

Great Western Brewing Company

Growth for the company: Should the emphasis be on “Great” or “Western”?

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Introduction

Mike Micovcin was constantly thinking about strategy for Great Western Brewing Company (GW). As the President and CEO, it was up to him to ensure the continued success of the business and he loved the challenge. He had joined the company in 2009 after moving to Saskatoon, Saskatchewan in Western Canada from Eastern Canada. He was previously involved in strategic planning with Coca-Cola; he had over fifteen years of experience with that company. Before GW, he spent five years in marketing with Kraft. His MBA from McGill University assisted with his marketing and strategic knowledge.

2014 had brought on new challenges and now at the start of 2015, Micovcin found himself trying to steer the company through an overall decline in the beer industry. He was wondering if it was due to the millennials, who grew up in a world of Starbucks and had sweeter taste preferences such as cocktails. It was predicted that in the United States market, wine was about to outpace beer for the first time in history. It also appeared that loyalty in beer was gone, or at least declining. Market research had shown that in the Canadian prairies (the provinces of Alberta, Saskatchewan, and Manitoba), only 9% of the market was loyal to a single brand and that users preferred different beer types by occasion. Consumer trends were also geared more towards healthy options and beer didn't always fit in. In addition, there was the "Vanishing Middle" - consumers were either trading up or trading down and beer brands in the middle were getting squeezed. This bode well for GW's Original 16 premier brand, and the affordable Brewhouse brand, but the flagship Great Western line was stagnating.

As a response to the consumer trends, including the public's desire to purchase local, and leveraging GW's strong Saskatchewan roots, GW had started a new campaign in 2014 highlighting that Great Western brew lines were made of only Saskatchewan barley. In addition, Micovcin had started downsizing the company five years previously in terms of volume and this had proven to be profitable.

Going forward, Micovcin wondered how to steer the company's brands in the face of continually changing consumer trends. He wanted to leverage the strengths of the company and further capture brand loyalty.

Beer in Canada

Long before Confederation in 1867 breweries had been established in Canada, with the first Canadian brewery built in 1668 ^[1]. Over the years, beer continued to be the most popular alcoholic beverage in the country, accounting for roughly eight percent of all household spending on food and beverages ^[2] in 2013.

Growing Competition

The Canadian brewery industry was considered to be a mature industry, characterized by high concentration and high levels of competition. From 2009 to 2014, the industry actually experienced a decline, with a negative annual growth rate of -2.6%. Projections for the proceeding five years were slightly healthier, with a positive yet minimal growth rate of 0.4% anticipated for 2014 to 2019. The quantity of breweries was expected to expand as well, at a 1.7% annualized rate by 2019, resulting in a total of 357 companies. Two major breweries

largely dominated the Canadian industry: Anheuser-Busch In-Bev (AB InBev), and Molson Coors with 50.3% and 41.4% of market-share, respectively. AB InBev was the primary operator in the Canadian Breweries industry managing six Canadian breweries. It also maintained a strong global presence with an extensive portfolio of popular brands such as Budweiser, Labatt, Beck's, Stella Artois, Alexander Keith's, and Kokanee. Molson Coors operated seven breweries throughout Canada, and sold thirteen brands throughout the country such as Molson Canadian, Coors Light, Rickard's, and Carling. These strong industry players had established distribution systems and access to raw materials. Additionally, brand loyalty across the country was extremely high for beer brands, making it difficult for small companies to advance long-term market share. Also contributing to increased competition had been the rise of the craft-brewing sector in recent years.

