

Ontario Wine Quarterly Scorecard Report - Q3 2014/15

Summary

For the 3 fiscal periods ended January 3, 2015

	Quarter 2			Quarter 3			Year to Date			Rolling 13		
	2014/15	2013/14	% Change	2014/15	2013/14	% Change	2014/15	2013/14	% Change	2014/15	2013/14	% Change
Value (Net Sales)												
Sales by Channel												
LCBO Ontario	\$ 131,781,609	\$ 122,841,718	7.3%	\$ 107,169,787	\$ 102,033,236	5.0%	\$ 325,477,009	\$ 305,931,049	6.4%	\$ 400,518,342	\$ 378,315,111	5.9%
LCBO Wines Category	\$ 124,358,815	\$ 116,152,776	7.1%	\$ 100,591,502	\$ 95,720,907	5.1%	\$ 307,035,261	\$ 288,933,465	6.3%	\$ 378,252,451	\$ 357,967,026	5.7%
VINTAGES	\$ 7,422,794	\$ 6,688,942	11.0%	\$ 6,578,285	\$ 6,312,329	4.2%	\$ 18,441,748	\$ 16,997,584	8.5%	\$ 22,265,891	\$ 20,348,085	9.4%
Winery Retail Stores	\$ 93,188,040	\$ 85,605,333	8.9%	\$ 67,014,075	\$ 65,705,795	2.0%	\$ 220,930,838	\$ 206,915,889	6.8%	\$ 270,449,708	\$ 254,545,280	6.2%
Direct Delivery	\$ 17,778,604	\$ 17,379,115	2.3%	\$ 11,303,115	\$ 11,641,697	-2.9%	\$ 41,141,995	\$ 41,497,660	-0.9%	\$ 49,635,353	\$ 50,048,141	-0.8%
Total	\$ 242,748,253	\$ 225,826,166	7.5%	\$ 185,486,977	\$ 179,380,728	3.4%	\$ 587,549,841	\$ 554,344,597	6.0%	\$ 720,603,402	\$ 682,908,532	5.5%
Volume (Litres Sold)												
Sales by Channel												
LCBO Ontario	12,744,104	11,908,834	7.0%	10,097,042	9,629,868	4.9%	31,325,589	29,523,623	6.1%	38,785,228	36,699,064	5.7%
LCBO Wines Category	12,481,298	11,671,529	6.9%	9,890,549	9,434,735	4.8%	30,696,747	28,953,193	6.0%	38,018,984	36,017,745	5.6%
VINTAGES	262,806	237,305	10.7%	206,493	195,133	5.8%	628,842	570,430	10.2%	766,244	681,319	12.5%
Winery Retail Stores	7,846,530	7,311,131	7.3%	5,849,160	5,741,670	1.9%	18,990,172	18,156,729	4.6%	23,708,016	22,654,118	4.7%
Direct Delivery	1,368,197	1,326,113	3.2%	872,991	905,571	-3.6%	3,174,510	3,186,118	-0.4%	3,853,011	3,865,669	-0.3%
Total	21,958,832	20,546,077	6.9%	16,819,194	16,277,110	3.3%	53,490,270	50,866,470	5.2%	66,346,255	63,218,851	4.9%

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 Financial Planning and Analysis

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Value Sales (\$)

