

Ontario Wine Quarterly Scorecard Report - Q2 2014/15

Summary

For the 4 fiscal periods ended October 11, 2014

	Quarter 1			Quarter 2			Year to Date			Rolling 13		
	2014/15	2013/14	% Change	2013/14	2012/13	% Change	2014/15	2013/14	% Change	2014/15	2013/14	% Change
Value (Net Sales)												
Sales by Channel												
LCBO Ontario	\$ 86,525,613	\$ 81,056,095	6.7%	\$ 131,781,609	\$ 122,841,718	7.3%	\$ 218,307,222	\$ 203,897,813	7.1%	\$ 395,381,810	\$ 373,752,712	5.8%
LCBO Wines Category	\$ 82,084,944	\$ 77,059,782	6.5%	\$ 124,358,815	\$ 116,152,776	7.1%	\$ 206,443,759	\$ 193,212,558	6.8%	\$ 373,432,404	\$ 353,854,874	5.5%
VINTAGES	\$ 4,440,669	\$ 3,996,313	11.1%	\$ 7,422,794	\$ 6,688,942	11.0%	\$ 11,863,463	\$ 10,685,255	11.0%	\$ 21,949,406	\$ 19,897,838	10.3%
Winery Retail Stores	\$ 60,612,160	\$ 55,604,761	9.0%	\$ 92,695,502	\$ 85,605,333	8.3%	\$ 153,307,662	\$ 141,210,094	8.6%	\$ 268,532,326	\$ 252,778,327	6.2%
Direct Delivery	\$ 11,989,642	\$ 12,476,847	-3.9%	\$ 17,486,303	\$ 17,379,115	0.6%	\$ 29,475,945	\$ 29,855,962	-1.3%	\$ 49,611,000	\$ 50,103,690	-1.0%
Total	\$ 159,127,414	\$ 149,137,703	6.7%	\$ 241,963,414	\$ 225,826,166	7.1%	\$ 401,090,828	\$ 374,963,869	7.0%	\$ 713,525,136	\$ 676,634,730	5.5%
Volume (Litres Sold)												
Sales by Channel												
LCBO Ontario	8,484,443	7,984,921	6.3%	12,744,104	11,908,834	7.0%	21,228,547	19,893,755	6.7%	38,318,059	36,343,971	5.4%
LCBO Wines Category	8,324,900	7,846,929	6.1%	12,481,298	11,671,529	6.9%	20,806,198	19,518,458	6.6%	37,566,354	35,690,097	5.3%
VINTAGES	159,543	137,992	15.6%	262,806	237,305	10.7%	422,349	375,297	12.5%	751,705	653,874	15.0%
Winery Retail Stores	5,289,633	5,103,928	3.6%	7,826,083	7,311,131	7.0%	13,115,716	12,415,059	5.6%	23,575,230	22,489,319	4.8%
Direct Delivery	929,282	954,434	-2.6%	1,340,616	1,326,113	1.1%	2,269,899	2,280,546	-0.5%	3,853,972	3,877,811	-0.6%
Total	14,703,359	14,043,283	4.7%	21,910,803	20,546,077	6.6%	36,614,162	34,589,360	5.9%	65,747,261	62,711,101	4.8%

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

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Value Sales (\$)

