

Ontario Wine Industry Market Share Report, Net Dollars

For the 3 months and year ended June 30, 2010

	Net Sales, 2nd quarter only		%	Rolling 12		%
	This Year	Last Year		This Year	Last Year	
Total LCBO Wine Sales (A)	275,185,655	278,484,422	-1.2%	1,119,302,229	1,131,760,969	-1.1%
LCBO Ontario Wine Sales						
White Wine	39,318,013	37,949,586	3.6%	154,083,445	148,459,570	3.8%
Red Wine	24,040,991	24,068,274	-0.1%	103,085,144	101,302,499	1.8%
Rose Wine	2,806,180	2,753,401	1.9%	10,649,423	10,843,282	-1.8%
Sparkling Wine	1,021,551	1,018,874	0.3%	5,342,295	5,511,370	-3.1%
Below 7% Sparkling Wine	1,800,562	1,896,420	-5.1%	8,960,161	9,307,307	-3.7%
Port	397,963	381,464	4.3%	1,773,545	1,682,038	5.4%
Sherry	2,058,613	2,190,561	-6.0%	8,714,184	8,925,920	-2.4%
Dessert Wines	228,184	205,827	10.9%	1,586,739	1,377,105	15.2%
Other	1,742,814	1,729,107	0.8%	8,171,937	8,041,726	1.6%
Total LCBO Sales of Ontario Wine (includes VQA) (B)	73,414,872	72,193,516	1.7%	302,366,873	295,450,818	2.3%
LCBO Share of Ontario Wine Sales (B/E)	53.3%	53.5%	-0.2%	54.1%	55.0%	-0.9%
Market Share of Ontario Wines at the LCBO (B/A)	26.7%	25.9%	0.8%	27.0%	26.1%	0.9%
Winery Retail Store Sales						
White Wine	23,282,671	22,436,898	3.8%	89,421,858	81,020,753	10.4%
Red Wine	21,236,759	21,505,131	-1.2%	90,079,939	85,451,311	5.4%
Rose Wine	1,821,892	1,841,770	-1.1%	7,062,389	6,740,344	4.8%
Sparkling Wine	670,652	666,292	0.7%	3,175,336	2,952,855	7.5%
Below 7% Sparkling Wine	213,697	166,368	28.4%	677,192	732,006	-7.5%
Port	89,501	101,276	-11.6%	432,901	528,942	-18.2%
Sherry	708,924	766,385	-7.5%	2,995,842	3,163,340	-5.3%
Dessert Wines	2,657,440	2,331,094	14.0%	11,898,268	12,144,514	-2.0%
Wine Coolers and Ciders	1,195,262	1,455,507	-17.9%	4,562,842	4,966,833	-8.1%
Other	978,561	937,184	4.4%	5,257,757	4,805,023	9.4%
Total Winery Retail Sales (C)	52,855,359	52,207,905	1.2%	215,564,322	202,505,920	6.4%
WRS Share of the Ontario Wine Sales	38.4%	38.7%	-0.3%	38.6%	37.7%	0.9%
Direct Delivery to Licencees						
VQA	10,955,120	9,880,763	10.9%	38,443,124	36,487,475	5.4%
Non-VQA	579,867	732,277	-20.8%	2,336,588	2,786,708	-16.2%
Total Direct Delivery (D)	11,534,987	10,613,039	8.7%	40,779,711	39,274,183	3.8%
Direct Delivery Share of the Ontario Wine Sales	8.4%	7.9%	0.5%	7.3%	7.3%	0.0%
Total Sales of Ontario wines, all channels E=[B+C+D]	137,805,217	135,014,460	2.1%	558,710,907	537,230,921	4.0%
Total Wine Sales, all channels F=[A+C+D]	339,576,001	341,305,367	-0.5%	1,375,646,263	1,373,541,072	0.2%
Overall Market share for Ontario wines (E/F)	40.6%	39.6%		40.6%	39.1%	
VQA Sales at the LCBO						
White Wine	9,474,519	8,676,997	9.2%	38,305,185	34,060,998	12.5%
Red Wine	6,927,733	6,055,115	14.4%	31,287,854	25,714,796	21.7%
Other Wines	1,174,584	953,072	23.2%	4,422,665	4,073,372	8.6%
Total (G)	17,576,836	15,685,184	12.1%	74,015,704	63,849,167	15.9%
VQA sales at Winery Retail Stores	20,627,869	19,096,359	8.0%	85,827,297	76,616,682	12.0%
Total VQA Sales	49,159,825	44,662,305	10.1%	198,286,124	176,953,324	12.1%
VQA Wine as a % of Ontario wine sales	35.7%	33.1%		35.5%	32.9%	