

MBLL 2026 INDUSTRY LUNCH & LEARN

September 25, 2026 – RBC Convention Centre



TODAY'S PROGRAM



Introduction & Land Acknowledgement

Greg Paseshnik, Director – Programming & Partnerships

Marketing & Communications Update

Danielle Rice, Vice President – Marketing and Communications

Business Update

Robert Holmberg, Executive Vice President - Liquor & Cannabis Operations

Special Olympics Manitoba

Rachel Wheatley, CEO, Special Olympics MB.

Special Olympics Manitoba

Mallory Cordingley

Adell Gauthier

Manitoba Liquor and Lotteries

Gillian Bourroughs

Peter Wilk

Matt Gilbert

Paul Rogers

Industry Partners

Fredrik Bergstrom – Bergstrom Brands

Krista Jenkinson – Dandurand Group

Wendy Kolsun – Prestige Beverage
Group

Alisa Lacroix – WETT Sales

WINNIPEG WINE FESTIVAL 2026 ORGANIZING COMMITTEE



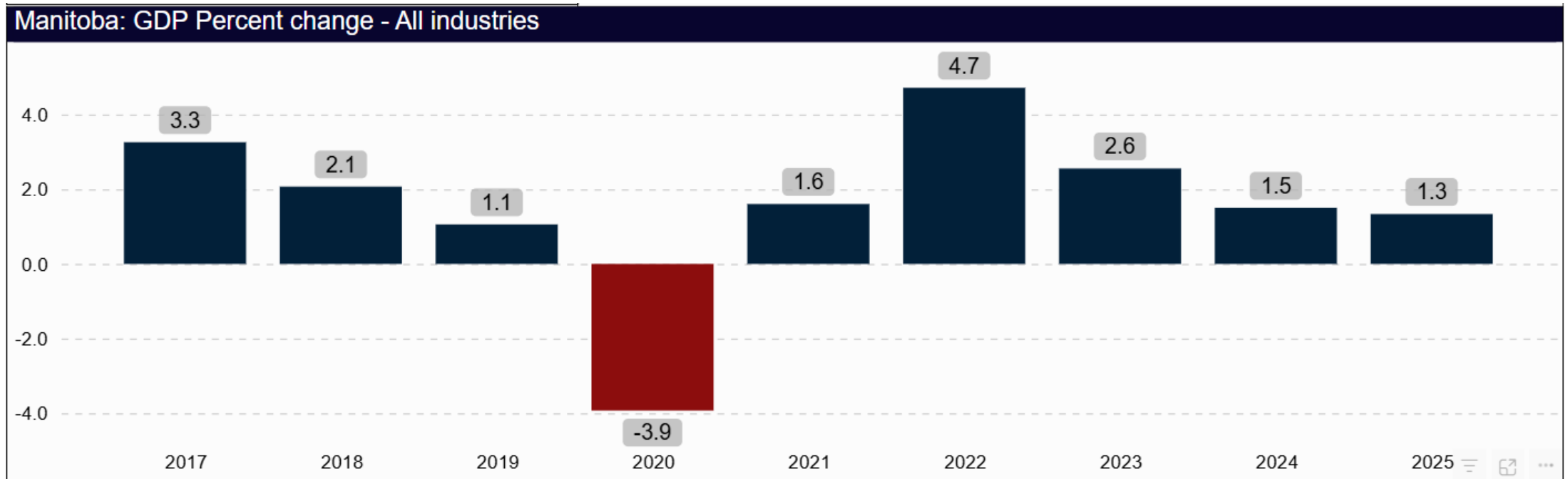
DANIELLE RICE

Vice President, Marketing & Communications
Manitoba Liquor & Lotteries



ECONOMY

MANITOBA ECONOMY

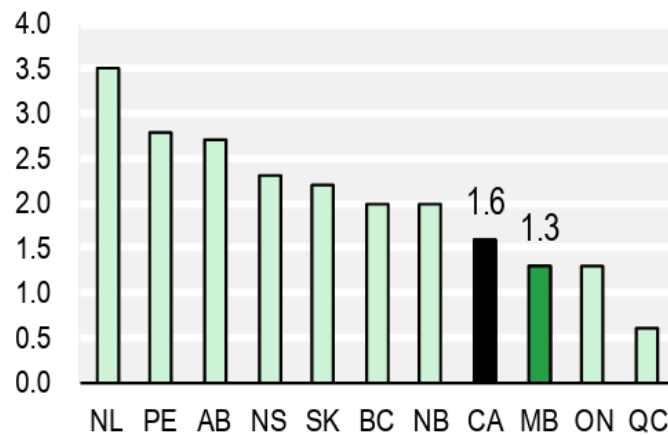


Source: Statistic Canada Gross Domestic Product by industry and provinces (January 15, 2026)- <https://www150.statcan.gc.ca/n1/pub/71-607-x/71-607-x2019024-eng.htm>

MANITOBA ECONOMY

Real Gross Domestic Product, 2025

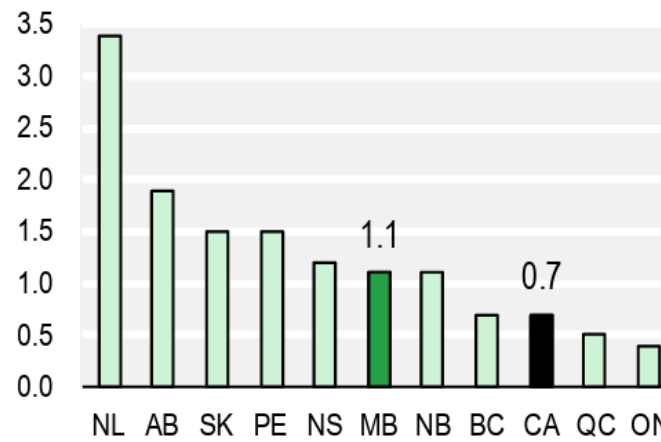
Year-over-year average change (%)



Source: Statistics Canada

Real Gross Domestic Product, 2026f

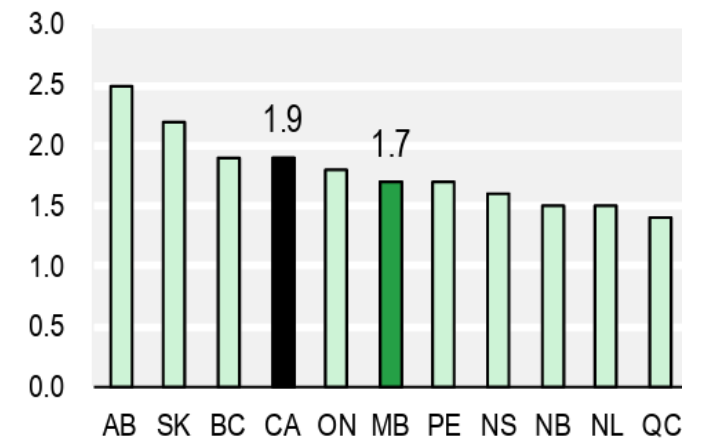
Year-over-year average change (%)



Source: Manitoba Finance Survey of Economic Forecasts

Real Gross Domestic Product, 2027f

Year-over-year average change (%)



Source: Manitoba Finance Survey of Economic Forecasts

GDP final for 2025 is 1.3% and forecasted at 1.1% for 2026. Forecast for 2027 is better at 1.7%.

