

Ontario Wine Industry Market Share Report, Net Dollars
For the 3 months and year ended September 30, 2010

	Net Sales, 2nd quarter only		%	Rolling 12		%
	This Year	Last Year		This Year	Last Year	
Total LCBO Wine Sales (A)	295,018,052	280,137,545	5.3%	1,134,182,736	1,129,285,455	0.4%
LCBO Ontario Wine Sales						
White Wine	45,150,244	40,945,407	10.3%	158,288,282	149,864,678	5.6%
Red Wine	27,555,439	26,016,392	5.9%	104,624,191	102,003,400	2.6%
Rose Wine	3,272,425	3,036,315	7.8%	10,885,534	10,785,075	0.9%
Sparkling Wine	1,130,679	1,080,550	4.6%	5,392,423	5,468,146	-1.4%
Below 7% Sparkling Wine	1,928,814	1,898,782	1.6%	8,990,193	9,252,314	-2.8%
Port	408,927	381,924	7.1%	1,800,548	1,689,157	6.6%
Sherry	2,074,279	2,107,114	-1.6%	8,681,349	8,926,622	-2.7%
Dessert Wines	286,910	219,099	30.9%	1,654,550	1,396,381	18.5%
Other	1,951,942	1,841,693	6.0%	8,282,186	8,290,235	-0.1%
Total LCBO Sales of Ontario Wine (includes VQA) (B)	83,759,659	77,527,276	8.0%	308,599,256	297,676,009	3.7%
LCBO Share of Ontario Wine Sales (B/E)	53.3%	52.7%	0.6%	54.3%	55.0%	-0.7%
Market Share of Ontario Wines at the LCBO (B/A)	28.4%	27.7%	0.7%	27.2%	26.4%	0.8%
Winery Retail Store Sales						
White Wine	25,176,325	24,038,234	4.7%	90,591,420	82,171,121	10.2%
Red Wine	24,705,385	23,597,169	4.7%	91,214,855	86,606,755	5.3%
Rose Wine	2,094,486	2,130,796	-1.7%	7,029,343	6,765,445	3.9%
Sparkling Wine	734,625	701,723	4.7%	3,208,238	3,075,912	4.3%
Below 7% Sparkling Wine	195,278	156,161	25.0%	716,309	691,422	3.6%
Port	103,411	102,155	1.2%	434,156	528,021	-17.8%
Sherry	676,839	741,921	-8.8%	2,930,759	3,158,158	-7.2%
Dessert Wines	4,411,182	4,101,481	7.6%	12,212,083	11,910,767	2.5%
Wine Coolers and Ciders	1,445,375	1,455,415	-0.7%	4,552,801	5,156,822	-11.7%
Other	1,577,658	1,535,681	2.7%	5,299,735	4,937,124	7.3%
Total Winery Retail Sales (C)	61,120,563	58,560,736	4.4%	218,189,701	205,001,547	6.4%
WRS Share of the Ontario Wine Sales	38.9%	39.8%	-0.9%	38.4%	37.9%	0.5%
Direct Delivery to Licencees						
VQA	11,307,686	10,337,178	9.4%	39,463,663	36,306,613	8.7%
Non-VQA	894,065	699,432	27.8%	2,531,221	2,631,125	-3.8%
Total Direct Delivery (D)	12,201,751	11,036,610	10.6%	41,994,884	38,937,739	7.9%
Direct Delivery Share of the Ontario Wine Sales	7.8%	7.5%	0.3%	7.4%	7.2%	0.2%
Total Sales of Ontario wines, all channels E=[B+C+D]	157,081,973	147,124,622	6.8%	568,783,840	541,615,294	5.0%
Total Wine Sales, all channels F=[A+C+D]	368,340,366	349,734,891	5.3%	1,394,367,320	1,373,224,740	1.5%
Overall Market share for Ontario wines (E/F)	42.6%	42.1%		40.8%	39.4%	
VQA Sales at the LCBO						
White Wine	11,930,572	10,094,240	18.2%	40,141,517	35,203,947	14.0%
Red Wine	8,992,546	7,559,861	19.0%	32,720,539	26,983,871	21.3%
Other Wines	1,504,221	1,129,366	33.2%	4,797,520	4,134,128	16.0%
Total (G)	22,427,339	18,783,467	19.4%	77,659,576	66,321,945	17.1%
VQA sales at Winery Retail Stores	27,387,523	25,591,653	7.0%	89,841,340	80,335,523	11.8%
Total VQA Sales	61,122,548	54,712,298	11.7%	206,964,579	182,964,082	13.1%
VQA Wine as a % of Ontario wine sales	38.9%	37.2%		36.4%	33.8%	