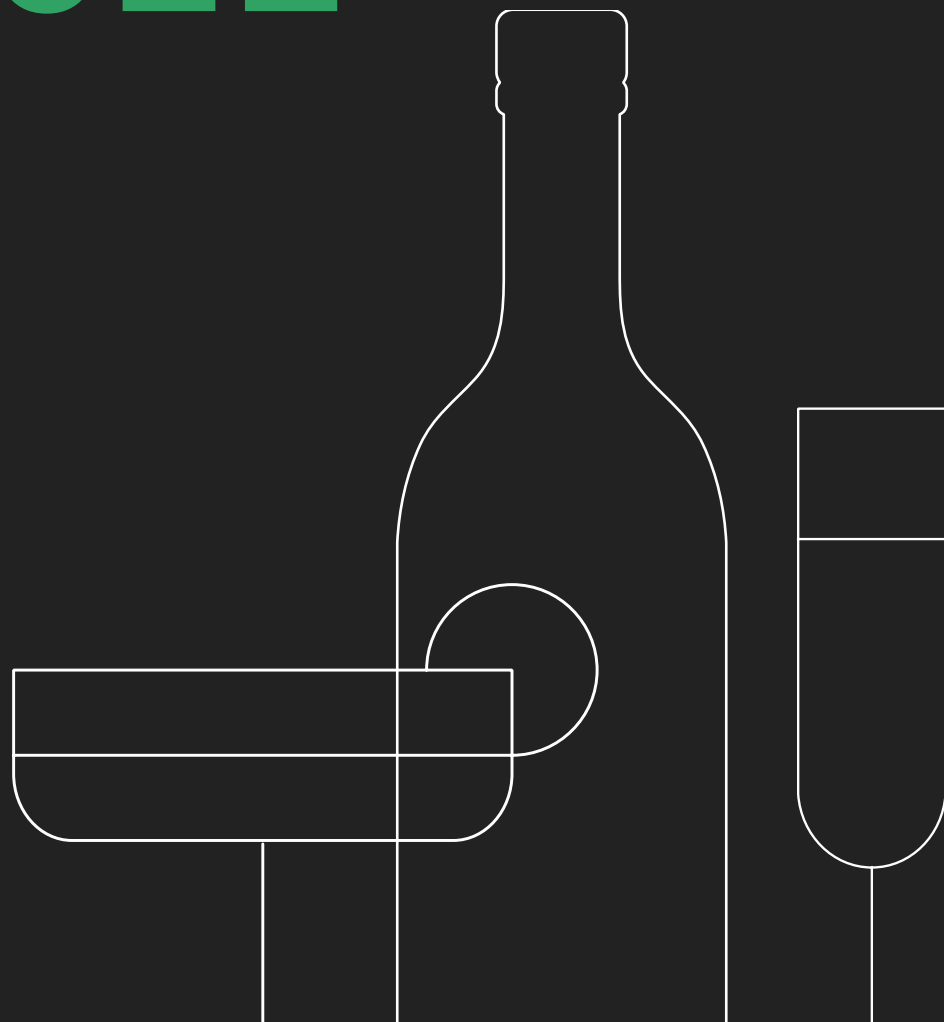


LCBO

TRADE DAY

2022



Commercial Services Breakout Session

Chris Dini, Senior Director Wholesale Services

Agenda

1 The Team

2 **Commercial Services**
Lines of Business

3 **Licensees**
Bottle shops

01

The Team

Wholesale Services



Nick Nanos

Chief Supply Chain Officer & SVP
Supply Chain & Wholesale



Chris Dini

Senior Director Wholesale Services



Arqile Karanxha

