

# Ontario Wine Quarterly Scorecard Report - Q1 2014/15

## Summary

For the 3 fiscal periods ended June 21, 2014

	Quarter 4			Quarter 1			Year to Date			Rolling 13		
	2013/14	2012/13	% Change	2014/15	2013/14	% Change	2014/15	2013/14	% Change	2014/15	2013/14	% Change
<b>Value (Net Sales)</b>												
<b>Sales by Channel</b>												
LCBO Ontario	\$ 75,033,340	\$ 72,383,195	3.7%	\$ 86,525,613	\$ 81,056,095	6.7%	\$ 86,525,613	\$ 81,056,095	6.7%	\$ 386,432,463	\$ 368,543,178	4.9%
LCBO Wines Category	\$ 71,401,571	\$ 69,168,384	3.2%	\$ 82,084,944	\$ 77,059,782	6.5%	\$ 82,084,944	\$ 77,059,782	6.5%	\$ 365,198,283	\$ 349,369,014	4.5%
VINTAGES	\$ 3,631,769	\$ 3,214,811	13.0%	\$ 4,440,669	\$ 3,996,313	11.1%	\$ 4,440,669	\$ 3,996,313	11.1%	\$ 21,234,180	\$ 19,174,164	10.7%
Winery Retail Stores	\$ 49,458,194	\$ 47,629,391	3.8%	\$ 58,959,137	\$ 55,527,915	6.2%	\$ 58,959,137	\$ 55,527,915	6.2%	\$ 259,538,246	\$ 248,961,198	4.2%
Direct Delivery	\$ 8,471,454	\$ 8,514,545	-0.5%	\$ 11,953,208	\$ 12,475,068	-4.2%	\$ 11,953,208	\$ 12,475,068	-4.2%	\$ 49,454,701	\$ 49,756,888	-0.6%
<b>Total</b>	<b>\$ 132,962,988</b>	<b>\$ 128,527,132</b>	<b>3.5%</b>	<b>\$ 157,437,958</b>	<b>\$ 149,059,078</b>	<b>5.6%</b>	<b>\$ 157,437,958</b>	<b>\$ 149,059,078</b>	<b>5.6%</b>	<b>\$ 695,425,411</b>	<b>\$ 667,261,265</b>	<b>4.2%</b>
<b>Volume (Litres Sold)</b>												
<b>Sales by Channel</b>												
LCBO Ontario	7,459,549	7,175,417	4.0%	8,484,443	7,984,921	6.3%	8,484,443	7,984,921	6.3%	37,482,565	35,986,892	4.2%
LCBO Wines Category	7,332,396	7,069,609	3.7%	8,324,900	7,846,929	6.1%	8,324,900	7,846,929	6.1%	36,754,944	35,367,918	3.9%
VINTAGES	127,153	105,808	20.2%	159,543	137,992	15.6%	159,543	137,992	15.6%	727,621	618,974	17.6%
Winery Retail Stores	4,715,059	4,497,389	4.8%	5,247,484	5,099,667	2.9%	5,247,484	5,099,667	2.9%	23,006,797	22,129,718	4.0%
Direct Delivery	674,948	679,551	-0.7%	923,673	954,343	-3.2%	923,673	954,343	-3.2%	3,833,085	3,858,623	-0.7%
<b>Total</b>	<b>12,849,556</b>	<b>12,352,357</b>	<b>4.0%</b>	<b>14,655,601</b>	<b>14,038,931</b>	<b>4.4%</b>	<b>14,655,601</b>	<b>14,038,931</b>	<b>4.4%</b>	<b>64,322,447</b>	<b>61,975,233</b>	<b>3.8%</b>

### Notes:

LCBO Duty Free and Private Ordering sales are omitted as well as coolers, ciders and flavoured drinks.

WRS and DD sales may not match other reports or past reports due to a timing difference of the retrieval of data. DD sales do not include Duty Free.

