

SPRING 2019

RETAIL PERSPECTIVES



Alcohol in Ontario: Choice & Convenience means Jobs & Growth

YUKON

Total Retail Sales: \$ 799.8 million
Core-Retail Sales: \$ 508.8 million
Number of Stores: 186
Jobs in Retail: 3,630

NORTHWEST TERRITORIES

Total Retail Sales: \$ 768.9 million
Core-Retail Sales: \$ n/a
Number of Stores: 182
Jobs in Retail: 3,345

NUNAVUT

Total Retail Sales: \$ 442.1 million
Core-Retail Sales: \$ n/a
Number of Stores: 80
Jobs in Retail: 1,645

BRITISH COLUMBIA

Total Retail Sales: \$ 84.3 billion
Core-Retail Sales: \$ 54.0 billion
Number of Stores: 20,398
Jobs in Retail: 290,290

ALBERTA

Total Retail Sales: \$ 80.3 billion
Core-Retail Sales: \$ 47.2 billion
Number of Stores: 17,219
Jobs in Retail: 263,630

SASKATCHEWAN

Total Retail Sales: \$ 19.6 billion
Core-Retail Sales: \$ 11.3 billion
Number of Stores: 4,882
Jobs in Retail: 67,455

MANITOBA

Total Retail Sales: \$ 20.4 billion
Core-Retail Sales: \$ 12.5 billion
Number of Stores: 4,712
Jobs in Retail: 65,960





RETAILERS ARE AT THE HEART OF EVERY COMMUNITY AND TOUCH THE EVERYDAY LIVES OF CANADIANS

CANADA

Total Retail Sales: \$ 588.8 billion

Core-Retail Sales: \$ 366.8 billion

Number of Stores: 142,103

Jobs in Retail: 2,182,090

NEWFOUNDLAND & LABRADOR

Total Retail Sales: \$ 9.2 billion

Core-Retail Sales: \$ 5.4 billion

Number of Stores: 2,718

Jobs in Retail: 28,235

PRINCE EDWARD ISLAND

Total Retail Sales: \$ 2.3 billion

Core-Retail Sales: \$ 1.4 billion

Number of Stores: 833

Jobs in Retail: 9,195

NOVA SCOTIA

Total Retail Sales: \$ 15.9 billion

Core-Retail Sales: \$ 9.3 billion

Number of Stores: 4,103

Jobs in Retail: 65,635

NEW BRUNSWICK

Total Retail Sales: \$ 12.8 billion

Core-Retail Sales: \$ 7.4 billion

Number of Stores: 3,398

Jobs in Retail: 42,060

ONTARIO

Total Retail Sales: \$ 216.3 billion

Core-Retail Sales: \$ 137.4 billion

Number of Stores: 51,460

Jobs in Retail: 843,170

QUEBEC

Total Retail Sales: \$ 125.7 billion

Core-Retail Sales: \$ 79.4 billion

Number of Stores: 32,932

Jobs in Retail: 497,840

FAST FACTS FOR CANADA



\$ 50.9 billion

in Retail Sales last month

In 2017, sales totalled \$588.8 Billion

\$ 50.9 billion

+ 0.24%

in Retail Sales Growth last month

Canada's banks predicted -0.3%



144 000+

storefronts in Canada

in Core-Retail growth last month

(Sales ex. Auto & Gas)



11.6 %

of Canada's workforce works in Retail.

That's 2,182,000 Canadians.

\$6,510.1 Million

in Capital Expenditures for 2018



\$75.6 Million

in total annual salaries paid in 2017.

\$22.54/HR

Canada's average hourly retail salary

in 2017



Table of Contents

- 1| EXECUTIVE SUMMARY 1
- 2| CONTEXT 2
- 3| ALCOHOL PRICES..... 3
- 4| METHODOLOGY: JOBS & GDP..... 5
- 5| CONCLUSION..... 7
- Appendix A: Regression of British Columbia Grocery Trade 8*
- Appendix B: Regression of British Columbia Grocery Jobs 9*

1 | EXECUTIVE SUMMARY

This report highlights how the Ontario Government's move to increase choice and convenience for alcohol increases overall retail sales and benefits the economy. In analyzing the opening of the British Columbian alcohol market, the Retail Council of Canada (RCC) report finds that liquor licensing a Grocery Store increases that stores sales by an estimated \$880,000.