Director, Commercial Services



Leanne Rhee

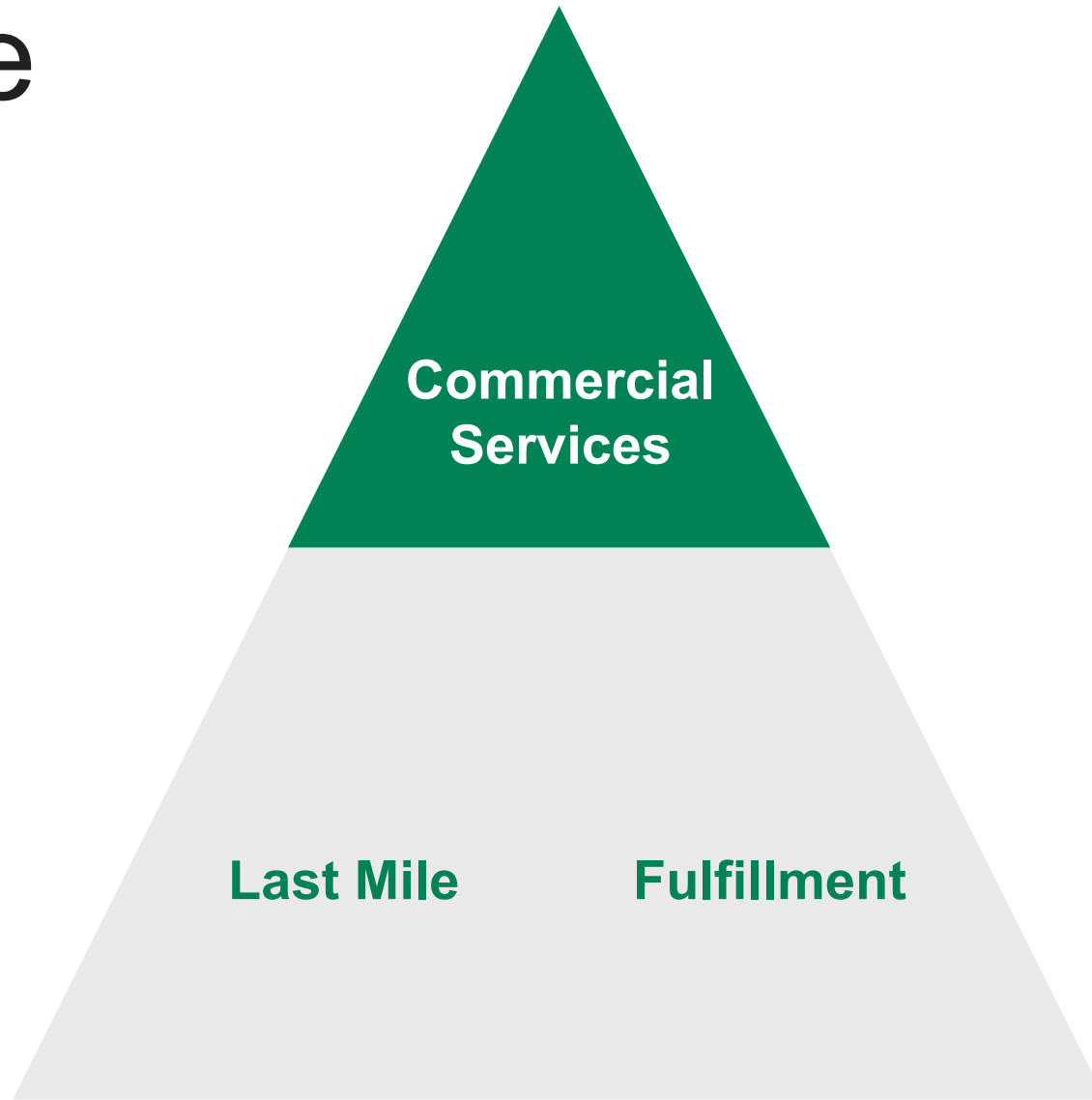
Director, Grocery Operations



Tony Back

Senior Manager, Data & Analytics

Wholesale Services



02

Commercial Services

Lines of Business

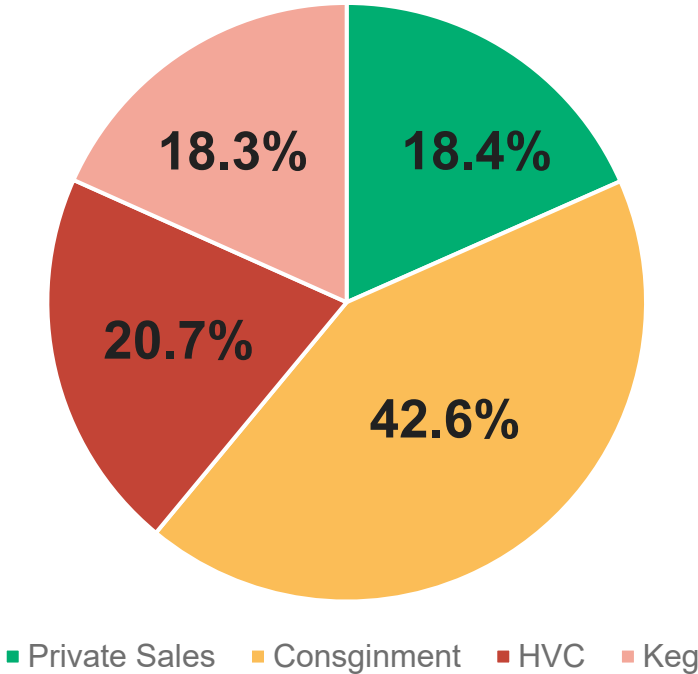
Lines of Business

	# of Customers	FY22 Sales (Millions)
Licensees (Bars & Restaurants)	18,470	\$374
LCO/Agency	394	\$261
TBS	440	\$215
Duty Free	13	\$13
Total	19,318	\$863

