

Ontario Wine Industry Market Share Report, Litres Sold

For the 3 months and year ended June 30, 2010

	Net Sales, 1st quarter only		%	Rolling 12		%
	This Year	Last Year		This Year	Last Year	
Total LCBO Wine Sales (A)	25,468,481	25,802,107	-1.3%	102,769,820	102,602,962	0.2%
LCBO Ontario Wine Sales						
White Wine	4,333,955	4,207,724	3.0%	16,960,149	16,517,149	2.7%
Red Wine	2,508,365	2,547,324	-1.5%	10,628,513	10,633,703	0.0%
Rose Wine	306,700	306,345	0.1%	1,188,231	1,204,241	-1.3%
Sparkling Wine	73,682	78,016	-5.6%	389,123	423,881	-8.2%
Below 7% Sparkling Wine	240,205	259,304	-7.4%	1,203,408	1,287,399	-6.5%
Port	38,622	38,336	0.7%	173,332	168,887	2.6%
Sherry	238,353	257,715	-7.5%	1,012,178	1,049,939	-3.6%
Dessert Wines	5,564	5,022	10.8%	37,220	31,549	18.0%
Other	124,110	122,429	1.4%	573,716	576,048	-0.4%
Total LCBO Sales of Ontario Wine (includes VQA) (B)	7,869,556	7,822,215	0.6%	32,165,870	31,892,796	0.9%
LCBO Share of Ontario Wine Sales (B/E)	56.7%	56.3%	0.4%	57.5%	57.6%	-0.1%
Market Share of Ontario Wines at the LCBO (B/A)	30.9%	30.3%	0.6%	31.3%	31.1%	0.2%
Winery Retail Store Sales						
White Wine	2,385,477	2,348,146	1.6%	9,175,815	8,786,008	4.4%
Red Wine	2,070,131	2,166,120	-4.4%	8,725,395	8,739,978	-0.2%
Rose Wine	172,939	178,433	-3.1%	685,831	682,501	0.5%
Sparkling Wine	54,815	57,728	-5.0%	261,590	281,329	-7.0%
Below 7% Sparkling Wine	25,939	20,485	26.6%	79,940	89,433	-10.6%
Port	8,083	8,770	-7.8%	39,152	43,949	-10.9%
Sherry	78,807	85,463	-7.8%	329,490	365,217	-9.8%
Dessert Wines	30,635	26,561	15.3%	144,999	147,858	-1.9%
Coolers and Cider	203,776	232,336	-12.3%	734,894	851,208	-13.7%
Other	69,615	60,037	16.0%	365,959	319,853	14.4%
Total Winery Retail Sales (C)	5,100,216	5,184,079	-1.6%	20,543,064	20,307,333	1.2%
WRS Share of the Ontario Wine Sales	36.8%	37.3%	-0.6%	36.7%	36.7%	0.0%
Direct Delivery to Licensees						
VQA	825,335	782,648	5.5%	2,948,420	2,844,977	3.6%
Non-VQA	77,708	95,839	-18.9%	312,705	348,738	-10.3%
Total Direct Delivery (D)	903,043	878,487	2.8%	3,261,124	3,193,715	2.1%
Direct Delivery Share of the Ontario Wine Sales	6.5%	6.3%	0.2%	5.8%	5.8%	0.1%
Total Sales of Ontario wines, all channels E=[B+C+D]	13,872,815	13,884,781	-0.1%	55,970,058	55,393,844	1.0%
Total Wine Sales, all channels F=[A+C+D]	31,471,740	31,864,672	-1.2%	126,574,009	126,104,010	0.4%
Overall Market share for Ontario wines (E/F)	44.1%	43.6%		44.2%	43.9%	
VQA Sales at the LCBO						
White Wine	712,227	668,096	6.6%	2,905,984	2,626,318	10.6%
Red Wine	497,281	430,563	15.5%	2,237,154	1,817,019	23.1%
Other Wines	68,103	54,696	24.5%	234,294	217,946	7.5%
Total (G)	1,277,610	1,153,355	10.8%	5,377,432	4,661,283	15.4%
VQA sales at Winery Retail Stores	1,134,654	1,110,316	2.2%	4,786,427	4,217,238	13.5%
Total VQA Sales	3,237,599	3,046,318	6.3%	13,112,279	11,723,498	11.8%
VQA Wine as a % of Ontario wine sales	23.3%	21.9%		23.4%	21.2%	
Total 'Cellared In' Sales	10,635,216	10,838,462	-1.9%	42,857,779	43,670,346	-1.9%