That number is significant, in part because of just how under served the Ontario market is. Based on Statistics Canada data, the Province of Ontario only has 2,702 locations that can retail alcohol in one form or another. As pointed out earlier this month in Ontario's 2019 budget, that represents 2.4 outlets per 10,000 persons ranking us last in the country – and well below the national average of 5.9¹.

To move to the national average, Ontario would need to increase the number of locations by 4,028. Based on this RCC report, if 4,028 new grocery locations could sell alcohol, that would mean an increase to Ontario's GDP of 3.5 billion a year.

In addition to a significant increase to Ontario's GDP, this report calls into question two numbers widely circulated by The Beer Store; (1) that there will be job loss from increasing choice and convenience, and (2) that beer will increase in price.

The Retail Council of Canada finds that neither of these claims by The Beer Store hold merit. The Beer Store has stated that opening the market would mean job loss of 7,000 full and part-time staff currently employed at The Beer Store. This report notes that allowing other market participants would add competition to The Beer Store but is very unlikely to cause the company to shutter its doors. This report notes that there is an increase in grocery store staff associated with adding alcohol SKUs to grocery – an estimated 2.3 employees per licensed store. That means that a move to Canada's average per capita store count would see a net increase of 9,100 jobs. That means, any job loss that occurs as a result of increased competition by grocers with The Beer Store is more than offset. Even when using The Beer Store's 7,000 number, the result is still a net increase of 2,100 jobs overall.

To contrast the view by The Beer Store that increased choice and convenience come at a price increase, RCC surveyed its own membership and found that the net-of-tax price of popular beers were an average of 8.3% more expensive in Ontario relative to Quebec. This suggests that increased choice and convenience can also mean savings for consumers, as large grocers negotiate with suppliers to compete for business.

In sum; RCC finds in this report that greater choice for alcohol and increase convenience is both a strong win for Ontario consumers as well as for Ontario's economy.

¹ Government of Ontario (2019). [2019 Ontario Budget: Protecting What Matters Most](#). Queen's Printer

2 | CONTEXT

Retail is Canada's largest private sector employer with over 2.1 million jobs across Canada, annually paying over \$76 billion in wages and employee benefits. Core retail sales (excluding vehicles and gasoline) were \$375 billion in 2018.

Retail Council of Canada (RCC) members represent more than two-thirds of core retail sales in the country, and when measured by total sales, over 90% of Grocery in Canada.

As the Voice of Retail™ in Canada, we proudly represent more than 45,000 storefronts in all retail formats, including department, grocery, specialty, discount, independent retailers and online merchants.

As a not-for-profit industry-funded association that represents small, medium and large retail businesses in every community across the country, RCC develops guides and reports to support our membership, as well as *retail perspective* papers like this one, to understand the economics before taking a lobby stance.

This report was developed in order to gain a deeper understanding of how increasing alcohol choice and convenience impacts the Ontario economy and job market. While we have anecdotal evidence from members stating that licensing leads to increase foot traffic, and that alcohol SKUs sell well, research like this strengthened the shared understanding of what the numbers say the effects are.

RCC knows that Province of Ontario is dead last in Canada when it comes to alcohol choice and convenience. Earlier this month, the Ontario's 2019 budget highlighted that our province has 2.4 outlets per 10,000 persons ranking us last in the country – and well below the national average of 5.9².

Prior polling has shown that 73% of Ontarians support the sale of 12- and 24-packs in grocery stores, and that 68% of Ontarians support the sale of alcohol at all grocery store locations in Ontario.

This report expands what we know about alcohol deregulation by focusing on three topics:

1. The Beer Store has made claims that choice and convenience for consumers means that the cost of beer will increase. RCC finds in Section 3-on Alcohol Pricing, that current prices at The Beer Store are 8.3% higher after netting out tax than in Quebec, a jurisdiction with a deregulated alcohol market.
2. The Beer Store has made the claim that there will be job loss of 7,000 as a result of increasing choice and convenience for consumer. In Section 4 and 5 this paper walks through two regression models which demonstrates that the net increase in jobs would be of 2,100 (with 9,100 new jobs for grocery, less any job loss by The Beer Store).
3. Finally, this report explores what impact increasing choice and convenience has on Ontario's Economy. This report concludes that increasing the number of licensed grocery stores could mean an economic boost of up to \$3.5 billion to Ontario's GDP.

Increase choice and convenience for alcohol means more jobs, a stronger economy, and lower beer prices.