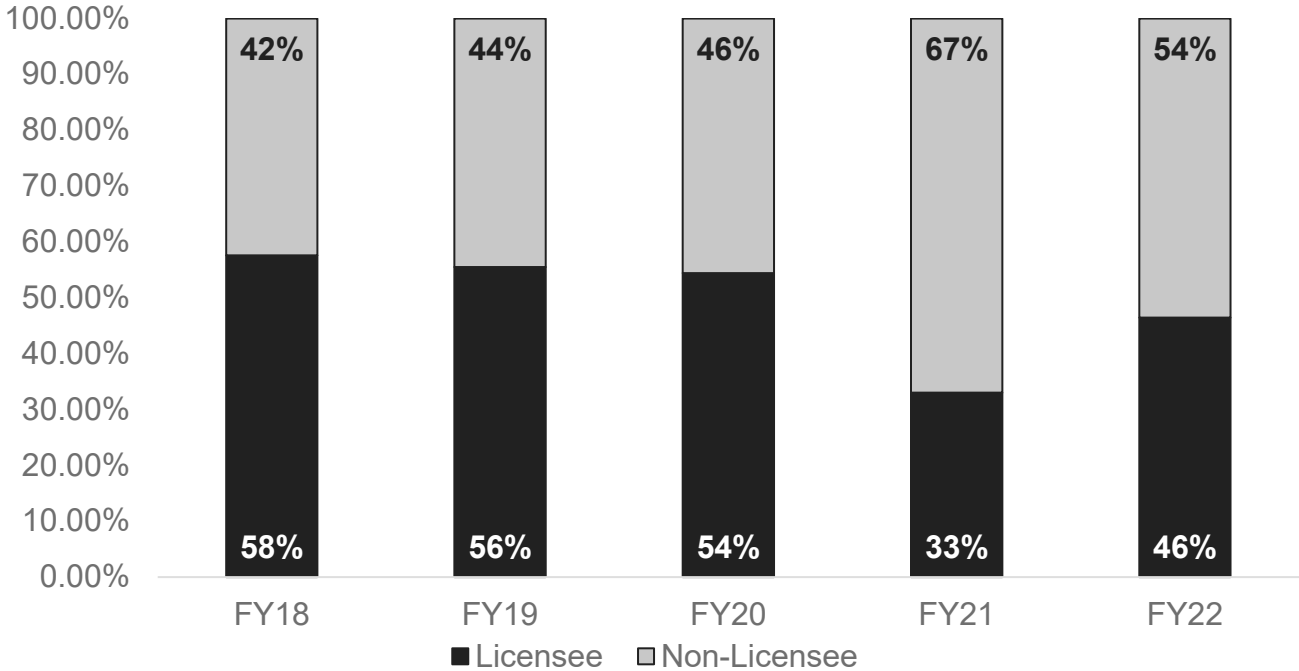
Specialty Services

- Fulfillment performed by Trillium
- Commercial Team under Wholesale Services

