic beverages is the jurisdiction of the various provinces, which provide a legal framework (laws and regulations) to be followed by the industry; provincial entities (agencies, divisions, Crown corporations) oversee activities relating to the import, sale and distribution of alcoholic beverages in compliance with applicable provincial legislation and their mandates

PEI

PEI Liquor Control Commission <<http://liquorpei.com/>>
Liquor Control Act, RSPEI 1988, c L-14

NB

NB Liquor (ANBL) <<http://www.nbliquor.com/>>
Liquor Control Act, RSNB 1973, c L-10

NS

Nova Scotia Alcohol, Gaming, Fuel and Tobacco Division
<<https://novascotia.ca/sns/access/alcohol-gaming.asp>>
Liquor Control Act, RSNS 1989, c 260

NL

Newfoundland and Labrador Liquor Corporation (NLC)
<<http://nlliquor.com/>>
Liquor Control Act, RSNL1990 c L-18

Federal Laws / Regulations / Guidelines

Manufacturers of alcoholic beverages must hold a license to undertake that activity. Duties on spirits, wine, beer and tobacco products manufactured in Canada are payable at the point of packaging rather than at the point of sale. When products are imported into Canada, duties are generally payable by the importer.

Canada Revenue Agency <<http://www.cra-arc.gc.ca>>

International commerce

Imports

► In 2015, total wine imports were valued at more than \$2 billion; the top import markets were the United States, France, Italy, Australia, Spain, Chile, Argentina, New Zealand, Portugal and South Africa, these 10 countries alone representing 97.5% of total imports by value

Exports

► Canada ranks 27th globally among wine exporters by value (the top 5 wine exporters being France, Italy, Spain, Chile and Australia).

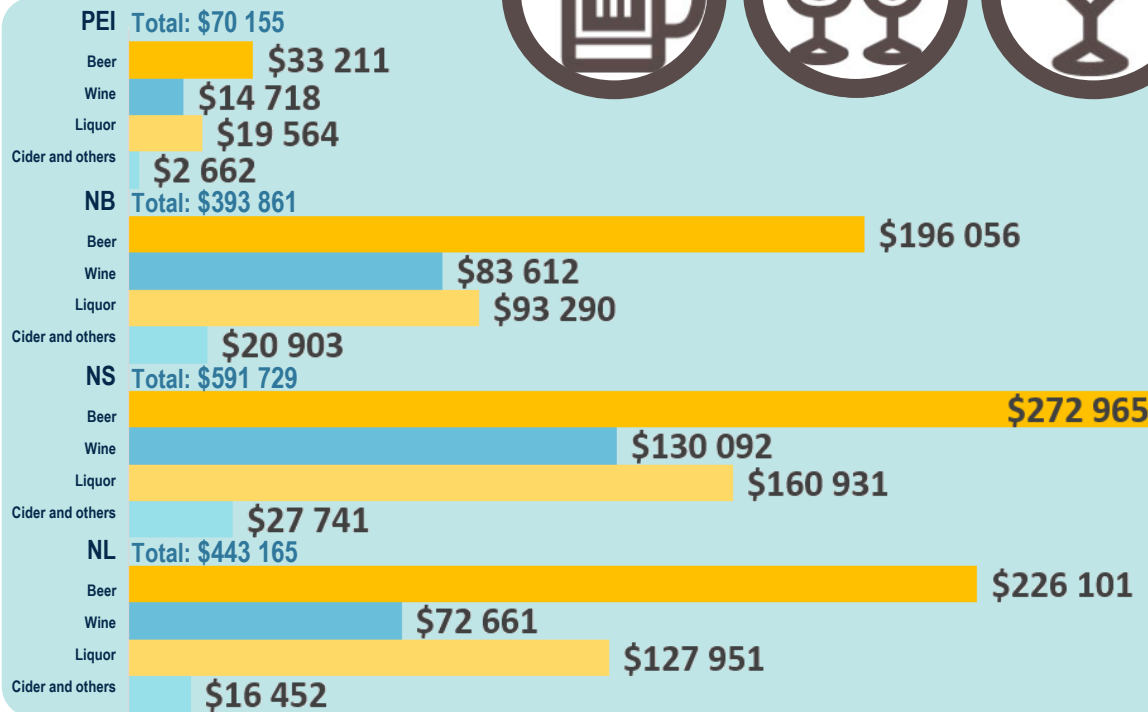
► Canadian wine exports grew from \$36.8 million in 2011 to \$73.9 million in 2015, an increase of 101% by value and 237% by volume. The top wine export markets by value are the United States, China, South Korea, Hong Kong and the United Kingdom.