² Government of Ontario (2019). [2019 Ontario Budget: Protecting What Matters Most](#). Queen's Printer

3 | ALCOHOL PRICES

To understand alcohol prices, this report delves into alcohol tax. From a federal perspective, the Government of Canada adds in an excise duty on all alcohol. For most forms of alcohol, the excise duty is a stepped function based on the percent of alcohol in the drink. For beer with more than a 2.5% alcohol content, the excise duty is \$0.3303/Litre.

While provincial taxation of alcohol varies widely in Canada, most jurisdictions use a Liquor Control Board to markup price. In addition to the LCBO, in the Ontario context there are three taxes built in all types of alcohol:

1. An environmental tax per non-refillable container (so beer cans would be taxed, reusable beer bottles exempt) which is always \$0.893/Container;
2. A volume tax measured in Litres. For beer that tax is \$0.176/Litre, and;
3. A basic tax, which is generally framed as a markup percentage (Spirits see a 61% price increase). Beer is an exception, which is just another volume-based tax – priced at \$0.8833/Litre.

In a world where a beer manufacturer is selling a beer directly, they remit the taxes on a monthly basis to the Ministry of Finance. Sales through the LCBO are exempt. That said, an equivalent markup is applied and transferred to the Ministry of Finance through the LCBO dividend (Note; the beer in grocery is currently purchased through the LCBO, and not The Beer Store).

Federally and Provincially, there is nearly always recognition that microbrewers do not have the same scale as the large brewers. Since there are fewer efficiencies for them to pass along to the consumer, and price competition is high in the grocery space, governments generally have a graduated scale reducing the taxes on microbrewers. Ontario is no exemption, charging a reduced base tax rate of \$0.3834/Litre (a tax reduction of 56.6%). By comparison, Quebec charges microbrewers between \$0.2079/Litre to \$0.4221/Litre (which represents a tax reduction of between 33.0% and 67.0%).

To help further understand pricing, RCC asked its grocery members to provide daily average prices in Quebec (pre-tax, without deposit) on a list of commonly consumed brands. Based on StatCan Retail Sales numbers, RCC's grocery members represents over 90% of the grocery market³. Table 2 represents an average of all those daily prices on a 24-pack.

TABLE 2: Average Price by Brand, for Month of February 2019

Beer Brand	Ontario (The Beer Store's Price)	Quebec (Average Grocery Price)	Percent Difference
Molson Canadian (24 x 355mL Can)	\$ 37.65	\$ 29.97	20.4%
Coors Light (24 x 355mL Can)	\$ 37.65	\$ 30.40	19.3%
Bud Light (24 x 355mL Can)	\$ 37.65	\$ 29.51	21.6%
Corona (24 x 341mL Bottles)	\$ 41.19	\$ 32.94	20.0%
Average	\$ 38.54	\$ 30.71	20.3%

³ Based on RCC's Grocery Members store sales, scaled by grocery (NAICS 44511) annual retail sales. See Statistics Canada. [Table 20-10-0008-01 Retail trade sales by province and territory \(x 1,000\)](#) for publicly available retail sales data.

To further understand pricing in Ontario, and the taxes applicable, this report takes the average Retail Price of Beer from Table 2 and breaks it out into what goes into it. To continue to provide a comparator, the same analysis is done with Quebec's beer. Notably, Quebec has much less tax on its beer. Because most of the brands above are in a 24 x 355mL Can format, the table below assumes that our hypothetical average priced 24-pack of beer is taxed based on being in the 355mL Can format.

TABLE 3: Estimated Average Taxes for Ontario & Quebec

Category	Ontario	Quebec	Percent Difference
Base Price of Beer	\$ 24.56	\$ 22.53	8.3%
Beer Basic Tax	\$ 7.53	\$ 5.37	
Federal Exercise Duty	\$ 2.81	\$ 2.81	0%
Volume Tax	\$ 1.50		
Environmental Tax	\$ 2.14		
Retail Price of Beer	\$ 38.54	\$ 30.71	20.3%
Sales Tax (Federal & Provincial)	\$ 5.01	\$ 4.60	8.2%
Final Price of Beer (Refundable deposit not included)	\$ 43.55	\$ 35.31	18.9%

Source: For Ontario: Ontario Ministry of Finance. [Beer & Wine Tax webpage](#).

For Quebec: Revenu Quebec (2018). [Consumption Taxes and Producers of Alcoholic Beverages](#).

For Canada: Canada Revenue Agency. [Excise Duty Rates webpage](#).