MANITOBA ECONOMY



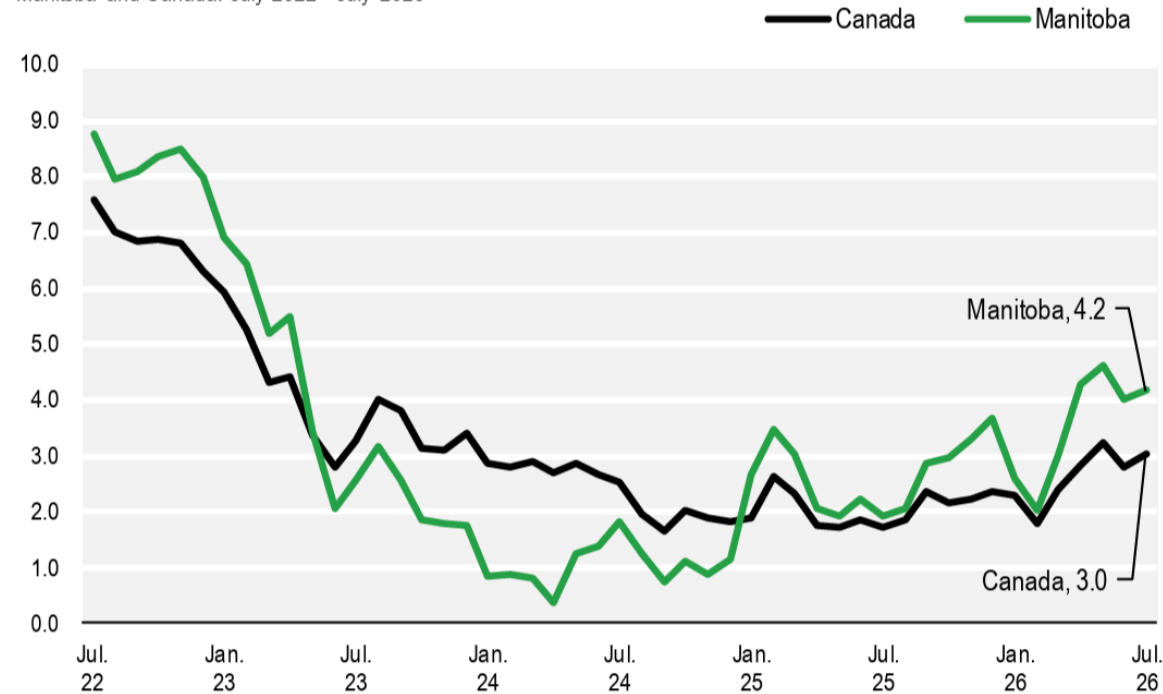
Overall, Manitoba's economy is starting to feel the pressure of increased CPI. Year over year, CPI has increased from 2.2%, persons employed is flat, causing unemployment to increase from 5.0% in April.

Source: Manitoba Bureau of Statistics - <https://www.gov.mb.ca/mbs/index.html>

MANITOBA ECONOMY

Consumer Price Index (CPI), 12-month change (%)

Manitoba and Canada: July 2022 - July 2026



Source: Statistics Canada, Table: 18-10-0004-01

Inflation is up year over year and accelerating again in Manitoba. In comparison, Canada's CPI has also increased but not nearly at the same rate.

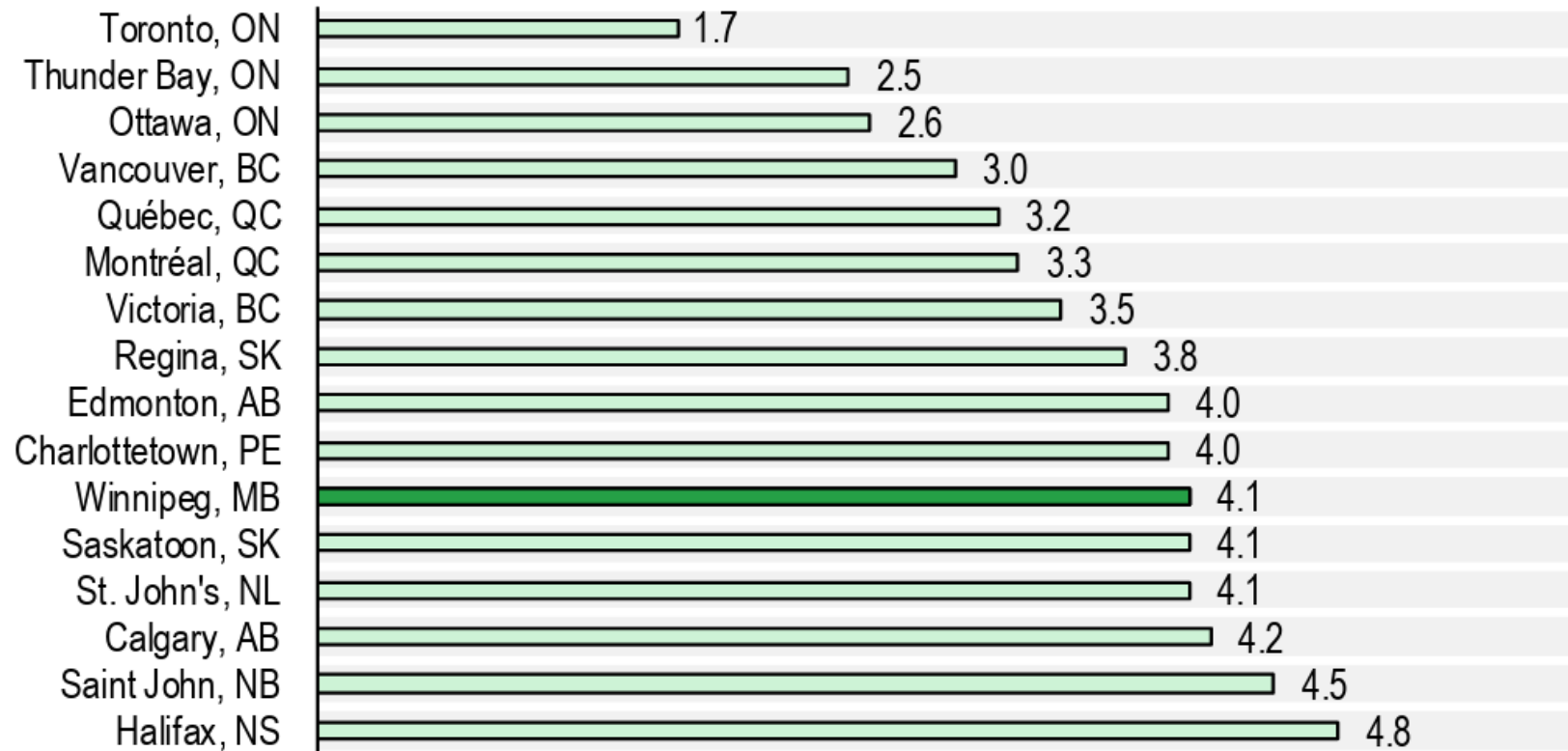
Source: Manitoba Bureau of Statistics - <https://www.gov.mb.ca/mbs/index.html>

MANITOBA ECONOMY



CPI, by city (CMA), 12-month change (%)

July 2025 - July 2026



Source: Statistics Canada, Table: 18-10-0004-01

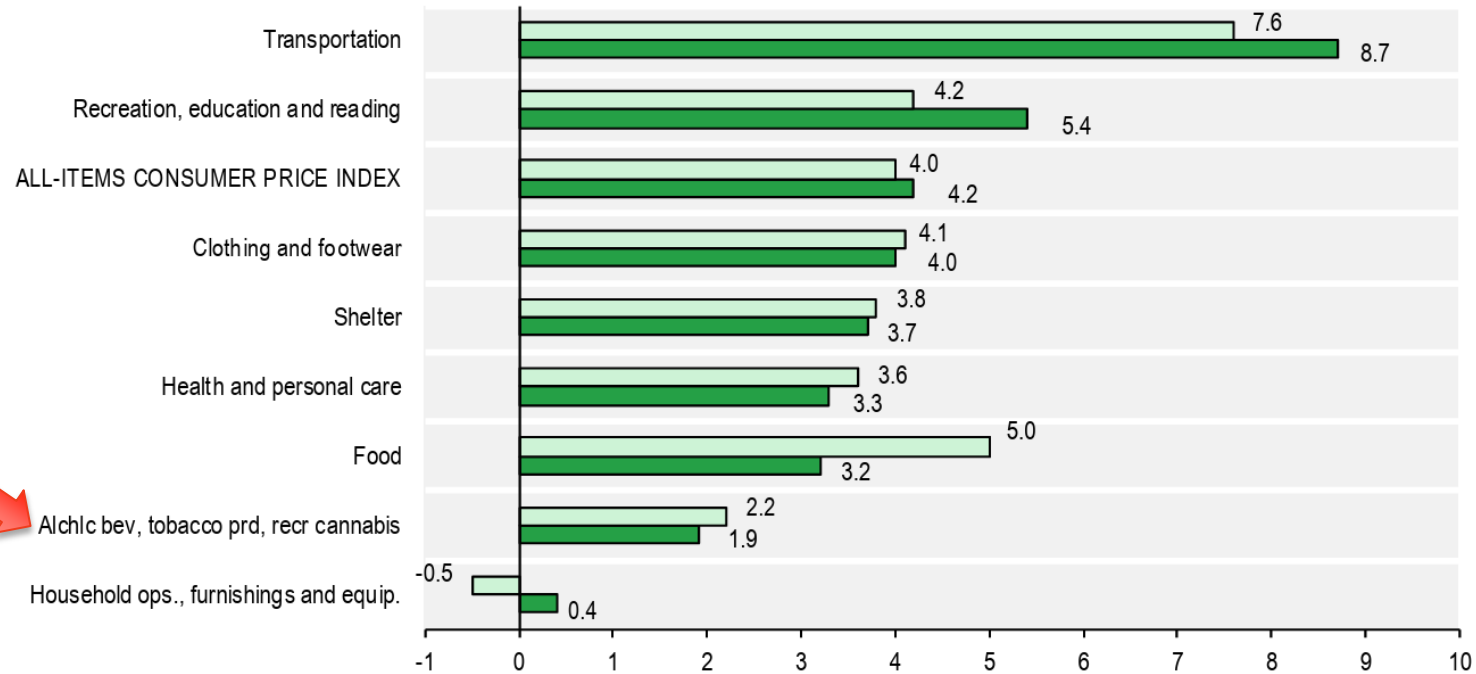
MANITOBA ECONOMY

Manitoba CPI, by major components, 12-month change (%)

