

Ontario Wine Industry Market Share Report, Litres Sold

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)	26,414,323	25,971,052	1.7%	103,213,091	103,090,407	0.1%
LCBO Ontario Wine Sales						
White Wine	4,775,832	4,514,055	5.8%	17,221,926	16,620,645	3.6%
Red Wine	2,721,939	2,686,254	1.3%	10,664,198	10,667,620	0.0%
Rose Wine	343,311	335,659	2.3%	1,195,883	1,201,439	-0.5%
Sparkling Wine	78,670	81,856	-3.9%	385,937	416,855	-7.4%
Below 7% Sparkling Wine	249,898	258,666	-3.4%	1,194,640	1,278,577	-6.6%
Port	38,505	37,962	1.4%	173,875	169,286	2.7%
Sherry	233,361	247,099	-5.6%	998,440	1,048,875	-4.8%
Dessert Wines	6,732	5,403	24.6%	38,510	32,177	19.7%
Other	132,884	126,682	4.9%	579,918	580,895	-0.2%
Total LCBO Sales of Ontario Wine (includes VQA) (B)	8,581,134	8,293,636	3.5%	32,453,328	32,016,368	1.4%
LCBO Share of Ontario Wine Sales (B/E)	58.1%	57.3%	0.8%	57.7%	57.6%	0.0%
Market Share of Ontario Wines at the LCBO (B/A)	32.5%	31.9%	0.6%	31.4%	31.1%	0.4%
Winery Retail Store Sales						
White Wine	2,377,969	2,381,020	-0.1%	9,174,210	8,810,426	4.1%
Red Wine	2,155,001	2,175,543	-0.9%	8,705,805	8,777,281	-0.8%
Rose Wine	186,003	199,741	-6.9%	672,288	679,572	-1.1%
Sparkling Wine	58,346	56,755	2.8%	263,181	286,698	-8.2%
Below 7% Sparkling Wine	22,614	18,724	20.8%	83,831	83,661	0.2%
Port	8,405	8,715	-3.5%	38,843	43,679	-11.1%
Sherry	72,477	81,404	-11.0%	320,563	361,036	-11.2%
Dessert Wines	46,080	43,708	5.4%	147,408	144,269	2.2%
Coolers and Cider	233,449	232,544	0.4%	735,799	848,616	-13.3%
Other	104,827	108,259	-3.2%	362,527	325,268	11.5%
Total Winery Retail Sales (C)	5,265,172	5,306,412	-0.8%	20,504,454	20,360,506	0.7%
WRS Share of the Ontario Wine Sales	35.7%	36.7%	-1.0%	36.4%	36.6%	-0.2%
Direct Delivery to Licensees						
VQA	809,242	780,259	3.7%	2,980,087	2,842,081	4.9%
Non-VQA	110,469	94,100	17.4%	329,074	338,488	-2.8%
Total Direct Delivery (D)	919,711	874,359	5.2%	3,309,161	3,180,569	4.0%
Direct Delivery Share of the Ontario Wine Sales	6.2%	6.0%	0.2%	5.9%	5.7%	0.2%
Total Sales of Ontario wines, all channels E=[B+C+D]	14,766,016	14,474,407	2.0%	56,266,944	55,557,443	1.3%
Total Wine Sales, all channels F=[A+C+D]	32,599,206	32,151,823	1.4%	127,026,707	126,631,482	0.3%
Overall Market share for Ontario wines (E/F)	45.3%	45.0%		44.3%	43.9%	
VQA Sales at the LCBO						
White Wine	866,496	778,719	11.3%	2,993,761	2,709,196	10.5%
Red Wine	623,969	539,812	15.6%	2,321,311	1,914,298	21.3%
Other Wines	87,965	66,903	31.5%	255,357	221,008	15.5%
Total (G)	1,578,430	1,385,434	13.9%	5,570,429	4,844,502	15.0%
VQA sales at Winery Retail Stores	1,311,327	1,281,745	2.3%	4,820,399	4,457,699	8.1%
Total VQA Sales	3,698,999	3,447,438	7.3%	13,370,915	12,144,282	10.1%
VQA Wine as a % of Ontario wine sales	25.1%	23.8%		23.8%	21.9%	
Total 'Cellared In' Sales	11,067,017	11,026,969	0.4%	42,896,029	43,413,160	-1.2%