Sources: Periodic Ontario Wine Scorecard Report, J10, WRS and VQA Reports

Prepared by: LCBO Economic Planning and Analysis

# Ontario Wine Quarterly Scorecard Report - Q1 2014/15

## Value Sales (\$)

For the 3 fiscal periods ended June 21, 2014

	Quarter 1			Year to Date			Rolling 13		
	2014/15	2013/14	% Change	2014/15	2013/14	% Change	2014/15	2013/14	% Change
<b>TOTAL LCBO Wine Sales (A)</b>	<b>385,559,855</b>	<b>372,022,894</b>	<b>3.6%</b>	<b>385,559,855</b>	<b>372,022,894</b>	<b>3.6%</b>	<b>1,737,935,128</b>	<b>1,695,457,515</b>	<b>2.5%</b>
<b>LCBO Ontario Wine Sales</b>									
White Wine	46,447,373	43,959,512	5.7%	46,447,373	43,959,512	5.7%	201,931,600	194,651,751	3.7%
Red Wine	30,790,118	27,950,447	10.2%	30,790,118	27,950,447	10.2%	139,490,668	128,689,027	8.4%
Rose Wine	3,094,294	3,017,829	2.5%	3,094,294	3,017,829	2.5%	12,763,230	12,389,666	3.0%
Sparkling / Fortified / Other	6,193,828	6,128,307	1.1%	6,193,828	6,128,307	1.1%	32,246,965	32,812,734	-1.7%
<b>Total LCBO Sales of Ontario Wine (includes VQA) (B)</b>	<b>86,525,613</b>	<b>81,056,095</b>	<b>6.7%</b>	<b>86,525,613</b>	<b>81,056,095</b>	<b>6.7%</b>	<b>386,432,463</b>	<b>368,543,178</b>	<b>4.9%</b>
<b>LCBO Share of Ontario Wine Sales (B/E)</b>	<b>55.0%</b>	<b>54.4%</b>	<b>0.6%</b>	<b>55.0%</b>	<b>54.4%</b>	<b>0.6%</b>	<b>55.6%</b>	<b>55.2%</b>	<b>0.3%</b>
<b>Winery Retail Store Sales</b>									
White Wine	25,525,347	24,691,899	3.4%	25,525,347	24,691,899	3.4%	111,665,007	103,165,704	8.2%
Red Wine	22,095,392	21,361,988	3.4%	22,095,392	21,361,988	3.4%	102,157,588	97,269,476	5.0%
Rose Wine	2,062,425	2,270,259	-9.2%	2,062,425	2,270,259	-9.2%	8,029,086	9,943,895	-19.3%
Sparkling Wine	930,696	589,515	57.9%	930,696	589,515	57.9%	3,450,870	3,021,972	14.2%
Below 7% Sparkling Wine	374,744	127,746	193.4%	374,744	127,746	193.4%	810,363	526,469	53.9%
Port	95,896	98,699	-2.8%	95,896	98,699	-2.8%	486,550	424,598	14.6%
Sherry	596,405	642,379	-7.2%	596,405	642,379	-7.2%	2,808,634	2,705,540	3.8%
Dessert Wines	2,318,307	2,257,456	2.7%	2,318,307	2,257,456	2.7%	10,818,445	11,596,683	-6.7%
Coolers and Cider	2,339,536	2,280,578	2.6%	2,339,536	2,280,578	2.6%	9,593,067	8,253,308	16.2%
Other	2,620,389	1,207,397	117.0%	2,620,389	1,207,397	117.0%	9,718,636	12,053,553	-19.4%
<b>Total Winery Retail Store Sales (C)</b>	<b>58,959,137</b>	<b>55,527,915</b>	<b>6.2%</b>	<b>58,959,137</b>	<b>55,527,915</b>	<b>6.2%</b>	<b>259,538,246</b>	<b>248,961,198</b>	<b>4.2%</b>
<b>WRS Share of the Ontario Wine Sales (C/E)</b>	<b>37.4%</b>	<b>37.3%</b>	<b>0.2%</b>	<b>37.4%</b>	<b>37.3%</b>	<b>0.2%</b>	<b>37.3%</b>	<b>37.3%</b>	<b>0.0%</b>
<b>Direct Delivery to Licencees</b>									
VQA	11,006,532	11,693,901	-5.9%	11,006,532	11,693,901	-5.9%	45,851,042	46,389,864	-1.2%
ICB/Non-VQA	946,675	781,168	21.2%	946,675	781,168	21.2%	3,603,659	3,367,025	7.0%
<b>Total Direct Delivery (D)</b>	<b>11,953,208</b>	<b>12,475,068</b>	<b>-4.2%</b>	<b>11,953,208</b>	<b>12,475,068</b>	<b>-4.2%</b>	<b>49,454,701</b>	<b>49,756,888</b>	<b>-0.6%</b>
<b>Direct Delivery Share of the Ontario Wine Sales (D/E)</b>	<b>7.6%</b>	<b>8.4%</b>	<b>-0.8%</b>	<b>7.6%</b>	<b>8.4%</b>	<b>-0.8%</b>	<b>7.1%</b>	<b>7.5%</b>	<b>-0.3%</b>
<b>TOTAL Sales of Ontario wines, all channels E=[B+C+D]</b>	<b>157,437,958</b>	<b>149,059,078</b>	<b>5.6%</b>	<b>157,437,958</b>	<b>149,059,078</b>	<b>5.6%</b>	<b>695,425,411</b>	<b>667,261,265</b>	<b>4.2%</b>
<b>TOTAL Wine Sales, all channels F=[A+C+D]</b>	<b>456,472,200</b>	<b>440,025,877</b>	<b>3.7%</b>	<b>456,472,200</b>	<b>440,025,877</b>	<b>3.7%</b>	<b>2,046,928,076</b>	<b>1,994,175,602</b>	<b>2.6%</b>
<b>VQA Sales at the LCBO</b>									
White Wine	13,111,731	12,523,351	4.7%	13,111,731	12,523,351	4.7%	59,651,409	59,366,105	0.5%
Red Wine	10,552,487	9,790,410	7.8%	10,552,487	9,790,410	7.8%	51,461,530	48,787,037	5.5%
Rose Wine	1,016,086	1,085,699	-6.4%	1,016,086	1,085,699	-6.4%	4,094,518	3,924,400	4.3%
Other	1,721,292	1,581,035	8.9%	1,721,292	1,581,035	8.9%	9,375,084	8,992,243	4.3%
<b>LCBO VQA Sales</b>	<b>26,401,596</b>	<b>24,980,495</b>	<b>5.7%</b>	<b>26,401,596</b>	<b>24,980,495</b>	<b>5.7%</b>	<b>124,582,541</b>	<b>121,069,785</b>	<b>2.9%</b>
<b>VQA Sales at Winery Retail Stores</b>	<b>22,489,206</b>	<b>22,293,598</b>	<b>0.9%</b>	<b>22,489,206</b>	<b>22,293,598</b>	<b>0.9%</b>	<b>106,696,209</b>	<b>103,562,871</b>	<b>3.0%</b>
<b>VQA Sales through Direct Delivery</b>	<b>11,006,532</b>	<b>11,693,901</b>	<b>-5.9%</b>	<b>11,006,532</b>	<b>11,693,901</b>	<b>-5.9%</b>	<b>45,851,042</b>	<b>46,389,864</b>	<b>-1.2%</b>
<b>TOTAL VQA Sales</b>	<b>59,897,334</b>	<b>58,967,993</b>	<b>1.6%</b>	<b>59,897,334</b>	<b>58,967,993</b>	<b>1.6%</b>	<b>277,129,792</b>	<b>271,022,519</b>	<b>2.3%</b>
<b>VQA Wine as a % of Ontario wine sales</b>	<b>38.0%</b>	<b>39.6%</b>	<b>-1.5%</b>	<b>38.0%</b>	<b>39.6%</b>	<b>-1.5%</b>	<b>39.9%</b>	<b>40.6%</b>	<b>-0.8%</b>