For the 4 fiscal periods ended October 11, 2014

	Quarter 2			Year to Date			Rolling 13		
	2014/15	2013/14	% Change	2014/15	2013/14	% Change	2014/15	2013/14	% Change
TOTAL LCBO Wine Sales (A)	556,015,574	526,817,953	5.5%	941,575,429	898,840,847	4.8%	1,767,142,191	1,716,526,733	2.9%
LCBO Ontario Wine Sales									
White Wine	70,911,196	66,972,334	5.9%	117,358,569	110,931,846	5.8%	205,619,335	196,519,281	4.6%
Red Wine	46,759,473	42,332,120	10.5%	77,549,591	70,282,567	10.3%	143,927,455	131,713,120	9.3%
Rose Wine	4,923,812	4,671,798	5.4%	8,018,106	7,689,627	4.3%	13,015,256	12,518,416	4.0%
Sparkling / Fortified / Other	9,187,128	8,865,466	3.6%	15,380,956	14,993,773	2.6%	32,819,764	33,001,895	-0.6%
Total LCBO Sales of Ontario Wine (includes VQA) (B)	131,781,609	122,841,718	7.3%	218,307,222	203,897,813	7.1%	395,381,810	373,752,712	5.8%
LCBO Share of Ontario Wine Sales (B/E)	54.5%	54.4%	0.1%	54.4%	54.4%	0.1%	55.4%	55.2%	0.2%
Winery Retail Store Sales									
White Wine	39,708,562	37,389,458	6.2%	65,436,077	62,113,027	5.4%	114,251,987	106,372,454	7.4%
Red Wine	35,030,156	32,344,076	8.3%	57,413,618	53,745,564	6.8%	105,235,016	98,481,924	6.9%
Rose Wine	3,006,467	2,791,839	7.7%	5,077,578	5,065,979	0.2%	8,259,652	8,741,676	-5.5%
Sparkling Wine	834,081	939,649	-11.2%	2,609,693	1,529,560	70.6%	4,190,218	3,024,028	38.6%
Below 7% Sparkling Wine	412,592	202,330	103.9%	787,924	330,076	138.7%	1,021,212	560,983	82.0%
Port	141,555	173,171	-18.3%	235,114	271,870	-13.5%	452,598	452,832	-0.1%
Sherry	784,240	833,726	-5.9%	1,380,645	1,476,104	-6.5%	2,759,149	2,666,316	3.5%
Dessert Wines	4,967,665	4,507,123	10.2%	7,461,476	6,765,976	10.3%	11,459,764	11,049,813	3.7%
Coolers and Cider	4,042,613	4,042,233	0.0%	6,413,425	6,322,811	1.4%	9,624,723	8,870,166	8.5%
Other	3,767,571	2,381,729	58.2%	6,492,111	3,589,127	80.9%	11,278,008	12,558,134	-10.2%
Total Winery Retail Store Sales (C)	92,695,502	85,605,333	8.3%	153,307,662	141,210,094	8.6%	268,532,326	252,778,327	6.2%
WRS Share of the Ontario Wine Sales (C/E)	38.3%	37.9%	0.4%	38.2%	37.7%	0.6%	37.6%	37.4%	0.3%
Direct Delivery to Licencees									
VQA	16,201,460	16,154,077	0.3%	27,217,871	27,849,757	-2.3%	45,919,278	46,640,666	-1.5%
ICB/Non-VQA	1,284,843	1,225,038	4.9%	2,258,074	2,006,205	12.6%	3,691,722	3,463,024	6.6%
Total Direct Delivery (D)	17,486,303	17,379,115	0.6%	29,475,945	29,855,962	-1.3%	49,611,000	50,103,690	-1.0%
Direct Delivery Share of the Ontario Wine Sales (D/E)	7.2%	7.7%	-0.5%	7.3%	8.0%	-0.6%	7.0%	7.4%	-0.5%
TOTAL Sales of Ontario wines, all channels E=[B+C+D]	241,963,414	225,826,166	7.1%	401,090,828	374,963,869	7.0%	713,525,136	676,634,730	5.5%
TOTAL Wine Sales, all channels F=[A+C+D]	666,197,379	629,802,401	5.8%	1,124,359,035	1,069,906,903	5.1%	2,085,285,517	2,019,408,751	3.3%
VQA Sales at the LCBO									
White Wine	21,076,951	20,446,177	3.1%	34,188,682	32,969,528	3.7%	60,282,183	59,186,821	1.9%
Red Wine	17,096,716	16,005,782	6.8%	27,649,203	25,796,192	7.2%	52,561,899	49,825,039	5.5%
Rose Wine	1,966,458	1,835,352	7.1%	2,982,544	2,921,051	2.1%	4,225,633	4,017,886	5.2%
Other	2,773,222	2,497,886	11.0%	4,494,514	4,078,921	10.2%	9,601,236	9,101,599	5.5%
LCBO VQA Sales	42,913,347	40,785,197	5.2%	69,314,943	65,765,692	5.4%	126,670,951	122,131,345	3.7%
VQA Sales at Winery Retail Stores	39,623,903	39,748,144	-0.3%	62,769,978	62,118,588	1.0%	107,336,310	105,117,790	2.1%
VQA Sales through Direct Delivery	16,201,460	16,154,077	0.3%	27,217,871	27,849,757	-2.3%	45,919,278	46,640,666	-1.5%
TOTAL VQA Sales	98,738,710	96,687,419	2.1%	159,302,792	155,734,037	2.3%	279,926,540	273,889,802	2.2%
VQA Wine as a % of Ontario wine sales	40.8%	42.8%	-2.0%	39.7%	41.5%	-1.8%	39.2%	40.5%	-1.2%

