



# CANADA'S NATIONAL BREWERS BEER PRICING & BRAND AVAILABILITY STUDY

**JUNE, 2013**



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## BACKGROUND

Ipsos Reid was contracted by Canada's National Brewers to assist in providing baseline data on beer pricing, brand availability, store appearance and staffing levels at beer retailing outlets in BC, Alberta and Quebec. The following report encompasses three provincial reports based on the findings of local surveyors in each province.

In total 90 stores (30 per province) in 17 cities were surveyed. Cities were selected to obtain a cross section of beer retailing outlets in urban, suburban and rural communities.

British Columbia	Alberta	Quebec
Vancouver	Edmonton	Montreal
Abbotsford	Red Deer	Trois-Rivieres
Chilliwack	Ponoka	Drummondville
Agassiz	Drayton Valley	St. Agathe-Des-Monts
Hope	Morinville	Napierville
Mission Springs		St. Sauveur

## METHODOLOGY

Local surveyors drove to each target city and visited various private beer and liquor stores. Once inside the store, the number of visible staff and total number of brands sold were assessed and recorded. The surveyors were in-field between April 24<sup>th</sup> and May 8<sup>th</sup> 2013.

The pricing details were recorded by the surveyors using voice recorders or cell phones.

The surveyors visited a wide variety of stores in each city, and prices were grouped according to the type of store they were from.

For the purposes of this study, the prices are grouped into the following four broad categories of store. Where the surveyors were able, photos were taken outside of the establishment.

Store Type	# of Stores	Example	Notes
Grocery	13	Loblaw's, IGA, Super C	In Quebec beer is sold in the grocery store itself. In Alberta some grocery stores run their own private liquor and beer store that is outside of the grocery location.
Large Retail	37	Paradis de la Biere, Coast Liquor Store, Liquor Barn	Large footprint retailers dedicated to liquor and beer sales.
Small Retail	31	The Plaza Liquor Store, Curvy Bottle	Small footprint retailers. Some were dedicated to liquor and beer, others were also inns or pubs.
Depanneur	9	Deli-Depanneur, Couche-Tard	Beer sold in corner stores in Quebec

## BRANDS AND PACK SIZES

Due to the vast differences in products and pack sizes available across each surveyed market, a list of 14 brands was selected by members of Canada's National Brewers project team.

Blue  
Bud Light  
Budweiser  
Busch  
Canadian  
Carling  
Coors Light

Heineken  
Keystone  
Lucky  
Molson Dry  
Pilsner  
Sleeman Original Draught  
Stella Artois

For each brand, several pack sizes were recorded.

### **Bottles**

24 x 341 ml  
12 x 341 ml  
12 x 330 ml  
6 x 341 ml  
6 x 330 ml

### **Cans**

24 x 355 ml  
20 x 355 ml  
15 x 355 ml  
12 x 355 ml  
12 x 330 ml  
6 x 355 ml  
6 x 330 ml

# PRICING REPORT

## QUEBEC

Quebec had the most diverse selection of both types of stores, as well as number of product brands in their stores. Quebec also sells beer at Depanneurs and Corner Stores.

A small number of the stores in Quebec sell the majority of their beer as individual bottles, and stock over 400 brands in store.

Some of the stores visited did not stock any of the major popular brands that were the subject of this study. These stores were not counted and supplemented with stores in Drummondville and St. Sauveur.

**Urban:** Montreal

**Suburban:** Trois-Rivieres, Drummondville

**Rural:** St. Agathe-des-Monts, Napierville, St. Sauveur

# PRICING REPORT QUEBEC

Quebec							
Montreal	Price Per Litre Including Sales Taxes (Ex Dep)						
	Pack Size	Sample Number	Low	High	Average	Ave TBS Home Consumer Price	Quebec Price Ontario Taxes
Grocery Store							
	20 - 24 pack	37	3.33	4.33	3.66	\$3.92	\$4.16
	12 - 15 pack	35	3.62	6.09	4.60	\$4.40	\$5.09
	6 - pack	10	5.36	7.75	6.84	\$5.32	\$7.29
Small Retail / Depanneur							
	20 - 24 pack	2	3.89	4.17	4.03	\$3.92	\$4.53
	12 - 15 pack	33	3.60	6.09	4.45	\$4.40	\$4.94
	6 - pack	11	4.39	8.31	6.42	\$5.32	\$6.88
Specialty Liquor / Beer Store / Large Retail							
	20 - 24 pack	-	-	-	-		
	12 - 15 pack	14	3.35	5.40	4.42	\$4.40	\$4.91
	6 - pack	2	6.09	7.75	6.92	\$5.32	\$7.37
All Store Types							
	20 - 24 pack	39	3.33	4.33	3.68	\$3.92	\$4.18
	12 - 15 pack	82	3.35	6.09	4.51	\$4.40	\$5.00
	6 - pack	23	4.39	8.31	6.65	\$5.32	\$7.10