July 2025 - July 2026

Jun26/Jun25

Jul26/Jul25

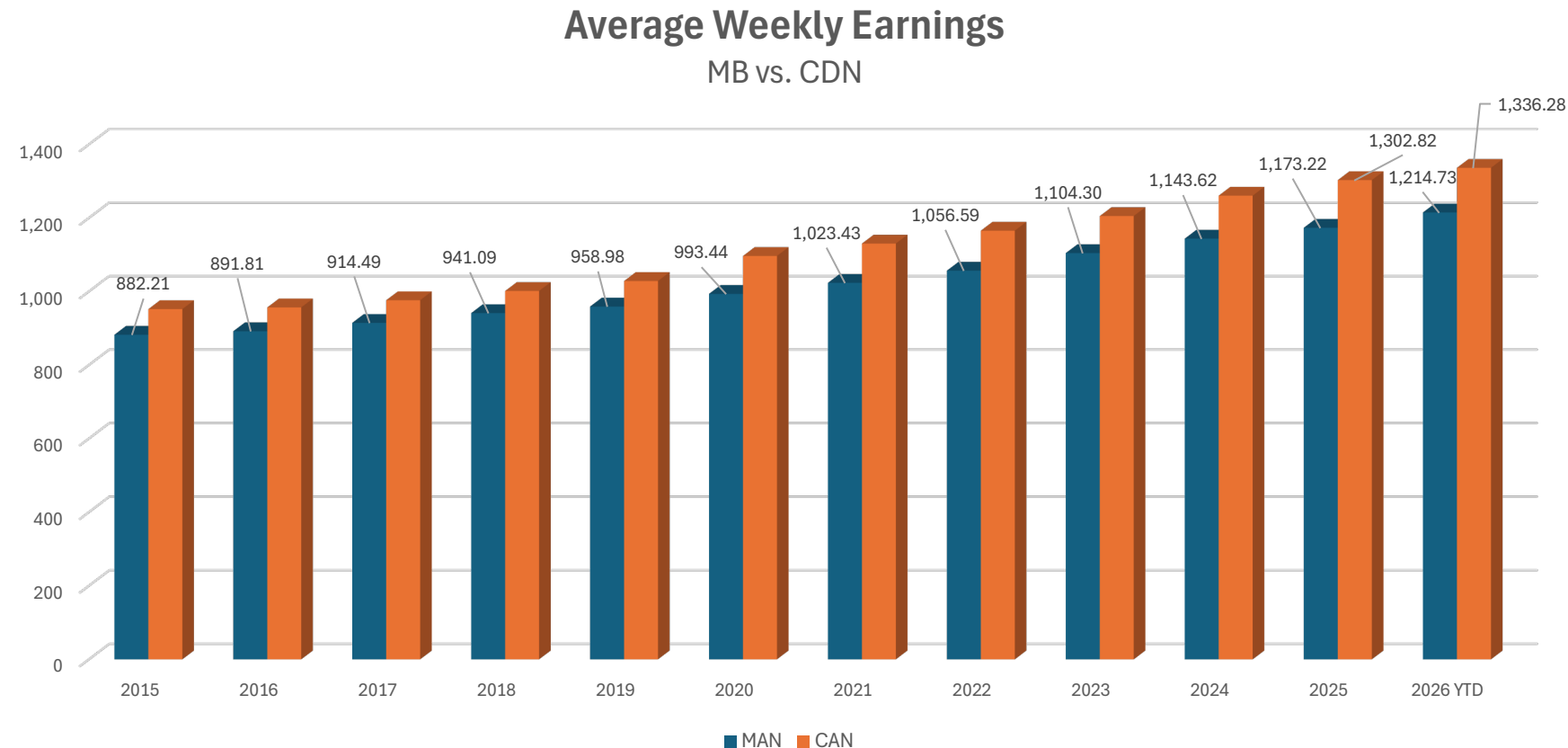


Source: Statistics Canada, Table: 18-10-0004-01

Increase in transportation costs is the main driver behind the increases, Manitoba leads all provinces with an 8.7% increase year-over-year.

Source: Manitoba Bureau of Statistics - <https://www.gov.mb.ca/mbs/index.html>

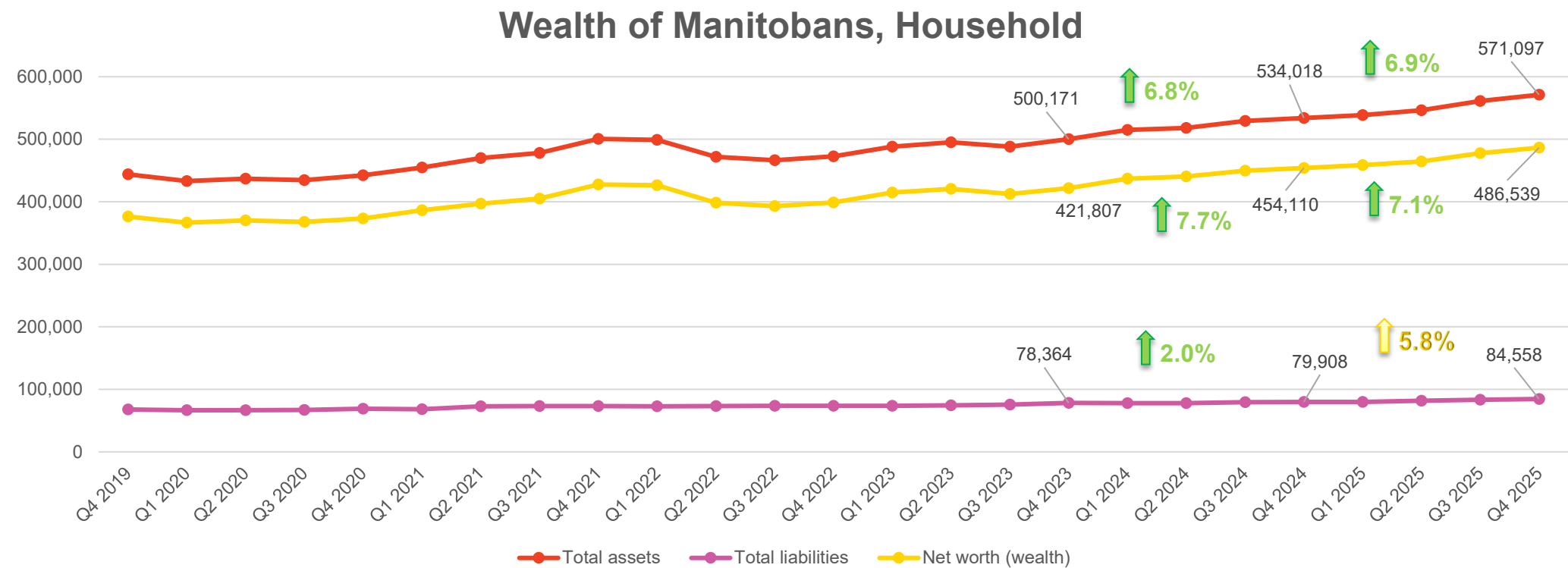
MANITOBA ECONOMY



Manitoban’s weekly income has grown 3.5% year over year in 2026 so far. This is above the 2.6% increase in 2025.