By segmenting the beer market into mainstream and craft, it becomes apparent that craft beer had seen strong growth in the preceding years while mainstream brands were facing a decrease in demand ^[3]. There had been an increasing number of microbreweries and brewpubs across the country since the 1980s ^[1]. In 2009 there was only one microbrewery in the province of Saskatchewan - Paddock Wood Brewing Company. By the end of 2014, there were five: Bin Brewing, District Brewing Company, Nokomis Craft Ales, Paddock Wood Brewing Company, and Black Bridge Brewery. In addition, there were 35 brewpubs in the province that brewed and sold their own beer. ¹ These numbers were anticipated to grow as Saskatchewan was behind other Canadian provinces in terms of liquor production due to stringent liquor laws (that were changing from 2012 onwards). While craft beer was growing in popularity, it was more of a sipping beer and resulted in lower consumption.

The terms craft brewery and microbrewery were often used interchangeably, but there were differences. Both indicated a lower volume of production annually. To be a craft brewery, the beer had to have a distinct taste and often a unique method of production. Saskatchewan had a microbrewery limit of 5000 hectolitres, the same as Alberta. As to limits in terms of production for craft beer, this was ambiguous and was still in the process of being determined. This ambiguity was due to the early stage of craft beers. The Brewery Association of Canada indicated a limit of 250,000 hectolitres to be classified as a craft beer. This was substantially less than the United States limit on craft beer of 6 million barrels. A barrel is equivalent to 1.17 hectolitres, resulting in a limit of 7 million hectolitres for craft beer in the American market. Sam Adams (which holds the largest market share in the craft beer segment) produced 7 million hectolitres annually.

Large brewing companies had seen the trend of declining beer sales, but double digit growth in the craft beer category. As a result, several craft breweries were acquired by larger companies.² Examples included Rolling Rock and Shock Top by Anheuser-Busch In-Bev.

The Red Tape – Rules and Regulations

The Constitution of Canada grants provincial and territorial governments the right to govern the wholesaling and distribution of alcohol across Canada. Each of the thirteen major liquor control agencies was put in place to facilitate the sale, legal distribution, retail sale of alcohol within each province and territory; the system had since become an important source of tax revenue

¹ <http://www.cbc.ca/news/canada/saskatchewan/saskatchewan-microbreweries-call-for-revised-liquor-laws-1.2888802>

² <http://www.canadianbusiness.com/lifestyle/the-dirty-dozen/>

for each government. Within this framework, each province or territory was entitled to regulate the industry as it saw fit. Although there had been little change in legislation in the previous five years and the industry was relatively stable due to government controls, producers, wholesalers, and retailers were highly subject to changes in provincial legislation. Importantly, out-of-province shipping fees and bans on interprovincial beer wholesaling were expected to be gradually eased from 2014-2019, a great benefit for small wineries and breweries alike.

Breweries Getting 'Crafty'

Small craft brewers were largely responsible for the rise in industry enterprise numbers and revenue moving forward. These businesses constituted 97.5% of the companies in the brewing industry, but were only responsible for about 14.5% of beer industry revenue. These small craft brewers were not able to take advantage of the economies of scale that large producers could achieve. Craft brewers faced primary competition from imports, primarily from more established US craft brewery counterparts. However, the success of the Canadian craft beer segment and growth due to premiumization had not been able to make up for major companies' declining beer sales. For this reason, craft brewery acquisitions by large firms had become popular in recent years. An example of such an acquisition was Molson acquiring Vancouver favorite, Granville Island Brewing Co., in 2009.

Major Beer Markets

Adults over the age of 19 were legally allowed to consume alcohol in Canada, and the number of Canadian citizens of legal age was expected to increase. The Canadian population as a whole was on the rise, and the total number of adults aged 20 to 64 was increasing along with it. Specifically, males consumed the predominant portion of beer sold in Canada – 79.6% of beer in terms of volume. Men aged 31 to 50 years old, 30.6% of the Canadian population, consumed 48.2% of beer sold domestically in 2014. Moreover, another important age demographic to consider was between the ages of 19 to 30. Although fewer in quantity, men in this age demographic drank *more* beer *more* regularly, consuming 14.9% of beer despite accounting for only 7.8% of the population. Women were estimated to drink only 20.4% of the beer consumed in Canada, although this market had been growing in the preceding five years. Innovative products such as sweeter beers or low-calorie options were marketed towards women as companies strived to appeal to this growing market. Women aged 31 to 50 years were the largest beer-consuming segment, projected to consume an average of 8.4% of beer served in 2014. This was followed closely by women aged 19-30, estimated to consume 7.9% in 2014. Beer marketing efforts typically focused on 18 to 35 year olds, as it was a large market generally viewed as being open to trying new products.

