

2024 INDUSTRY BRUNCH & LEARN

January 26, 2024 – RBC Convention Centre





LAND ACKNOWLEDGMENT

TODAY'S PROGRAM

Welcome

Danielle Rice, Vice President – Marketing and Communications

Manitoba Liquor & Lotteries Overview

Gerry Sul, President & CEO

Business Update

Robert Holmberg, Executive Vice President - Liquor & Cannabis Operations

Special Olympics Manitoba

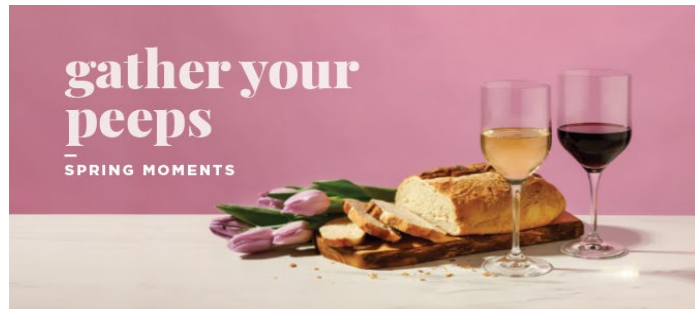
Monica Manaire, Board Director

Trade Show

LIQUOR MART 100 (1923 – 2023)



THEMATIC



gather your
peeps
—
SPRING MOMENTS



pink looks
good on you
—
OUR FAVOURITE ROSÉ



bling in the
new year
—
HELLO SPARKLING WINE



**MONTE DA RIBEIRA
TINTO (PORTUGAL)**
47794 | 750 ml
Reg. \$14.99

**MÉNAGE À TROIS
PINOT NOIR
(CALIFORNIA)**
48493 | 750 ml
Reg. \$16.99

**JOEL GOTT
PINOT NOIR
(CALIFORNIA)**
48495 | 750 ml
Reg. \$20.99

**WOLF BLASS
YELLOW LABEL
CHARDONNAY
(AUSTRALIA)**
226860 | 750 ml
Reg. \$17.99
NOW \$16.09

**WOLF BLASS
YELLOW LABEL
CABERNET
SAUVIGNON
(AUSTRALIA)**
251876 | 750 ml
Reg. \$17.99
NOW \$16.09



**ANCIANO
OLD VINES GARNACHA
(SPAIN)**
24604 | 750 ml
Reg. \$19.99
NOW \$17.99

SAVE \$2.00

SAVE \$1.60

SAVE \$2.00

**MICHELE CHIARLO
PALAS GAVI DOCG
(ITALY)**
24676 | 750 ml
Reg. \$19.99
NOW \$17.99

**BREE
RIESLING QBA
(GERMANY)**
15760 | 750 ml
Reg. \$15.99
NOW \$14.39

**LANDLUST
ORGANIC RIESLING
(GERMANY)**
30715 | 750 ml
Reg. \$16.99
NOW \$14.99



**SMIRNOFF
VODKA & SODA
RASPBERRY ROSÉ**
33038 | 4 x 355 ml
Reg. \$13.49

**SMIRNOFF
VODKA & SODA
WHITE PEACH ROSÉ**
33032 | 4 x 355 ml
Reg. \$13.49

**SMIRNOFF
VODKA & SODA
RASPBERRY ROSÉ**
33038 | 4 x 355 ml
Reg. \$13.49

**SMIRNOFF
VODKA & SODA
WHITE PEACH ROSÉ**
33032 | 4 x 355 ml
Reg. \$13.49

**OFFER VALID
APRIL 1-15, 2023**

SAVE \$1.50

**PERIQUITA
ROSÉ (PORTUGAL)**
31490 | 750 ml
Reg. \$12.99
NOW \$11.49

**CONO SUR
BICICLETA
PINOT NOIR
ROSÉ (CHILE)**
31345 | 1000 ml
Reg. \$13.99



**VIÑA ESMERALDA
ROSADO (SPAIN)**
28461 | 750 ml
Reg. \$17.99 | NOW \$15.99

**STUDIO BY MIRAVAL
ROSÉ (FRANCE)**
40828 | 750 ml
Reg. \$21.99 | NOW \$19.49

**LOLEA N.5
ROSÉ (SPAIN)**
793554 | 750 ml
Reg. \$18.99 | NOW \$16.99

SAVE \$2.00

SAVE \$2.50

SAVE \$2.00



**18
Cortes Miles**

**15
Cortes Miles**

**DEVAUX CUVÉE D
CHAMPAGNE (FRANCE)**
51982 | 750 ml
Reg. \$79.99

**MOËT & CHANDON
IMPERIAL BRUT
CHAMPAGNE (FRANCE)**
453084 | 750 ml
Reg. \$85.99

**FOLONARI
PROSECCO EXTRA DRY
(ITALY)**
51781 | 750 ml
Reg. \$18.99
NOW \$16.99

**ZONIN CUVÉE 1821
BRUT PROSECCO DOC
(ITALY)**
15095 | 750 ml
Reg. \$17.95
NOW \$15.95

**FREIXENET CORDON
NEGRO BRUT CAVA DO
(SPAIN)**
12053 | 750 ml
Reg. \$16.99
NOW \$14.99

**VAL D'OCA
MOSCATO
SPUMANTE DOLCE
(ITALY)**
14435 | 750 ml
Reg. \$19.99

**CINZANO
PROSECCO DOC
(ITALY)**
476 | 750 ml
Reg. \$17.49

**LA MARCA
PROSECCO
(ITALY)**
786825 | 750 ml
Reg. \$20.99
NOW \$18.89

**RUFFINO
PROSECCO ROSÉ
(ITALY)**
42326 | 750 ml
Reg. \$20.29
NOW \$18.26

SAVE \$2.10

SAVE \$2.03



**BREAD & BUTTER
PROSECCO
(ITALY)**
44595 | 750 ml
Reg. \$23.99
NOW \$21.49

SAVE \$2.50

SAVE \$2.00

SAVE \$2.00

FLYER

LIQUOR MART

MARCH 2023

why not
[add a splash of yellow!]

YELLOW TAIL
PURE BRIGHT PINOT GRIGIO
(AUSTRALIA)
5756 | 750 ml
Reg. \$14.99 | NOW \$11.49

SAVE
\$3.50

YELLOW TAIL
MERLOT (AUSTRALIA)
1416 | 750 ml
Reg. \$14.99 | NOW \$11.49

SAVE
\$3.50

YELLOW TAIL
WHISKEY BARREL AGED
CABERNET SAUVIGNON
(AUSTRALIA)
43245 | 750 ml
Reg. \$16.99 | NOW \$12.87

SAVE
\$4.12

OFFERS VALID
MARCH 1-31, 2023
Actual items may not be exactly as shown.
Subject to change without notice. Offer valid in
Alberta only. Prices subject to change without notice.
While quantities last.

18+ ENJOY RESPONSIBLY

LIQUOR MART

JUNE 2023

take a sip
back in time

BUD LIGHT
SELTZER
HARD SODA
LEMON LIME SODA
NATURAL FLAVOUR
80 CALORIES (160kJ)
0g SUGAR (0% cal from sugar)
4.0% alc/vol

SAVE
\$3.40

BUD LIGHT
SELTZER
HARD SODA
VARIETY PACK
49185 | 12 x 355 ml
Reg. \$33.98
NOW \$30.58

SAVE
\$3.40

OFFERS VALID JUNE 1-30, 2023
UNLESS OTHERWISE STATED
Actual items may not be exactly as shown.
Subject to change without notice. Offer valid in
Alberta only. Prices subject to change without notice.
While quantities last.

18+ ENJOY RESPONSIBLY

LIQUOR MART

NOVEMBER 2023

it's
game time!
WHY NOT SCORE
A CROWN ROYAL TODAY

CROWN ROYAL
PEACH FLAVOURED
WHISKY BEVERAGE
29377 | 750 ml
Reg. \$33.49 | NOW \$31.79

SAVE
\$1.70

CROWN ROYAL
APPLE FLAVOURED
WHISKY BEVERAGE
17860 | 750 ml
Reg. \$33.49 | NOW \$31.79

SAVE
\$1.70

CROWN ROYAL
FINE DE LUXE
CANADIAN WHISKY
12182 | 1140 ml
Reg. \$42.49 | NOW \$40.34

SAVE
\$2.15

OFFERS VALID NOVEMBER 1-30, 2023
Actual items may not be exactly as shown.
Subject to change without notice. Offer valid in
Alberta only. Prices subject to change without notice.
While quantities last.