Sources and useful links: Acadia Laboratory for Agri-food and Beverage, <https://novascotia.ca/>; Agriculture and Agri-Food Canada, <http://www.agr.gc.ca/>; Canadian Association of Professional Sommeliers, <http://sommelierscanada.com/>; Atlantic Wine Institute, <http://www.acadiaentrepreneurshipcentre.com/>; Beer Canada, <http://www.beercanada.com/>; Canadian Vintners Association, <http://www.canadianvintners.com/>; Craft Brewers Association of Nova Scotia, <http://nscraftbeer.ca/>; Innovation, Science and Economic Development Canada, <https://www.ic.gc.ca/>; NS Vineyard Development and Expansion Program, <https://novascotia.ca/>; Grape Industry Development Program, <http://www2.gnb.ca/>; Statistics Canada, <http://www.statcan.gc.ca/>; Winery Association of Nova Scotia, <https://winesofnovascotia.ca/>

Economic context of the alcoholic beverage industry

Alcoholic Beverage Sales (in thousands of \$)



Total national sales at the end of 2015 reach \$21,338 billion (latest data available)

Zoom on production

New Brunswick

► 17 wineries were active in 2016, in NB, producing an estimated 80 tons of grapes with an approximate economic impact of \$7.75 million

► Economic spinoffs resulting from microbrewery products accounted for 3% of the provincial beer market, amounting to an annual \$8.3 million estimate

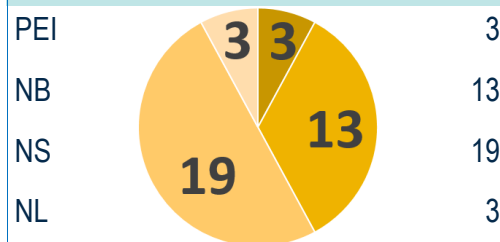
Nova Scotia

► The NS grape & wine industry generates \$218 million annually, representing more than 900 jobs and 90 grape growers