# PRICING REPORT QUEBEC

Quebec							
Trois Rivières	Price Per Litre Including Sales Taxes (Ex Dep)						
	Pack Size	Sample Number	Low	High	Average	Ave TBS Home Consumer Price	Quebec Price Ontario Taxes
Grocery Store							
	20 - 24 pack	22	3.68	4.41	4.06	\$3.92	\$4.56
	12 - 15 pack	23	3.67	6.38	4.77	\$4.40	\$5.25
	6 - pack	6	6.08	8.21	6.94	\$5.32	\$7.39
Small Retail / Depanneur							
	20 - 24 pack	24	3.68	4.66	3.96	\$3.92	\$4.46
	12 - 15 pack	51	3.39	7.84	4.50	\$4.40	\$4.99
	6 - pack	13	5.41	8.81	7.54	\$5.32	\$7.98
Specialty Liquor / Beer Store / Large Retail							
	20 - 24 pack	23	3.53	4.10	3.89		
	12 - 15 pack	34	3.67	6.08	4.51	\$4.40	\$5.00
	6 - pack	6	6.08	7.90	6.84	\$5.32	\$7.29
All Store Types							
	20 - 24 pack	69	3.53	4.66	3.97	\$3.92	\$4.47
	12 - 15 pack	108	3.39	7.84	4.56	\$4.40	\$5.05
	6 - pack	25	5.41	8.81	7.23	\$5.32	\$7.67

# PRICING REPORT QUEBEC

Quebec							
Quebec Rural	Price Per Litre Including Sales Taxes (Ex Dep)						
	Pack Size	Sample Number	Low	High	Average	Ave TBS Home Consumer Price	Quebec Price Ontario Taxes
Grocery Store							
	20 - 24 pack	48	3.35	4.80	3.73	\$3.92	\$4.23
	12 - 15 pack	64	3.35	5.82	4.60	\$4.40	\$5.09
	6 - pack	19	4.82	7.75	6.55	\$5.32	\$7.00
Small Retail / Depanneur							
	20 - 24 pack	21	3.35	4.02	3.65	\$3.92	\$4.15
	12 - 15 pack	44	3.35	7.18	4.60	\$4.40	\$5.09
	6 - pack	15	5.09	8.31	7.03	\$5.32	\$7.48
All Store Types							
	20 - 24 pack	69	3.35	4.80	3.71	\$3.92	\$4.21
	12 - 15 pack	108	3.35	7.18	4.60	\$4.40	\$5.09
	6 - pack	34	4.82	8.31	6.76	\$5.32	\$7.21

# PRICING REPORT QUEBEC

Quebec							
Provincial Total	Price Per Litre Including Sales Taxes (Ex Dep)						
	Pack Size	Sample Number	Low	High	Average	Ave TBS Home Consumer Price	Quebec Price Ontario Taxes
Grocery Store							
	20 - 24 pack	107	3.33	4.80	3.82	\$3.92	\$4.32
	12 - 15 pack	122	3.35	6.38	4.66	\$4.40	\$5.15
	6 - pack	35	4.82	8.21	6.78	\$5.32	\$7.23
Small Retail / Depanneur							
	20 - 24 pack	47	3.35	4.24	3.88	\$3.92	\$4.38
	12 - 15 pack	128	3.35	7.84	4.52	\$4.40	\$5.01
	6 - pack	39	4.39	8.81	7.00	\$5.32	\$7.45
Specialty Liquor / Beer Store / Large Retail							
	20 - 24 pack	23	3.53	4.10	3.89	3.92	4.39
	12 - 15 pack	48	3.35	6.08	4.47	\$4.40	\$4.96
	6 - pack	8	6.08	7.90	6.88	\$5.32	\$7.33
All Store Types							
	20 - 24 pack	177	3.33	4.80	3.86	\$3.92	\$4.36
	12 - 15 pack	298	3.35	7.84	4.55	\$4.40	\$5.04
	6 - pack	82	4.39	8.81	6.88	\$5.32	\$7.33