Brewery Locations

Breweries were commonly located nearest their largest consumer markets for their products. This was due to high costs of product transportation. Therefore, brewery establishments were largely concentrated in three provinces with the highest populations: Ontario, British Columbia, and Quebec.

The Changing 'Brew' Consumer Threatening Revenue

Canadian brewers were faced with many changes in consumer preferences such as substitution, premiumization, and an overall decrease in disposable income in recent years. Disposable income growth was an important driver of industry revenue as it boosts consumers' purchasing

power. The recession had caused Canadians' disposable income to substantially decrease for the first time since 1996. This change was actually initially positive for less expensive, value brew brands such as Molson Canadian and Budweiser. However this increase did not last long. Since 2009, there had been a slow but positive 0.7% annualized increase in disposable income yet spending on Canadian beer had declined. It was speculated that poor industry performance and the industry's reluctance to 'bounce-back' was partially due to changes in consumer preferences. Consumer beer demand had shifted from mass-market value products such as Budweiser and Molson Canadian, to more specialty, top-shelf products such as premium, craft beers. This premiumization particularly hurt major brewing companies that depended on high-volume sales to achieve profitability. Canadian breweries also faced the effects of globalization and an increase in consumers purchasing import beers. This trend was encouraged by a strong Canadian dollar at the time, making foreign products relatively less costly than domestics. Finally, substitution was also a concern for the Canadian brewing industry. As Canadians continued to seek out healthy lifestyle choices, beer was often viewed as a less healthful option than wine and spirits.

Increasing Cost of Inputs Threatening Profitability

Manufacturing costs were on the rise in the Canadian brewing industry, with components such as wheat, aluminum, and glass becoming more costly. The worldwide price of wheat represents the average for all grain prices – vital components in the manufacturing of beer. The worldwide price of wheat skyrocketed in 2011 and despite its slight decline in the preceding last two years, it was expected to rise again in 2014, contributing to the industry's decreasing profitability. Additionally, aluminum, another important input material, was also on the rise. The increase in the world price of aluminum lead to higher manufacturing costs for brewers as aluminum cans were used as packaging material. The world price of aluminum was projected to slowly increase, further impeding industry profits. Costs of distribution were also important as some breweries acted as wholesalers. Transportation costs were a concern for such companies, as alcohol was a heavy product to ship. Therefore, gasoline was a significant expense to consider. Largely, distributors were usually able to pass any increase in fuel cost downstream to retailers and customers, however many industry contracts were locked-in to limit fuel price volatility. Crude oil prices had been especially unstable in recent months, and were therefore crucial to consider for future potential opportunities and threats.

The Changing Canadian

People were increasingly seeing beer as less healthy and less exotic than wine and spirits, though Canadians had responded well to craft, light, and premium beers ^[5]. Domestic craft beers were expected to continue to increase in popularity as they appealed to the consumer trends of local involvement and premium pricing ^[4].

The trend of premiumization was hindering major companies like Molson Coors and Anheuser-Busch, as they typically relied on high volume sales at a low cost ^[5]. This shift in consumer preference towards specialty and higher priced beverages led to a growth in the dollar value of liquor sales in Saskatchewan ^[9].

Light and low alcohol beers were also experiencing growth as they were seen to be healthier alternatives. Magazines such as Fitness and Canadian Living had featured articles on the 'best light beers'. These light beers were targeted at consumers who were concerned with managing their alcohol or calorie intake ^[4].