► Craft beer sales climbed 25% in 2015 in NS

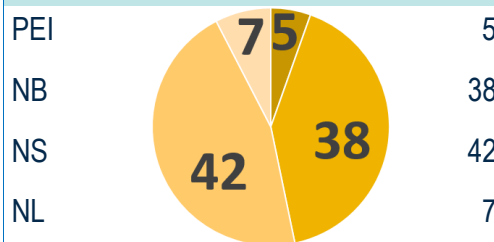
Wine producers

Number of establishments



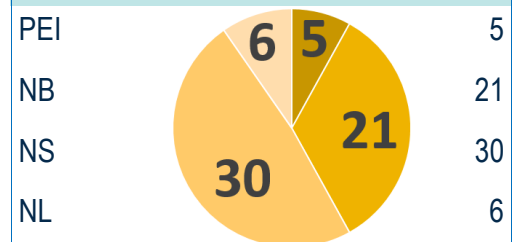
Beer producers

Number of establishments

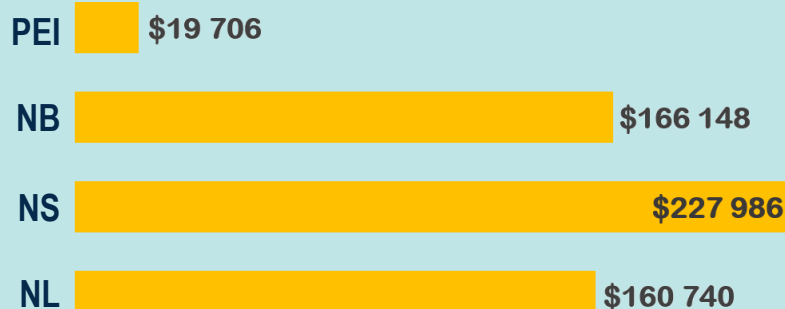


Craft beer producers

Number of establishments



Net income of provincial and territorial liquor authorities (in thousands of dollars)



Total net income nationally: \$ 5,686 billion

Atlantic Canada Wine Symposium 2017

June 11-13, 2017, Halifax, NS

<https://atlanticwinesymposium.ca/>



The 5th Atlantic Canada Wine Symposium is an opportunity to meet with other industry professionals, to hear more than 40 high-profile national and international speakers, and take part in workshops, winery tours, a supplier marketplace and wine tastings. More than 300 attendees are anticipated this year.

Industry groups, associations and programs

Research and Innovation

Federal Government

Kentville R&D Center, NS

Agriculture and Agri-Food Canada
Wine Grape Research Program

Specialized studies of different production factors, such as grape variety, soil conditions, climate, etc., that influence grape growing and wine production; the Center aims to promote the growth of the wine industry in NS thanks in part to an experimental vineyard enabling the study of microclimates, soil fertility and unique terroirs and their impact on grape culture

Provincial Governments / Educational Institutions

Biorefinery Technology Scale-Up Center
Collège communautaire du NB, Campus d'Edmundston, NB

The Centre's mandate is to support the industry's bioproduct/ biotech promotion efforts across Atlantic Canada, including fermentation technologies and other bioprocesses used in producing alcoholic beverages; the Center developed recognized expertise in specialized analysis of hops, malt, beer and spirits as well as flavoring associated with beer brewing, and acts a facilitator for SMEs in the bioprocesses sector, by helping them innovate

Atlantic Wine Institute
Acadia University, Wolfville, NS

The Institute helps meet the industry's needs through its research, outreach and education activities, and by promoting communication, it facilitates the flow of information between various regional actors (partner institutions, industrial organizations and individual companies) and supports economic growth in Atlantic Canada

Acadia Laboratory for Agri-food and Beverage (ALAB)
Acadia University, Wolfville, NS

The new grape and wine laboratory at Acadia University begins offering its services to the wine industry in the spring of 2017 while also conducting research into wine composition, investigating the influence of factors such as water, soil and climate on wine's aroma and flavor. It will also study the impact of fermentation techniques

Canadian Institute of Fisheries Technology (CIFT)
Dalhousie University, Halifax, NS

With its leading-edge technology and expertise in the area of fermentation processes, the Institute is equipped to meet the needs of craft brewers and promote the growth of this industry by providing opportunities to test various types of fermentation, yeasts, grains and hops, as a necessary step in product development; in the near future, the Institute hopes to increase collaboration opportunities with wine producers and brewers



Groups and associations

National

Beer Canada

<http://www.beercanada.com/>

Voluntary trade association representing the 40 largest brewing companies across the country, responsible for producing more than 90% of Canadian beer

Canadian Vintners Association

<http://www.canadianvintners.com/>

National association founded in 1967 with more than 80 members active in various sectors related to wine making. These members account for 90% of all wine produced in Canada annually

Canadian Association of Professional Sommeliers

<http://sommelierscanada.com/fr/>

A member of the *Association de la Sommellerie Internationale*, the Canadian association has more than 500 members working in the sommelier profession and restaurant services. The association is affiliated with the Best Sommelier of the World Competition