## BRITISH COLUMBIA

British Columbia sells beer and liquor at both Government and Licensed Retail Stores which are privately operated liquor stores typically connected to a hotel or licensed establishment . For the purpose of this study, only the Licensed Retail Stores were surveyed in order to be comparable to the other provinces.

B.C retailers stocked an average of 180 brands at large retail outlets, and 102 at small retail outlets. Despite the number of brands, 24 pack sizes were relatively uncommon, and pack sizes such as 6, 12 and 15 packs were more common.

**Urban:** Vancouver

**Suburban:** Abbotsford, Chilliwack

**Rural:** Agassiz, Hope, Mission Springs

# PRICING REPORT BRITISH COLUMBIA

British Columbia							
Vancouver	Price Per Litre Including Sales Taxes (Ex Dep)						
	Pack Size	Sample Number	Low	High	Average	Ave TBS Home Consumer Price	BC Price Ontario Taxes
Large Retail							
	20 - 24 pack	2	5.86	6.44	6.15	\$3.92	\$6.04
	12 - 15 pack	58	4.88	8.65	6.93	\$4.40	\$6.80
	6 - pack	25	6.22	8.96	8.31	\$5.32	\$8.16
Small Retail							
	20 - 24 pack	6	5.21	6.23	5.57	\$3.92	\$5.47
	12 - 15 pack	44	4.57	9.07	6.88	\$4.40	\$6.76
	6 - pack	20	6.94	9.39	8.45	\$5.32	\$8.30
All Store Types							
	20 - 24 pack	8	5.21	6.44	5.71	\$3.92	\$5.61
	12 - 15 pack	102	4.57	9.07	6.91	\$4.40	\$6.78
	6 - pack	45	6.22	9.39	8.37	\$5.32	\$8.24

# PRICING REPORT BRITISH COLUMBIA

British Columbia							
Abbotsford	Price Per Litre Including Sales Taxes (Ex Dep)						
	Pack Size	Sample Number	Low	High	Average	Ave TBS Home Consumer Price	BC Price Ontario Taxes
Large Retail							
	20 - 24 pack	26	4.42	6.47	5.53	\$3.92	\$5.43
	12 - 15 pack	85	4.41	7.95	6.11	\$4.40	\$6.00
	6 - pack	20	6.06	8.33	7.59	\$5.32	\$7.45
Small Retail							
	20 - 24 pack	19	4.44	6.10	5.32	\$3.92	\$5.22
	12 - 15 pack	77	3.76	7.89	5.91	\$4.40	\$5.80
	6 - pack	21	5.77	8.56	7.42	\$5.32	\$7.29
All Store Types							
	20 - 24 pack	45	4.42	6.47	5.44	\$3.92	\$5.34
	12 - 15 pack	162	3.76	7.95	6.02	\$4.40	\$5.91
	6 - pack	41	5.77	8.56	7.50	\$5.32	\$7.36

# PRICING REPORT BRITISH COLUMBIA

British Columbia							
BC Rural	Price Per Litre Including Sales Taxes (Ex Dep)						
	Pack Size	Sample Number	Low	High	Average	Ave TBS Home Consumer Price	BC Price Ontario Taxes
Large Retail							
	20 - 24 pack	19	5.16	6.41	5.95	\$3.92	\$5.84
	12 - 15 pack	70	4.31	8.43	6.79	\$4.40	\$6.67
	6 - pack	21	7.06	8.99	8.22	\$5.32	\$8.07
Small Retail							
	20 - 24 pack	3	5.38	6.26	5.74	\$3.92	\$5.71
	12 - 15 pack	34	5.04	8.33	6.57	\$4.40	\$6.45
	6 - pack	10	6.48	8.79	8.09	\$5.32	\$7.94
All Store Types							
	20 - 24 pack	22	5.16	6.41	5.92	\$3.92	\$5.81
	12 - 15 pack	104	4.31	8.43	6.61	\$4.40	\$6.49
	6 - pack	31	6.48	8.99	8.18	\$5.32	\$8.03