18+ ENJOY RESPONSIBLY

6

ENHANCED HOT BUY, LTO AND FLASH SALES

HOT BUYS
Save up to 40%
April 1-15, 2023

MICHELOB ULTRA
33463 | 30 x 355 ml
Reg. \$61.49
NOW \$36.49

SLEEMAN CLEAR 2.0
24641 | 15 x 355 ml
Reg. \$28.49
NOW \$17.00

SLEEMAN
39 CALORIES
90 CALORIES

SLOW PRESS CABERNET SAUVIGNON (CALIFORNIA)
45266 | 750 ml | Reg. \$18.99
NOW \$10.99

CROWN ROYAL VANILLA WHISKY
74189 | 750 ml
Reg. \$33.49
NOW \$23.49

JACOB'S CREEK DOTS PINOT GRIGIO (AUSTRALIA)
22609 | 750 ml
Reg. \$16.99
NOW \$8.99

PELEE ISLAND LOLA CABERNET FRANC ROSE VQA (ONTARIO)
26364 | 750 ml
Reg. \$16.99
NOW \$9.99

SMOKING LOON MERLOT (CALIFORNIA)
715032 | 750 ml
Reg. \$14.99
NOW \$8.99

100 LIQUOR MART
SERVING MANITOBA SINCE 1923
@ LiquorMarts.ca

HUNDREDS OF ITEMS ON SALE THIS MONTH
save more on more
WHILE QUANTITIES LAST

GIBSON'S FINEST RARE 12 YEAR OLD CANADIAN WHISKY
200741 | 750 ml
Reg. \$76.99 | NOW \$57.74

1800 REPOSADO TEQUILA
111419 | 750 ml
Reg. \$39.99 | NOW \$29.99

REIFEL CANADIAN RYE WHISKY
46315 | 750 ml
Reg. \$42.99 | NOW \$32.24

KNOB CREEK KENTUCKY STRAIGHT BOURN WHISKY
326009 | 750 ml
Reg. \$49.99 | NOW \$37.49

GREY GOOSE VODKA
17949 | 1140 ml
Reg. \$73.99 | NOW \$55.49

JÄGERMEISTER HERBAL LIQUEUR
47896 | 750 ml
Reg. \$30.99 | NOW \$23.64

JAMESON COLD BREW
36820 | 750 ml
Reg. \$41.49 | NOW \$31.14

GRAY WHALE GIN
36692 | 750 ml
Reg. \$59.99 | NOW \$44.99

BOWMORE 12 YEAR ISLAY SINGLE MALT SCOTCH WHISKY
616 | 750 ml
Reg. \$65.99 | NOW \$49.74

CROWN ROYAL NORTHERN HARVEST RYE WHISKY
712360 | 750 ml
Reg. \$36.99 | NOW \$27.69

FORTY CREEK DOUBLE BARREL CANADIAN WHISKY
30919 | 750 ml
Reg. \$39.99 | NOW \$29.99

ON THE ROCKS THE MARGARITA
49052 | 750 ml
Reg. \$36.99 | NOW \$27.70

ON THE ROCKS THE COSMOPOLITAN
49050 | 750 ml
Reg. \$36.99 | NOW \$27.70

ON THE ROCKS THE OLD FASHIONED
49053 | 750 ml
Reg. \$36.99 | NOW \$27.70

3 DAYS TO SAVE UP TO 30%
Flash Sale
DECEMBER 18-20, 2023

JIM BEAM KENTUCKY STRAIGHT BOURN WHISKY
34771 | 750 ml
Reg. \$64.99 | NOW \$51.99

SLEEMAN HONEY BROWN LAGER
37488 | 15 x 355 ml
Reg. \$33.79 | NOW \$21.99

MAKER'S MARK KENTUCKY STRAIGHT BOURN WHISKY
103747 | 750 ml
Reg. \$46.99 | NOW \$37.59

PATENT 5 ELETARIA OLD FASHIONED
49420 | 375 ml
Reg. \$26.95 | NOW \$18.85

KINKY BLUE LIQUEUR
46844 | 750 ml
Reg. \$29.99 | NOW \$23.99

SANTA CAROLINA RESERVA DE FAMILIA CARMENERE (CHILE)
34520 | 750 ml
Reg. \$23.99 | NOW \$16.79

VALLE LAS ACEQUIAS MALBEC (ARGENTINA)
9902 | 750 ml
Reg. \$21.99 | NOW \$15.39

PFEIFFER MOSCATO (AUSTRALIA)
12638 | 750 ml
Reg. \$19.99 | NOW \$13.99

PELEE ISLAND LOLA ROSE VQA (ONTARIO)
20187 | 750 ml
Reg. \$15.99 | NOW \$10.49

FRISKY ZEBRAS SEDUCTIVE SHIRAZ (SOUTH AFRICA) FAIR TRADE CERTIFIED
28892 | 750 ml
Reg. \$18.99 | NOW \$13.29

FRISKY ZEBRAS SENSUOUS SAUVIGNON BLANC (SOUTH AFRICA) FAIR TRADE CERTIFIED
28894 | 750 ml
Reg. \$18.99 | NOW \$13.29

100 LIQUOR MART
SERVING MANITOBA SINCE 1923
@ LiquorMarts.ca

AIR MILES

A promotional graphic for Air Miles with a teal background. It features the Air Miles logo (a white circle with a blue airplane) in the top left. Festive holiday decorations, including a red gift box, a red ornament, and a gold ornament, are in the top right. The text "get rewarded this holiday season" is in large white font. Below it, "SPEND \$100 GET 40 AIR MILES® BONUS MILES™*" is in white. The date "DECEMBER 1-10, 2022" is at the bottom. A small "18+" is in the bottom right.

AIR MILES.

get rewarded
this holiday
season

—

SPEND \$100
GET 40 AIR MILES®
BONUS MILES™*

DECEMBER 1-10, 2022

*Terms apply. Excludes taxes and gift card purchases.

18+

A promotional graphic for Air Miles with a blue background. It features the Air Miles logo (a white circle with a blue airplane) in the top left. Summer-themed items, including lemons and lemon slices, are in the top right. The text "get rewarded this summer" is in large white font. Below it, "SPEND \$100 GET 50 AIR MILES® BONUS MILES™*" is in white. The date "JUNE 21-22, 2023" is at the bottom. A small "18+" is in the bottom right.

AIR MILES.

get rewarded
this summer

—

SPEND \$100
GET 50 AIR MILES®
BONUS MILES™*

JUNE 21-22, 2023

*Terms apply. Excludes taxes and gift card purchases.

18+

A promotional graphic for Air Miles with a purple background. It features the Air Miles logo (a white circle with a blue airplane) in the top left. The text "AIR MILES." is in white. Below it, "cheers to 100 years" is in large white font. Then "SCAN YOUR AIR MILES® CARD FOR A CHANCE TO WIN 100,000 AIR MILES REWARD MILES™" is in white and yellow. The date "NOVEMBER 1-30, 2023" is at the bottom. A small "18+" is in the bottom right. The background image shows two people sitting on beach chairs, looking out at the ocean.

AIR MILES.

cheers to
100 years

—

SCAN YOUR AIR MILES® CARD
FOR A CHANCE TO WIN
100,000
AIR MILES REWARD MILES™

NOVEMBER 1-30, 2023

No purchase necessary. *Contest rules apply.
AIR MILES Loyalty Inc. is in no way connected to the management of this contest.

18+



[PRODUCTS](#)

[PROMOTIONS](#)

[LEARNING](#)

[SHOP ONLINE](#)

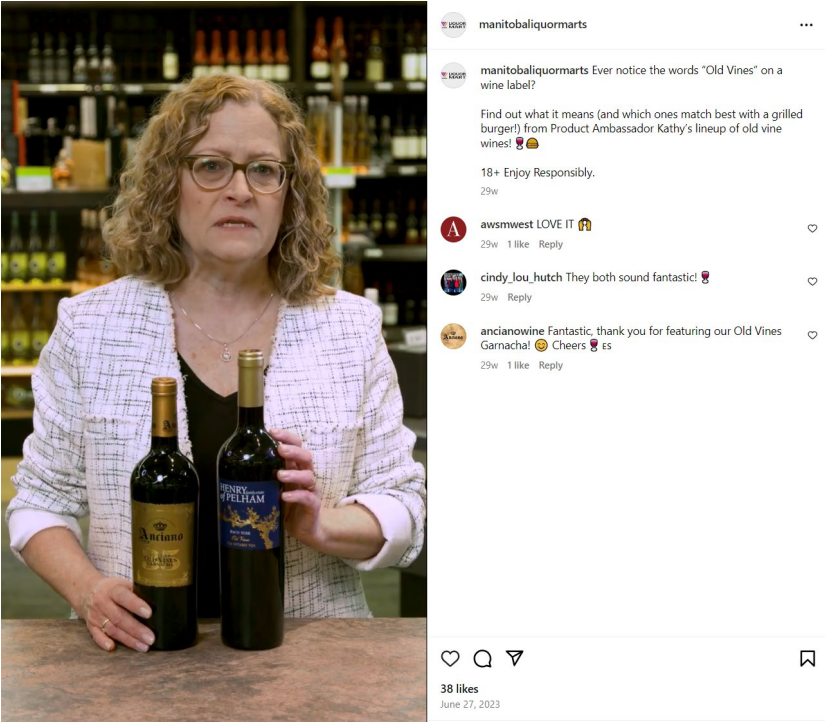
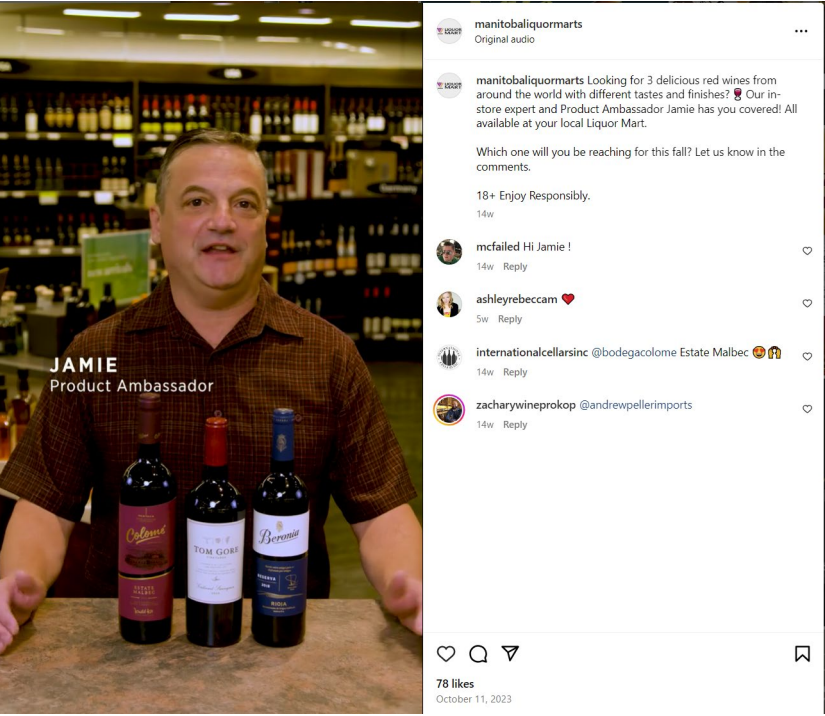
[ABOUT](#)

