CANADA OPM REPORT

February 23 2024

CANADA SPIRITS SALES TRENDS

CGA by NIQ's first-of-its-kind On Premise Measurement (OPM) solution in Canada, brings clarity to sales performance in the traditional On Premise channel (bars, pubs, restaurants, nightclubs). Manufacturers can now unlock visibility beyond headline shipment data that is only made available across select provinces, to quantify their share of the market along with competitive benchmarking.

The new research reveals that total spirits sales by value in bars, pubs, restaurants, and nightclubs in the week to October 7th 2023 were 7.1% higher than in the previous 12 months.

Growth by value has been powered by a 7.3% increase in average price—a sign of pricing's significant contribution to sales when taking volume and distribution levels into account.

OPM is the only fully projected and extensively validated measure of beverage alcohol performance for the Canadian On Premise.

MITCH STEFANI
CLIENT SOLUTIONS DIRECTOR - AMERICAS

"It's encouraging to see solid growth in the dollars earned by spirits in Canada's On Premise. However, flat volumes and a drop in distribution highlight challenges for the category.

In an increasingly competitive landscape where regionality plays an important role in developing national growth, it's crucial to understand how shifts across markets are reflective to brand and manufacturer performance.

OPM is here to provide that essential intelligence, and the CGA by NIQ team are excited to be supporting On Premise businesses in this dynamic part of the market."

TOTAL CANADA

CANADA'S ON PREMISE SPIRITS VALUE RISES, WHILE VOLUMES AND DISTRIBUTION TRAIL

Over the last 52 weeks, less spirit volume was sold, largely due to a decline in distribution. On a more positive note, spirits are selling well in the outlets they are stocked in, being driven by Vodka, Tequila and Whiskey categories.

Market: Total Canada

VS YA trend		
	(Value) $ % Chg YA	+7.1%
	(Volume) 9L EQ % Chg YA	-0.1%
	(Distribution)TDP % Chg YA	-7.1%
	(Volume Rate of Sale) 9L EQ/TDP % Chg YA	+7.5%
	Avg Price % Chg YA	+7.3%

Source: CGA by NIQ OPM Canada data - Spirits, mega category, value, volume & TDP Rolling 52 W/E 10/7/2023 vs YA

CATEGORY TRENDS

Vodka remains Canada's most popular Spirit, with a 22.1% share of volume sales during the period vs YA. Whiskey and Tequila achieved growth of +0.8% and +2.7% respectively, with all other categories in experiencing declines

Total Canada	Vodka	Whiskey	Cordials	Tequila	Gin	Rum	Brandy/ Cognac
Volume share of Spirits	22.1%	17.6%	15.4%	14.6%	14.3%	13.6%	1.3%
Volume	918K	732K	640K	608K	593K	565K	56K
Volume % chg vs YA	+0.1%	+0.8%	-0.9%	+2.7%	-2.5%	-1.0%	-4.9%
Distribution % chg vs YA	-7.4%	-7.2%	-9.2%	-7.9%	-8.3%	-7.7%	-8.5%

Source: CGA by NIQ OPM Canada data - Spirits, Category, Volume & TDP Rolling 52 W/E 10/7/2023 vs YA

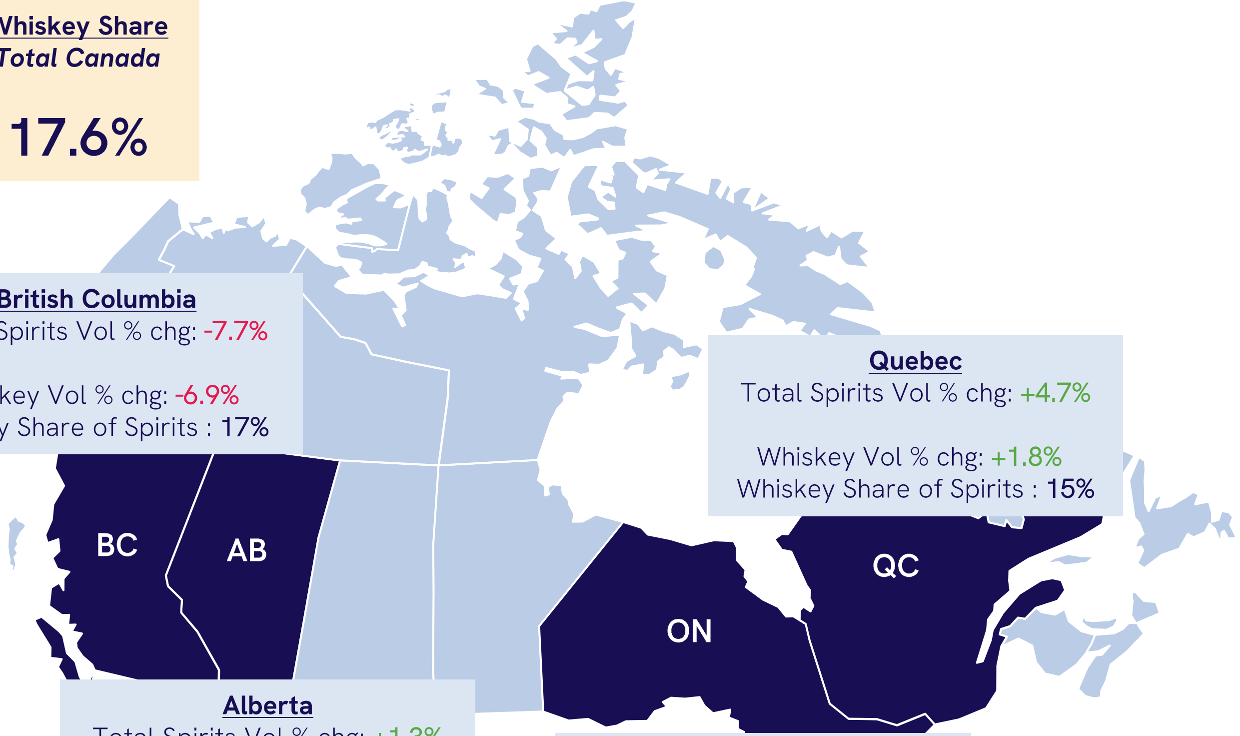
TOTAL CANADA

WHISKEY SHARE BY PROVINCE

OPM not only reports nationally, but also across major provinces to benchmark brand, category, and manufacturer performance. Whiskey takes its highest share of spirits sales (26%) in Alberta, where the category achieved 8% growth by volume vs YA. Whiskey's share is much lower in Quebec at 15%, although total spirits sales here grew 4.7%.

Whiskey Share
Total Canada

17.6%



British Columbia
Total Spirits Vol % chg: -7.7%

Whiskey Vol % chg: -6.9%
Whiskey Share of Spirits : 17%

Quebec
Total Spirits Vol % chg: +4.7%

Whiskey Vol % chg: +1.8%
Whiskey Share of Spirits : 15%

Alberta
Total Spirits Vol % chg: +1.3%

Whiskey Vol % chg: +8.0%
Whiskey Share of Spirits : 26%

Ontario
Total Spirits Vol % chg: +2.3%

Whiskey Vol % chg: +4.1%
Whiskey Share of Spirits : 18%

Prairies & Atlantic Territories also reported on

Source: CGA by NIQ OPM Canada data - Spirits, Category, Volume & share Rolling 52 W/E 10/7/2023 vs YA

For further details on CGA's On Premise Measurement solutions, along with support in understanding trends at category, segment and brand level within the On Premise, contact Mitch Stefani at Mitch.x.Stefani@nielseniq.com or download more information here

Sign up to receive On Premise news & Insights for the Canadian market, here