Very frequently, in either news discourse, or in the broader research community, assertions have been made either representing the view that The Beer Store keeps cost down, or that, acting as a monopoly, they inflate prices. The top line of Table 3 represents the Base Price of Beer, with taxes removed. Strictly in analyzing that, this report can definitively say that the average net-of-tax price on four key consumer brands in February 2019 was an average of 8.3% cheaper in Quebec.

Adding extra insight from a longitudinal perspective into this report's 8.3% figure is a 2014 CD Howe study, which found at that time, that Ontario's net-of tax price was 8.8% more expensive than Quebec's⁴. While The Beer Store is very quick to make claims that prices will increase in a deregulated market, the net-of-tax numbers from this report taken together with prior research suggest a different story – that a lack of price negotiation by distributors are leading to monopolistic profits for the two largest owners of The Beer Store; the parent companies of Anheuser-Busch InBev & Sapporo Brewery.

⁴ Masson, P & Sen, A. (2014). [Uncorking a Strange Brew: The Need for More Competition in Ontario's Alcoholic Beverage Retailing System](#).

4 | METHODOLOGY: JOBS & GDP

4.1| DEFINITIONS

This paper's approach to understanding impact is viewed through the lens of how much additional retail sales and additional jobs will occur when a grocery store receives a license to sell alcohol. Anecdotally, Retailers in Canada self-report that adding alcohol SKUs increases foot traffic in stores – this model attempts to quantify that and to estimate impact on the Ontario market.

As a first step to that, we need to articulate how the variables used in this report were calculated, and the sources from which they were gathered.

We will start with our dependent variables. Our focus is on overall Retail Sales and Jobs in Retail. Statistics Canada maintains a wealth of information online related to historical retail sales through the monthly Retail Trade dataset⁵. For our job numbers, there are two different jobs databases available through StatCan; the System of National Accounts, and the Labour Force Survey. This paper opted to use the Labour Force Survey for job statistics, because of the independent variables we use is population, and the System of National Accounts contains a monthly estimate of population (no other publicly available StatCan dataset estimates population counts on a month to month basis)⁶.

For both dependant variables, in order to understand grocery specifically, this report focuses in on two North American Industry Classification System (NAICS) codes – Grocery Sales (NAICS 44511) and Alcohol Sales (NAICS 4453).

Using those same Statistics Canada data, we built out two regressions, using different independent variables, but identical dependent variables, such that:

Grocery Sales = $\beta_0 + \beta_1 \text{ Consumer Price Index} + \beta_2 \text{ Gross Domestic Product} + \beta_3 \text{ Population} + \beta_4 \text{ Unemployment Rate} + \beta_5 \text{ Volume of Alcohol Consumed} + \beta_6 \text{ Number of Alcohol Licenced Retailers} + \epsilon$

Grocery Jobs = $\beta_0 + \beta_1 \text{ Gross Domestic Product per Capita} + \beta_2 \text{ Unemployment Rate} + \beta_3 \text{ Volume of Alcohol Consumed} + \beta_4 \text{ Number of Alcohol Licenced Retailers} + \epsilon$

Next, we define our independent variables – our drivers of Grocery Sales in Canada.

Consumer Price Index. Because of inflation, prices naturally increase each year, and therefore the total value of Grocery Sales increase each year. This report includes the Consumer Price Index as a variable for Grocery Sales a way to control for those increases. This variable is not used in the Grocery Jobs regression, as employee counts do not move with inflation (only their wages, which we do not measure here).

Inflation data is measured monthly by province by StatCan⁷.

⁵ Statistics Canada. [Table 20-10-0008-01 Retail trade sales by province and territory \(x 1,000\)](#)

⁶ Statistics Canada. [Table 14-10-0017-02 Labour force characteristics by province, monthly, unadjusted for seasonality](#)

⁷ Statistics Canada. [Table 18-10-0004-01 Consumer Price Index, monthly, not seasonally adjusted](#)

Gross Domestic Product. National economies go through upswings and downswings and have a significant impact on how much the consumer spends on Grocery. During the time frame used in this model, there was a recession in Canada – by adding GDP, that is something that is accounted for.

This report draws from StatCan data for both Provincial GDP numbers. Provincial GDP Numbers are not publicly released on a quarterly or monthly basis, and instead released only annually⁸

Population. As total population increases, numbers inflate. To account for that, this report adds population as a variable.

Populations estimates are taken monthly from the StatCan’s Labour Force Survey⁹.

Unemployment Rate. As another way to model economic upturns and downturns, one of the variables that this report controls are changes in the Provincial unemployment rate.