\$Share by Program



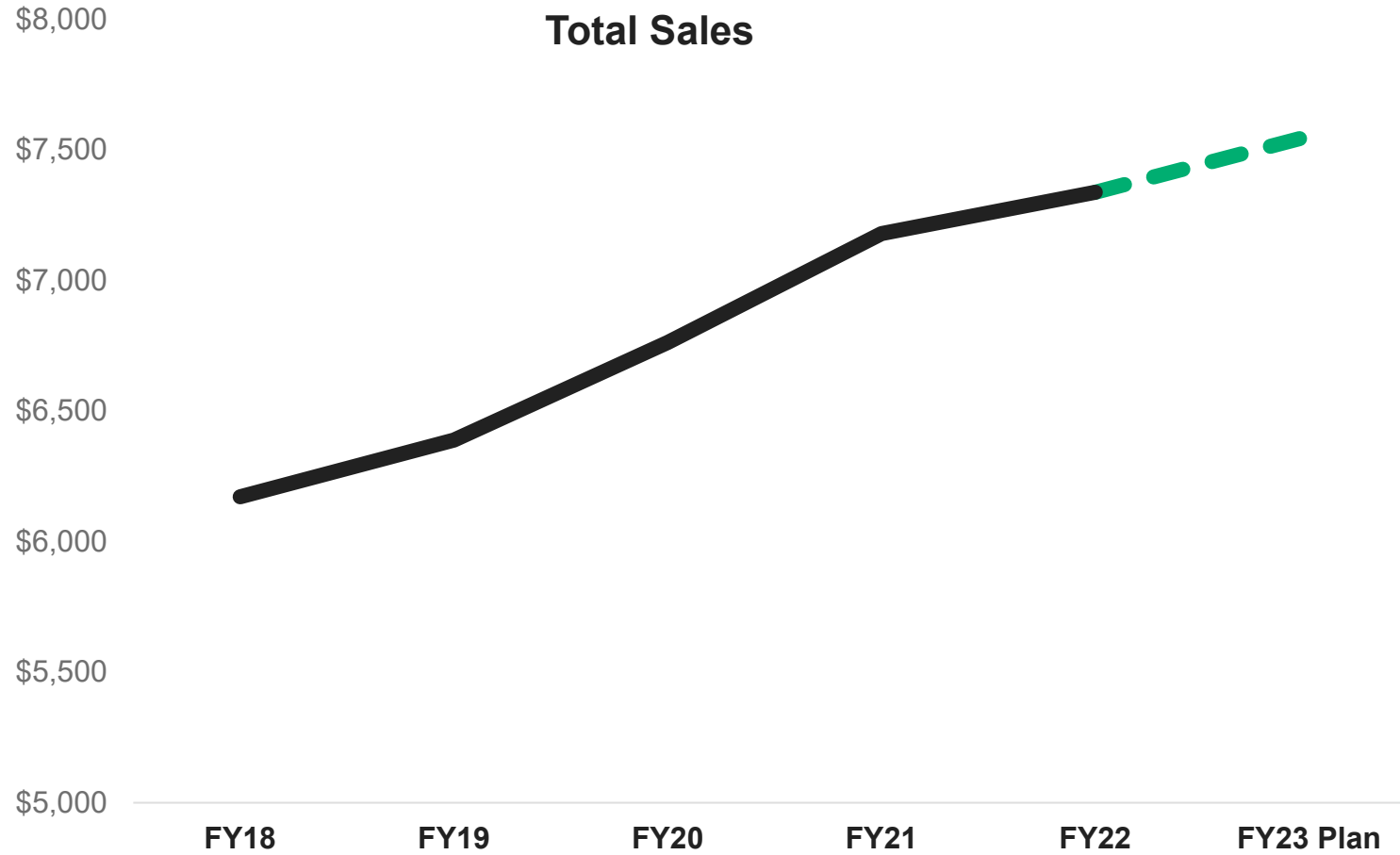
Customer Share: Licensee vs Non Licensee