Regional and provincial

Atlantic Canada Chapter

Canadian Association of Professional Sommeliers

<https://capsac.wildapricot.org/>

Wine, beer and spirits courses and tasting workshops; organizer of the Atlantic Canada's Top Sommelier competition every 3 years; promotion of the sommelier profession in the region

Winery Association of Nova Scotia

<https://winesofnovascotia.ca/>

Represents 11 vineyards in 7 regions of the province and advocates for winemakers across the province

Craft Brewers Association of Nova Scotia

<http://nscraftbeer.ca/>

The Craft Brewers Association of NS was founded in 2011; 5 years later, it represents 34 members throughout the province

New Brunswick Craft Alcohol Producers Association

<https://fr-fr.facebook.com/nbcapa/>

Association of approximately 30 craft brewers, cideries, mead producers, wine makers and distillers in the province; official organizer of the craft alcohol producers' excellence gala

Financial support programs

NB

► Grape Industry Development Program

Provincial aid program established to promote development of the winemaking industry and to improve grape production from two perspectives: development of vineyards and new technologies and the purchase of equipment

NS

► Vineyard Development and Expansion Program

This program is in place to support Nova Scotia's wine industry; in addition to vineyard development and expansion, available aid goes toward expanding production and exploring new markets



Celebration of Industry Excellence

Competitions / Awards / Recognition

National

Canadian Brewing Awards

<https://www.canadianbrewingawards.com/winners/2016-winner-list/>

May 25-27, 2017, Ottawa, Ontario

15th edition of this national competition open to brewers small and large across Canada. In addition to handing out awards in 55 beer and 4 cider categories, the distinctions of Canadian Brewery of the Year and Canadian Beer of the Year are announced at the event

National Wine Awards of Canada 2017

<http://www.winealign.com/awards>

June 15-19, 2017, Wolfville, NS

This nationwide competition takes place each June with Nova Scotia serving as host of this 17th edition. Wines and ciders produced across Canada are reviewed and Platinum, Gold, Silver and Bronze medals awarded in more than 20 categories along with additional prestigious distinctions based on total medals earned

Canadian Wine Industry Awards

<http://www.canadianvintners.com/initiatives/canadian-wine-industry-awards-prix-de-lindustrie-vinicole-canadienne/>

June 21, 2017, Niagara-on-the-Lake, Ontario

Yearly award recognizing success, leadership and outstanding commitment among members of Canada's grape and wine industry

Regional

Atlantic Canadian Wine Awards

<https://fr-fr.facebook.com/WineAwardsAtlantic/>

2017 edition (more details TBA)

Annual event with more than 45 awards handed out at the 2016 edition including 36 awards in 10 different categories plus 9 special awards

Atlantic Canadian Beer Awards

<http://acbeerblog.ca/2016/11/07/2016-acba-winners/>

2017 edition, Halifax, NS (more details TBA)

More than 250 beers and ciders reviewed by 21 judges, and 49 awards (in 14 different categories plus 7 special awards) were presented for the region's best products

Atlantic Canada's Top Sommelier

<https://capsac.wildapricot.org/events>

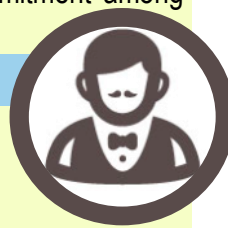
April 8, 2017, Halifax, NS

Sommeliers throughout the Atlantic region are invited to come vie for the title of Atlantic Canada's best sommelier. Their ability to taste wine, knowledge of wine regions and service skills will all be put to the test at this event

2016 Lieutenant Governor's Award for Excellence in Nova Scotia Wines

<http://lt.gov.ns.ca/news-events/2016-07-21/>

Annual award bestowed since 2014 by the Lieutenant Governor of Nova Scotia in recognition of 3 to 5 wines selected as the year's best, regardless of variety or vintage