COCKTAIL RECIPES



**cocktail
recipes**

SOCIAL MEDIA



PREMIUM SPIRIT RELEASE



marketing program guide

APRIL 2024 /
MARCH 2025

 LIQUOR MART



**omni-channel
display
support
advertising
experience**

COMMUNITY SUPPORT – OVER 75 EVENTS



CHAMPIONING MANITOBA

#MBLLGoodTogether



EXPANSIVE COMMUNITY INVOLVEMENT

We're really big fans
of the things you
care about

#MBLLGoodTogether



- Creating pride of ownership among Manitobans
- Focusing on partnership
- Engaging partners and their audiences

DIVERSITY, EQUITY, INCLUSION



Manitoba Liquor & Lotteries @mbliquorlotteries

Nov 4

Truly Fabulous! For a full half-century the @rainbowresourcecentre has been providing support to Manitoba's 2SLGBTQ+ community in the form of counselling, education and programming for individuals ranging from children through those aged 55+. While their 50th Anniversary Gala "Studio 73" is sold out, you can still lend your support. Make a donation with love at rainbowresourcecentre.org/donate-with-love

#MBLLGoodTogether

[Read less](#)



Manitoba Liquor & Lotteries @mbliquorlotteries

Nov 16

Alanis Morissette provides a virtual interview and Susan Aglukark, O.C., performs live at the Raising Our Voices Gala for @humanrights.ca Nov. 22nd. The achievements and contributions of both artists will be honoured along with the significant efforts of Moe Levy to help make the Canadian Museum for Human Rights a reality. Show your support by purchasing tickets @humanrights.ca.

#MBLLGoodTogether

[Read less](#)



COMMUNITY



Manitoba Liquor & Lotteries

Oct 27

Congratulations to our Community Champion Partner, Pink Ribbon Golf Classic For Hope! 🙏

#MBLLGoodTogether

Winnipeg Blue Bombers



Manitoba Liquor & Lotteries @mbliquorlotteries

Oct 16

Manitoba Liquor & Lotteries is proud to cover up to 50% of the cost of smaller community projects (\$30K max.) through our Small Capital Sponsorship Program.

Find out more at link in bio under Our Responsibilities > Community Support.

Note: the application deadline has been extended until November 1, 2023.

#MBLLGoodTogether

Read less



SUSTAINABILITY



Manitoba Liquor & Lotteries @mbliquorlotteries
Jul 30

As part of our commitment to ensuring the sustainability of Manitoba's commercial fisheries, Manitoba Liquor and Lotteries works with Fish Forward to source sustainably harvested Manitoba fish for its casino restaurants. 🐟 Visit casinosofwinnipeg.ca to find out what is on our menus this week.

Visit fishforward.ca for more.

#MBLLGoodTogether

[Read less](#)



Manitoba Liquor & Lotteries @mbliquorlotteries
Oct 24

October is National Fairtrade month, and MBLL is a proud supporter of this global movement committed to making a difference for farmers and workers around the world. Every day, we are pleased to offer our customers and guests a range of Fairtrade certified products, and since 2019, we have been recognized as the largest Fairtrade designated workplace in Canada!

To learn more, visit [Our Responsibilities > Our Stories](#) at our link in bio! 📱

[Read less](#)



[MBLL- Our Responsibilities](#)

SPORTS, ARTS, CULTURE



Manitoba Liquor & Lotteries @mbliquorlotteries
Nov 2

Milt Stegall headlines an all-star list of inductees tonight as the Manitoba Sports Hall of Fame welcomes five new members plus the 1965 Terry...

[Read more](#)



Manitoba Liquor & Lotteries @mbliquorlotteries
Nov 29

Have you herd? Your ticket to the @manitobamuseum is on us this Friday, December 1 (5-9 pm), as well as the first Friday of every month this year! Free First Fridays courtesy of Manitoba Liquor & Lotteries!

Details at their link in bio [🔗](#)

#MBLLGoodTogether

[Read less](#)



Manitoba Liquor & Lotteries @mbliquorlotteries
Nov 28

Giftwrapped just in time for the holiday season Rogers and Hammerstein's classic The Sound of Music comes to @mtcwinnipeg from Nov. 28 through Dec. 23. Just try to not hum along to some of your "favourite things" including Do-Re-Mi, Climb Ev'ry Mountain and So Long, Farewell. Tickets will go fast so get them today at their link in bio!

#MBLLGoodTogether

[Read less](#)



WEBSITE



Enriching the lives of Manitobans

#MBLLGoodTogether



We enrich the lives of Manitobans by making the greatest possible contribution to the economic and social well-being of our province.

In addition to the products and services we offer, our profits stay in Manitoba and is used to support provincial programs and initiatives that touch everyone who lives here. Our strong commitment to corporate responsibility drives everything we do – from how we run our business to how we serve our customers and communities.



Read our [Corporate Responsibility Performance Measures](#) to view our continued progress toward our economic, environmental and social priorities.

Our approach

- ▲ OPERATING RESPONSIBLY
- ▲ MAKING SIGNIFICANT ECONOMIC CONTRIBUTIONS
- ▲ STRENGTHENING LOCAL COMMUNITIES
- ▲ FOCUSING ON CUSTOMER WELL-BEING
- ▲ BEING GOOD BUSINESS PARTNERS
- ▲ REDUCING OUR ENVIRONMENTAL FOOTPRINT
- ▲ BEING A GREAT PLACE TO WORK

By the Numbers:

100%

Investment

100% of net income is invested back in the province to support healthcare, education and other essential community services.

2%

Social Responsibility

2% of annual net income is earmarked for social responsibility initiatives including alcohol- and gambling-related consumer information, research and treatment.

Contributing to Manitoba's economy

#MBLLGoodTogether



People, communities and businesses across Manitoba benefit from our economic contributions.



Profits Stay in Manitoba

Our core mandate is to provide revenue to the Government of Manitoba to support provincial programs and initiatives in areas such as healthcare, education, social services, housing and infrastructure. Every dollar we earn in profit is invested back in the province.

\$597.8 million
earned for the province in 2021/22

Quality Jobs Created

Manitoba Liquor & Lotteries employs approximately 3,000 people who bring a wide range of backgrounds, skills and experience. We pride ourselves on hiring talented and passionate individuals who are part of a diverse workplace that represents the vibrant communities we serve.

At our casinos, we hire customer service experts, skilled tradespeople, local performers, food and beverage professionals, equipment technicians, and many others across different fields. Our knowledgeable Liquor Mart staff ensure the retail experience for our customers is both convenient and socially responsible. Our corporate employees help make our company run effectively and are always focussed on our customers.

Local business benefits

We generate thousands of additional direct and indirect jobs in the provincial economy.

In rural Manitoba, independent retailers serve their communities as local liquor vendors. Our lottery ticket and video lotto (VLT) products are delivered through networks of independent business operators. These products directly support important business sectors in Manitoba including the retail, hotel and restaurant industries. They are also sold through veterans' organizations and First Nations.

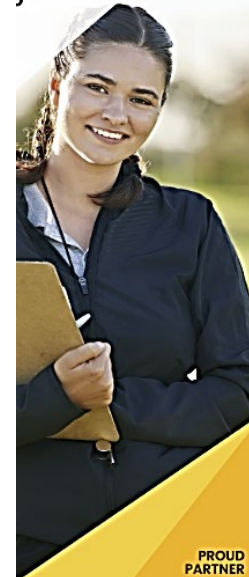
COMMUNITY SUPPORT/PARTNERSHIPS



**MAKES A
COMMUNITY
EASIER TO PLAY.**

FOR THE
SPORT YOU LOVE.

SCAN THE CODE
TO GET STARTED



t
B A

PROUD
PARTNER
**MANITOBA
LIQUOR
& LOTTERIES**
#MBLLGoodTogether

**IT TAKES A
COMMUNITY
TO PLAY.**

OFFICIATE FOR THE
SPORT YOU LOVE.

SCAN THE CODE
TO GET STARTED



Sport
MANITOBA

PROUD
PARTNER
**MANITOBA
LIQUOR
& LOTTERIES**
#MBLLGoodTogether

**IT TAKES A
COMMUNITY
TO PLAY.**

VOLUNTEER FOR THE
SPORT YOU LOVE.