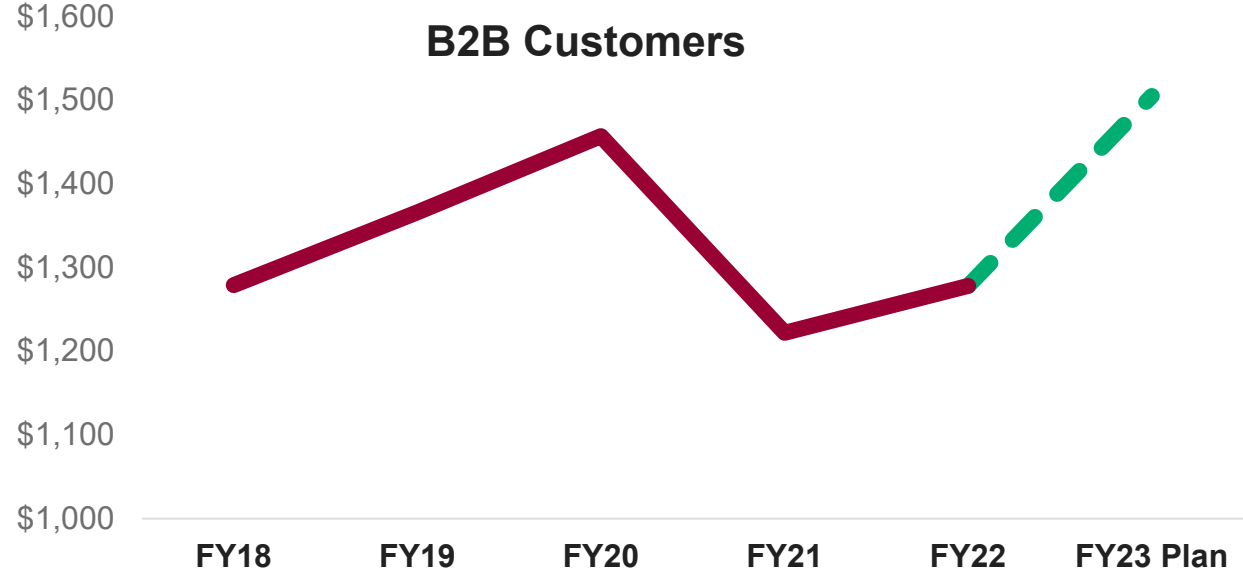
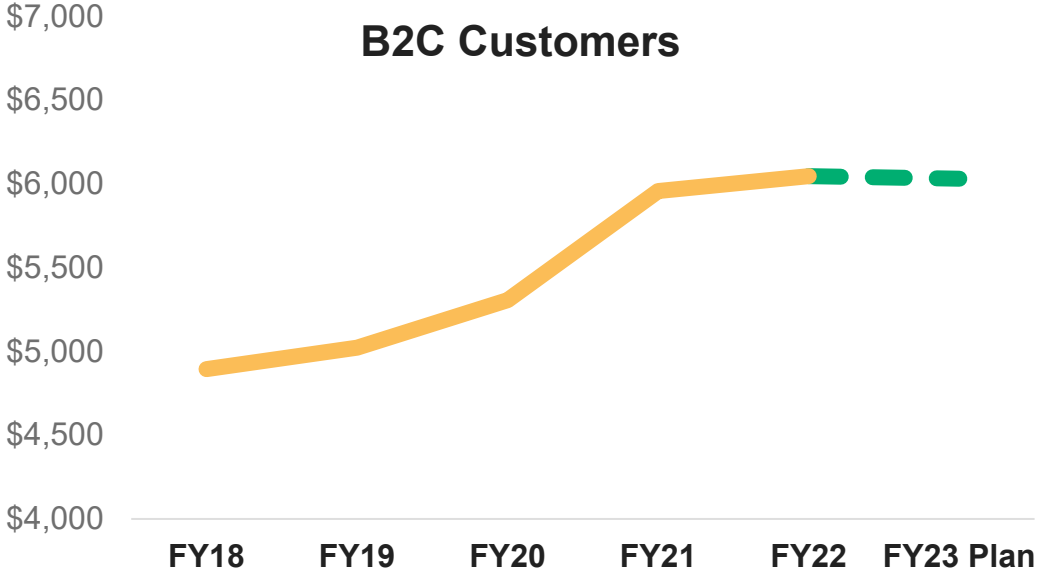
03