Calendar of events 2017

► Nova Scotia Icewine Festival

March 4-5, 2017, Grand Pré, NS

Annual event showcasing locally produced wines and ice wines and Nova Scotia cuisine

► Fredericton Craft Beer Festival

March 8-12, 2017, Fredericton, NB

45 microbreweries showcasing 190 products

► Full House Craft Beer Fest

May 12-13, 2017, Halifax, NS

28 breweries set to meet under one roof for the NS Craft Beer Week

► Festival of Wines

May 26-27, 2017, Charlottetown, PEI

Wine tasting of more than 260 wines from around the world

► 2017 Atlantic Beer Festival

May 26-27, 2017, Moncton, NB

► FestiVin

May 26 - June 3, 2017, Caraquet, NB

21st edition providing the opportunity to discover various wines as well as local products

► Northumberfest 2017

May 27, 2017, Pictou, NS

This event is organized to celebrate craft beer in Nova Scotia

► Yarmouth Craft Beer Festival

May 27, 2017, Yarmouth, NS

Celebrating brewers in the Maritimes

► East Coast Cider Festival

May 27, 2017, Halifax, NS

First event of its kind in the province

► Halifax Seaport Beerfest

August 11-12, 2017, Halifax, NS

10th edition of the largest craft beer gathering in Atlantic Canada

► OktoberFest des Acadiens

August 31 - September 3, 2017, Bertrand, NB

Family event featuring tastings of imported and local beers and local food products

► World Wine and Food Expo

Fall 2017, Moncton, NB

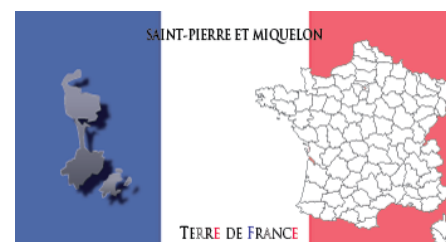
Prestige tasting and other wine tasting experiences as well as dinners and seminars

► NB Spirits Festival

November 14-18, 2017, Fredericton, NB

Canada's oldest whisky and spirits festival celebrates its 22nd year in 2017





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Events



The major events in metropolitan France

French vineyards are inseparable from the terroir that nurtures them, and French wines are a reflection of those who work to produce them. Each region has its own distinct identity and is characterized by its unique wines and spirits. The many designations of wines from France come from terroirs of incredible variety.

The major wine events in France (find all the events on: eventseye.com)

Bordeaux	VINEXPO : International Wine and Spirits Exhibition	Biennial	18.06 - 21.06 2017
Paris	GOURMET FOOD & WINE SELECTION : Gastronomy and Wine Fair	Biennial	4.09 - 25.09 2017
Paris	WHISKY LIVE PARIS : International whiskey tasting event	Annual	23.09 - 24.09 2017
Beaune	FÊTE DES GRANDS VINS DE BOURGOGNE : 3000 varieties available	Annual	nov. 2017 (?)
Montpellier	SITEVI : International Trade Exhibition of Equipment and Techniques for Vine/Wine and Fruit-Growing Sectors	Biennial	28.11 - 30.11 2017
Cognac	VS PACK : Trade Show dedicated to Innovation in Packaging for Wines and Spirits	Biennial	05.12 - 07.12 2017
Montpellier	VINISUD : International Exhibition of Mediterranean Wines and Spirits	Biennial	janv. 2018 (?)
Angers	SIVAL : Interprofessional Trade Show for Viticulture, Agriculture and Horticulture	Annual	janv. 2018 (?)
Mulhouse	MONDIAL DE LA BIÈRE EUROPE	Annual	fév. 2018 (?)
Angers	SALON DES VINS DE LOIRE : Professional Wine Show, entirely dedicated to the Loire Vineyards	Annual	fév. 2018 (?)

