

Ontario Wine Industry Market Share Report, Net Dollars

For the 3 months and year ended December 31, 2010

	Net Sales, 3rd quarter only		%	Rolling 12		%
	This Year	Last Year		This Year	Last Year	
Total LCBO Wine Sales (A)	364,847,134	336,880,556	8.3%	935,045,368	895,594,395	4.4%
LCBO Ontario Wine Sales						
White Wine	47,102,399	42,445,180	11.0%	131,572,334	121,340,173	8.4%
Red Wine	34,091,745	30,932,208	10.2%	85,689,185	81,016,874	5.8%
Rose Wine	3,135,322	2,823,233	11.1%	9,214,024	8,612,949	7.0%
Sparkling Wine	2,435,976	2,281,723	6.8%	4,576,291	4,358,000	5.0%
Below 7% Sparkling Wine	3,969,736	3,678,764	7.9%	7,699,267	7,473,966	3.0%
Port	634,973	589,508	7.7%	1,441,877	1,352,896	6.6%
Sherry	2,511,466	2,492,445	0.8%	6,644,385	6,790,120	-2.1%
Dessert Wines	850,684	882,365	-3.6%	1,365,779	1,307,292	4.5%
Other	2,817,406	2,883,585	-2.3%	6,512,220	6,454,385	0.9%
Total LCBO Sales of Ontario Wine (includes VQA) (B)	97,549,707	89,009,010	9.6%	254,715,362	238,706,655	6.7%
LCBO Share of Ontario Wine Sales (B/E)	56.2%	54.9%	1.3%	54.3%	53.7%	0.6%
Market Share of Ontario Wines at the LCBO (B/A)	26.7%	26.4%	0.3%	27.2%	26.7%	0.6%
Winery Retail Store Sales						
White Wine	25,461,925	24,452,153	4.1%	74,025,649	70,927,285	4.4%
Red Wine	28,068,020	26,881,142	4.4%	74,104,589	71,983,442	2.9%
Rose Wine	1,833,703	1,783,133	2.8%	5,763,308	5,755,700	0.1%
Sparkling Wine	1,396,934	1,273,546	9.7%	2,802,211	2,641,561	6.1%
Below 7% Sparkling Wine	153,218	210,363	-27.2%	562,616	532,892	5.6%
Port	152,190	151,063	0.7%	345,101	354,495	-2.6%
Sherry	778,900	839,828	-7.3%	2,164,662	2,348,133	-7.8%
Dessert Wines	3,652,300	3,486,536	4.8%	10,733,788	9,919,111	8.2%
Wine Coolers and Ciders	1,090,878	1,172,260	-6.9%	3,731,516	4,083,183	-8.6%
Other	2,093,388	2,093,551	0.0%	4,654,825	4,566,416	1.9%
Total Winery Retail Sales (C)	64,681,457	62,343,576	3.7%	178,888,265	173,112,217	3.3%
WRS Share of the Ontario Wine Sales	37.3%	38.5%	-1.2%	38.2%	39.0%	-0.8%
Direct Delivery to Licencees						
VQA	10,358,804	10,128,375	2.3%	32,737,993	30,346,315	7.9%
Non-VQA	869,669	624,615	39.2%	2,346,117	2,056,323	14.1%
Total Direct Delivery (D)	11,228,473	10,752,990	4.4%	35,084,110	32,402,639	8.3%
Direct Delivery Share of the Ontario Wine Sales	6.5%	6.6%	-0.2%	7.5%	7.3%	0.2%
Total Sales of Ontario wines, all channels E=[B+C+D]	173,459,637	162,105,576	7.0%	468,687,737	444,221,511	5.5%
Total Wine Sales, all channels F=[A+C+D]	440,757,064	409,977,122	7.5%	1,149,017,743	1,101,109,251	4.4%
Overall Market share for Ontario wines (E/F)	39.4%	39.5%		40.8%	40.3%	
VQA Sales at the LCBO						
White Wine	14,099,057	11,489,429	22.7%	35,504,604	30,260,666	17.3%
Red Wine	12,368,683	10,393,004	19.0%	28,348,100	24,007,979	18.1%
Other Wines	1,825,275	1,395,045	30.8%	4,492,178	3,454,336	30.0%
Total (G)	28,293,014	23,277,477	21.5%	68,344,882	57,722,981	18.4%
VQA sales at Winery Retail Stores	24,924,947	25,281,829	-1.4%	73,857,312	69,969,842	5.6%
Total VQA Sales	63,576,765	58,687,682	8.3%	174,940,187	158,039,138	10.7%
VQA Wine as a % of Ontario wine sales	36.7%	36.2%		37.3%	35.6%	