Source: Prepared by the Manitoba Bureau of Statistics, adapted from Statistics Canada, tables 14-10-0203-01 & 14-10-0204-01, April 27, 2026

DISCRETIONARY INCOME



Average household net worth levels have continued to increased by 7.1% year over year

Source: Statistics Canada. Table 36-10-0661-01 Distributions of household economic accounts, wealth, Canada, regions and provinces, quarterly

THE ELEPHANT IN THE ROOM





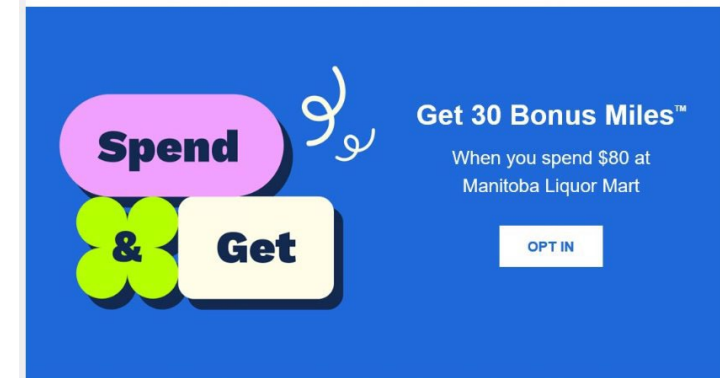
THISCLOSE

LIQUOR MARKETING



LOYALTY PROGRAM

- No longer available (as of June 1)
 - Targeted CRM program
 - Emailable collectors – approx. 280k
 - Customer segmentation
 - Category /Basket analysis
 - Programming alternative
 - Occasion/ Event promotions



PROGRAMMING TRENDS YTD

- Programming drives growth:
 - F26 saw \$188M in sales and a +4.5% growth, despite overall sales declining 2%
- Programming matters:
 - Influences 41% of revenue and offers growth opportunity



MARKETING PROGRAM GUIDE

- Save the Date for Fiscal 2027-28 Release
- October 20, 2026 at the Club Regent Event Centre



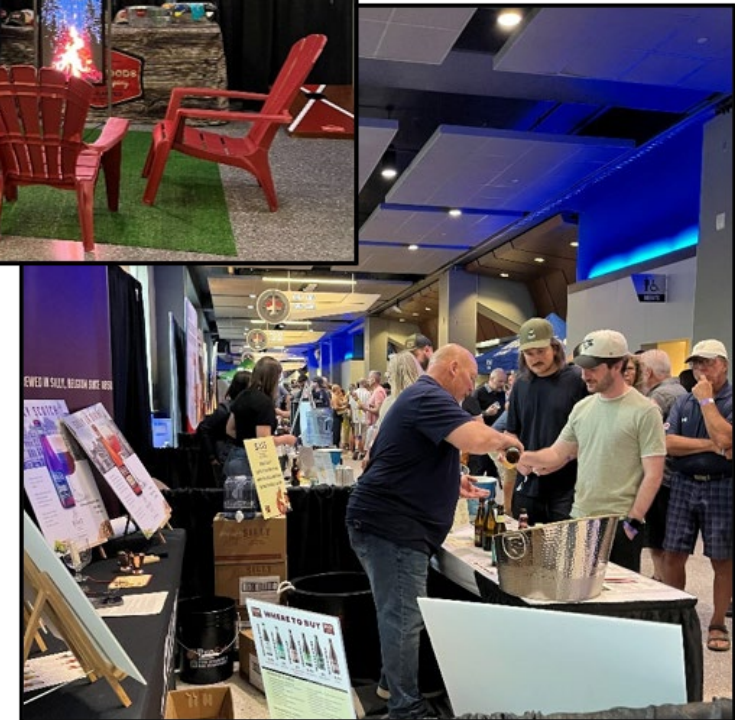
WINNIPEG WHISKY FESTIVAL

- Largest festival to date
 - 72 booths
- Record attendance
 - ~900 attendees
- Curated product selection
 - 327 products
 - 130 exclusives including 19 VIP luxury selections
- LM sales
 - ~\$87K, 688 units



FLATLANDERS BEER & BEVERAGE FESTIVAL

- 2 in 1 festival continues to shine highlighting both beers & RTD's segmented on different levels
- 103 booths
- Record product selection
 - 527 samples
- Record attendance
 - 3770 tickets sold
 - +3% YOY



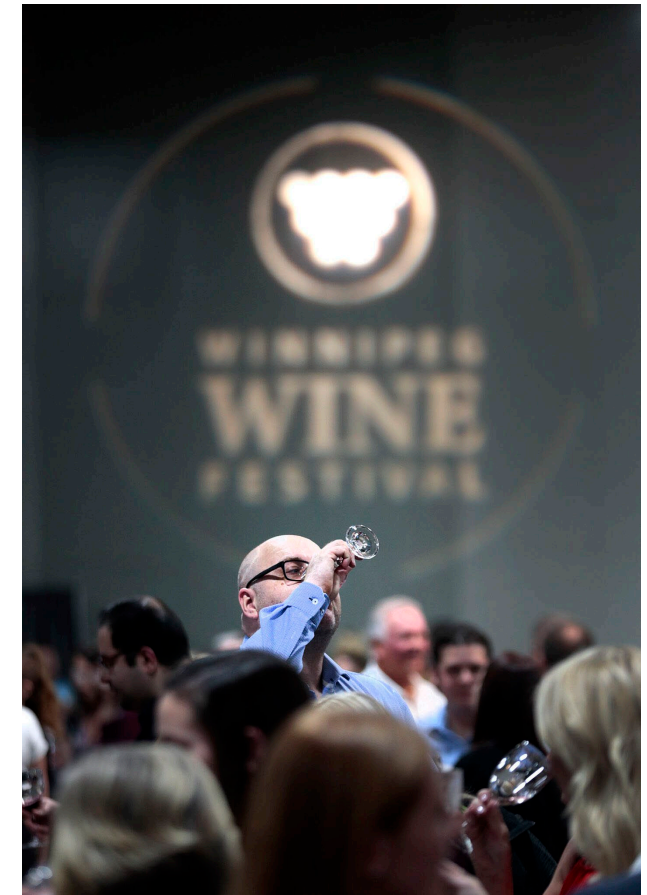
WINNIPEG WINE FESTIVAL – LOOKING AHEAD

2026:

- 102 booths
- 4 market booths & 4 activations
- VIP returns for Friday and Saturday evenings

FUTURE:

- Strategic planning meetings in November & December to help reimagine the festival



MBLL IMPACT IN THE COMMUNITY



- 405 not-for-profit & charitable organizations sponsored
 - +\$4.6million dollairs.
- Customers donated nearly \$150,000 for 12 charitable organizations through coin boxes at Liquor Marts & Casinos of Winnipeg
- Employees contributed nearly \$65,000 through payroll deduction to charities of their interest through our Annual Workplace Giving campaign
- **Overall, 434 organizations were supported through MBLL's funding, employee and customer contributions**



ROBERT HOLMBERG

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

SINCE WE LAST MET



- MBLL continued to collaborate with the MPWSA to support our valued Specialty Wine Store business partners; the new Consignment program was launched and refined, and various operational enhancements were delivered for wine store operators.
- MBLL introduced a new single harmonized pricing model, in doing so, moved away from requiring suppliers to be familiar with the complexities of navigating two pricing calculators.
- Existing inventory of American products were returned to shelf in December and Last Chance discounts were used in May to advance sales of several wine SKUs prior to expiry. MBLL is evaluating necessary next steps on the small quantity of remaining USA inventory.
- Westport Liquor Mart – A new development on the west side of Winnipeg near the Costco site, which is planned to be the first full-sized Liquor Mart since the opening of Seasons of Tuxedo in 2019.
- Container Deposits were added to RTD products; this improved the container deposit program and addressed long standing feedback from public customers and hotel beer vendors.

