



Request for Proposals Business Modelling & Financial Benchmarking Toolkit

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Background & Context

The BC wine industry has experienced significant growth over the past 30 years. International recognition has positioned British Columbia as a world-class wine region, generating meaningful economic impact with the industry contributing more than \$3.75 billion in economic activity, including over \$750 million in wages and \$440 million in tax revenue in 2019.

Today, the industry stands at a critical crossroads, characterized by:

- Climate variability and long-term climate change impacts on grape suitability and yields.
- Evolving market trends, consumer behavior and varietal/wine preferences
- Significant vineyard replanting and long-term varietal uncertainty.
- Rising costs of production labour availability challenges and operational pressures.
- An evolving inter-provincial regulatory environment and shifting consumer preferences and market dynamics.

In response, the BC Wine Grape Industry Task Force (WGITF) was established as an industry-led initiative to take coordinated action and strengthen the long-term sustainability of grape growing and winemaking in British Columbia. Over the next eighteen months, WGITF is investing in targeted projects and initiatives that address the most significant opportunities and risks facing the sector.

The Task Force is governed by an Advisory Committee comprised of leadership from five key industry associations, with a Program Delivery Team supporting coordination, communication, and reporting to ensure effective implementation.

Problem Statement

The BC wine grape industry operates across diverse scales, regions, and business models. There is currently no standardized financial benchmarking framework that enables consistent comparison of cost structures, profitability metrics, or operational performance across comparable operations.

Financial reporting practices vary widely across operations, including accounting approaches, cost categorization, and the treatment of agricultural versus commercial activities. As a result, producers have limited ability to evaluate their financial performance against peers or clearly identify key cost drivers and efficiency opportunities within their operations.

Without structured benchmarks and practical modelling tools, businesses lack reliable reference points to support financial planning, assess scale efficiencies, or make informed investment and operational decisions.

A defensible financial benchmarking and modelling framework is required to improve financial visibility, enable meaningful comparison across operations, and support data-informed business decision-making.

Purpose

The Business Economics Working Group, one of six working groups under the Task Force, is seeking proposals from qualified proponents to design, pilot, and deliver a Financial Benchmarking and Business Modelling Toolkit for the BC wine grape industry.

This project will establish a standardized financial framework that enables producers to better understand their business performance, identify key cost drivers, and support more informed operational and investment decisions across vineyard and winery operations.

Specifically, the project will:

- Develop a practical financial modelling tool to support forecasting and business decision-making
- Define standardized financial metrics and cost-of-production methodologies applicable to vineyard and winery operations
- Analyze cost structures and key profitability drivers across various production models.
- Establish the foundation for future industry benchmarking through standardized financial definitions and data structures

The resulting toolkit must be practical, defensible, and accessible for small-to-medium vineyard and winery operators without internal financial analysis capacity.

The toolkit will be developed through structured engagement with industry stakeholders to ensure it is analytically sound, practical for business use, and sustainable for ongoing industry adoption.

Success will be demonstrated through:

- Clear definitions and calculation methods for cost-of-production metrics, including cost per litre across vineyard and winery operations

- Delivery of a standardized Financial Benchmark Framework with defined metrics, segmentation categories, and profitability definitions
- Completion of a Financial Insights Report suitable for integration into the Long-Term Industry Environmental Scan
- Development, pilot validation, and industry-ready release of a practical Financial Modelling Toolkit capable of calculating cost per litre and other key financial indicators.

This project will run concurrently with the Long-Term Industry Strategy, including the Environmental Industry Scan. The successful proponent will coordinate with the strategic planning consultants and leverage existing reports, industry data, and related outputs to ensure alignment of assumptions, integration of findings, and avoid duplication.

Value Proposition

This project represents an opportunity to establish foundational financial infrastructure that strengthens business decision-making and long-term economic sustainability within the BC wine grape industry.

The successful proponent will deliver a framework and toolkit that clarifies:

- The capital requirements and scaling thresholds across vineyard and winery operations.
- The relationship between cost structure, pricing, and profitability
- The financial sustainability of different business models within BC
- The financial metrics that most significantly influence long-term competitiveness and operational performance.

The framework should allow businesses to analyze individual components of their operations independently or together, improving understanding of cost drivers, profitability, and performance across the value-chain.

Success will be demonstrated through delivery of a practical and defensible financial benchmarking and modelling framework that supports businesses to better understand their performance while establishing the foundation for future industry-wide benchmarking.

Scope of Work

The successful proponent will complete the following core components. Proponents are encouraged to recommend a phased or streamlined approach that preserves the intent and outcomes while ensuring feasibility within scope and budget.