A trend was also developing with beer-based cocktails, which were developed to increase beer sales within brewpubs ^[4]. Though these pubs needed to drive in-store purchases, it is important to note that the Brewers Association of Canada found 80% of Canadian beer consumption took place in the home ^[10].

Rules and Regulations

When marketing any type of alcoholic beverage, strict guidelines must be followed. All advertising had to adhere to the Code for Broadcast Advertising of Alcoholic Beverages, which is shown in Appendix F, with a comprehensive explanation available at www.crtc.gc.ca

In addition, beer prices within Saskatchewan were regulated. The lowest price a case of beer could sell for was, at the time, \$38. In addition, beer prices in Saskatchewan were amongst the highest in North America due to taxes. For example; taxes in Alberta were \$0.40 per litre and \$1.80 per litre in Saskatchewan.

Great Western Brewing Company

The Great Western Brewery was built in Saskatoon, Saskatchewan in 1927 and operated as the Hub City Brewing Company. The company was acquired in 1956 and operated as O'Keefe Brewing until 1989. An amalgamation with Molson Brewing Company would have resulted in a closure. So, in 1989 sixteen employees pooled their resources to purchase the Brewery and formed the Great Western Brewing Company ^[6]. 80% of the funding was provided by the NDP government at that time. GW was not likely to go public as they were debt free. However, the brewhouse was old (built in 1927) and it would cost \$10 million to build a new one.

Shortly after its start Great Western received the Saskatchewan Chamber of Commerce "Business of the Year" award ^[7], and so began its legacy of world-class craftsmanship.

Great Western Brewing Company was one of Canada's most successful regional brewers, one of Canada's 50 Best Managed companies, and an internationally recognized producer of world-class beer ^[6]. The capacity of the brewery was 360 bottles and 480 cans per minute. This equated to 170,000 hectolitres. As a comparison, a microbrewery in Saskatchewan was only allowed to produce up to 5000 hectolitres (500,000 litres).³

The Beer

The Great Western Brewing Company sold a variety of beers, including: Great Western Lager, Great Western Light, Great Western Pilsner, Great Western Pilsner Light, Original 16 Canadian Pale Ale, Original 16 Canadian Copper Ale and Original 16 Krystal. They also sold Brewhouse Pilsner, Brewhouse Light, Brewhouse Prime, Brewhouse Honey Lager, Olympia, and Gold Strong,

³ <https://www.slsa.gov.sk.ca/Prebuilt/Public/Micro%20Brewery%20Policy.pdf>

which had been branded separately from their main product line. Each product was available in cans, bottles, or kegs.

Brewhouse

Great Western's largest seller in terms of volume was Brewhouse, which had a large customer base in both Saskatchewan and Alberta ^[9] and constituted 60% of the company's sales. The product line previously had only two products – Pilsner and Light – but in December of 2013 the line was expanded and Brewhouse started a rebrand. Despite the changes to Brewhouse, the line was still targeted at males aged 19 to 27 and maintained its value-based pricing strategy.

The rebrand, as shown in Appendix B and Appendix C, drastically changed the overall look of the products while maintaining its classic tagline, "Refreshingly honest beer". In addition to revitalizing the packaging a new product was added, Brewhouse Prime.

Brewhouse Pilsner was an award winning beer, winning Gold in 2012 and 2014 for North American Style Lager at the Canadian Brewing Awards.

Original 16

In 2011, Great Western launched Original 16 – a premium Canadian pale ale that was double-aged to make a smoother beer with less of an aftertaste – as a nod to the sixteen employees that formed Great Western Brewing Company in 1989. *"We wanted it to have not only commercial success but also to help establish the credentials and credibility of our company, what we stand for and in time give us a platform to be able to launch other great products under the Great Western umbrella,"* said the president and CEO of Great Western, Michael Micovcin ^[9].

Original 16 was also available in a Copper and as a wheat beer (Krystall). The wheat beer was launched in 2014.