SCAN THE CODE
TO GET STARTED



Sport
MANITOBA

PROUD
PARTNER
**MANITOBA
LIQUOR
& LOTTERIES**
#MBLLGoodTogether



GERRY SUL

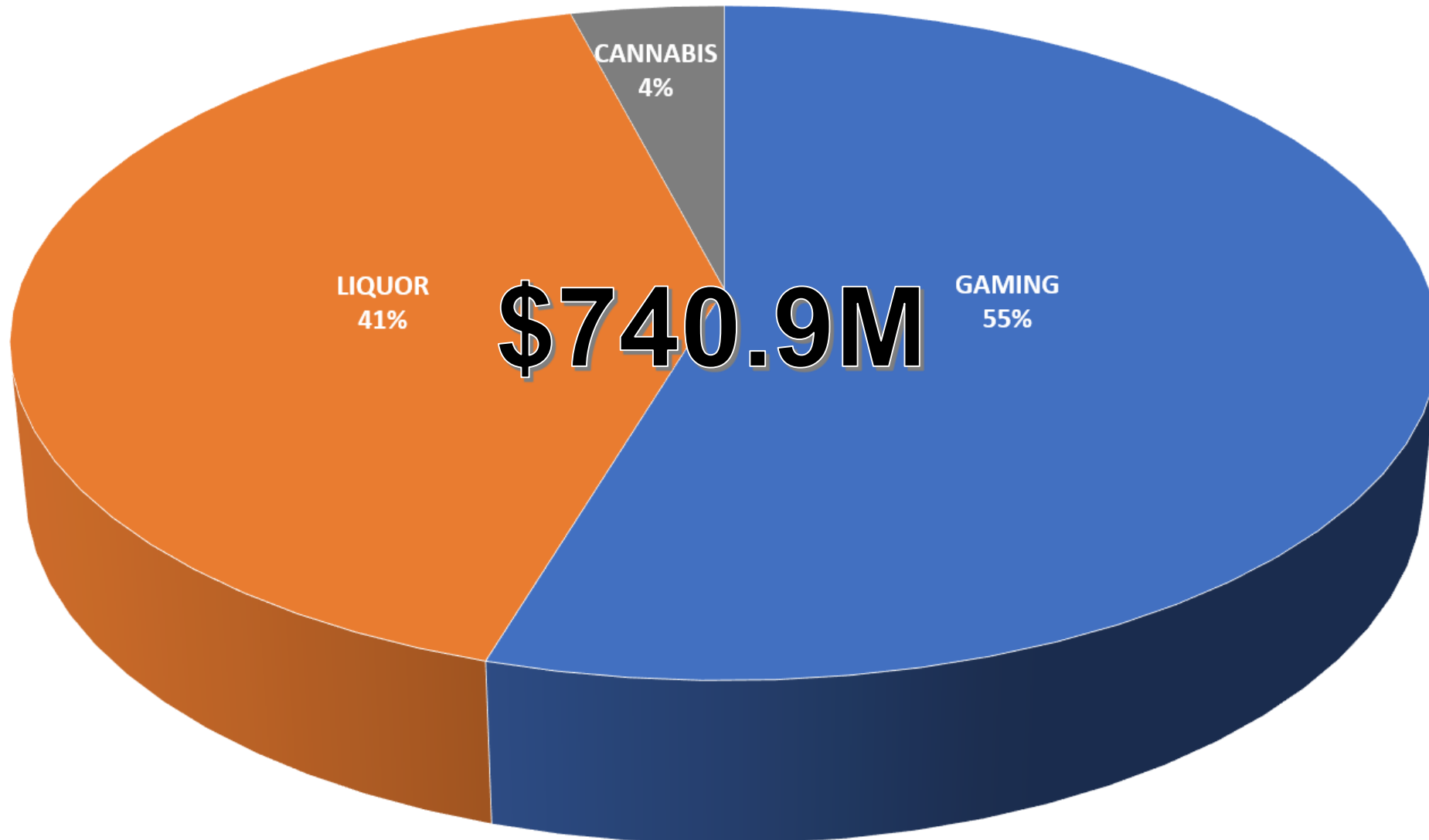
President & Chief Executive Officer
Manitoba Liquor & Lotteries

FISCAL 2022/23 HIGHLIGHTS

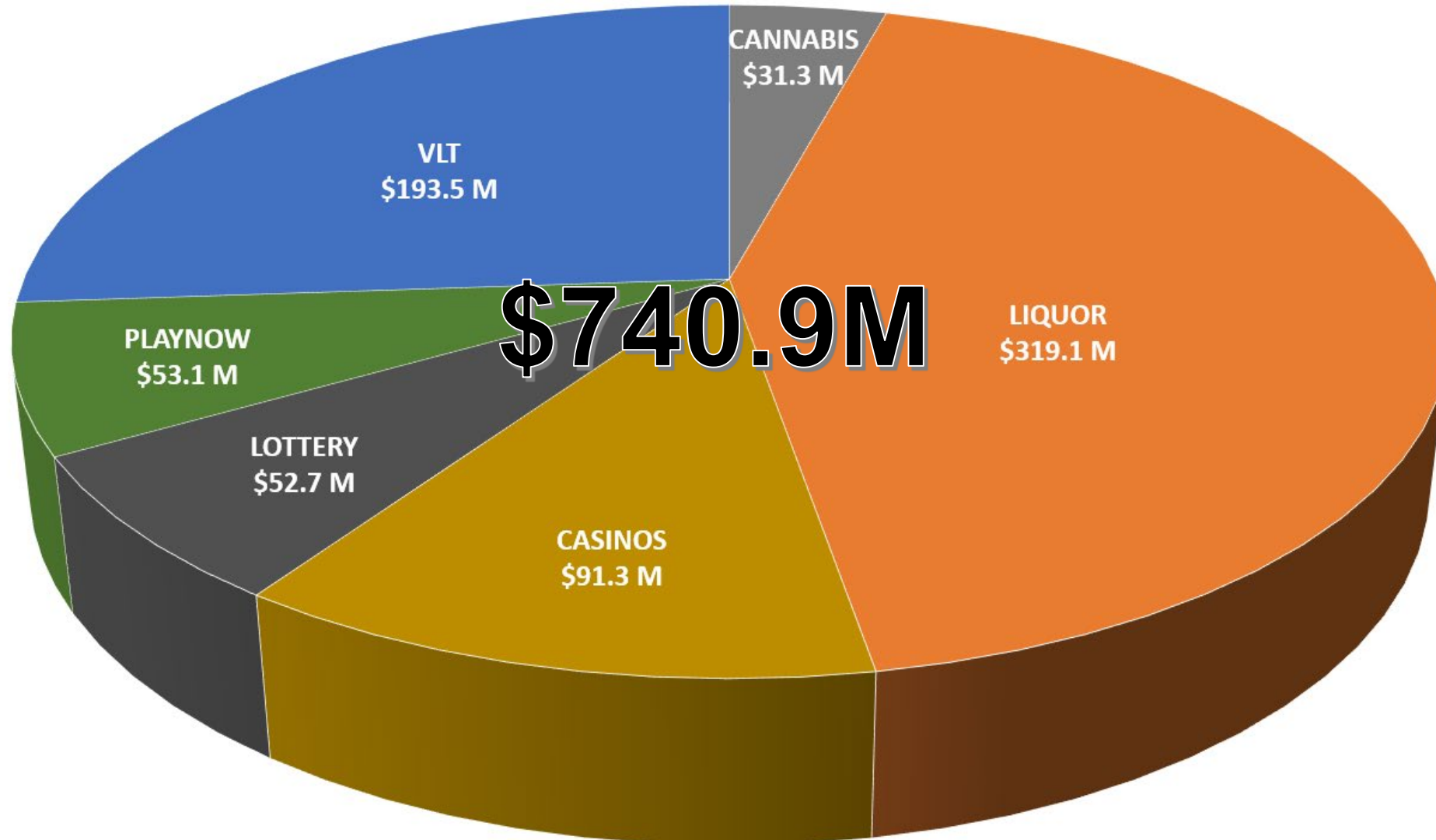
- Public Health Orders lifted
- Post-pandemic record casino profits
- Live entertainment backlog cleared
- VLTs climbing back
- Gaming refresh strategy continuation
- Manitoba cannabis sector strengthens



RECORD RETURNS TO PROVINCE – FISCAL 2022/23

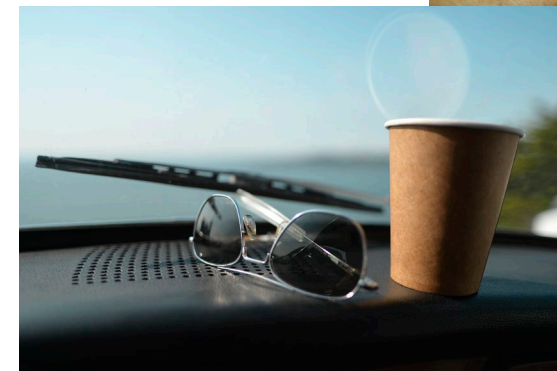
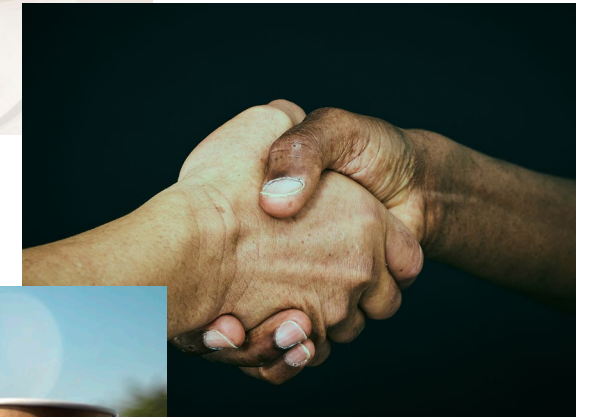