Licensees

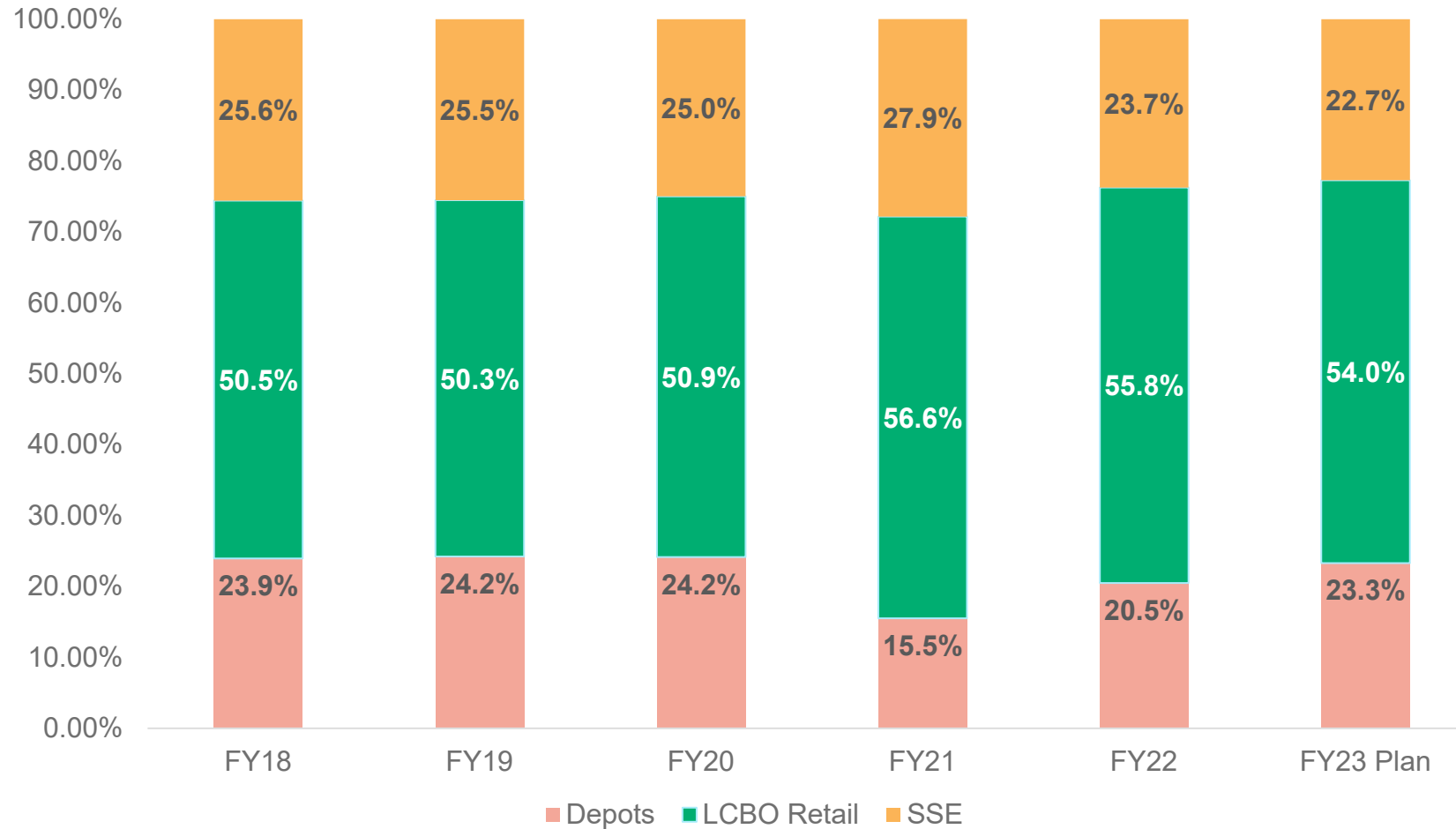
LCBO Sales History (\$000,000s)



Sales History By Customer Type (\$000,000s)