Original 16, a premium priced Canadian pale ale, was targeted at males over 33. The beer was promoted through a campaign that highlighted the story behind the beer, which could, at the time, be seen at original16.com. The documentary-based series of 16 videos was also posted on YouTube with minimal results. By early 2015, the highest viewed video has less than 650 views (accessible at www.youtube.com/user/original16beer). The goal when introducing the beer was to focus on 'on-tap' at premises. The goal of GW was to have Original 16 replace Alexander Keith's (AK) as the 'on tap' at Saskatchewan pubs. To the company, AK was a direct competitor in terms of a domestic premium beer. The strategy was successful and Original 16 Pale Ale quickly replaced AK in pubs and soon outsold all of the AK family of beer in Saskatchewan.

Great Western

For its Great Western branded product, the company wanted to maintain its target of Saskatchewan males aged 28 to 32 while making sure not to cannibalize the sales of its other product lines. The Brewery had invested in Saskatchewan-grown malted barley and wheat and its new packaging in the Spring of 2014 boasted that the Great Western beer was 100% Saskatchewan made. Great Western Light was winner of World's Best Light Carb Lager at the World Beer Awards 2014.

The Community

Micovcin said that, *“Working in partnership with our customers and our suppliers has been a cornerstone in the success of our company.”* Because of this value, The Great Western Brewing Company participated in a variety of provincial community events. Its many partners were broken down into categories – charitable, sport, and cultural – and were, at the time, listed on the GW website at www.gwbc.ca

In 2013 Great Western was the official sponsor of the CFL though it also sponsored teams with lower visibility, such as the Weyburn Beavers, Yorkton Cardinals, and approximately 300 hockey teams throughout Saskatchewan.

For years Great Western had been the official beer of the University of Saskatchewan’s Huskie Athletics, with Micovcin saying, *“University of Saskatchewan Huskies [have] been a great partner of ours. They are a first class organization, they have a great brand, and they add a tremendous amount of community spirit and pride to our region.”*

Competitive Landscape in Saskatchewan

The beer market was highly competitive with low levels of customer loyalty, which made product development and marketing key to increasing sales ^[3]. Some companies had done this by marketing to women, which had been a seemingly untouched market segment ^[5]. The majority of campaigns still reflected beer as a manly beverage as men drank nearly 80% of beer in terms of volume ^{[4] [5]}. A breakdown of market segmentation can be seen in Appendix D.

As previously stated, Molson Coors Brewing and Anheuser-Busch were the largest players in the Canadian beer market, accounting for 50.3% and 41.4% of the market respectively ^[5]. In Saskatchewan these companies’ market shares remained high, though local companies such as Great Western and Paddock Wood had gained the attention of many consumers.

Molson Coors Brewing Company

Molson Coors had a wide product range, from Coors Banquet to Keystone Lager, and they sold a variety of brands at a variety of prices. After recognizing the growth of the cider market in Canada, Molson Coors had branched out and was selling Molson Canadian Cider.

This company’s marketing efforts were focused on #anythingforhockey, and featured a travelling beer fridge that was branded with a maple leaf. If you couldn’t tell by its name, the brand was thoroughly Canadiana. Its website boasted, *“Canada is known around the world for our vast wilderness, thousands of freshwater lakes, and golden Prairie barley fields as far as the eye can see. Our land is packed full of nature at its best. And it’s from this land that we make our signature beer, Molson Canadian.”*

Labatt Brewing Company

Owned by Anheuser-Busch, Labatt Brewing had an expansive product line that included: Budweiser, Labatt, Stella Artois, Bud Light, Alexander Keith’s, and Kokanee, just to name a few. The company was strongly based out of Eastern Canada, with its roots in London, Ontario.

Though Labatt still had a Canadian feel to its brand, it was far more focused on values when it came to its advertising. Think of the 2014 Super Bowl commercial for Budweiser; heartwarming. The over 47.6 million views on YouTube alone showed just how impactful the advertisement was.