NET INCOME FISCAL 2022/23



CURRENT FISCAL HIGHLIGHTS

- Milestone Birthdays:
Liquor, Casinos, PlayNow, Cannabis
- Collective bargaining progress
- Cannabis retail growth
- Cannabis delivery performance improvements
- Strong results through Q3
- New government & mandate





ROBERT HOLMBERG

Executive Vice President, Liquor & Cannabis Operations
Manitoba Liquor & Lotteries

LIQUOR & CANNABIS OPERATIONS

The division is organized into five areas:



SINCE WE LAST MET

- New government elected, new board appointed with new mandate
- Bryan Letkeman heading up the supply chain
- Dan Eliasson heading up Cannabis and Commercial Liquor Operations
- Specialty wine stores have re-signed a 10-year agreement with MBLL
- Controlled entrances remain an effective tool for security and safety of employees and customers
- Product education seminars and training

LIQUOR IN MANITOBA AT A GLANCE



A Wide Selection of Service:

- +400 private liquor retail locations throughout Winnipeg and rural Manitoba
- 63 publicly-run Liquor Mart locations
- +1,500 restaurants, lounges, bars and taprooms

Distribution:

- MBLL oversees the wholesale and distribution of liquor products
- Products are warehoused at our King Edward Distribution Centre and by third-party private distributors
- Distribution to Liquor Marts and Commercial Partners is via:
 - MBLL Distribution
 - WETT Sales Distributors
 - BDL (Beer) Distributors
 - Direct from Local Manufacturers

ECONOMIC FACTORS

	Dec 2021	Dec 2022	Sep 2023
Total Canadian Retail Industry	+11.9%	+8.3%	+2.2%
Total MB Retail Industry	+13.3%	+8.6%	+3.2%
MB Full-Time Job Growth	+4.9%	+2.8%	+2.6%
MB Weekly Earnings	+2.9%	+3.2%	+4.6%
MB Inflation (CPI)	+3.3%	+7.9%	+2.6%

MB retail growth
outpacing the national
average

Liquor sales in
Manitoba are **tied to
disposable income**

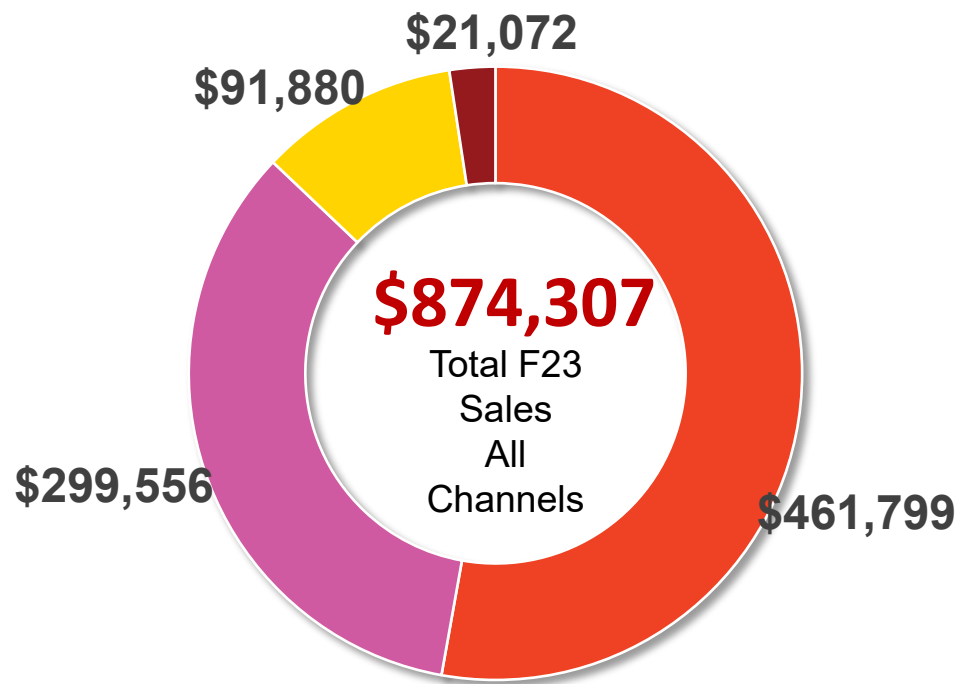
TRENDS WE'RE WATCHING



DIVISIONAL PERFORMANCE (F23)



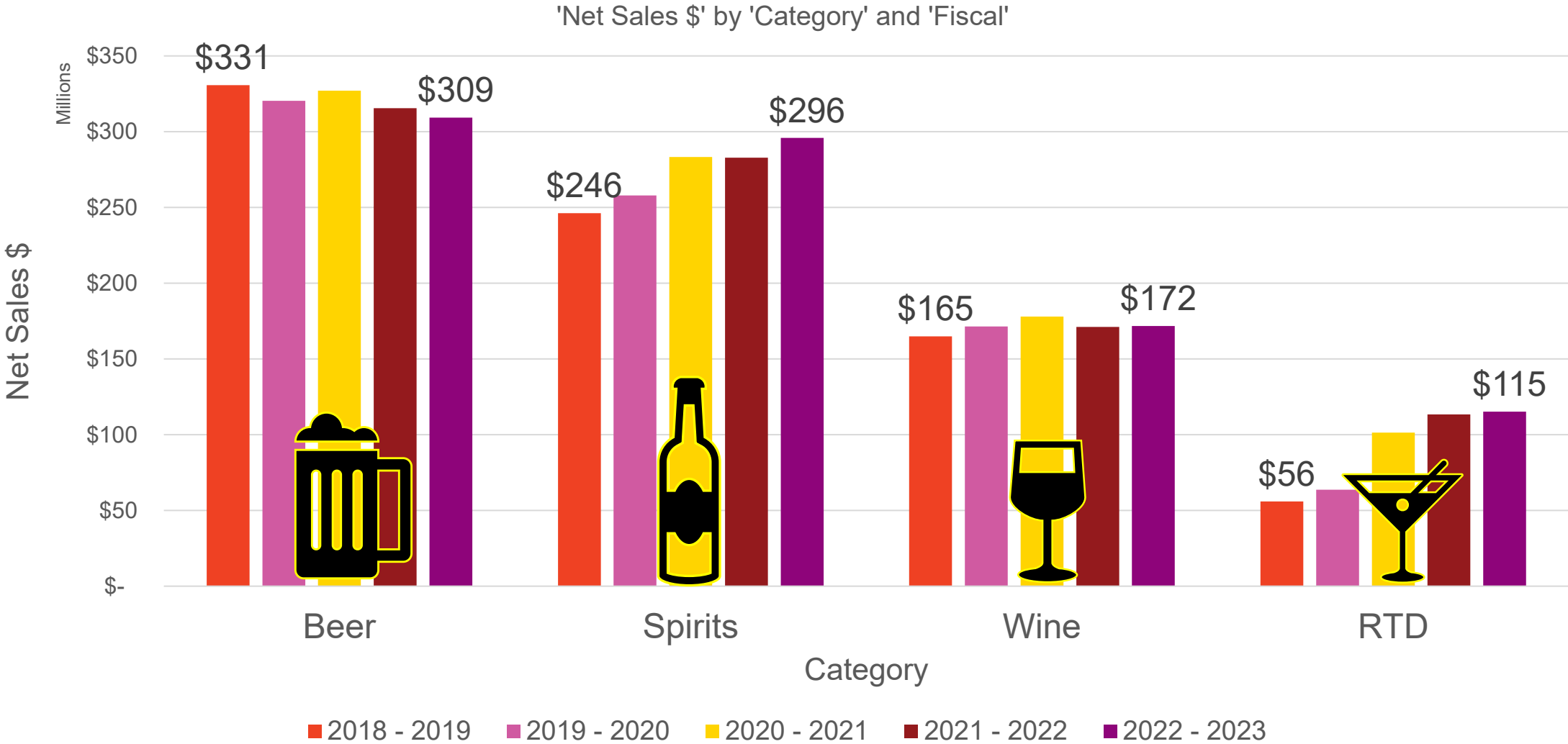
F23 Sales by Retail Channel
(in 000's)



Annual Sales by Retail Channel:

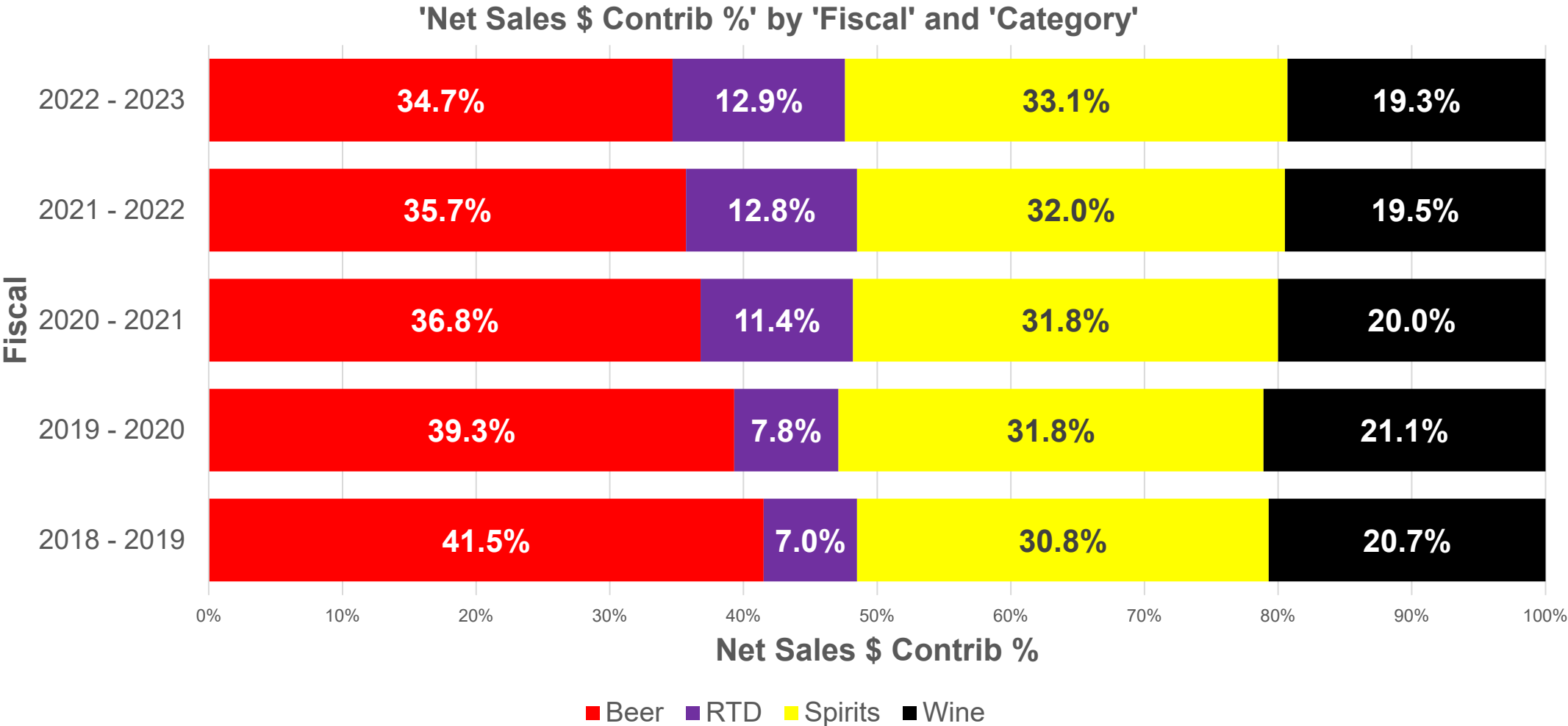
- In F23, the 63 publicly-run Liquor Marts, 400+ private liquor locations, and 1,500+ licensees had total sales of **\$874.3M**.
- The allocation of these sales by channel is as follows:
 - Liquor Marts = 53% of Sales
 - Licensees = 34% of Sales
 - Liquor Vendors = 11% of Sales
 - Specialty Wine Stores (SWS) = 2% of Sales