Vin & Société - represents the 500,000 stakeholders in the wine sector

Vin & Société is a unique organization in France that aims to transmit the values and traditions of an entire industry. Established in regions, its goal is to bring the dynamics of the wine industry to the society of the future. Vin & Société also represents the French wine sector on social issues at the European level. Its objective: to encourage dialogue on the issues of responsible consumption and public health and to defend the place of wine in society. It collaborates with the other European producer countries and the institutions of the European Union through a strong commitment and concrete actions within the Wine in Moderation-Art de vivre Program.

www.vinetsociete.fr

Source: vinetsociété ; eventseye

The Wine-Growing Regions



List of French Wines

A major player on the international scene, France is recognized throughout the world for its wine-making. It has 17 wine regions, with different terroirs and varieties of grapes.

Overview of the major wine-growing regions :

Bordeaux : The largest producing region of high quality wine in France and in the world. It has around 7,000 chateaux.

Vineyards :	120 000 hectares (300 000 acres)
	Merlot (50%)
Cépages in Bordeaux :	Cabernet-Sauvignon (26%)
	Cabernet-Franc (10%)
	Sémillon (8%)
Production :	850 millions bottles, 25% de la production AOC en France
	Full-bodied red wine (pomerol)
Type of wine :	Red wine (bordeaux AOC)
	Dry white wine (entre deux mers)
	Sweet white wine (sauternes)

For further information : www.bordeaux.com/fr

Bourgogne : Region of "clos and climats", it is distinguished by the diversity of its soils and exceptional climatic conditions. Its wine is recognized throughout the world.

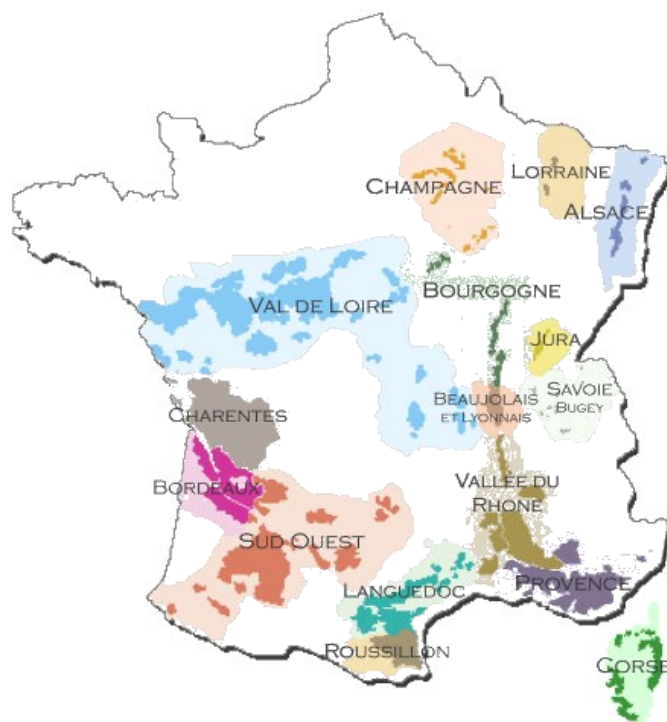
Vineyards :	25 000 hectares (60 000 acres)
Cépages :	Red wine : Pinot Noir (60%)
	White wine : Chardonnay (31%)
Production :	180 millions bottles
	Full-bodied red wine (Pommard-Corton)
Type of wine :	Medium red wine (Beaune)
	Dry white wine (Chablis, Chassagne Montrachet)

For further information : <http://www.vins-bourgogne.fr/>

Val de Loire : the 3rd largest region of appellation wines in France, Val de Loire has 85 appellations and designations. It is one of ten European vineyards registered as a UNESCO World Heritage Site.