# PRICING REPORT BRITISH COLUMBIA

British Columbia							
Provincial Total	Price Per Litre Including Sales Taxes (Ex Dep)						
	Pack Size	Sample Number	Low	High	Average	Ave TBS Home Consumer Price	BC Price Ontario Taxes
Large Retail							
	20 - 24 pack	47	4.42	6.47	5.88	\$3.92	\$5.77
	12 - 15 pack	213	4.31	8.65	6.61	\$4.40	\$6.49
	6 - pack	66	6.06	8.99	8.04	\$5.32	\$7.90
Small Retail							
	20 - 24 pack	28	4.68	6.26	5.54	\$3.92	\$5.44
	12 - 15 pack	155	3.76	9.07	6.45	\$4.40	\$6.33
	6 - pack	51	5.77	9.39	7.99	\$5.32	\$7.85
All Store Types							
	20 - 24 pack	75	4.42	6.47	5.67	\$3.92	\$5.57
	12 - 15 pack	368	3.76	9.07	6.51	\$4.40	\$6.39
	6 - pack	117	5.77	9.39	8.02	\$5.32	\$7.88



## ALBERTA

Alberta beer is sold at both large and small private retailers, as well as stores owned and operated by grocery chains. Unlike grocery stores in Quebec, the beer retailer is a separate building located just outside the main store. In this report, Alberta grocery beer prices are grouped with other Large Retailers.

Morinville was added to the rural towns visited as the others did not have enough beer retailers to fill our quota.

**Urban:** Edmonton

**Suburban:** Red Deer,

**Rural:** Ponoka, Drayton Valley, Morinville

# PRICING REPORT ALBERTA

Alberta							
Edmonton	Price Per Litre Including Sales Taxes (Ex Dep)						
	Pack Size	Sample Number	Low	High	Average	Ave TBS Home Consumer Price	Alberta Price Ontario Taxes
Large Retail							
	20 - 24 pack	57	3.28	5.74	5.39	\$3.92	\$5.82
	12 - 15 pack	108	3.78	7.89	5.93	\$4.40	\$6.41
	6 - pack	21	5.86	7.97	7.64	\$5.32	\$8.25
Small Retail							
	20 - 24 pack	30	4.20	6.11	5.62	\$3.92	\$6.07
	12 - 15 pack	71	3.81	7.52	5.91	\$4.40	\$6.38
	6 - pack	16	5.08	8.12	7.42	\$5.32	\$8.01
All Store Types							
	20 - 24 pack	87	3.28	6.11	5.47	\$3.92	\$5.91
	12 - 15 pack	179	3.78	7.89	5.92	\$4.40	\$6.39
	6 - pack	37	5.08	8.12	7.54	\$5.32	\$8.14

# PRICING REPORT ALBERTA

Alberta							
Red Deer	Price Per Litre Including Sales Taxes (Ex Dep)						
	Pack Size	Sample Number	Low	High	Average	Ave TBS Home Consumer Price	Alberta Price Ontario Taxes
Large Retail							
	20 - 24 pack	36	3.00	5.69	5.09	\$3.92	\$5.50
	12 - 15 pack	84	3.47	7.31	5.73	\$4.40	\$6.19
	6 - pack	13	5.62	7.67	7.30	\$5.32	\$7.88
Small Retail							
	20 - 24 pack	29	3.38	5.49	5.13	\$3.92	\$5.54
	12 - 15 pack	66	3.37	7.29	5.55	\$4.40	\$6.00
	6 - pack	10	6.43	7.82	7.07	\$5.32	\$7.63
All Store Types							
	20 - 24 pack	65	3.00	5.69	5.11	\$3.92	\$5.52
	12 - 15 pack	150	3.37	7.31	5.65	\$4.40	\$6.10
	6 - pack	23	5.62	7.82	7.20	\$5.32	\$7.77