CATEGORY TRENDS



CATEGORY SALES MIX IN MANITOBA

↓ 1.0% Beer ↑ 0.1% RTD ↑ 1.1% Spirits ↓ 0.2% Wine

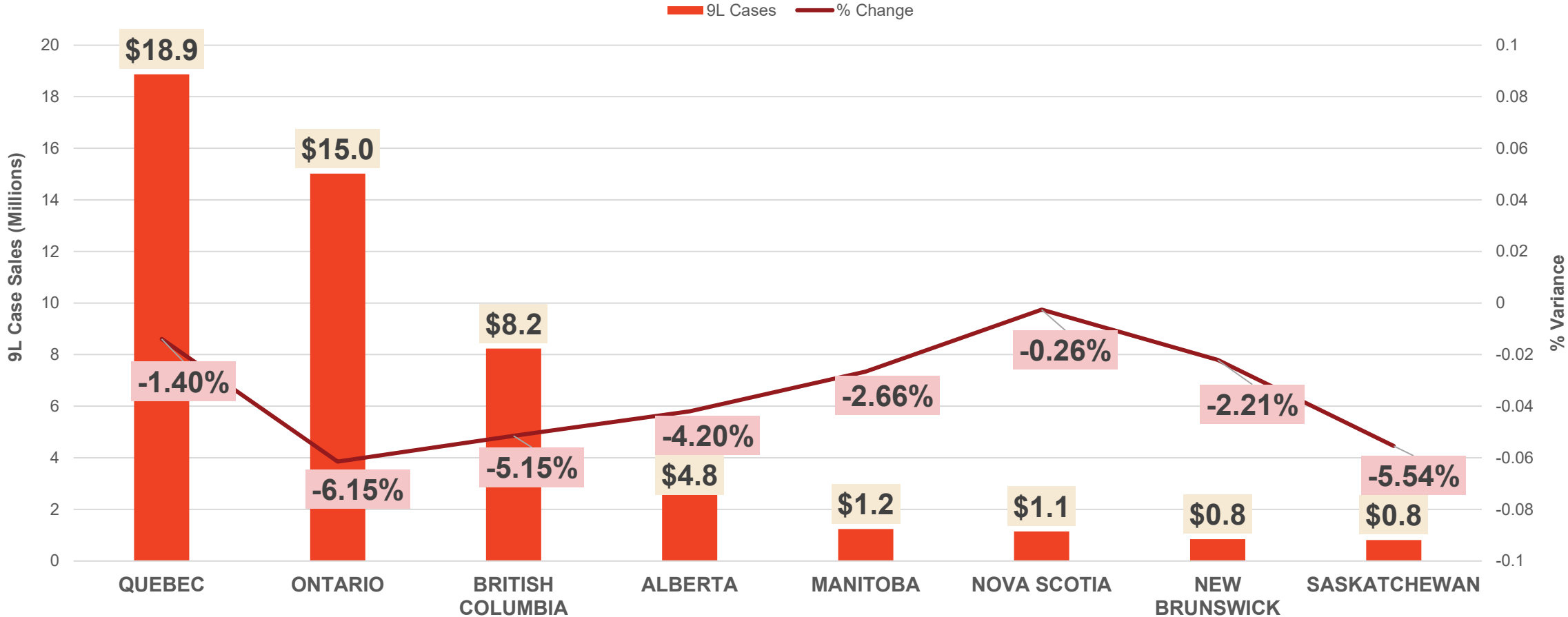


NATIONAL WINE TRENDS



National Wine Sales
9L Case Sales and Trend

Average growth nationally is
-2.0%

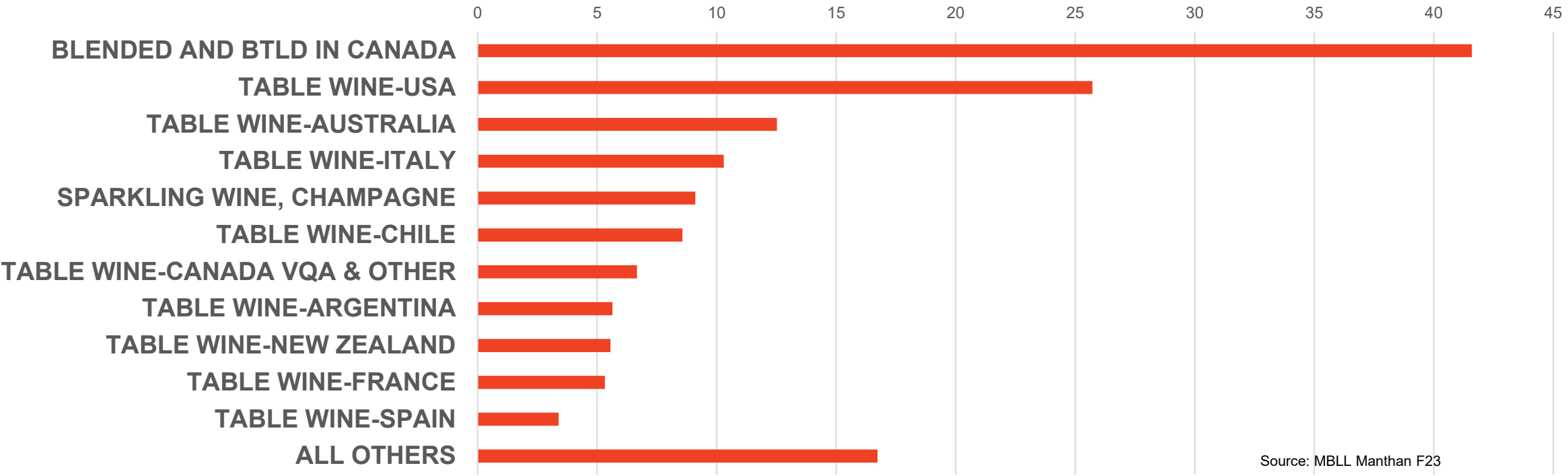


Source: ACD 12 months rolling ending June 2022

MANITOBA TOTAL WINE SALES BY SHELF GROUP

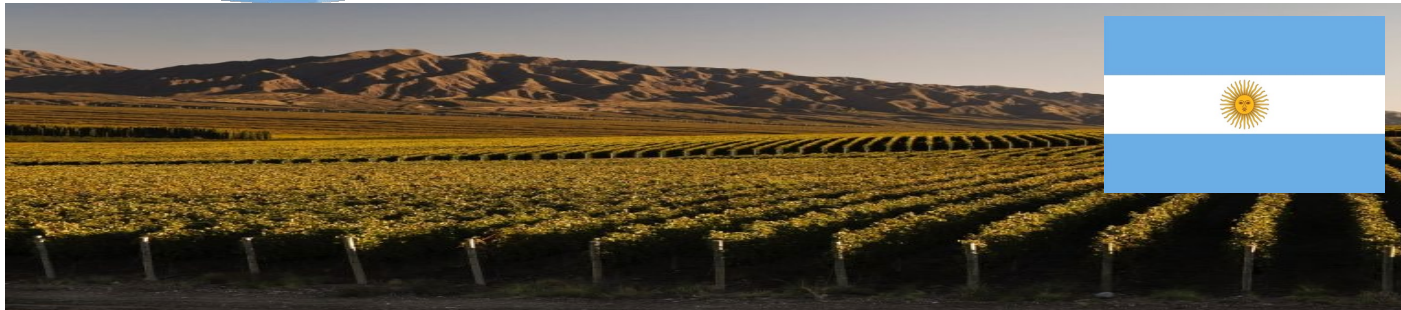
Total Dollar Sales in F23 of Listed Product by MBLL Shelf Group
(\$ Sales in Millions)

↓0.2% Wine



Source: MBLL Manthan F23

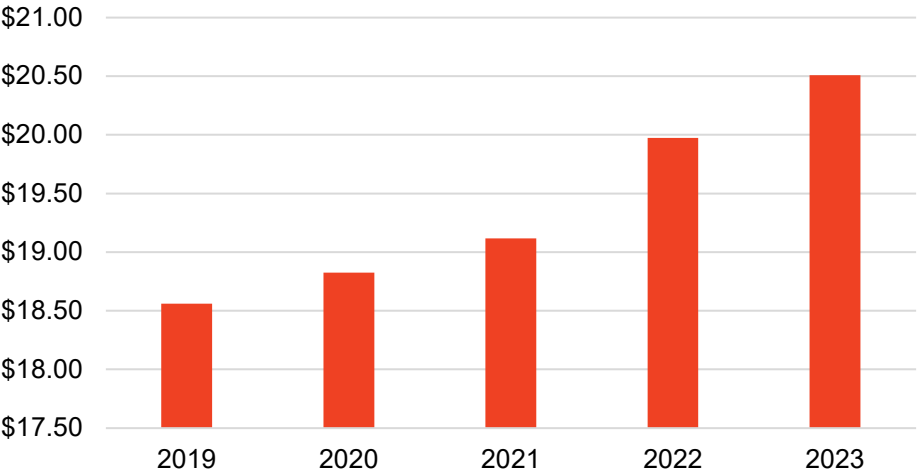
WINNIPEG WINE FESTIVAL THEME COUNTRY - ARGENTINA



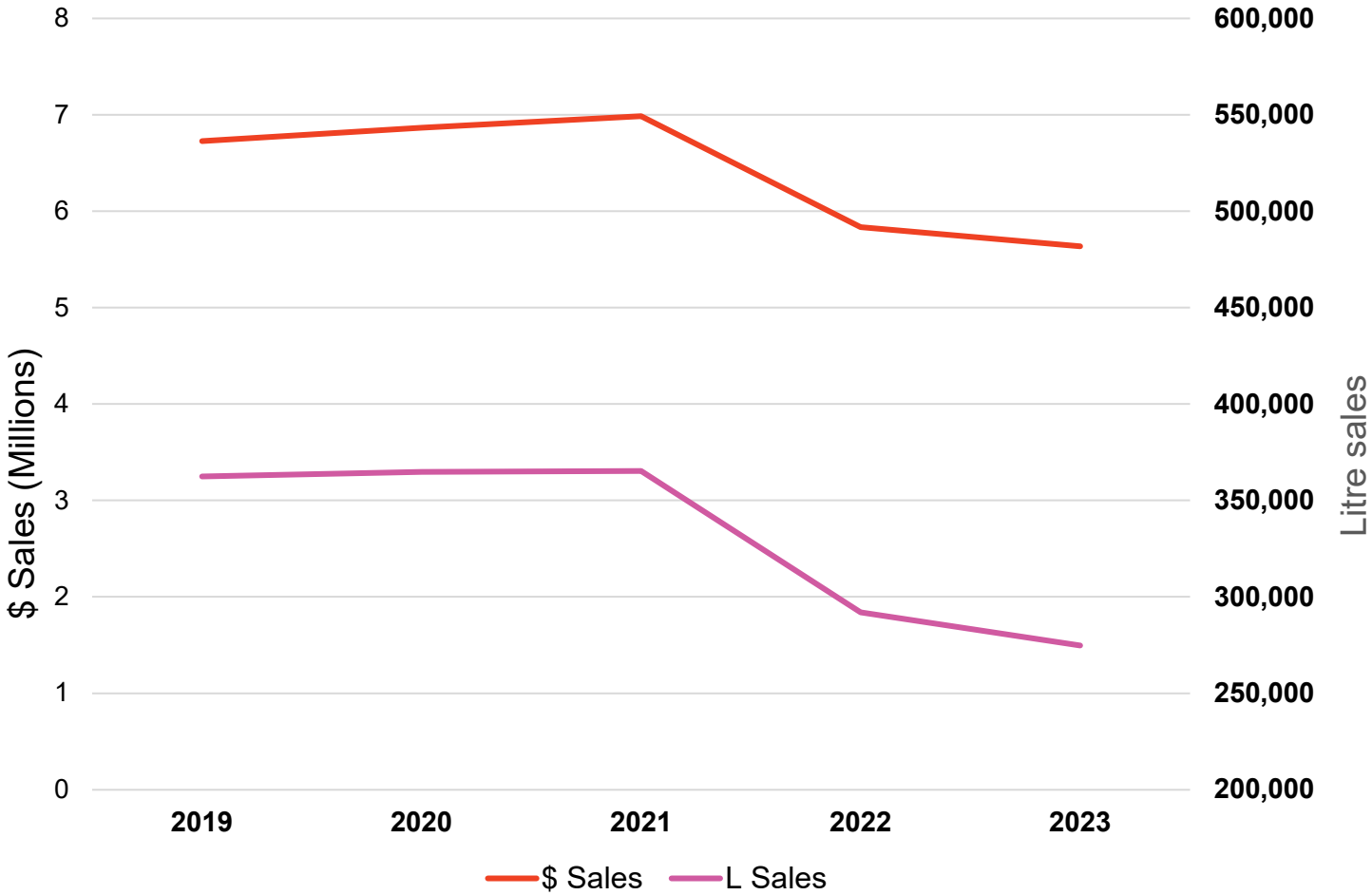
ARGENTINA WINE SALES – ALL MANITOBA (LISTED PRODUCTS)