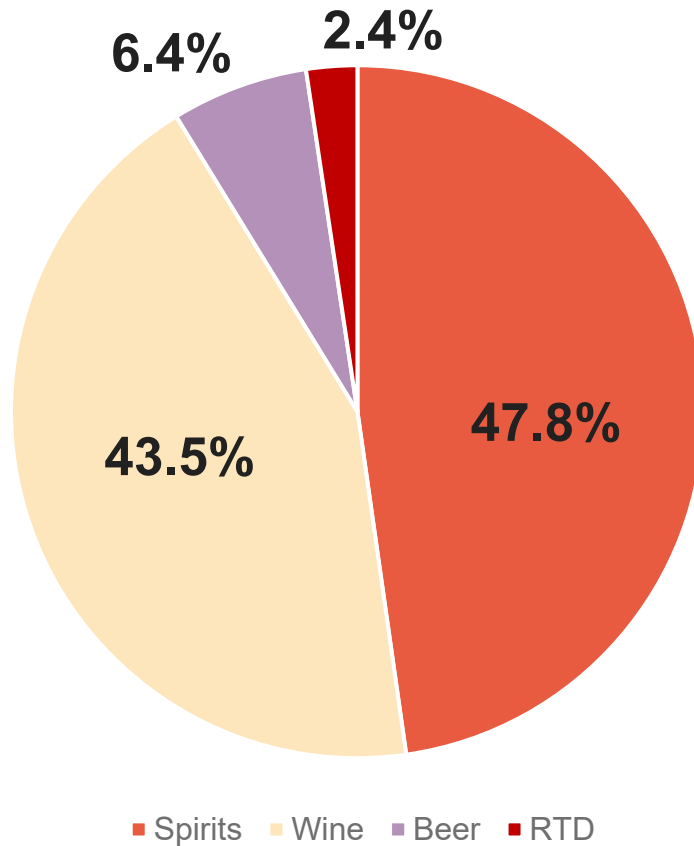


Servicing the Licensee Customer

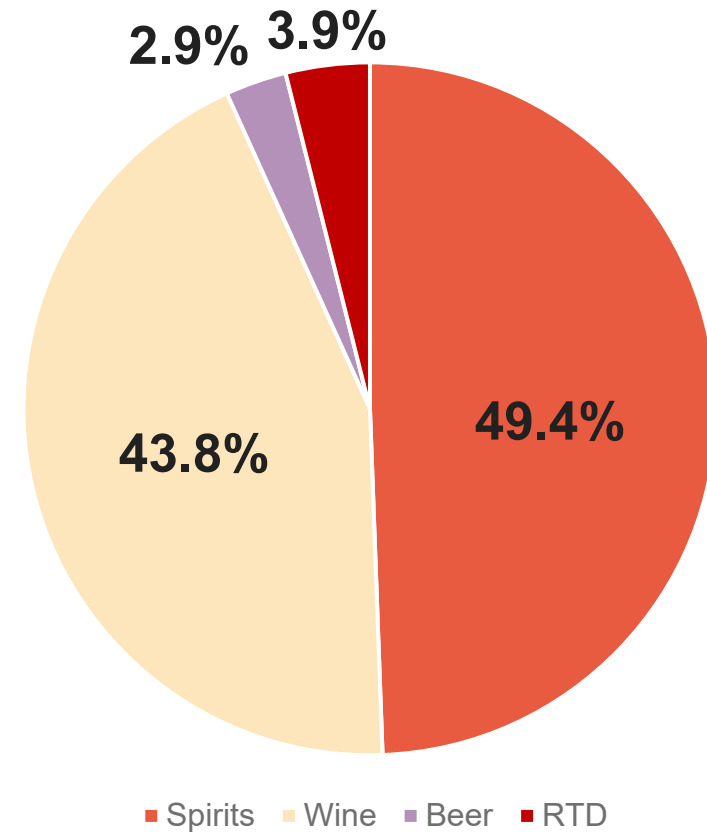


Licensee Sales by Product Type

FY20 – Pre-Covid



FY22



Supporting Licensees

- March 17, 2020 state of emergency declared → bars and restaurants ordered closed except for takeout and delivery
- March 26, 2020 Regulation 719 under the *Liquor Licence Act* temporarily amended to allow licensees to sell beer, wine and spirits as part of a food order for takeout or delivery
- Intended to last until December 31, 2020
- Effectively became permanent on January 21, 2021
- For details visit: <https://www.agco.ca>

Toronto's Best Bottle Shops

Takeout booze is here to stay, and the city is now dotted with neighbourhood bottle shops, bodegas and wine dealers

BY TORONTO LIFE | PHOTOGRAPHY BY CARMEN CHEUNG |
NOVEMBER 29, 2021



TORONTO STAR

January 18, 2022

Are private liquor stores here? New bottle shops focus on hard-to-find wines and beers — plus mandatory snacks

Ontario consumers have a wider variety of products to choose from, but industry experts say the regulations for bottle shops still need work.

“No longer will Torontonians look wistfully to Montreal, with its more lax liquor laws, and be envious of their ability to pick up bottles from the local depanneur.”
Toronto Now, March 18, 2021

NOW Magazine

How Toronto bars transformed to survive the pandemic

Bottle shops have introduced a new variety of options from producers all over the world, the kind of drinks usually unavailable to the public...