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Volume Sales (L)

For the 4 fiscal periods ended October 11, 2014

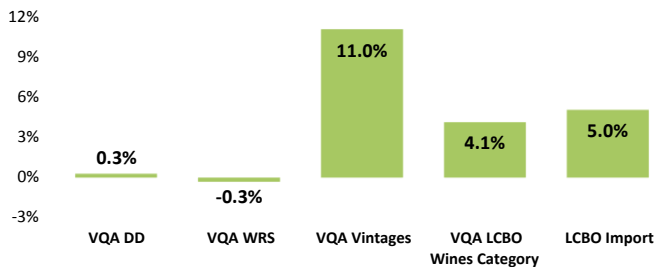
	Quarter 2			Year to Date			Rolling 13		
	2014/15	2013/14	% Change	2014/15	2013/14	% Change	2014/15	2013/14	% Change
TOTAL LCBO Wine Sales (A)	40,839,529	39,286,270	4.0%	69,383,074	67,198,905	3.3%	128,501,750	126,234,256	1.8%
LCBO Ontario Wine Sales									
White Wine	7,140,900	6,730,453	6.1%	11,856,811	11,206,275	5.8%	20,793,098	19,877,888	4.6%
Red Wine	4,395,122	3,994,636	10.0%	7,332,617	6,677,230	9.8%	13,559,853	12,471,980	8.7%
Rose Wine	477,062	456,915	4.4%	788,121	758,326	3.9%	1,311,949	1,274,685	2.9%
Sparkling / Fortified / Other	731,020	726,830	0.6%	1,250,998	1,251,924	-0.1%	2,653,159	2,719,418	-2.4%
Total LCBO Sales of Ontario Wine (includes VQA) (B)	12,744,104	11,908,834	7.0%	21,228,547	19,893,755	6.7%	38,318,059	36,343,971	5.4%
LCBO Share of Ontario Wine Sales (B/E)	58.2%	58.0%	0.2%	58.0%	57.5%	0.5%	58.3%	58.0%	0.3%
Winery Retail Store Sales									
White Wine	3,520,883	3,340,028	5.4%	5,888,943	5,680,883	3.7%	10,533,679	9,921,768	6.2%
Red Wine	2,839,082	2,693,250	5.4%	4,757,825	4,627,776	2.8%	9,087,233	8,688,366	4.6%
Rose Wine	254,755	229,853	10.8%	445,314	432,839	2.9%	735,732	760,290	-3.2%
Sparkling Wine	44,698	63,240	-29.3%	106,332	107,153	-0.8%	228,096	215,510	5.8%
Below 7% Sparkling Wine	43,922	25,476	72.4%	82,753	41,794	98.0%	109,774	70,676	55.3%
Port	8,771	9,714	-9.7%	15,067	16,697	-9.8%	31,940	30,922	3.3%
Sherry	87,519	86,761	0.9%	153,984	154,371	-0.3%	299,022	275,239	8.6%
Dessert Wines	43,148	38,504	12.1%	69,765	58,517	19.2%	109,499	102,514	6.8%
Coolers and Cider	734,159	702,896	4.4%	1,175,707	1,111,562	5.8%	1,746,220	1,503,957	16.1%
Other	249,145	121,409	105.2%	420,026	183,468	128.9%	694,035	920,078	-24.6%
Total Winery Retail Store Sales (C)	7,826,083	7,311,131	7.0%	13,115,716	12,415,059	5.6%	23,575,230	22,489,319	4.8%
WRS Share of the Ontario Wine Sales (C/E)	35.7%	35.6%	0.1%	35.8%	35.9%	-0.1%	35.9%	35.8%	0.0%
Direct Delivery to Licencees									
VQA	1,148,098	1,140,154	0.7%	1,940,442	1,978,354	-1.9%	3,312,514	3,355,684	-1.3%
ICB/Non-VQA	192,518	185,958	3.5%	329,457	302,192	9.0%	541,458	522,127	3.7%
Total Direct Delivery (D)	1,340,616	1,326,113	1.1%	2,269,899	2,280,546	-0.5%	3,853,972	3,877,811	-0.6%
Direct Delivery Share of the Ontario Wine Sales (D/E)	6.1%	6.5%	-0.3%	6.2%	6.6%	-0.4%	5.9%	6.2%	-0.3%
TOTAL Sales of Ontario wines, all channels E=[B+C+D]	21,910,803	20,546,077	6.6%	36,614,162	34,589,360	5.9%	65,747,261	62,711,101	4.8%
TOTAL Wine Sales, all channels F=[A+C+D]	50,006,228	47,923,513	4.3%	84,768,689	81,894,510	3.5%	155,930,952	152,601,386	2.2%
VQA Sales at the LCBO									
White Wine	1,384,744	1,350,351	2.5%	2,243,137	2,177,560	3.0%	3,961,407	3,927,109	0.9%
Red Wine	1,059,099	1,004,881	5.4%	1,717,318	1,619,364	6.0%	3,263,910	3,136,268	4.1%
Rose Wine	124,208	115,962	7.1%	189,452	184,876	2.5%	272,724	258,167	5.6%
Other	53,118	45,092	17.8%	88,692	75,613	17.3%	191,015	170,732	11.9%
LCBO VQA Sales	2,621,169	2,516,286	4.2%	4,238,599	4,057,413	4.5%	7,689,056	7,492,276	2.6%
VQA Sales at Winery Retail Stores	1,803,539	1,890,440	-4.6%	2,915,703	3,007,689	-3.1%	5,239,211	5,185,619	1.0%
VQA Sales through Direct Delivery	1,148,098	1,140,154	0.7%	1,940,442	1,978,354	-1.9%	3,312,514	3,355,684	-1.3%
TOTAL VQA Sales	5,572,806	5,546,881	0.5%	9,094,743	9,043,456	0.6%	16,240,782	16,033,580	1.3%
VQA Wine as a % of Ontario wine sales	25.4%	27.0%	-1.6%	24.8%	26.1%	-1.3%	24.7%	25.6%	-0.9%