Vineyards :	30 000 hectares
	Cabernet Franc
Cépages :	Melon de Bourgogne
	Chenin Blanc
	Sauvignon
Production :	400 millions de bouteilles
	Dry white wine
	Sweet white wine
Type of wine :	Semi-dry white wine
	Sparkling white wine
	Fruity red wine

For further information : www.vinsvaldeloire.fr



Key figures for the sector :

- ⇒ **The wine sector is the leading French agricultural sector in terms of value**
- ⇒ 558,000 stakeholders in the wine sector
- ⇒ 750,000 ha of vineyards in France
- ⇒ 85% of French households consume wine
- ⇒ 7.9 billion in wine exports in 2016
- ⇒ 60% of the wine produced in France is sold in France
- ⇒ France produces 16% of the world's wine
- ⇒ France has more than 10,000 tourism wine cellars, which welcomed 10 million wine tourists in 2016, of which 42% were foreigners
- ⇒ 96% of restaurants / cafés / hotels offer wine by the glass; an average of 9 different choices of wine are offered
- ⇒ France is the second largest wine-consuming country after the United States and ahead of Italy
- ⇒ On average, the French drink 42 litres of wine per person per year
- ⇒ France has 308 AOC (controlled designation of origin) and 74 IGP (Protected Geographical Indications).
- ⇒ Breakdown of wine production: 55% red wine, 26% white wine, 19% rosé

Sources : terroirs-france ; vins-france ; vinetsociété ; vin-vigne

The market for spirits



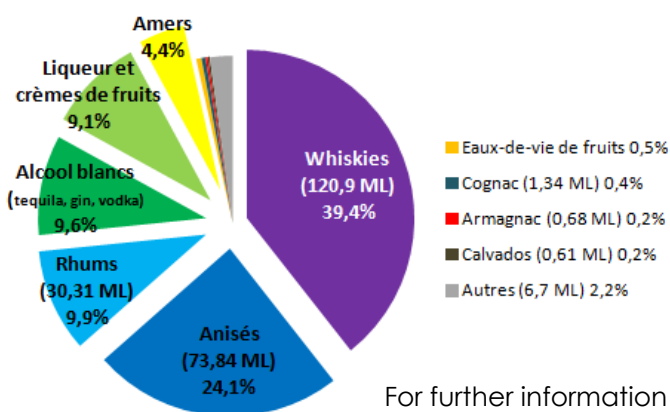
The French prefer whiskey

The number one "hard liquor" consumed in France is whiskey. With an overall market share of almost 40%, whiskey is ahead of pastis and other aniseed-flavoured spirits (24% of the market) and vodka (7.8%). The vast majority (77.2%) of spirits are bought in supermarkets and consumed at home or in friends' homes (80%).

In short, the market for spirits in France

- ⇒ 100,000 direct and indirect jobs
- ⇒ 2000 producers (-10,000 hL in volume per year)
- ⇒ 600 million litres produced in France
- ⇒ 481 million litres exported
- ⇒ in 2nd position for positive trade balance (wines and spirits)

Consumer trends :



For further information : www.spiritueux.fr/maj/phototheque/photos/pdf/ffs_reperes_2015.pdf



Sources: whiskylive.fr ; spiritueux.fr

Focus - Whiskey

In this wine country, whiskey is the king of hard liquor with an average yearly consumption of 2.15 litres per inhabitant, according to figures provided by the Fédération française des spiritueux. (FFS).

The French market is dominated by Scotch whiskeys and scotch (90% of the volume sold). However, bourbon and Canadian and Japanese whiskeys are showing signs of growth. The three most popular brands of whiskey in France are the most affordable, Jack Daniel's, Ballantines and Clan Campbell.

77% of sales of spirits take place in supermarkets and 80% of their consumption occurs at home or at friends' homes. The revenue from retail sales of spirits amounted to 4.46 billion euros in 2014, up 1% in one year. Almost half (46.9%) was generated by sales of whiskey (2.09 billion euros).

France produces nearly 700,000 bottles of whiskey per year

Today there are approximately 40 distilleries of French whiskey. It is estimated that there will be around fifty in 2020. Their overall sales have reached 3% of the sales of non-Scotch whiskey.