# Ontario Wine Quarterly Scorecard Report - Q1 2014/15

## Volume Sales (L)

For the 3 fiscal periods ended June 21, 2014

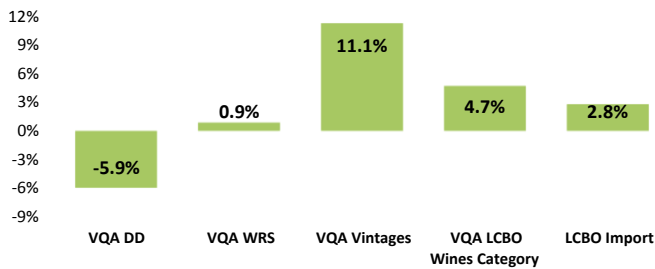
	Quarter 1			Year to Date			Rolling 13		
	2014/15	2013/14	% Change	2014/15	2013/14	% Change	2014/15	2013/14	% Change
<b>TOTAL LCBO Wine Sales (A)</b>	<b>28,543,545</b>	<b>27,912,635</b>	<b>2.3%</b>	<b>28,543,545</b>	<b>27,912,635</b>	<b>2.3%</b>	<b>126,948,147</b>	<b>125,378,706</b>	<b>1.3%</b>
<b>LCBO Ontario Wine Sales</b>									
White Wine	4,715,911	4,475,822	5.4%	4,715,911	4,475,822	5.4%	20,386,223	19,770,522	3.1%
Red Wine	2,937,495	2,682,594	9.5%	2,937,495	2,682,594	9.5%	13,159,140	12,227,186	7.6%
Rose Wine	311,059	301,411	3.2%	311,059	301,411	3.2%	1,291,806	1,259,343	2.6%
Sparkling / Fortified / Other	519,978	525,094	-1.0%	519,978	525,094	-1.0%	2,645,396	2,729,841	-3.1%
<b>Total LCBO Sales of Ontario Wine (includes VQA) (B)</b>	<b>8,484,443</b>	<b>7,984,921</b>	<b>6.3%</b>	<b>8,484,443</b>	<b>7,984,921</b>	<b>6.3%</b>	<b>37,482,565</b>	<b>35,986,892</b>	<b>4.2%</b>
<b>LCBO Share of Ontario Wine Sales (B/E)</b>	<b>57.9%</b>	<b>56.9%</b>	<b>1.0%</b>	<b>57.9%</b>	<b>56.9%</b>	<b>1.0%</b>	<b>58.3%</b>	<b>58.1%</b>	<b>0.2%</b>
<b>Winery Retail Store Sales</b>									
White Wine	2,355,901	2,338,754	0.7%	2,355,901	2,338,754	0.7%	10,337,670	9,696,682	6.6%
Red Wine	1,901,664	1,932,605	-1.6%	1,901,664	1,932,605	-1.6%	8,920,685	8,611,304	3.6%
Rose Wine	189,949	202,768	-6.3%	189,949	202,768	-6.3%	709,838	871,121	-18.5%
Sparkling Wine	60,888	43,906	38.7%	60,888	43,906	38.7%	245,892	218,566	12.5%
Below 7% Sparkling Wine	38,755	16,318	137.5%	38,755	16,318	137.5%	91,252	66,182	37.9%
Port	6,296	6,983	-9.8%	6,296	6,983	-9.8%	32,883	31,025	6.0%
Sherry	66,465	67,611	-1.7%	66,465	67,611	-1.7%	298,264	275,463	8.3%
Dessert Wines	24,739	19,998	23.7%	24,739	19,998	23.7%	102,907	110,203	-6.6%
Coolers and Cider	438,168	408,666	7.2%	438,168	408,666	7.2%	1,711,576	1,351,911	26.6%
Other	164,659	62,059	165.3%	164,659	62,059	165.3%	555,829	897,260	-38.1%
<b>Total Winery Retail Store Sales (C)</b>	<b>5,247,484</b>	<b>5,099,667</b>	<b>2.9%</b>	<b>5,247,484</b>	<b>5,099,667</b>	<b>2.9%</b>	<b>23,006,797</b>	<b>22,129,718</b>	<b>4.0%</b>