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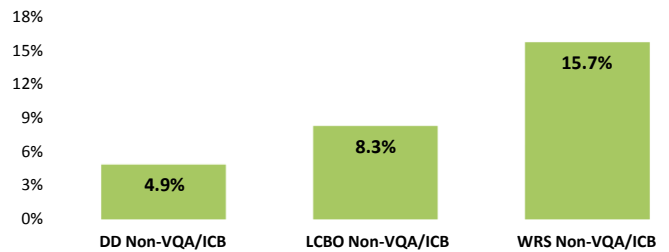
Charts

For the 4 fiscal periods ended October 11, 2014

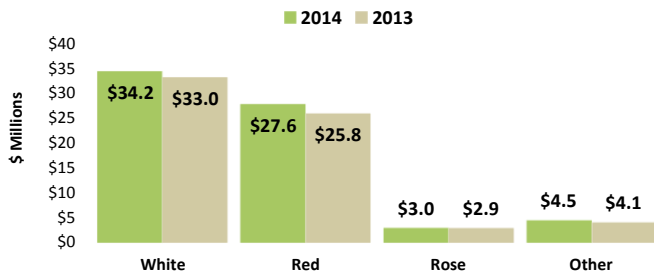
Ontario VQA Wine Value Sales Growth vs. Import
Q2 2014/15



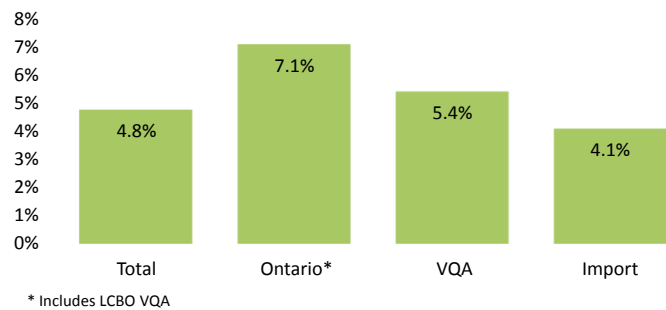
Ontario Non-VQA/ICB Wine Value Sales Growth
Q2 2014/15



LCBO VQA Wine Value Sales by Type (\$ Millions)
Q2 YTD 2014/15



LCBO Wine Value Sales Growth
Q2 YTD 2014/15



Ontario Wine Value Sales Growth by Channel
Rolling 13 Periods Q2 2014/15