Single Malt or Blend?

Understanding the appellations

- ⇒ A single malt is a whiskey made from only malted barley and comes from a single distillery.
- ⇒ A blended scotch (or blend) is an assembly of single malts and grain whiskeys (made from wheat, corn, rye ...); the younger the scotch, the more quickly it incorporates grain whiskey (which ages more quickly).
- ⇒ A blended malt combines single malts from several distilleries.
- ⇒ "Pure malt" is a sales concept; it is a blended malt that prefers to rely on phonetic ambiguity with single malt rather than being mistaken for a blend.

Map of the distilleries in France : www.distilzine.fr/2015/12/21/la-carte-de-france-des-whiskies/

Innovation Conference 26/06



An innovation conference organized by Archipel Développement on the theme of brews and spirits will take place on the islands of Saint-Pierre and Miquelon on June 26, 2017.

This first Innovation Conference will be organized at the Centre Culturel et Sportif de Saint-Pierre, within the framework of the FIER SPM project and will focus on the spirits sector, in particular whiskey.

Distillery Project in Saint-Pierre et Miquelon



Archipel Développement is currently supporting two entrepreneurs, Christian Vergier and Yannick Mahe, for a distillery project in Saint-Pierre, with a high ambition: to showcase the exceptional period of the Prohibition around a key product for the Archipelago.

The entire production facility will be set up in the archipelago. It will be composed of a brewery, a distillation unit, an aging cellar, a bottling plant and an analysis laboratory, with a production target of 100,000 bottles per year, primarily for the North American and European markets.

Christian Vergier, a graduate in oenology from the University of Dijon, is the consultant for the European leaders in the markets for rums. With more than 60 medals obtained in various national and international competitions in 2015, he is also the initiator of new techniques of aging.

Yannick Mahe, a native of the archipelago, holds a degree in Management Science and Project Engineering. He was responsible for the creation and management of various organizations in the industrial and tourism sectors. He is also a graduate of the Université de Bourgogne in Wine Tourism.

The first aging cellar for whiskey located in Saint-Pierre is expected to receive its first liquor by the end of 2017. Ninety percent of the sales will come from the export of whiskey but the production facility could be used for the local market, including beer, gin or vodka.

Like the breweries and distilleries which are becoming major attractions in North America and Europe, this may also constitute an opportunity for the agricultural and livestock sectors.

ARCHIPEL
DÉVELOPPEMENT

Saint-Pierre
et Miquelon
Collectivité Territoriale



Programme

8:30	Welcome
9:00	Opening of the Innovation Conference
9:10	Plenary session : ⇒ Description and Challenges of International Markets for Spirits ⇒ Distillery project in Saint Pierre and Miquelon (Christian VERGIER) ⇒ Brewery project (Thierry HEINS)
10:30	First Round table Session (by invitation) ⇒ Group 1 / Tourism and the Prohibition <i>How to develop tourism through a distillery and the historical heritage related to the prohibition?</i> ⇒ Group 2 / Agriculture and Malt <i>Upstream and downstream of a distillery/ brewery, what is the potential for agriculture (grain, compost, animal feed, etc.)?</i>
14:00	Second Round Table Session (by invitation) ⇒ Group 1 / Training and wine tourism <i>What training would be of benefit to the distillery? What introduction and training could be offered for amateurs, tourists and professionals?</i> ⇒ Group 2 / Agrifoods and Food Industry <i>What is the added value to local products that incorporate beer and spirits?</i>
15:45	Summary of the Round Table Discussions and Conclusions ⇒ Remarks by the French government and by the local authority
17:30	Cocktails

Public registration beginning on May 9 (limited places).

Contact : Agnès Lehuenen,
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INTELL-ECHO



Are you seeking business opportunities in this sector?
CACIMA and FCCC-AN can facilitate your business prospection process and help with establishing new partnerships
(targeted information and network contacts)

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