<b>WRS Share of the Ontario Wine Sales (C/E)</b>	<b>35.8%</b>	<b>36.3%</b>	<b>-0.5%</b>	<b>35.8%</b>	<b>36.3%</b>	<b>-0.5%</b>	<b>35.8%</b>	<b>35.7%</b>	<b>0.1%</b>
<b>Direct Delivery to Licencees</b>									
VQA	791,872	838,109	-5.5%	791,872	838,109	-5.5%	3,303,619	3,348,717	-1.3%
ICB/Non-VQA	131,801	116,234	13.4%	131,801	116,234	13.4%	529,467	509,906	3.8%
<b>Total Direct Delivery (D)</b>	<b>923,673</b>	<b>954,343</b>	<b>-3.2%</b>	<b>923,673</b>	<b>954,343</b>	<b>-3.2%</b>	<b>3,833,085</b>	<b>3,858,623</b>	<b>-0.7%</b>
<b>Direct Delivery Share of the Ontario Wine Sales (D/E)</b>	<b>6.3%</b>	<b>6.8%</b>	<b>-0.5%</b>	<b>6.3%</b>	<b>6.8%</b>	<b>-0.5%</b>	<b>6.0%</b>	<b>6.2%</b>	<b>-0.3%</b>
<b>TOTAL Sales of Ontario wines, all channels E=[B+C+D]</b>	<b>14,655,601</b>	<b>14,038,931</b>	<b>4.4%</b>	<b>14,655,601</b>	<b>14,038,931</b>	<b>4.4%</b>	<b>64,322,447</b>	<b>61,975,233</b>	<b>3.8%</b>
<b>TOTAL Wine Sales, all channels F=[A+C+D]</b>	<b>34,714,703</b>	<b>33,966,645</b>	<b>2.2%</b>	<b>34,714,703</b>	<b>33,966,645</b>	<b>2.2%</b>	<b>153,788,029</b>	<b>151,367,047</b>	<b>1.6%</b>
<b>VQA Sales at the LCBO</b>									
White Wine	858,393	827,209	3.8%	858,393	827,209	3.8%	3,927,013	3,979,819	-1.3%
Red Wine	658,219	614,483	7.1%	658,219	614,483	7.1%	3,209,464	3,092,639	3.8%
Rose Wine	65,244	68,914	-5.3%	65,244	68,914	-5.3%	264,483	255,428	3.5%
Other	35,574	30,521	16.6%	35,574	30,521	16.6%	184,435	168,220	9.6%
<b>LCBO VQA Sales</b>	<b>1,617,430</b>	<b>1,541,127</b>	<b>5.0%</b>	<b>1,617,430</b>	<b>1,541,127</b>	<b>5.0%</b>	<b>7,585,395</b>	<b>7,496,106</b>	<b>1.2%</b>
<b>VQA Sales at Winery Retail Stores</b>	<b>1,071,902</b>	<b>1,112,987</b>	<b>-3.7%</b>	<b>1,071,902</b>	<b>1,112,987</b>	<b>-3.7%</b>	<b>5,229,769</b>	<b>5,110,397</b>	<b>2.3%</b>
<b>VQA Sales through Direct Delivery</b>	<b>791,872</b>	<b>838,109</b>	<b>-5.5%</b>	<b>791,872</b>	<b>838,109</b>	<b>-5.5%</b>	<b>3,303,619</b>	<b>3,348,717</b>	<b>-1.3%</b>
<b>TOTAL VQA Sales</b>	<b>3,481,204</b>	<b>3,492,223</b>	<b>-0.3%</b>	<b>3,481,204</b>	<b>3,492,223</b>	<b>-0.3%</b>	<b>16,118,782</b>	<b>15,955,220</b>	<b>1.0%</b>
<b>VQA Wine as a % of Ontario wine sales</b>	<b>23.8%</b>	<b>24.9%</b>	<b>-1.1%</b>	<b>23.8%</b>	<b>24.9%</b>	<b>-1.1%</b>	<b>25.1%</b>	<b>25.7%</b>	<b>-0.7%</b>

