

Ontario Wine Industry Market Share Report, Net Dollars
For the 3 months and year ended March 31, 2010

	Net Sales, 4th quarter only		%	Rolling 12		%
	This Year	Last Year		This Year	Last Year	
Total LCBO Wine Sales (A)	225,979,469	229,206,680	-1.4%	1,115,869,637	1,109,451,214	0.6%
LCBO Ontario Wine Sales						
White Wine	31,401,827	29,778,302	5.5%	153,361,415	144,861,552	5.9%
Red Wine	22,114,469	21,560,238	2.6%	102,849,758	99,125,283	3.8%
Rose Wine	1,985,619	1,979,756	0.3%	10,596,637	10,482,772	1.1%
Sparkling Wine	941,610	929,827	1.3%	5,339,618	5,445,753	-1.9%
Below 7% Sparkling Wine	1,586,154	1,729,932	-8.3%	9,056,020	9,220,553	-1.8%
Port	404,567	372,235	8.7%	1,757,046	1,683,469	4.4%
Sherry	2,057,417	2,109,983	-2.5%	8,846,131	8,862,833	-0.2%
Dessert Wines	258,165	248,566	3.9%	1,564,382	1,328,533	17.8%
Other	530,909	501,549	5.9%	2,093,991	2,383,676	-12.2%
Total LCBO Sales of Ontario Wine (includes VQA) (B)	61,280,736	59,210,388	3.5%	295,464,998	283,394,424	4.3%
LCBO Share of Ontario Wine Sales (B/E)	55.4%	55.1%	0.4%	53.7%	53.1%	0.6%
Market Share of Ontario Wines at the LCBO (B/A)	27.1%	25.8%	1.3%	26.5%	25.5%	0.9%
Winery Retail Store Sales						
White Wine	17,659,158	16,849,077	4.8%	88,576,085	84,120,734	5.3%
Red Wine	18,383,462	18,613,801	-1.2%	90,348,311	88,845,838	1.7%
Rose Wine	1,327,306	1,304,110	1.8%	7,082,267	6,880,602	2.9%
Sparkling Wine	529,416	544,024	-2.7%	3,170,976	3,354,729	-5.5%
Below 7% Sparkling Wine	96,972	90,558	7.1%	629,864	638,497	-1.4%
Port	90,181	146,255	-38.3%	444,676	574,148	-22.6%
Sherry	705,169	807,052	-12.6%	3,053,303	3,234,851	-5.6%
Dessert Wines	1,657,460	1,524,445	8.7%	11,571,922	11,526,398	0.4%
Wine Coolers and Ciders	739,904	852,401	-13.2%	4,823,086	5,376,539	-10.3%
Other	649,964	836,532	-22.3%	5,216,380	5,718,627	-8.8%
Total Winery Retail Sales (C)	41,838,992	41,568,254	0.7%	214,916,869	210,270,962	2.2%
WRS Share of the Ontario Wine Sales	37.8%	38.7%	-0.8%	39.1%	39.4%	-0.4%
Direct Delivery to Licencees						
VQA	7,027,166	6,303,420	11.5%	37,368,767	36,819,757	1.5%
Non-VQA	432,674	444,393	-2.6%	2,488,997	2,948,955	-15.6%
Total Direct Delivery (D)	7,459,840	6,747,813	10.6%	39,857,764	39,768,713	0.2%
Direct Delivery Share of the Ontario Wine Sales	6.7%	6.3%	0.5%	7.2%	7.5%	-0.2%
Total Sales of Ontario wines, all channels E=[B+C+D]	110,579,568	107,526,456	2.8%	550,239,630	533,434,098	3.2%
Total Wine Sales, all channels F=[A+C+D]	275,278,300	277,522,747	-0.8%	1,370,644,269	1,359,490,888	0.8%
Overall Market share for Ontario wines (E/F)	40.2%	38.7%		40.1%	39.2%	
VQA Sales at the LCBO						
White Wine	7,648,335	6,632,057	15.3%	39,954,937	34,346,751	16.3%
Red Wine	6,563,318	5,377,537	22.1%	31,490,109	25,273,198	24.6%
Other Wines	597,874	496,926	20.3%	2,897,585	3,050,758	-5.0%
Total (G)	14,809,527	12,506,519	18.4%	74,342,631	62,670,707	18.6%
VQA sales at Winery Retail Stores	14,360,023	12,842,955	11.8%	84,285,243	74,381,600	13.3%
Total VQA Sales	36,196,716	31,652,894	14.4%	195,996,640	173,872,064	12.7%
VQA Wine as a % of Ontario wine sales	32.7%	29.4%		35.6%	32.6%	