# PRICING REPORT ALBERTA

Alberta							
Alberta Rural	Price Per Litre Including Sales Taxes (Ex Dep)						
	Pack Size	Sample Number	Low	High	Average	Ave TBS Home Consumer Price	Alberta Price Ontario Taxes
Large Retail							
	20 - 24 pack	34	5.04	5.60	5.27	\$3.92	\$5.69
	12 - 15 pack	71	3.72	7.21	5.61	\$4.40	\$6.06
	6 - pack	12	5.30	7.75	6.93	\$5.32	\$7.48
Small Retail							
	20 - 24 pack	29	3.43	5.79	5.16	\$3.92	\$5.58
	12 - 15 pack	58	3.75	7.38	5.45	\$4.40	\$5.89
	6 - pack	8	6.44	7.53	7.06	\$5.32	\$7.62
All Store Types							
	20 - 24 pack	63	3.43	5.79	5.22	\$3.92	\$5.64
	12 - 15 pack	129	3.72	7.38	5.54	\$4.40	\$5.99
	6 - pack	20	5.30	7.75	6.98	\$5.32	\$7.54

# PRICING REPORT ALBERTA

Alberta							
Provincial Total	Price Per Litre Including Sales Taxes (Ex Dep)						
	Pack Size	Sample Number	Low	High	Average	Ave TBS Home Consumer Price	Alberta Price Ontario Taxes
Large Retail							
	20 - 24 pack	127	3.00	5.74	5.25	\$3.92	\$5.67
	12 - 15 pack	263	3.47	7.89	5.76	\$4.40	\$6.22
	6 - pack	46	5.30	7.97	7.29	\$5.32	\$7.87
Small Retail							
	20 - 24 pack	88	3.38	6.11	5.30	\$3.92	\$5.73
	12 - 15 pack	195	3.37	7.52	5.64	\$4.40	\$6.09
	6 - pack	34	5.08	8.12	7.18	\$5.32	\$7.75
All Store Types							
	20 - 24 pack	215	3.00	6.11	5.27	\$3.92	\$5.69
	12 - 15 pack	458	3.37	7.89	5.70	\$4.40	\$6.16
	6 - pack	80	5.08	8.12	7.24	\$5.32	\$7.82

# **INTERPROVINCIAL PRICING COMPARISON**

# INTERPROVINCIAL PRICING COMPARISON

Average Price Per Litre								
	Pack Size	Quebec	Alberta	British Columbia	Ave TBS Home Consumer Price	Quebec Price Ontario Taxes	Alberta Price Ontario Taxes	BC Price Ontario Taxes
Large Retailers								
	20 - 24 pack	3.85	5.25	5.88	\$3.92	\$4.35	\$5.67	\$5.77
	12 - 15 pack	4.56	5.76	6.61	\$4.40	\$5.05	\$6.22	\$6.49
	6 - pack	6.83	7.29	8.04	\$5.32	\$7.28	\$7.87	\$7.90
Small Retailers								
	20 - 24 pack	3.88	5.30	5.54	\$3.92	\$4.38	\$5.73	\$5.44
	12 - 15 pack	4.52	5.64	6.45	\$4.40	\$5.01	\$6.09	\$6.33
	6 - pack	7.00	7.18	7.99	\$5.32	\$7.45	\$7.75	\$7.85
All Store Types								
	20 - 24 pack	3.86	5.27	5.67	\$3.92	\$4.36	\$5.69	\$5.57
	12 - 15 pack	4.55	5.70	6.51	\$4.40	\$5.04	\$6.16	\$6.39
	6 - pack	6.88	7.24	8.02	\$5.32	\$7.33	\$7.82	\$7.88

\*\*Quebec Grocery Stores and Specialty Liquor / Beer Store / Large Retail are combine into "Large Retailers" for Interprovincial Pricing Comparison.\*\*

## CALCULATION AVERAGE TBS HOME CONSUMER PRICE

- Average TBS home consumer prices are from TBS fiscal period 5, 2013 (4 weeks in the month of May 2013) and include Harmonized Sales Tax but exclude deposits.
- Average per litre price for 20 to 24 package sizes was calculated based on the average per litre price of all 369 TBS products which were sold in 20 to 24 package size configurations in containers ranging from 330ml to 355ml in size.
- Average per litre price for 12 to 15 package sizes was calculated based on the average per litre price of all 335 TBS products which were sold in 12 to 15 package size configurations in containers ranging from 330ml to 355ml in size.
- Average per litre price for 6 package size products was calculated based on the average per litre price of all 222 TBS products which were sold in 6 pack configurations in containers ranging from 330ml to 355ml in size.