For the 3 fiscal periods ended January 3, 2015

	Quarter 3			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)	512,037,019	488,713,610	4.8%	1,453,612,448	1,387,554,457	4.8%	1,790,465,618	1,727,119,311	3.7%
LCBO Ontario Wine Sales									
White Wine	52,225,416	49,276,955	6.0%	169,583,985	160,208,801	5.9%	208,567,793	198,202,197	5.2%
Red Wine	40,310,419	38,229,143	5.4%	117,860,010	108,511,710	8.6%	146,008,723	134,823,373	8.3%
Rose Wine	3,021,824	2,853,477	5.9%	11,039,930	10,543,104	4.7%	13,183,596	12,676,688	4.0%
Sparkling / Fortified / Other	11,612,128	11,673,661	-0.5%	26,993,084	26,667,434	1.2%	32,758,230	32,612,853	0.4%
Total LCBO Sales of Ontario Wine (includes VQA) (B)	107,169,787	102,033,236	5.0%	325,477,009	305,931,049	6.4%	400,518,342	378,315,111	5.9%
LCBO Share of Ontario Wine Sales (B/E)	57.8%	56.9%	0.9%	55.4%	55.2%	0.2%	55.6%	55.4%	0.2%
Winery Retail Store Sales									
White Wine	26,734,664	27,391,470	-2.4%	92,393,315	89,504,497	3.2%	113,817,755	109,540,968	3.9%
Red Wine	29,246,052	27,235,055	7.4%	86,934,894	80,980,619	7.4%	107,521,237	101,381,463	6.1%
Rose Wine	1,703,090	1,882,378	-9.5%	6,813,386	6,948,357	-1.9%	8,113,082	8,680,900	-6.5%
Sparkling Wine	555,500	996,427	-44.3%	3,169,291	2,525,987	25.5%	3,753,389	3,087,618	21.6%
Below 7% Sparkling Wine	535,831	164,456	225.8%	1,323,754	494,532	167.7%	1,392,587	566,172	146.0%
Port	105,638	130,682	-19.2%	359,441	402,553	-10.7%	446,242	489,579	-8.9%
Sherry	624,643	707,572	-11.7%	2,005,289	2,183,676	-8.2%	2,676,220	2,836,754	-5.7%
Dessert Wines	2,406,923	2,479,693	-2.9%	9,885,707	9,245,669	6.9%	11,404,301	10,769,094	5.9%
Coolers and Cider	1,702,720	1,828,460	-6.9%	8,135,746	8,151,271	-0.2%	9,518,583	9,365,581	1.6%
Other	3,399,014	2,889,602	17.6%	9,910,017	6,478,728	53.0%	11,806,311	7,827,152	50.8%
Total Winery Retail Store Sales (C)	67,014,075	65,705,795	2.0%	220,930,838	206,915,889	6.8%	270,449,708	254,545,280	6.2%
WRS Share of the Ontario Wine Sales (C/E)	36.1%	36.6%	-0.5%	37.6%	37.3%	0.3%	37.5%	37.3%	0.3%
Direct Delivery to Licencees									
VQA	10,564,371	10,938,996	-3.4%	38,040,476	38,788,753	-1.9%	45,802,887	46,623,887	-1.8%
ICB/Non-VQA	738,744	702,701	5.1%	3,101,519	2,708,906	14.5%	3,832,466	3,424,254	11.9%
Total Direct Delivery (D)	11,303,115	11,641,697	-2.9%	41,141,995	41,497,660	-0.9%	49,635,353	50,048,141	-0.8%
Direct Delivery Share of the Ontario Wine Sales (D/E)	6.1%	6.5%	-0.4%	7.0%	7.5%	-0.5%	6.9%	7.3%	-0.4%
TOTAL Sales of Ontario wines, all channels E=[B+C+D]	185,486,977	179,380,728	3.4%	587,549,841	554,344,597	6.0%	720,603,402	682,908,532	5.5%
TOTAL Wine Sales, all channels F=[A+C+D]	590,354,209	566,061,102	4.3%	1,715,685,280	1,635,968,005	4.9%	2,110,550,678	2,031,712,732	3.9%
VQA Sales at the LCBO									
White Wine	16,377,847	15,553,392	5.3%	50,566,529	48,522,920	4.2%	61,106,642	59,146,642	3.3%
Red Wine	16,103,581	15,482,853	4.0%	43,752,784	41,279,045	6.0%	53,182,617	50,735,778	4.8%
Rose Wine	715,691	777,407	-7.9%	3,698,235	3,698,458	0.0%	4,163,915	4,175,640	-0.3%
Other	3,649,884	3,594,672	1.5%	8,144,398	7,673,593	6.1%	9,656,452	9,113,494	6.0%
LCBO VQA Sales	36,847,003	35,408,324	4.1%	106,161,946	101,174,016	4.9%	128,109,626	123,171,554	4.0%
VQA Sales at Winery Retail Stores	28,057,293	27,152,351	3.3%	91,404,875	89,270,939	2.4%	108,818,857	106,226,744	2.4%
VQA Sales through Direct Delivery	10,564,371	10,938,996	-3.4%	38,040,476	38,788,753	-1.9%	45,802,887	46,623,887	-1.8%
TOTAL VQA Sales	75,468,667	73,499,671	2.7%	235,607,297	229,233,708	2.8%	282,731,370	276,022,184	2.4%
VQA Wine as a % of Ontario wine sales	40.7%	41.0%	-0.3%	40.1%	41.4%	-1.3%	39.2%	40.4%	-1.2%