Price Per Litre

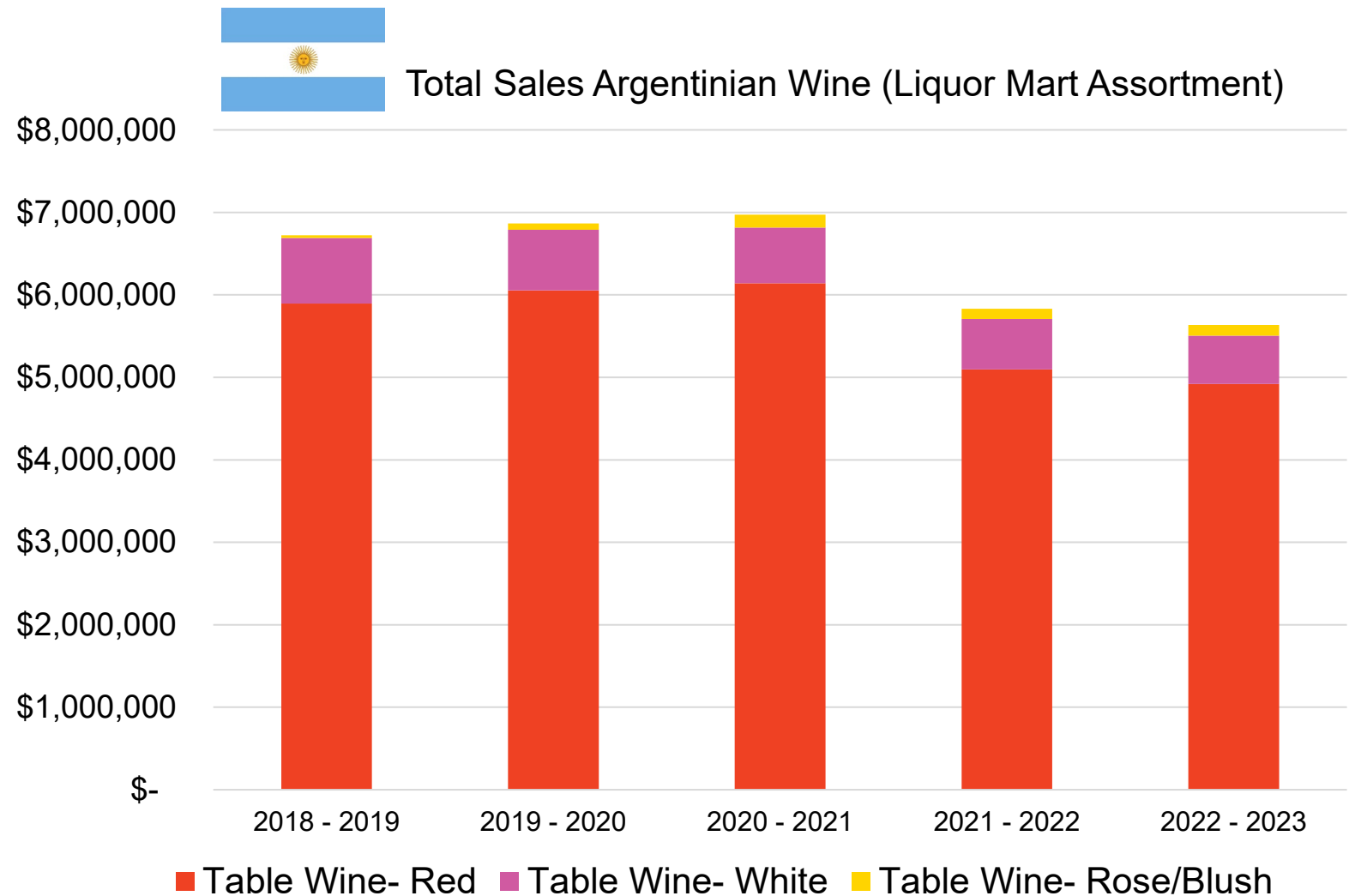


Total Annual Sales of Listed Argentinian Wines



ARGENTINA WINE SALES – TYPE & VARIETAL

- **68%** sold in F23 were Malbecs
- **11%** were Cabernet Sauvignons
- **8 of 10** bottles sold are red wine



WHAT'S HAPPENING AT LIQUOR MARTS

- Store Development
 - Store renovations
 - Expanded assortments with new fixturing
 - Expanded Winegate opportunities
 - Accessibility improvements
- In-Store Experience
 - Distinctions releases
 - Experiential events
- Sustainable Development
 - Brew Case vs Brew Bag
- System Upgrades
 - Pin pad software and hardware upgrade
 - POS software upgrade



UPDATED LOGISTICAL CHALLENGES 2023



Material & Labour Shortages



Trucking Shortages



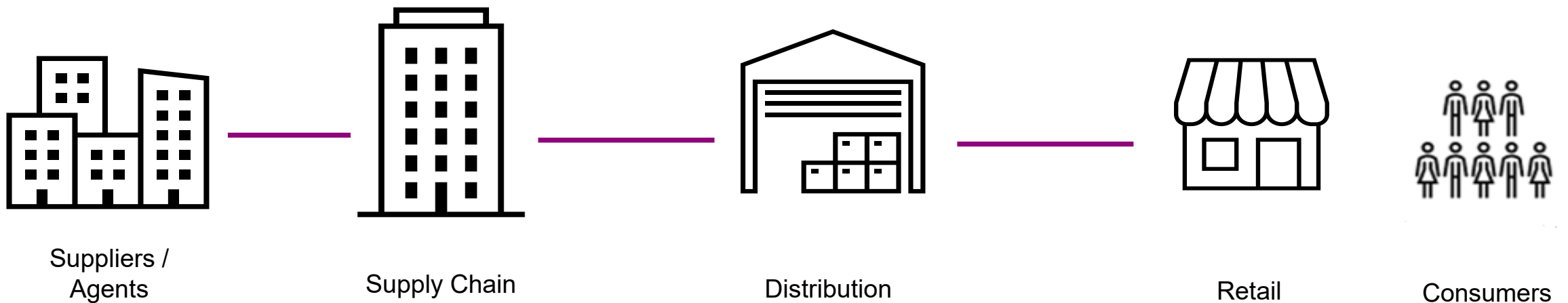
Instability in Global Market



Fuel Costs

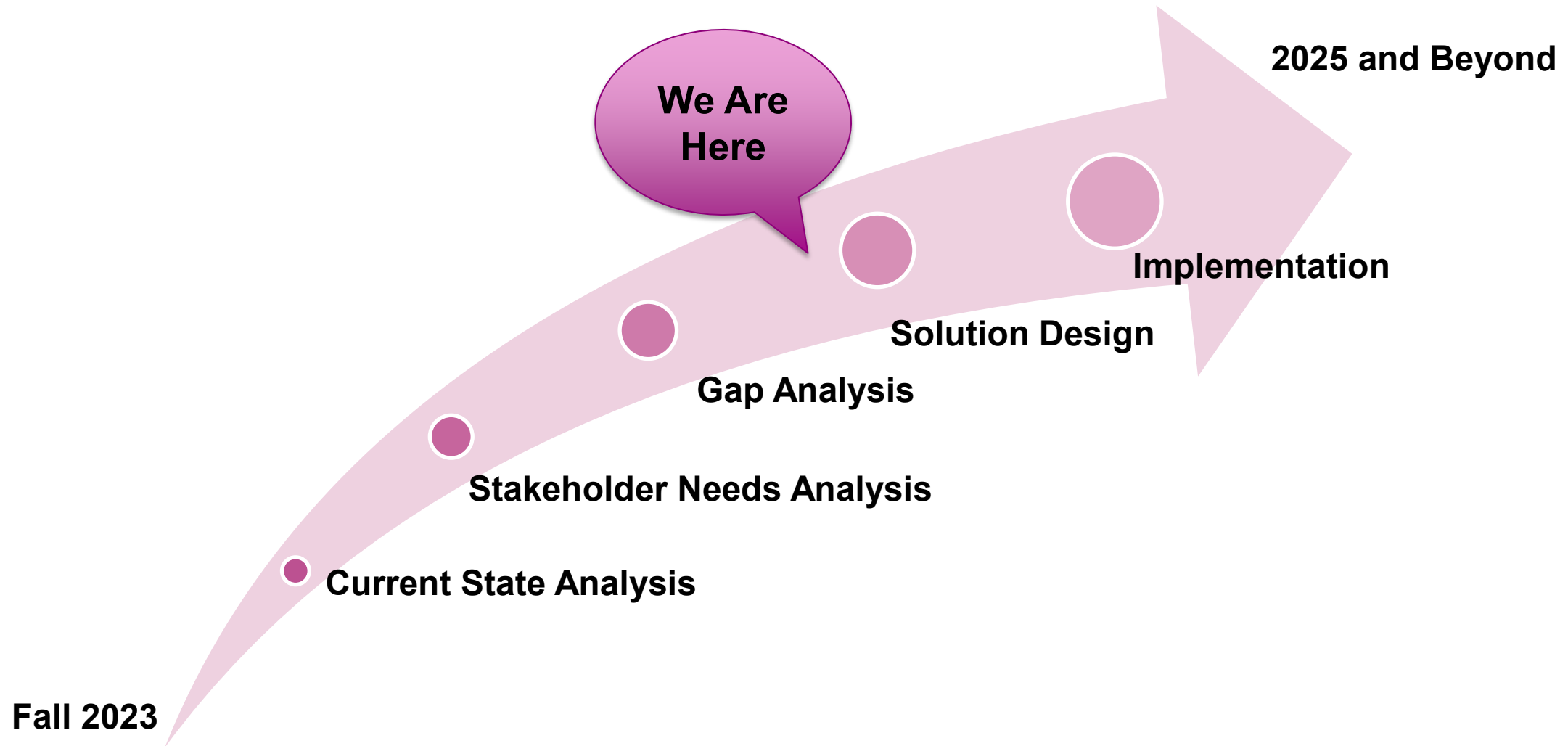
PROJECT EXPLORER

Rebuilding the foundation of our beverage alcohol business, resetting the "source to retail" model to better serve the Manitoba consumer.



People, Processes, and Tools

PROJECT EXPLORER PHASES



LOOKING AHEAD



Challenges

- Long term consumer behaviors
- Economic trade winds
- Global Supply Chain
- Extreme Weather



Opportunities

- Price, convenience & selection
- New store development
- Supply chain enhancements
- Omni-channel retailing
- Environmental Sustainability
- Diversity, Equity & Inclusion



MONICA MANAIGRE

Board Director
Special Olympics Manitoba



Mission

Special Olympics Manitoba is dedicated to enriching the lives of Manitobans with an intellectual disability through sport.



**Special
Olympics**
Manitoba



About Us

1298 athletes

396 volunteers

105 weekly programs

20 communities across Manitoba



The Winnipeg Wine Festival is the largest fundraiser in support of Special Olympics Manitoba.

Since its inception, the WWF has raised over 3 million dollars for our athletes across the province. We are extremely grateful for the generosity of this industry and the exceptional impact you have on our community.

TRADE SHOW



MARKETING



**RETAIL &
PRODUCT
EDUCATION**



**COMMERCIAL
RETAIL
PARTNERS**



SUPPLY CHAIN

ENJOY THE JANUARY 2024 WINNIPEG WINE FESTIVAL!



Scan the QR code to be taken to the
presentation link on MBLPartners.ca
(Will be live at noon today)