Component	Objective	Deliverables
Discovery and Needs Assessment	Identify priority financial questions, benchmarking needs, and segmentation categories.	<ul style="list-style-type: none"> ● Current state financial assessment: analysis of cost structures, profitability drivers and performance variability across operations. ● Data Framework and Architecture: definition of standardized financial data structures
Toolkit Design and Development	Design and develop a toolkit that allows producers to analyze their business performance and test financial scenarios.	<ul style="list-style-type: none"> ● Financial modelling toolkit (web-based tool with dashboard) with flexible financial data input options ● Documentation of modelling logic and tool structure ● Recommendations for long-term governance of the toolkit and any associated data infrastructure, including considerations related to data storage, access, privacy, and ongoing maintenance.
Financial Analysis	Analyze cost structures and profitability dynamics across vineyard and winery operations to identify key performance	<ul style="list-style-type: none"> ● Business Insights Report: Summary of identified key cost and profitability drivers and assessment of margin

	drivers.	variability across business models (suitable for integration into the Long-Term Strategy E-Scan).
Financial Benchmark Development	Establish a standardized benchmarking framework and financial definitions to support future industry benchmarking.	<ul style="list-style-type: none"> Financial benchmark framework: Defined set of standardized financial metrics, segmentation categories and profitability definitions.
Pilot and Validation	Test the toolkit with industry and refine it for practical adoption and sector-wide use.	<ul style="list-style-type: none"> Refined and validated toolkit ready for industry use. Implementation guide to support the adoption and proper use of the toolkit

Through Working Group discussions and industry engagement, several recurring financial questions have emerged. The questions below illustrate the types of issues the proposed benchmarking framework and modelling toolkit should enable producers and industry leadership to analyze. Proponents are not expected to answer these questions directly, but should demonstrate how their proposed framework and modelling approach would allow them to be examined.

- What are the primary cost drivers across vineyard and winery operations?
- How does profitability vary across size, region, and business model?
- Which financial benchmarks are most relevant for long-term viability?
- How should profitability be consistently defined across the sector?
- How do capital investments influence cost structure and margins?
- How should inventory management be incorporated into financial modelling?
- What modelling structure will support adoption and practical use?
- How can AI-enabled analytics enhance analysis and forecasting capability, if applicable?
- How can cost-of-production be calculated across different stages of the production cycle?
- How can financial modelling incorporate operational risk scenarios such as crop loss, vintage variation, or climate-related production disruptions?

Stakeholder Engagement

The successful proponent will work collaboratively with:

- The targeted audience for this toolkit: small - to - medium growers and winery operators and their accounting professionals and financial advisors that prepare their financial statements.
- WGITF Business Economics Working Group.
- WGITF Program Delivery Team, other Working Groups and Advisory Committee.
- Boards, staff, and member representatives from the five industry groups that comprise the WGITF.
- External consultants and project teams currently engaged in related initiatives, where appropriate.
- Cross-commodity partners where relevant (e.g., tree fruit).
- Relevant provincial/federal and agricultural support bodies where appropriate.

Engagement must:

- Protect confidentiality of sensitive financial information
- Be structured and efficient
- Surface needs before “validation” (i.e. engagement must inform the work, not only confirm it)
- Support credibility and transparency
- Avoid duplication with other active initiatives and leverage work underway where possible
- Produce findings that are defensible and usable by the Advisory Committee

Timeline & Location

It is anticipated that this project will commence in April 2026 and run for approximately six months (April – September 2026). Given the harvest season, the toolkit may be launched in October / November 2026. The proponent must provide a detailed project schedule as part of the proposal that highlights any possible dependencies on related initiatives and any assumptions regarding availability of parallel project outputs. Engagement sessions may occur virtually and, if required, in person.

Budget

Proponents must provide:

- A detailed cost breakdown by phase/component

- Clear assumptions related to scope and engagement approach
- Identification of efficiencies where coordination with related initiatives may reduce duplication or cost
- Opportunities for cost-sharing or other external funding sources if applicable
- Any optional enhancements or phased approaches

Proposal Requirements

Proposals must include:

- Organization profile, relevant experience, project team
- Proposed approach, to include stakeholder engagement approach, and work plan
- Data and information requirements
- Detailed fee proposal
- References

Evaluation Criteria

Proposals will be evaluated holistically, with emphasis on clarity, feasibility, and alignment. Key criteria include:

- Demonstrated understanding of agricultural / commodity organization ecosystems
- Experience in organizational assessment, governance review, and stakeholder engagement
- Ability to translate complex organizational systems into clear visuals and decision-ready outputs
- Practicality and feasibility within timeline and budget
- Value for money

Submission Instructions

- For any questions / inquiries please contact [Abbie Morris](#) and [Lindsay Kelm](#).
- Please submit your proposal in pdf format via email to abbie@bcwinegrapeindustry.com by 17:00 PDT on Friday, April 10, 2026.
- Final decisions will be made by the Advisory Committee in April 2026.