Big Rock

Micovcin felt that Big Rock (BR) was trying to be the Sam Adams of Canada; Sam Adams was the largest craft beer company in the United States. BR was an Alberta based mid-sized brewing company, the same as GW, but had three times the production capabilities. BR was sold across Canada and was the first larger brewing company in Canada to produce craft beer. It had made a strategic decision to focus more on craft beers after the company had “strayed” and tried to focus on efficiency. In the past, the company had concentrated on increasing volume and engaged in private label manufacturing such as President’s Choice beer in Alberta. At one point, the company was 50% deep discount beer and 50% craft beer, and was losing credibility as a craft beer company. In 2012, the company decided to move back towards craft beers but was struggling. It still had the same operating costs but was only operating at 30% capacity. In addition, there were numerous new competitors in the craft beer market and the company had lost its competitive edge. Consumers questioned the company’s credibility as a craft beer producer (due to its foray into increasing volume) and the company’s marketing of “deliberately different” craft beer (www.bigrockbeer.com) wasn’t winning consumers over. Micovcin saw the company’s decreasing sales and struggling financials as an opportunity for GW in the Western Canadian market. BR Traditional would have been seen as a direct competitor to Original 16.

According to the BR 2013 Annual Report, “Big Rock reported a decline in both net income and operating profit in 2013 as compared to the previous year. Net income for the year ended December 30, 2013 was \$2.6 million compared to \$4.1 million in the year ended December 30, 2012. Operating profit for 2013 was \$3.3 million compared to \$5.6 million in 2012. The declines were attributed to a 15 per cent reduction in the total volume of Big Rock’s sales, which decreased from 217,646 hectolitres (“hl”) for 2012 to 184,802 hl for 2013.” Financials of the first 3 quarters of 2014 indicated that the company wasn’t faring any better.

Big Rock focused on engaging with consumers and sponsored film and music festivals.

Paddock Wood Brewing Co.

Paddock Wood was a Saskatoon-based indie microbrewery with products available at Liquor Board Stores and a variety of restaurants and pubs in Canada. Though Paddock Wood did not have anywhere near the market share of Molson or Labatt, it had experienced significant growth over the past years.

Paddock Wood carried a variety of craft beers and focused on creating distinctive flavours and refreshing tastes. They relied heavily on word-of-mouth advertising and supported a variety of local musicians, artists, and “anything indie” ^[11].

Next Steps for Great Western

Great Western Brewing Company was looking to grow the company while ensuring its three major lines – Brewhouse, Great Western, and Original 16 – were branded separately in order to avoid cannibalization of sales.

Micovcin was concerned that Great Western was too Saskatoon centric, with sales in that city being twice those of the second largest city in Saskatchewan, Regina. In addition, the market share in Saskatoon was four times that of rural Saskatchewan.

With the success of Original 16 (and the story of that brand being the basis of the company), he felt the greatest opportunity was with this brand. In addition, with Big Rock struggling, Micovcin felt the timing was right to focus on the Western Canadian market.

Which customers should he direct his energy towards? Should he focus on loyal customers in Saskatoon? Should he focus on the rest of the Saskatchewan population? Or, should he attempt to build credibility throughout the rest of Western Canada?

How should the company and the Original 16 brand be positioned? Stay small and remain a local beer? Or has the company already become too large to maintain a small-company image? GW was not necessarily a craft beer company, but it also couldn't compete against the large multinational beer companies. Or could it?

With a total annual marketing budget of \$500,000, what should Micovcin do?