# CALCULATION OF TAX EQUIVALENCY, QUEBEC, ALBERTA AND BRITISH COLUMBIA

- Quebec: Quebec prices were converted to Quebec Price with Ontario Tax by backing out 9.5% Quebec sales tax, backing out 5% federal goods and service tax and subtracting Quebec \$.50 per litre beer tax and subsequently adding Ontario basic beer taxes \$1.0007/litre and applying the Harmonized Sales Tax (13%). Basic Ontario beer taxes are comprised of the basic beer tax: \$.7402/litre, a beer volume levy: \$.176/litre and a beverage alcohol container environmental levy: \$.0893 per container fee applicable to non-refillable containers. On the 926 TBS products sampled environmental levy revenue worked out to a per litre average of \$.0845 for all products.
- Alberta: Converted to Alberta Price with Ontario Tax by backing out 5% federal goods and service tax and subtracting the basic Alberta Gaming and Liquor Commission beer markup of \$.98/litre and adding Ontario beer taxes (\$1.0007/litre) and applying HST (13%).
- British Columbia: Converted to B.C. Price with Ontario Tax by backing out 10% BC sales tax and 5% federal goods and services tax and subtracting estimate of BC Liquor Distribution Branch (LDB) large brewer net markup of \$1.05 per litre (Basic LDB markup of \$1.63/litre minus LDB retail cost estimate and Licensee Retail Store discounts (16% of LDB selling price)) and adding basic Ontario beer taxes (\$1.0007) and applying HST (13%).
- In calculating average provincial tax rates, no attempt was made to estimate the average reduction in beer taxes associated with provincial small brewery tax and markup subsidies.

# STORE APPEARANCE

# QUEBEC STORE APPEARANCE

Urban: Montreal



# QUEBEC STORE APPEARANCE

**Suburban:** Trois-Rivieres, Drummondville





# QUEBEC STORE APPEARANCE

**Rural:** St. Agathe-des-Monts, Napierville, St. Sauveur



# BRITISH COLUMBIA STORE APPEARANCE

Urban: Vancouver



# BRITISH COLUMBIA STORE APPEARANCE

Suburban: Abbotsford, Chilliwack





# BRITISH COLUMBIA STORE APPEARANCE

Rural: Agassiz, Hope, Mission Springs





# ALBERTA STORE APPEARANCE

Urban: Edmonton



## ALBERTA STORE APPEARANCE

Suburban: Red Deer,



## ALBERTA STORE APPEARANCE

**Rural:** Ponoka, Drayton Valley, Morinville



# BRAND AVAILABILITY

## BRAND AVAILABILITY

Quebec						
	Large Retailers / Grocery			Small Retailers		
	Low	High	Average	Low	High	Average
Urban	124	682	330	105	314	159
Suburban	58	463	144	46	81	59
Rural	82	121	107	38	57	52

British Columbia						
	Large Retailers			Small Retailers		
	Low	High	Average	Low	High	Average
Urban	105	236	189	60	190	110
Suburban	196	279	231	73	210	146
Rural	132	305	180	48	130	102

Alberta						
	Large Retailers / Grocery			Small Retailers		
	Low	High	Average	Low	High	Average
Urban	97	147	125	42	118	67
Suburban	25	279	116	95	152	133
Rural	71	113	89	42	64	55

# STAFFING REPORT



# STAFFING REPORT

Quebec						
	Large Retailers / Grocery			Small Retailers		
	Range (low to high)	Average	Mode	Range (low to high)	Average	Mode
Urban	2-12	4	2	1-2	2	2
Suburban	2-8	4	3	1-4	2	1
Rural	8-23	16	12	1-3	2	1

British Columbia						
	Large Retailers			Small Retailers		
	Range (low to high)	Average	Mode	Range (low to high)	Average	Mode
Urban	1-5	2	2	1-2	1	1
Suburban	1-2	2	2	1-2	1	1
Rural	1-3	2	1	1-2	1	1

Alberta						
	Large Retailers			Small Retailers		
	Range (low to high)	Average	Mode	Range (low to high)	Average	Mode
Urban	1-2	2	2	1-3	2	3
Suburban	1-5	2	2	1-3	2	1
Rural	1-2	1	1	1-1	1	1