

Ontario Wine Industry Market Share Report, Net Dollars

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)	236,833,070	222,540,720	6.4%	1,171,878,344	1,122,708,303	4.4%
LCBO Ontario Wine Sales						
White Wine	32,703,657	30,856,799	6.0%	164,275,991	152,715,018	7.6%
Red Wine	22,479,144	21,717,870	3.5%	108,168,329	103,112,428	4.9%
Rose Wine	1,928,539	1,946,754	-0.9%	11,142,563	10,596,644	5.2%
Sparkling Wine	868,482	880,295	-1.3%	5,444,773	5,289,077	2.9%
Below 7% Sparkling Wine	1,495,174	1,503,346	-0.5%	9,194,441	9,056,020	1.5%
Port	402,842	396,144	1.7%	1,844,719	1,757,046	5.0%
Sherry	2,004,711	2,029,021	-1.2%	8,649,096	8,846,131	-2.2%
Dessert Wines	224,415	236,442	-5.1%	1,590,194	1,564,382	1.6%
Other	1,708,852	1,657,086	3.1%	8,221,072	8,158,230	0.8%
Total LCBO Sales of Ontario Wine (includes VQA) (B)	63,815,816	61,223,759	4.2%	318,531,178	301,094,976	5.8%
LCBO Share of Ontario Wine Sales (B/E)	55.7%	55.4%	0.3%	54.5%	54.2%	0.4%
Market Share of Ontario Wines at the LCBO (B/A)	26.9%	27.5%	-0.6%	27.2%	26.8%	0.4%
Winery Retail Store Sales						
White Wine	18,505,383	17,670,256	4.7%	92,700,468	88,597,542	4.6%
Red Wine	18,802,327	18,389,630	2.2%	93,129,034	90,373,072	3.0%
Rose Wine	1,157,272	1,327,922	-12.9%	6,942,347	7,083,622	-2.0%
Sparkling Wine	529,746	529,416	0.1%	3,333,768	3,170,976	5.1%
Below 7% Sparkling Wine	46,673	96,972	-51.9%	611,814	629,864	-2.9%
Port	89,986	90,181	-0.2%	442,179	444,676	-0.6%
Sherry	680,294	705,169	-3.5%	2,855,763	3,053,303	-6.5%
Dessert Wines	1,629,734	1,657,460	-1.7%	12,414,491	11,576,571	7.2%
Wine Coolers and Ciders	720,453	739,904	-2.6%	4,453,278	4,823,086	-7.7%
Other	652,724	651,704	0.2%	5,321,032	5,218,120	2.0%
Total Winery Retail Sales (C)	42,814,591	41,858,613	2.3%	222,204,176	214,970,830	3.4%
WRS Share of the Ontario Wine Sales	37.4%	37.9%	-0.5%	38.1%	38.7%	-0.6%
Direct Delivery to Licencees						
VQA	7,400,009	7,037,144	5.2%	40,702,200	37,383,459	8.9%
Non-VQA	554,069	432,674	28.1%	2,539,544	2,488,997	2.0%
Total Direct Delivery (D)	7,954,078	7,469,817	6.5%	43,241,744	39,872,456	8.5%
Direct Delivery Share of the Ontario Wine Sales	6.9%	6.8%	0.2%	7.4%	7.2%	0.2%
Total Sales of Ontario wines, all channels E=[B+C+D]	114,584,485	110,552,189	3.6%	583,977,098	555,938,262	5.0%
Total Wine Sales, all channels F=[A+C+D]	287,601,739	271,869,150	5.8%	1,437,324,264	1,377,551,589	4.3%
Overall Market share for Ontario wines (E/F)	39.8%	40.7%		40.6%	40.4%	
VQA Sales at the LCBO						
White Wine	7,755,739	7,095,400	9.3%	43,260,343	37,507,663	15.3%
Red Wine	6,608,324	6,272,006	5.4%	34,956,424	30,415,235	14.9%
Other Wines	793,527	669,544	18.5%	5,297,060	4,150,612	27.6%
Total (G)	15,157,590	14,036,950	8.0%	83,513,827	72,073,510	15.9%
VQA sales at Winery Retail Stores	12,943,335	14,392,721	-10.1%	88,500,722	84,362,563	4.9%
Total VQA Sales	35,500,934	35,466,815	0.1%	212,716,749	193,819,532	9.7%
VQA Wine as a % of Ontario wine sales	31.0%	32.1%		36.4%	34.9%	