Monthly unemployment figures by province were taken into consideration. Like population, these figures are from StatCan’s Labour Force Survey¹⁰.

Volume of Alcohol Consumed. abc.

Statistics Canada publicly reports Canadian business counts from 2011 to 2018 semi-annually using its Business Registry. That said, Statistics Canada privately holds Business Registry data from 1996 to 2011. RCC made use of the publicly available data and worked with Statistics Canada to provide access to Business Registry records from 2003 onwards to RCC.

Number of Alcohol Licenses Retailers. This is the variable that this report will mainly be analyzing, understanding how the number of alcohol licenses retailers have impacts the combined sales for Grocery and Alcohol.

Statistics Canada publicly reports the number of Alcohol Licensed Retailers hold annually¹¹.

Timeframe. The NAICS for Grocery [44511] and for Alcohol Sales [4453] are not available prior to 2003 on an unadjusted basis, below the national level. Because of that constraint, it is impossible to extend any datasets beyond 2003. As a result, the period for all data are limited to 2003 to 2018.

There is, however, an even tighter restraint. The store counts data for Alcohol Licenses Retailers have is only available from 2004 to 2017 by Statistics Canada. That said, in order to analyze the deregulation of the British Columbia’s alcohol marketplace, that timeframe works nicely; with deregulation in British Columbia starting in 2003.

4.2| REGRESSIONS

In this study, we ran two regressions, in order to understand how sales and jobs numbers changed as British Columbia deregulated alcohol.

⁸ Statistics Canada. [Table 36-10-0487-01 Gross domestic product \(GDP\) at basic prices, by sector and industry, provincial and territorial \(x 1,000,000\)](#)

⁹ Statistics Canada. [Table 14-10-0017-01 Labour force characteristics by sex and detailed age group, monthly, unadjusted for seasonality \(x 1,000\)](#)

¹⁰ Statistics Canada. [Table 14-10-0017-01 Labour force characteristics by sex and detailed age group, monthly, unadjusted for seasonality \(x 1,000\)](#)

¹¹ Statistics Canada. [Table 10-10-0013-01 Sales of alcoholic beverages by liquor authorities and other retail outlets, by type of outlet \(x 1,000\)](#)

There is an underlying assumption in this paper that, once the alcohol market is saturated, the net impact of an additional licensed grocery store will decrease towards zero. While this paper would have liked to model that with each Canadian jurisdiction that has moved to deregulate alcohol (Alberta, British Columbia, and Quebec), the data provided by StatCan does not reach far enough back (only goes back as far as Jan. 2004). Alberta and Quebec were deregulated many years prior to that, so the number of licenses in the market are already saturated. British Columbia, on the other hand, made its move to deregulate the market in 2003, so this data perfectly captures the net impact of a license to sell alcohol.

The regression outputs can be seen in Appendix B and C for British Columbia.

4.3| ANALYSIS OF RESULTS

This report finds that each additional licensed grocery store increases same store sales by over \$880,000. Ontario currently has 2,702 locations, well below the national average. If Ontario were to move up to the national average, that would mean adding an additional 4,028 locations. By allowing grocery stores, convenience stores and big box stores to sell alcohol, this report estimates that Ontario could increase GDP by up to 3.5 Billion a year.

Further, this report finds that licensing an additional grocery store increases the number of total grocery employees by 2.3. Again, a move to the national average number of licensed stores could mean an increase of 9,100 new jobs for grocery stores, convenience stores and big box stores.

5 | CONCLUSION

Currently, Ontario is the most underserved alcohol market based on retail locations per capita in Canada. With only 2,702 locations that can retail alcohol, this report explores how increased choice and convenience will impact Ontario from an economic perspective.

To move to the national average, Ontario would need to increase the number of locations by 4,028.

By increase choice and convenience for alcohol to the Canadian average, this report concludes that Ontario also helps to build a stronger economy. RCC finds that along with greater choice comes 9,100 new jobs and a \$3.5 billion increase to GDP.

This report also demonstrates that net-of-tax beer prices are higher in Ontario, by 8.3%.

This RCC report calls into question the numbers widely circulated by The Beer Store; that there will be job losses from increasing choice and convenience, and that beer will increase in price.

With this report supporting the suggestions of retailers, the Retail Council of Canada will be taking a position to support greater choice for alcohol and increase convenience. It's a win for consumers, and a win for Ontario's economy.