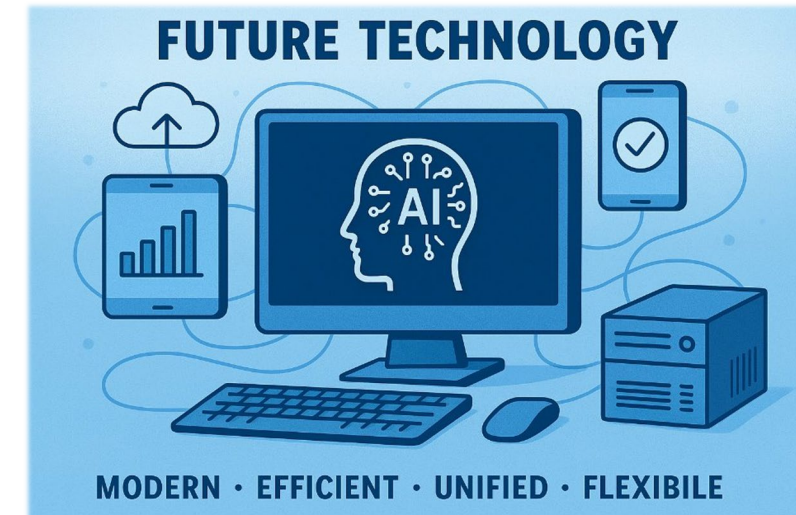
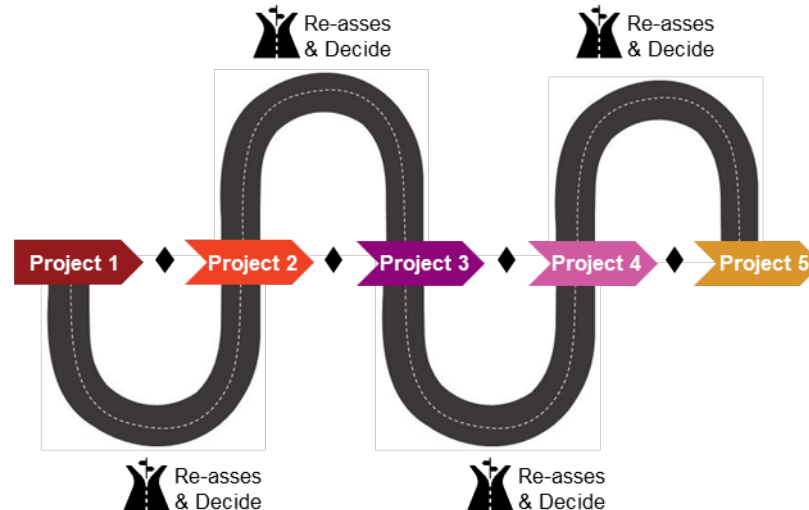
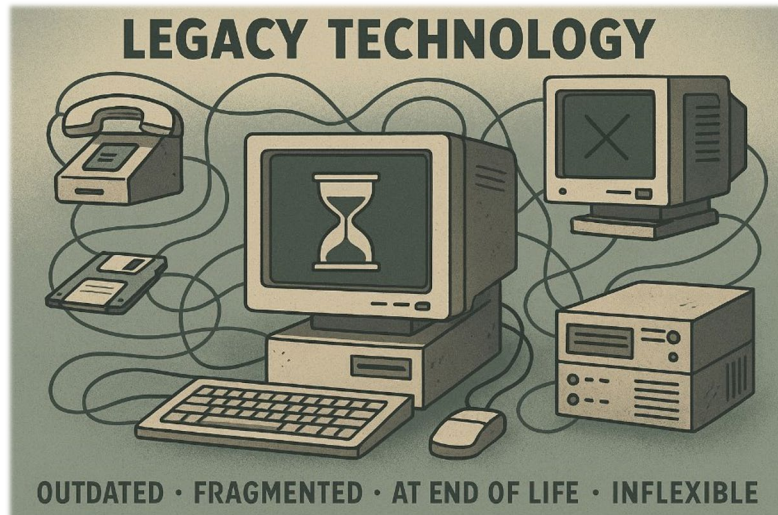
SINCE WE LAST MET - LIQUOR MART KIOSK



- Launched a new format store.
- The Liquor Mart Kiosk was introduced in August 2026.
- The Kiosk is embedded in the shopping floor of the Save On Foods at Northgate.
- 580 sq feet and 240 top selling SKUs.
- Selection of local craft products proudly on display.
- This concept allows for impulse purchases and offers a more convenient experience than the LMX model.

ESMR AND ESMR FOUNDATION

- The Essential Systems Modernization Roadmap (ESMR) is MBLL's multiyear plan to modernize our technology and ways of working.
- Work is already underway with ESMR Foundation: Finance & Supply Chain



FULFILLING OUR VISION

Our goal to **modernize our core technology** will allow us to **provide a positive impact to Manitoba.**



Optimizing business operations reliably, efficiently and securely.



Enhancing the customer and partner experience while being a **great place to work.**



Introducing industry best practices and modern technology with sustainable support models.



Meeting Manitobans' changing needs by quickly adapting business processes.

