

Ontario Wine Industry Market Share Report, Litres Sold

For the 3 months and year ended March 31, 2011

	Net Sales, 4th quarter only		%	Rolling 12		%
	This Year	Last Year		This Year	Last Year	
Total LCBO Wine Sales (A)	21,263,753	20,801,109	2.2%	104,448,581	103,119,432	1.3%
LCBO Ontario Wine Sales						
White Wine	3,495,982	3,448,639	1.4%	17,467,785	16,833,918	3.8%
Red Wine	2,259,863	2,270,710	-0.5%	10,762,417	10,667,472	0.9%
Rose Wine	212,113	225,537	-6.0%	1,197,707	1,187,876	0.8%
Sparkling Wine	59,923	63,263	-5.3%	376,186	390,363	-3.6%
Below 7% Sparkling Wine	187,561	201,318	-6.8%	1,190,402	1,222,508	-2.6%
Port	38,118	38,719	-1.6%	175,255	173,045	1.3%
Sherry	225,205	235,075	-4.2%	978,764	1,031,540	-5.1%
Dessert Wines	5,012	5,621	-10.8%	36,032	36,678	-1.8%
Other	116,723	119,310	-2.2%	566,985	572,035	-0.9%
Total LCBO Sales of Ontario Wine (B)	6,600,500	6,608,191	-0.1%	32,751,533	32,115,435	2.0%
LCBO Share of Ontario Wine Sales (B/E)	57.8%	57.5%	0.3%	58.0%	57.4%	0.6%
Market Share of Ontario Wines at the LCBO (B/A)	31.0%	31.8%	-0.7%	31.4%	31.1%	0.2%
Winery Retail Store Sales						
White Wine	1,891,738	1,911,507	-1.0%	9,138,538	9,139,488	0.0%
Red Wine	1,843,997	1,903,311	-3.1%	8,637,929	8,822,436	-2.1%
Rose Wine	119,843	135,860	-11.8%	658,823	691,429	-4.7%
Sparkling Wine	46,886	45,850	2.3%	271,274	264,503	2.6%
Below 7% Sparkling Wine	5,955	11,308	-47.3%	73,873	74,486	-0.8%
Port	7,971	8,473	-5.9%	38,174	39,839	-4.2%
Sherry	74,380	78,399	-5.1%	309,875	336,147	-7.8%
Dessert Wines	19,459	22,796	-14.6%	145,346	140,962	3.1%
Coolers and Cider	121,346	113,765	6.7%	723,312	763,454	-5.3%
Other	39,621	49,328	-19.7%	350,827	356,475	-1.6%
Total Winery Retail Sales (C)	4,171,196	4,280,598	-2.6%	20,347,971	20,629,218	-1.4%
WRS Share of the Ontario Wine Sales	36.6%	37.2%	-0.7%	36.0%	36.9%	-0.8%
Direct Delivery to Licensees						
VQA	551,202	543,203	1.5%	3,012,219	2,906,489	3.6%
Non-VQA	87,160	60,148	44.9%	353,557	326,540	8.3%
Total Direct Delivery (D)	638,362	603,351	5.8%	3,365,776	3,233,029	4.1%
Direct Delivery Share of the Ontario Wine Sales	5.6%	5.3%	0.3%	6.0%	5.8%	0.2%
Total Sales of Ontario wines, all channels E=[B+C+D]	11,410,058	11,492,139	-0.7%	56,465,280	55,977,682	0.9%
Total Wine Sales, all channels F=[A+C+D]	26,073,311	25,685,058	1.5%	128,162,328	126,981,679	0.9%
Overall Market share for Ontario wines (E/F)	43.8%	44.7%		44.1%	44.1%	
VQA Sales at the LCBO						
White Wine	563,183	536,897	4.9%	3,158,884	2,861,853	10.4%
Red Wine	456,152	452,973	0.7%	2,418,183	2,170,436	11.4%
Other Wines	40,291	32,964	22.2%	279,297	217,794	28.2%
Total (G)	1,059,626	1,022,834	3.6%	5,856,364	5,250,083	11.5%
VQA sales at Winery Retail Stores	678,982	883,259	-23.1%	4,481,330	4,766,043	-6.0%
Total VQA Sales	2,289,810	2,449,296	-6.5%	13,349,913	12,922,615	3.3%
VQA Wine as a % of Ontario wine sales	20.1%	21.3%		23.6%	23.1%	
Total 'Cellared In' Sales	9,120,248	9,042,843	0.9%	43,115,367	43,055,067	0.1%