Mar 18, 2021



FOOD & DRINK | ADVICE

A wine lover's guide to Eataly

With more than 700 labels in stock, Eataly stands tall as one of the best places in Canada to shop for Italian wine.



By **Carolyn Evans Hammond** Contributing Columnist
Thu., March 17, 2022 | 4 min. read

Market Analysis & Challenges

1

Sample Set

- Identified 136 businesses offering beverage alcohol with take-out or delivery:
 - 103 in GTA
 - 20 in Southwestern Ontario
 - 9 in Eastern Ontario
 - 4 in Northern Ontario
 - 109 existing businesses offering beverage alcohol with food take-out or delivery
 - 27 net new businesses offering beverage alcohol with food take-out or delivery
-

2

Challenges

- Closures and re-opening disrupt timeline
- Limited data points
- No unique identifier for licensees selling beverage alcohol with food take-out or delivery

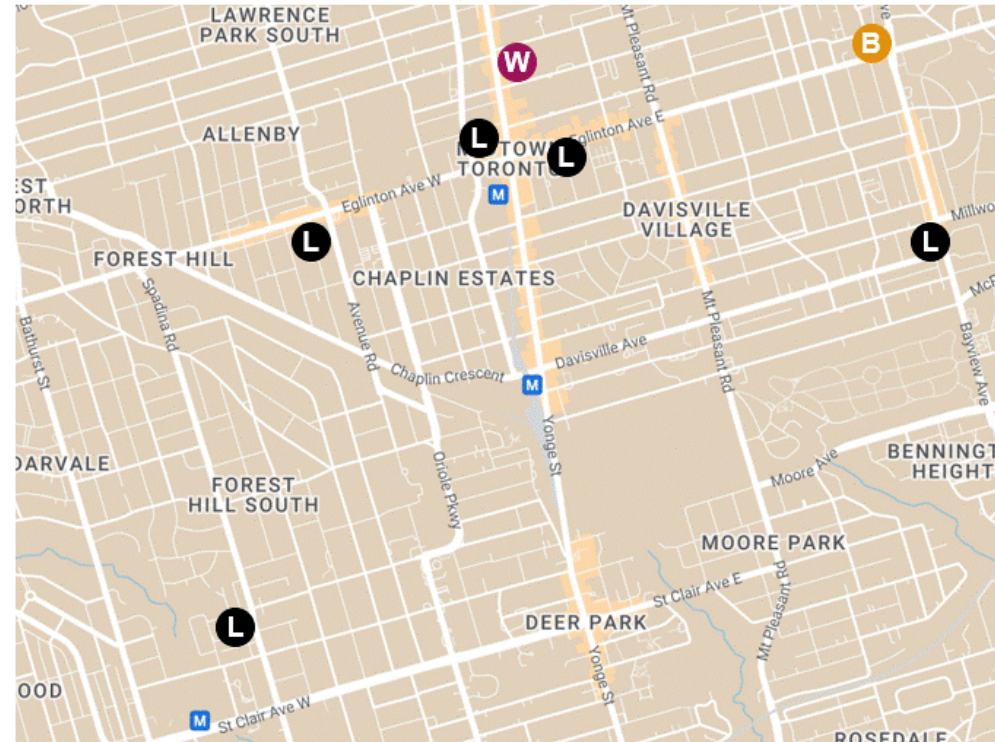
Analysis – vs LY and FY20

	FY22	Var to FY21		Var to FY20 (pre-pandemic year)	
	Total	Chg	%	Chg	%
All in Sample (n=136)	\$10,364,096	+\$3,094,625	+43%	+\$3,216,259	+46%
Existing licensees (n=109)	\$8,426,099	+\$2,070,288	+33%	+\$1,278,263	+18%

Yonge and Davisville intersection

7 Points of Access

2015



- W** Wine Rack
- G** Authorized Grocer

- L** LCBO
- B** Beer Store

Initiatives & Strategies to Support



**Build
relationships**



**Communication
& Collaboration**



**Data and
Analytics**

Stay Informed & Connect



[HOME](#) > [WHOLESALE](#)

Wholesale

Grocery Operations



LCBO Convenience Outlet-LCO



Licensee



Embassy



Specialty Services