Appendix A: Regression of British Columbia Grocery Trade

Regression Statistics

Multiple R	0.836781722
R Square	0.700203651
Adj. R Square	0.688131315
Standard Error	84977197.92
Observations	156

ANOVA

	<i>Df</i>	<i>SS</i>	<i>MS</i>	<i>F</i>	<i>Significance F</i>
Regression	6	2.51E+18	4.19E+17	58.00068	1.51E-36
Residual	149	1.08E+18	7.22E+15		
Total	155	3.59E+18			

Regression Equation

	<i>Coefficients</i>	<i>Standard Error</i>	<i>t Stat</i>	<i>P-value</i>	<i>Lower 95%</i>	<i>Upper 95%</i>	<i>Lower 95.0%</i>	<i>Upper 95.0%</i>
Intercept	-882134645	4.41E+08	-1.99915	0.047411	-1.8E+09	-1E+07	-1.8E+09	-1E+07
CPI	6111921.76	8484406	0.720371	0.472425	-1.1E+07	22877219	-1.1E+07	22877219
Provincial GDP	-0.00866935	0.002735	-3.16956	0.001853	-0.01407	-0.00326	-0.01407	-0.00326
Population	672.998302	415.9972	1.617795	0.107822	-149.018	1495.014	-149.018	1495.014
Alcohol Bought	-338.309817	132.2826	-2.55748	0.011542	-599.702	-76.9178	-599.702	-76.9178
Unemployment	-22848116.3	9343413	-2.44537	0.015636	-4.1E+07	-4385408	-4.1E+07	-4385408
# of Licenses	880405.48	364380.5	2.416171	0.016895	160384.8	1600426	160384.8	1600426

Appendix B: Regression of British Columbia Grocery Jobs

Regression Statistics

Multiple R	0.851411
R Square	0.724901
Adj. R Square	0.715731
Standard Error	1458.777
Observations	156

ANOVA

	<i>Df</i>	<i>SS</i>	<i>MS</i>	<i>F</i>	<i>Significance F</i>
Regression	5	8.41E+08	1.68E+08	79.05181	2.85E-40
Residual	150	3.19E+08	2128030		
Total	155	1.16E+09			

Regression Equation

	<i>Coefficients</i>	<i>Standard Error</i>	<i>t Stat</i>	<i>P-value</i>	<i>Lower 95%</i>	<i>Upper 95%</i>	<i>Lower 95.0%</i>	<i>Upper 95.0%</i>
Intercept	12898.35	9766.103	1.320727	0.188604	-6398.54	32195.25	-6398.54	32195.25
Provincial GDP	-5.7E-07	4.29E-08	-13.2305	5.7E-27	-6.5E-07	-4.8E-07	-6.5E-07	-4.8E-07
Population	0.046884	0.006071	7.722998	1.5E-12	0.034889	0.05888	0.034889	0.05888
Alcohol Bought	-0.00187	0.002237	-0.83592	0.404531	-0.00629	0.00255	-0.00629	0.00255
Unemployment	-706.903	146.716	-4.81817	3.51E-06	-996.8	-417.006	-996.8	-417.006
# of Licenses	2.278702	1.844062	1.235697	0.218503	-1.36499	5.922394	-1.36499	5.922394

For additional information on the methodology, contact:

Sebastian Prins

Director of Government Relations (Ontario)

Tel: 1.416.467.3759 | 1.888.373.8245 **Ext.** 241

Email: sprins@retailcouncil.org



RCC RETAIL
COUNCIL
OF CANADA

CCCD CONSEIL CANADIEN
DU COMMERCE
DE DÉTAIL

TORONTO OFFICE

800-1881 Yonge Street
Toronto, ON M4S 3C4
Toll Free: (888) 373-8245

PRAIRIES OFFICE

201 Portage Avenue, 18th Floor
Winnipeg, MB R3B 3K6
Toll Free: (888) 254-1654

QUEBEC OFFICE

550 Sherbrooke Street West
Suite 1680, West Tower
Montreal, QC H3A 1B9
Toll Free: (877) 229-0922

WESTERN OFFICE

890 West Pender Street, Suite 410
Vancouver, BC V6C 1J9
Toll Free: (800) 663-5135

OTTAWA OFFICE

222 Queen St, Suite 1404,
Ottawa, ON K1P 5V9
Toll Free: (844) 656-7900

ATLANTIC OFFICE

201-5121 Sackville Street
Halifax, NS B3J 1K1
Toll Free: (855) 422-4144