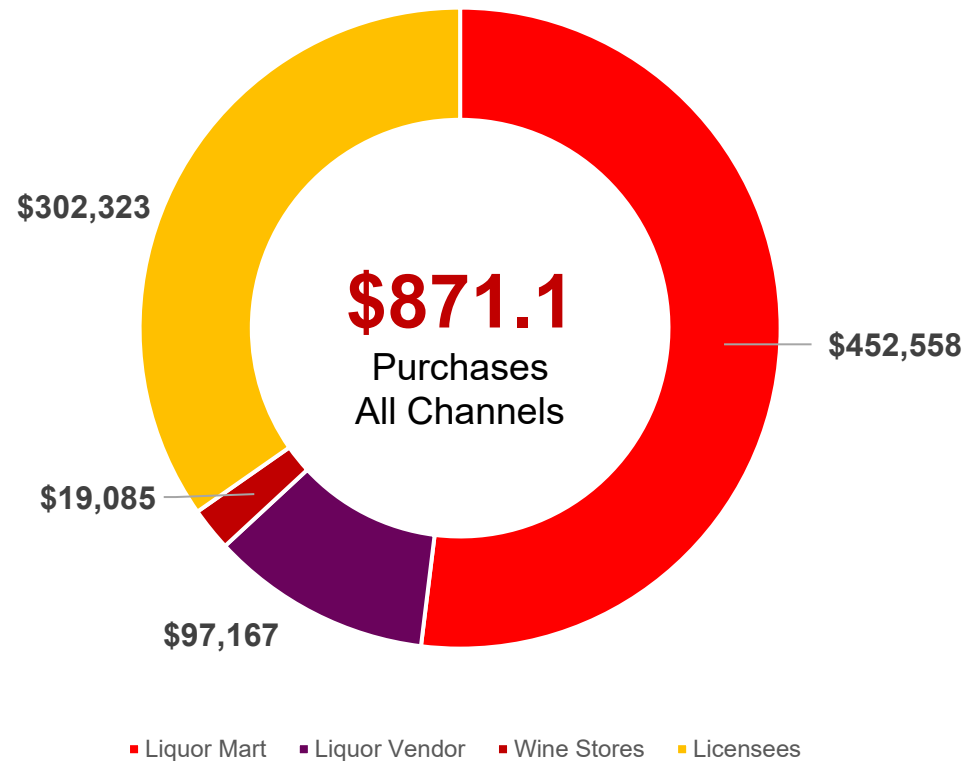


OUR BUSINESS TODAY

Divisional Performance & Category Trends

F26 LIQUOR RESULTS

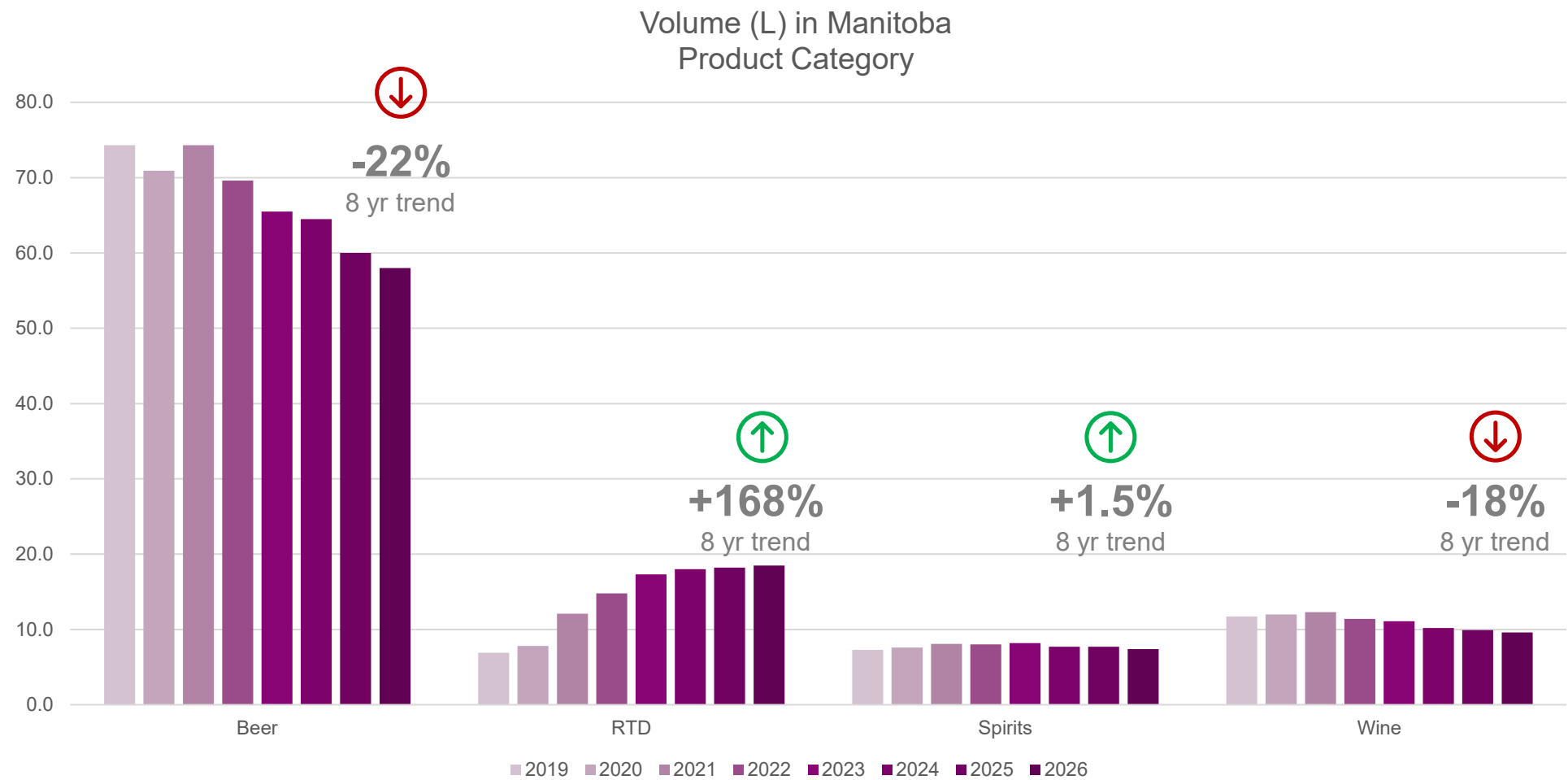
F26 Liquor Purchases by Channel



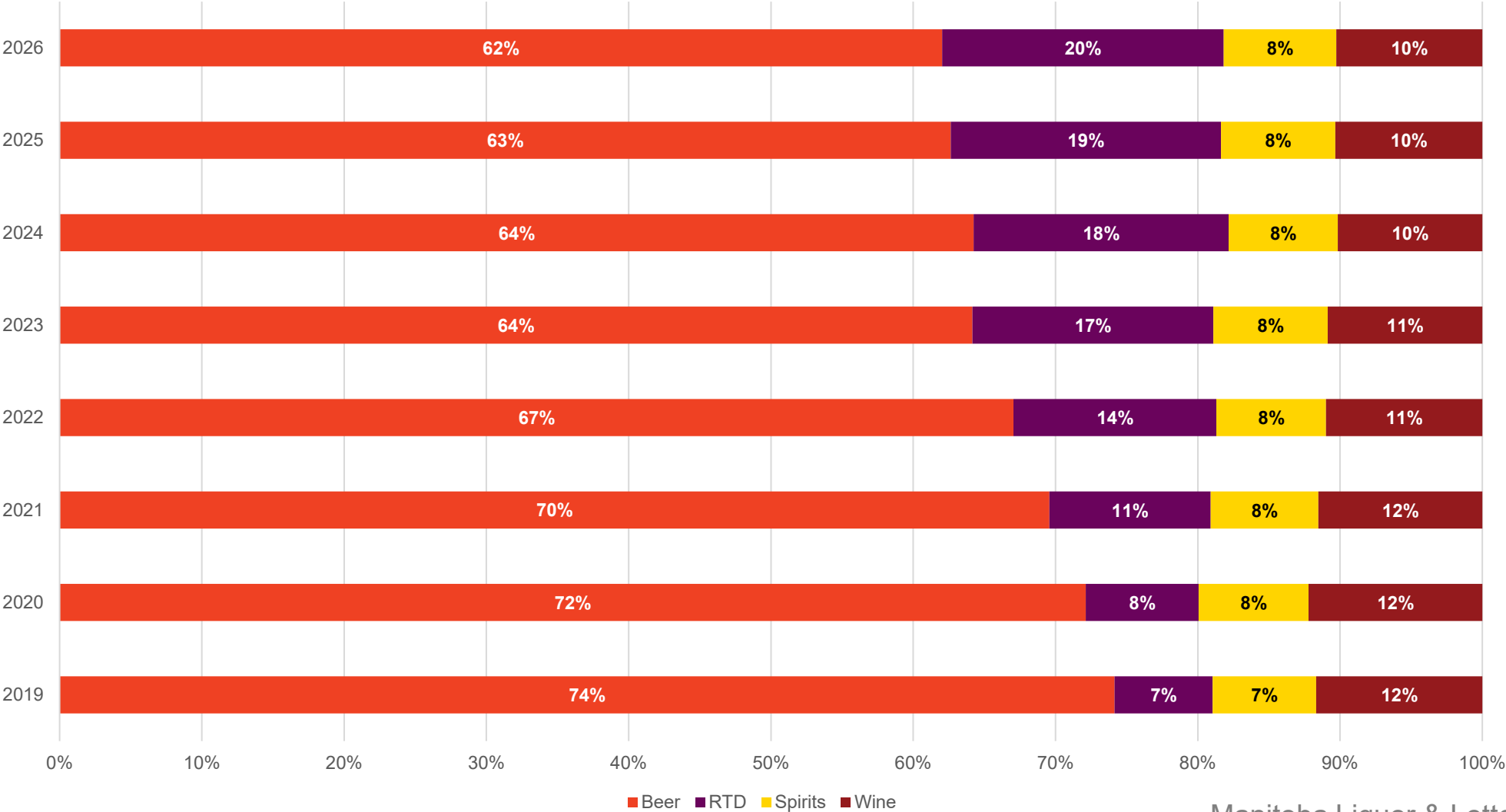
Annual Liquor Purchases by Retail Channel:

- In F26, the 63 publicly-run Liquor Marts, 400 private liquor locations, and 1,000+ licensees purchased or sold **\$871.1M**.
- The allocation of purchases by channel was:
 - Liquor Marts = 52% of Purchases/Sales
 - Licensees = 35% of Purchases
 - Liquor Vendors = 11% of Purchases
 - Specialty Wine Stores = 2% of Purchases
- For private retailers, not all items purchased from MBLL during F26 were sold to customers in that year.