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Appendix A: Sales of Alcoholic Drinks by Category

Table 11 Sales of Alcoholic Drinks by Category: Total Volume 2007-2012

Million litres	2007	2008	2009	2010	2011	2012
Beer	2,272.7	2,365.4	2,363.8	2,360.2	2,341.0	2,348.8
Cider/Perry	15.0	19.5	21.4	22.0	22.9	24.2
RTDs/High-Strength Premixes	83.2	83.5	74.4	73.7	73.6	74.1
Spirits	151.8	154.1	156.4	156.2	157.1	159.6
Wine	405.7	422.8	434.0	456.7	478.3	503.7
Alcoholic Drinks	2,928.4	3,045.3	3,050.1	3,068.8	3,073.0	3,110.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 Sales of Alcoholic Drinks by Category: Total Value 2007-2012

C\$ million	2007	2008	2009	2010	2011	2012
Beer	14,402.6	15,081.6	15,182.1	15,387.0	15,616.4	15,996.2
Cider/Perry	102.2	132.6	145.0	155.2	168.0	182.4
RTDs/High-Strength Premixes	2,565.3	2,580.5	2,279.7	2,249.6	2,302.3	2,375.4
Spirits	7,971.9	8,239.6	8,504.5	8,651.2	8,982.6	9,375.7
Wine	7,878.6	8,271.0	8,475.1	9,134.1	9,849.4	10,639.0
Alcoholic Drinks	32,920.6	34,305.3	34,586.3	35,577.1	36,918.7	38,568.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Appendix B: The New Brewhouse

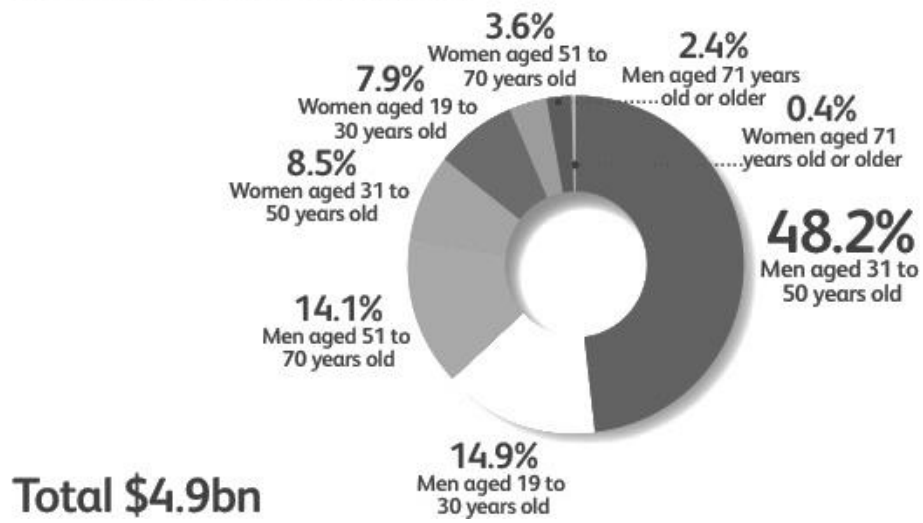


Appendix C: The Old Brewhouse



Appendix D: Segmentation of Canadian Beer Consumption

Major market segmentation (2012)