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Volume Sales (L)

For the 3 fiscal periods ended January 3, 2015

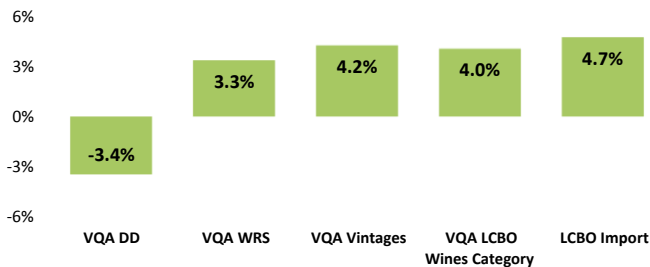
	Quarter 3			Year to Date			Rolling 13		
	2014/15	2013/14	% Change	2014/15	2013/14	% Change	2014/15	2013/14	% Change
TOTAL LCBO Wine Sales (A)	35,299,082	34,000,667	3.8%	104,682,156	101,199,572	3.4%	129,799,326	126,522,901	2.6%
LCBO Ontario Wine Sales									
White Wine	5,185,870	4,907,401	5.7%	17,042,681	16,113,676	5.8%	21,071,553	20,017,637	5.3%
Red Wine	3,690,306	3,514,239	5.0%	11,022,923	10,191,469	8.2%	13,735,915	12,719,368	8.0%
Rose Wine	319,128	294,669	8.3%	1,107,249	1,052,995	5.2%	1,336,415	1,283,971	4.1%
Sparkling / Fortified / Other	901,738	913,559	-1.3%	2,152,736	2,165,483	-0.6%	2,641,345	2,678,088	-1.4%
Total LCBO Sales of Ontario Wine (includes VQA) (B)	10,097,042	9,629,868	4.9%	31,325,589	29,523,623	6.1%	38,785,228	36,699,064	5.7%
LCBO Share of Ontario Wine Sales (B/E)	60.0%	59.2%	0.9%	58.6%	58.0%	0.5%	58.5%	58.1%	0.4%
Winery Retail Store Sales									
White Wine	2,491,330	2,526,920	-1.4%	8,390,088	8,207,802	2.2%	10,507,904	10,204,296	3.0%
Red Wine	2,470,576	2,373,325	4.1%	7,238,556	7,001,102	3.4%	9,194,638	8,925,592	3.0%
Rose Wine	165,826	166,353	-0.3%	612,961	599,192	2.3%	737,027	759,790	-3.0%
Sparkling Wine	39,565	75,016	-47.3%	145,968	182,169	-19.9%	192,716	223,991	-14.0%
Below 7% Sparkling Wine	57,828	18,509	212.4%	140,580	60,303	133.1%	149,092	69,276	115.2%
Port	8,531	9,742	-12.4%	23,969	26,439	-9.3%	31,100	33,686	-7.7%
Sherry	69,542	73,707	-5.7%	223,526	228,079	-2.0%	294,857	296,949	-0.7%
Dessert Wines	24,002	25,257	-5.0%	93,906	83,774	12.1%	108,382	98,441	10.1%
Coolers and Cider	309,657	319,113	-3.0%	1,487,640	1,430,674	4.0%	1,739,040	1,630,929	6.6%
Other	212,303	153,728	38.1%	632,978	337,196	87.7%	753,259	411,167	83.2%
Total Winery Retail Store Sales (C)	5,849,160	5,741,670	1.9%	18,990,172	18,156,729	4.6%	23,708,016	22,654,118	4.7%
WRS Share of the Ontario Wine Sales (C/E)	34.8%	35.3%	-0.5%	35.5%	35.7%	-0.2%	35.7%	35.8%	-0.1%
Direct Delivery to Licencees									
VQA	764,389	808,871	-5.5%	2,719,355	2,787,225	-2.4%	3,282,557	3,357,565	-2.2%
ICB/Non-VQA	108,603	96,701	12.3%	455,154	398,893	14.1%	570,454	508,103	12.3%
Total Direct Delivery (D)	872,991	905,571	-3.6%	3,174,510	3,186,118	-0.4%	3,853,011	3,865,669	-0.3%
Direct Delivery Share of the Ontario Wine Sales (D/E)	5.2%	5.6%	-0.4%	5.9%	6.3%	-0.3%	5.8%	6.1%	-0.3%
TOTAL Sales of Ontario wines, all channels E=[B+C+D]	16,819,194	16,277,110	3.3%	53,490,270	50,866,470	5.2%	66,346,255	63,218,851	4.9%
TOTAL Wine Sales, all channels F=[A+C+D]	42,021,234	40,647,909	3.4%	126,846,837	122,542,419	3.5%	157,360,353	153,042,688	2.8%
VQA Sales at the LCBO									
White Wine	1,072,094	1,015,077	5.6%	3,315,231	3,192,637	3.8%	4,018,417	3,899,337	3.1%
Red Wine	985,693	958,974	2.8%	2,703,011	2,578,338	4.8%	3,290,624	3,177,473	3.6%
Rose Wine	48,340	52,000	-7.0%	237,792	236,876	0.4%	269,071	268,916	0.1%
Other	73,861	71,917	2.7%	162,553	147,530	10.2%	192,974	174,130	10.8%
LCBO VQA Sales	2,179,988	2,097,968	3.9%	6,418,587	6,155,381	4.3%	7,771,086	7,519,856	3.3%
VQA Sales at Winery Retail Stores	1,391,415	1,367,529	1.7%	4,329,644	4,375,218	-1.0%	5,285,623	5,275,762	0.2%
VQA Sales through Direct Delivery	764,389	808,871	-5.5%	2,719,355	2,787,225	-2.4%	3,282,557	3,357,565	-2.2%
TOTAL VQA Sales	4,335,792	4,274,368	1.4%	13,467,586	13,317,824	1.1%	16,339,266	16,153,183	1.2%
VQA Wine as a % of Ontario wine sales	25.8%	26.3%	-0.5%	25.2%	26.2%	-1.0%	24.6%	25.6%	-0.9%