CATEGORY TRENDS - VOLUME



CATEGORY TRENDS – SHARE OF VOLUME SALES

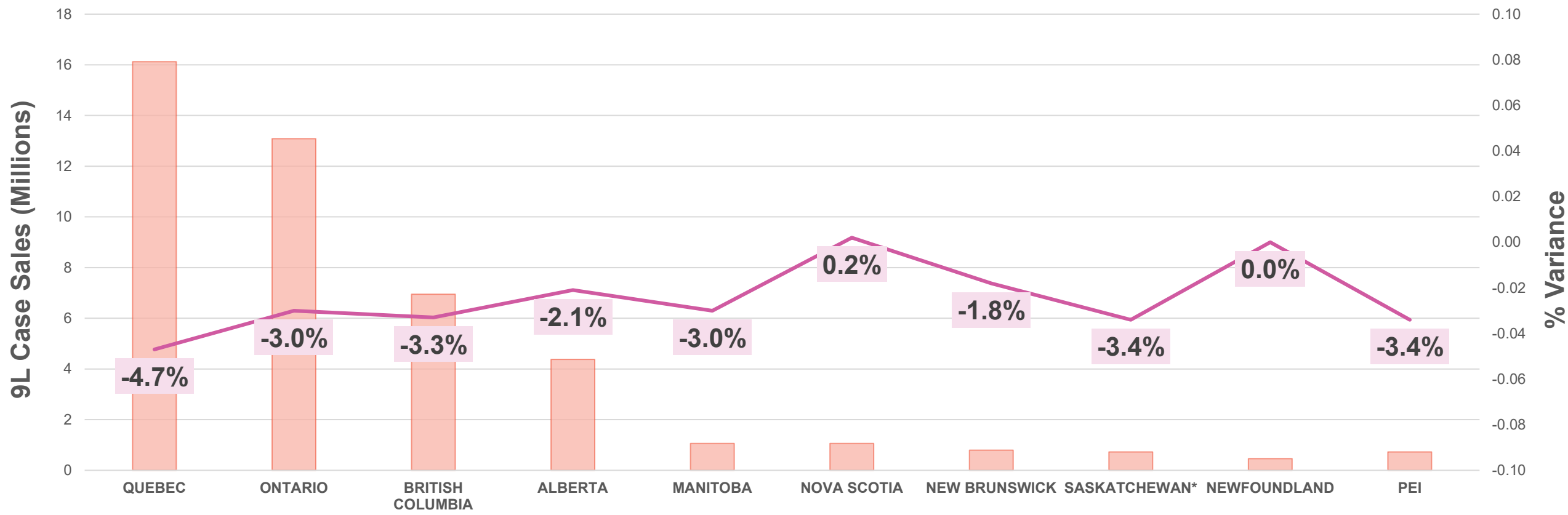


NATIONAL WINE TRENDS – 2026 VS 2025



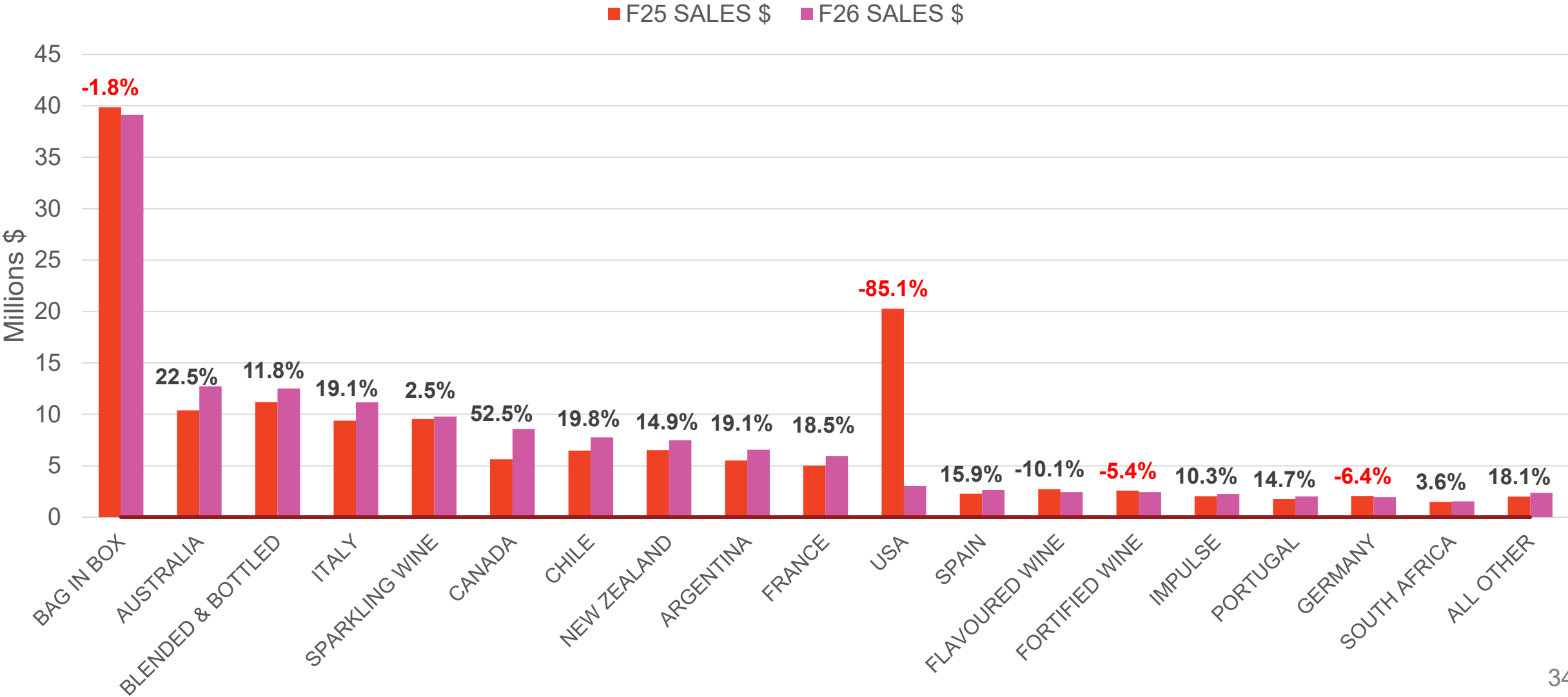
9L Case Sales and Trend

9L Cases % Change



*Sources: Manitoba: Manthan R12 May 2026, Other: ACD R12 May 2026 *(SK is R12 2025)