SOURCE: IBISWORLD

Appendix E: Competition Line-up

COORS BANQUET - MOLSON	6PK x 355ml	\$14.69
ALEXANDER KEITH'S INDIA PALE ALE - LABATT	6PK x 355ml	\$14.49
MILLER GENUINE DRAFT - MOLSON	6PK x 355ml	\$14.49
ORIGINAL 16 CANADIAN COPPER ALE - GW	6PK x 355ml	\$14.49
ORIGINAL 16 CANADIAN PALE ALE - GW	6PK x 355ml	\$14.49
RICKARD'S RED - MOLSON	6PK x 355ml	\$14.49
CZECH MATE LAGER - PADDOCK WOOD	6PK x 355ml	\$14.32
BLACK CAT LAGER - PADDOCK WOOD	6PK x 355ml	\$14.07
BUDWEISER - LABATT	6PK x 355ml	\$13.95
BUD LIGHT - LABATT	6PK x 355ml	\$13.95
CANADIAN - MOLSON	6PK x 355ml	\$13.95
CANADIAN 67 - MOLSON	6PK x 341ml	\$13.95
COORS LIGHT - MOLSON	6PK x 355ml	\$13.95
GREAT WESTERN LAGER	6PK x 355ml	\$13.95
GREAT WESTERN LIGHT	6PK x 355ml	\$13.95
GREAT WESTERN PILSNER	6PK x 355ml	\$13.95
GREAT WESTERN PILSNER LIGHT	6PK x 355ml	\$13.95
KOKANEE - LABATT	6PK x 355ml	\$13.95
KOKANEE LIGHT - LABATT	6PK x 355ml	\$13.95
LABATT BLUE	6PK x 355ml	\$13.95
LABATT LITE	6PK x 355ml	\$13.95
PILSNER - MOLSON	6PK x 355ml	\$13.95
GOLD STRONG - GW	6PK x 355ml	\$10.45
BREWHOUSE PILSENER - GW	6PK x 355ml	\$10.15
BREWHOUSE LIGHT - GW	6PK x 355ml	\$10.15
BREWHOUSE PRIME - GW	6PK x 355ml	\$10.15
BREWHOUSE HONEY LAGER - GW	6PK x 355ml	\$10.15
KEYSTONE LAGER - MOLSON	6PK x 355ml	\$10.15
KEYSTONE LIGHT - MOLSON	6PK x 355ml	\$10.15
OLYMPIA - GW	6PK x 355ml	\$10.15

Source: www.saskliquor.com

Appendix F: Rules and Regulations

Commercial messages for alcoholic beverages shall not:

- a) Attempt to influence non-drinkers of any age to drink or to purchase alcoholic beverages;
- b) Be directed at persons under the legal drinking age, associate any such product with youth or youth symbols, or portray persons under the legal drinking age or persons who could reasonably be mistaken for such persons in a context where any such product is being shown or promoted;
- c) Portray the product in the context of, or in relation to, an activity attractive primarily to people under the legal drinking age;
- d) Contain an endorsement of the product, personally or by implication, either directly or indirectly, by any person, character or group who is or is likely to be a role model for minors because of a past or present position of public trust, special achievement in any field of endeavour, association with charities and/or advocacy activities benefiting children, reputation or exposure in the mass media;
- e) Attempt to establish the product as a status symbol, a necessity for the enjoyment of life or an escape from life's problems, or attempt to establish that consumption of the product should take precedence over other activities;
- f) Imply directly or indirectly that social acceptance, social status, personal success, or business or athletic achievement may be acquired, enhanced or reinforced through consumption of the product;
- g) Imply directly or indirectly that the presence or consumption of alcohol is, in any way, essential to the enjoyment of an activity or an event;
- h) Portray any such product, or its consumption, in an immoderate way;
- i) Exaggerate the importance or effect of any aspect of the product or its packaging;
- j) Show or use language that suggests, in any way, product misuse or product dependency, compulsive behaviour, urgency of need or urgency of use;
- k) Use imperative language to urge people to purchase or consume the product;
- l) Introduce the product in such a way or at such a time that it may be associated with the operation of any vehicle or conveyance requiring skill;
- m) Introduce the product in such a way or at such a time as may associate the product with any activity requiring a significant degree of skill, care or mental alertness or involving an obvious element of danger;
- n) Contain inducements to prefer an alcoholic beverage because of its higher alcohol content;
- o) Refer to the feeling and effect caused by alcohol consumption or show or convey the impression, by behaviour or comportment, that the people depicted in the message are under the influence of alcohol;
- p) Portray persons with any such product in situations in which the consumption of alcohol is prohibited; or
- q) Contain scenes in which any such product is consumed, or that give the impression, visually or in sound, that it is being or has been consumed.

Source: www.crtc.gc.ca