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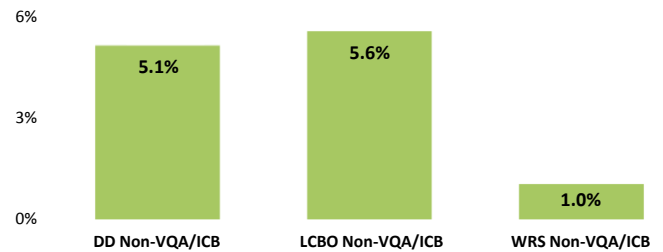
Charts

For the 3 fiscal periods ended January 3, 2015

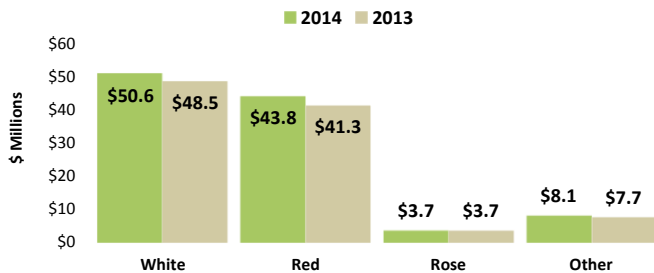
Ontario VQA Wine Value Sales Growth vs. Import
Q3 2014/15



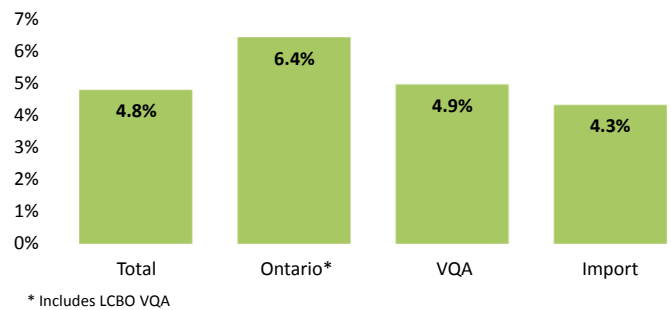
Ontario Non-VQA/ICB Wine Value Sales Growth
Q3 2014/15



LCBO VQA Wine Value Sales by Type (\$ Millions)
Q3 YTD 2014/15



LCBO Wine Value Sales Growth
Q3 YTD 2014/15



Ontario Wine Value Sales Growth by Channel
Rolling 13 Periods Q3 2014/15