# Ontario Wine Quarterly Scorecard Report - Q1 2014/15

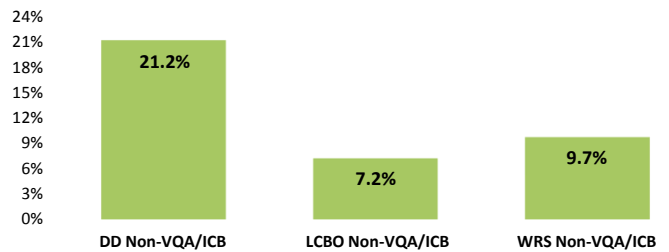
## Charts

For the 3 fiscal periods ended June 21, 2014

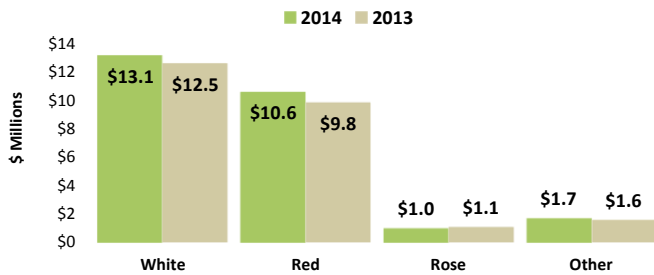
Ontario VQA Wine Value Sales Growth vs. Import  
Q1 2014/15



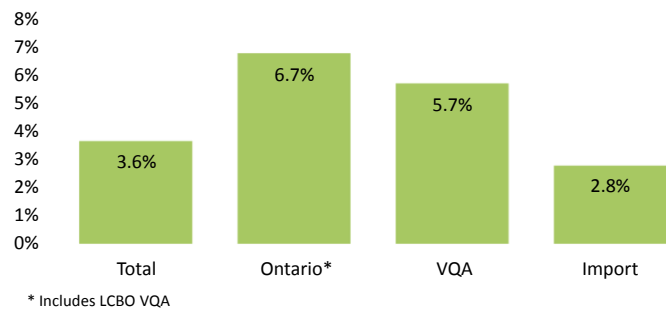
Ontario Non-VQA/ICB Wine Value Sales Growth  
Q1 2014/15



LCBO VQA Wine Value Sales by Type (\$ Millions)  
Q1 YTD 2014/15



LCBO Wine Value Sales Growth  
Q1 YTD 2014/15



Ontario Wine Value Sales Growth by Channel  
Rolling 13 Periods Q1 2014/15