MB \$ SALES BY SHELF GROUP





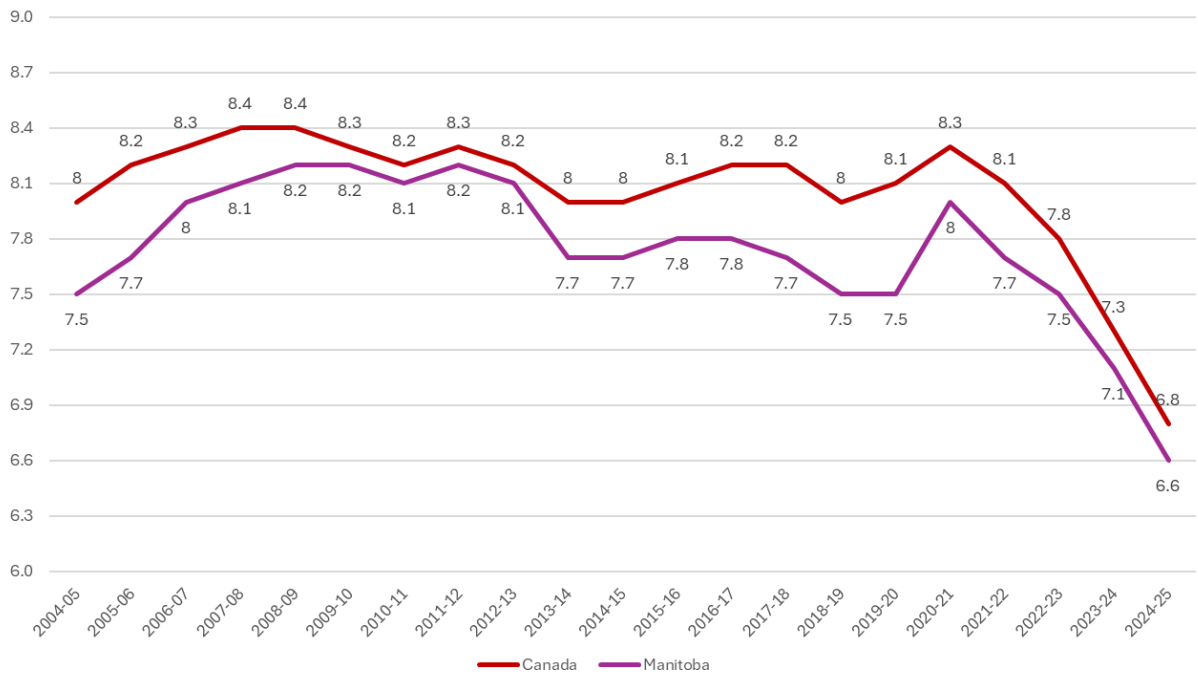
TRENDS WE ARE WATCHING

Consumption, Health & Wellness

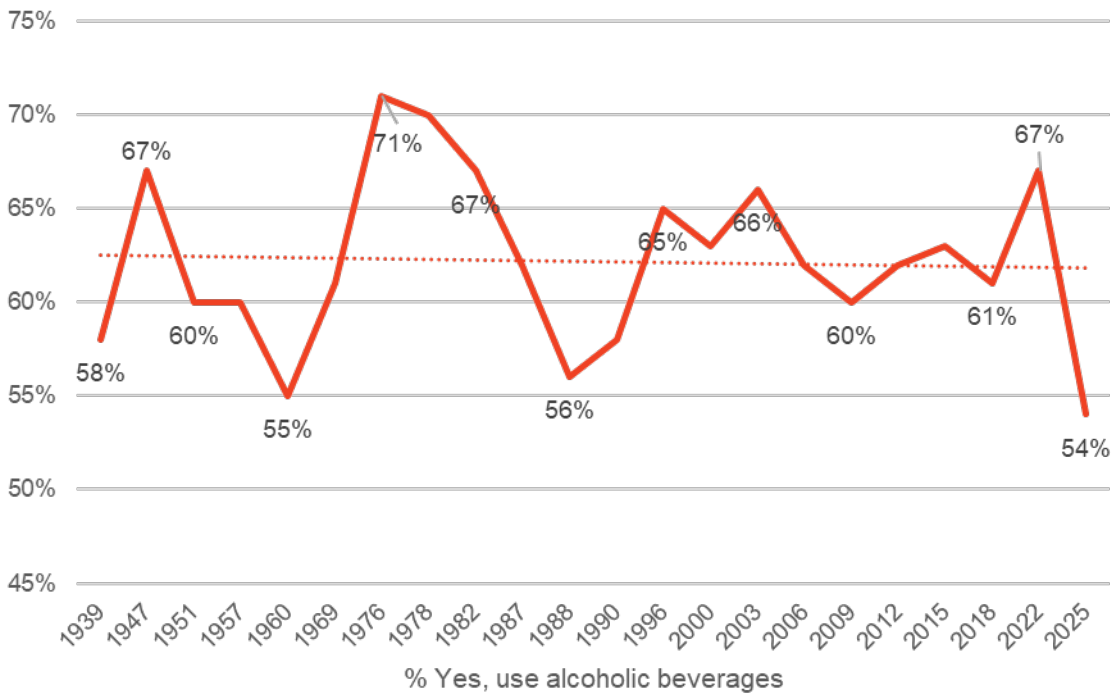
NORTH AMERICAN CONSUMPTION IS DECLINING

Liquor volume sales per capita in Canada continue to decline; USA similar.

Absolute Volume (L) Sales per Capita



American's Use of Alcoholic Beverages (self-reported)



HEALTH, WELLNESS AND MODERATION



Drinking in Moderation

- From outright abstinence to Dry January, Dry February, Sober October, moderation is reshaping the alcohol landscape.

Canada's Evolving Demographic Landscape

- Many new Canadians come from cultures where alcohol consumption is moderate or avoided altogether for religious or cultural reasons.
- The traditional post-work beer may be lost.

Weight Loss Drugs

- Prescriptions for Ozempic and similar drugs (GLP-1) have skyrocketed impacting alcohol consumption and other compulsive behaviors.

Generational Impacts

- Every generation has different relationships with alcohol and varying consumption rates; GEN Z is not to blame for current results but are consuming differently (lower volume, higher cost).



HEADWINDS

Facing & Navigating the Headwinds

FACING THE HEADWINDS.

Together.

The landscape is changing.
The winds around us are real.
But by **working together**,
we can navigate forward and
create opportunity for Manitoba.



Health & Wellness
and Moderation



Changing
Demographics



Declining
Consumption



Economic Pressure &
Discretionary Income



Generational
Change



Tariffs &
Uncertainty



SUPPLIERS

Bringing great products
and insights to market.

—
STRONG PARTNERSHIPS.



AGENTS

Connecting products
with customers and
opportunities.

—
VALUED CONNECTIONS.



MBLL

Leading with purpose,
adapting with focus.

—
ONE TEAM. ONE PURPOSE.



LOCAL PRODUCERS

Crafting quality products
that Manitobans value.

—
SUPPORTING LOCAL.



LOCAL RETAILERS & LICENSEES

Connecting products to
customers across Manitoba.

—
SERVING OUR COMMUNITIES.

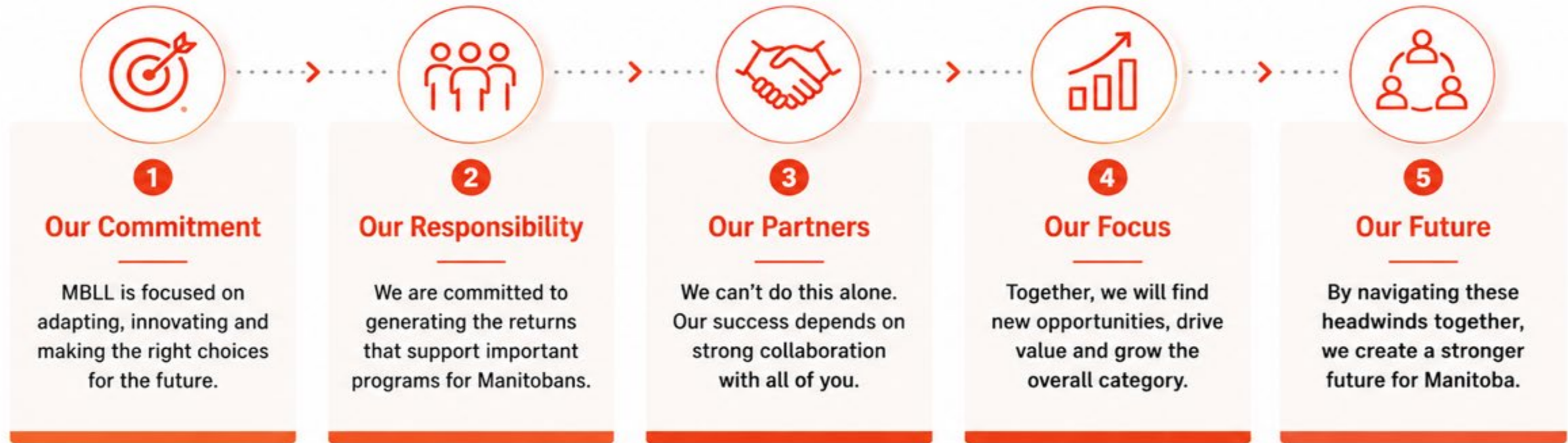


TOGETHER, WE CAN TURN **HEADWINDS** INTO **TAILWINDS**.

NAVIGATING THE HEADWINDS.

The landscape is evolving and the challenges are real.

MBLL has a responsibility to act – and we're doing just that.



Change brings challenges. Collaboration brings solutions.
Together, we can turn headwinds into tailwinds.

OUR STRATEGIC APPROACH



- Our new multi-year strategic plan for the liquor & cannabis lines of business leverages four key Objectives that will guide our decisions.
- **Goals** = Sustain & Grow sales, Support Our Partners, Modernize the future.

Objective 1

Drive Sales Growth

- Focus on creating customer excitement
- Drive LDA shoppers to liquor retailers in MB
- Create reasons for shoppers to grow their basket sizes.
- Build on in-store sampling programs.

Objective 2

Reliable Infrastructure

- Continue to ensure customer facing and back-office systems are reliable.
- Reduce risk of system downtime.
- Seek opportunities to modernize where possible.

Objective 3

Commercial Growth

- Create programs that can help our commercial retail partners grow sales.
- Supplier events, education, trending product awareness.
- Enhance commercial ordering processes.

Objective 4

Modernization

- Seek opportunities to modernize our retail experiences.
- Evaluate eCommerce, enhanced home delivery.
- Store renovations and new store development.



HOW CAN YOU CONTRIBUTE

Partner with us to achieve success

GIVE MANITOBANS A REASON TO VISIT

OUR PARTNERSHIP. MORE **TRANSACTIONS**. STRONGER TOGETHER.



In a changing market, we need to work together to get customers off their couches and into our Liquor Marts. Our goal is simple: build **transactions**.



CREATE EXCITEMENT

Give customers something new, interesting and compelling enough to **make the trip** to Liquor Mart.



BRING US YOUR BEST IDEAS

Share **what's working** in other markets—products, experiences, activations and trends that can translate to Manitoba.



HELP CUSTOMERS DISCOVER

Use sampling, education, storytelling, events and experiences to turn curiosity into **store visits and purchases**.



BUILD OCCASIONS, NOT JUST PRODUCTS

Help us connect products to occasions and experiences that give customers a **reason to shop**.



MEASURE SUCCESS TOGETHER

Ultimately, we need to understand whether our collective efforts are driving **more transactions**, stronger baskets and sustainable category growth.



OUR SHARED CHALLENGE:

GET CUSTOMERS OFF THE COUCH AND GIVE THEM A REASON TO VISIT.

More visits. More discoveries. More transactions. More growth for all of us.

RACHEL WHEATLEY

CEO
Special Olympics Manitoba





Mission

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



About Us

3,000+ athletes

700+ volunteers

125+ weekly programs

7 regions across Manitoba



**Special
Olympics**
Manitoba



Cole Jarvie

Special Olympics Manitoba Athlete



**Special
Olympics**
Manitoba





**Special
Olympics**
Manitoba



**Thank you for
supporting us!**

ENJOY THE 2026 WINNIPEG WINE FESTIVAL!