

Untapped Potential:

*A Case for Improving Private Competition in
the Sale of Alcoholic Beverages in Atlantic Canada*

September 2025

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Author



Duncan Robertson
Director, Nova Scotia

Highlights

This report outlines the potential benefits for local small businesses and producers if the Atlantic provinces expanded private options for alcohol sales to retail small businesses. Such a change would not be radical; it would simply bring the region in line with the rest of Canada. Key findings include:

- Private alcohol sales vary widely across Canada. **Alberta** and **Saskatchewan** have fully private retail systems where the province only acts as a wholesaler. **Ontario** and **Quebec** allow small businesses, such as convenience stores, to sell select alcoholic beverages. British Columbia uses a mixed public–private model. **Manitoba, New Brunswick, and Newfoundland and Labrador** permit only limited private sales. **Nova Scotia** and **Prince Edward Island** maintain a government monopoly on alcohol sales, apart from heavily regulated agency stores.
- Nearly 8 in 10 (77%) Atlantic Canadian small businesses want their governments to allow private retailers, such as convenience stores, gas stations, and grocery stores to sell alcoholic beverages.
- Allowing retail small businesses to sell alcoholic beverages has the potential to support these businesses by attracting more customers at a time where close to 5 in 10 small business across Atlantic Canada cite lack of demand as a top impact to their business.
- The Financial Accountability Office of Ontario found that moving to a model with added private retailers in their province had the potential to add \$353 million in net income to the Liquor Control Board of Ontario by 2030, driven by wholesale activity to private retailers.
- Beyond allowing additional private retailers, Atlantic Provinces could support local retail small businesses and producers by modernizing how alcoholic beverages are sold in the province. This could be in the form of introduce cross selling, no-touch-no-tax policies that are currently being used in other jurisdictions, or unilaterally implementing Direct-to-Consumer (DTC) interprovincial sale of alcohol.

Introduction

Governments long held position of protecting their monopoly on the sale of alcoholic beverages is changing. From coast to coast, it is becoming more accepted that private retailers have a role to play in how alcohol is sold. So, why have Atlantic provinces generally been laggards in adopting more liberalized models of selling alcohol?

This report compares the make up of the retail alcohol market in the Atlantic provinces with the rest of Canada. It also outlines the potential benefits introducing more private competition could have in the Atlantic region and proposes additional policies to modernize how alcoholic beverages are sold in the region.

Recently, Ontario has moved forward with greater private competition and Nova Scotia is deliberating the future of how alcohol can be sold in the province. As more provinces embrace private competition, Atlantic Canada should consider modernizing alcohol sales to benefit local retailers and producers. Compared to other provinces, Atlantic Canada has limited liberalization, with alcohol sales ranging from full government control to limited private retail options (see figure 2).



As a result of limited competition, Atlantic Canadian small businesses in the retail and alcoholic beverage sector are missing out on potential economic gains increased competition could bring to their businesses. With small businesses in the region still having low levels of optimism in the next 12-months, due to economic uncertainty and trade tensions with the United States,¹ governments need to make choices that drive economic productivity to the region's small businesses. In 2019, the Retail Council of Canada estimated that opening the sale of alcoholic beverages to grocery stores alone could increase Ontario's overall GDP by \$3.5 billion and generate up to 9,100 local jobs, based on analysis of

¹ Canadian Federation of Independent Business (CFIB), "Monthly Business Barometer®, July 2025 Results," Business Barometer®, August 2025

British Columbia's expansion starting in 2003.² While the results for Atlantic Canada would be on a smaller scale, an increase in private retailers could bring economic benefits, create jobs, and improved consumer choice to the region. The Convenience Industry Council of Canada (CICC) also estimates that allowing convenience stores to sell alcoholic beverages could result in around \$50,000 of added investment and up to three additional employees per store.³

Small Business' Perspective on the Sale of Alcoholic Beverages

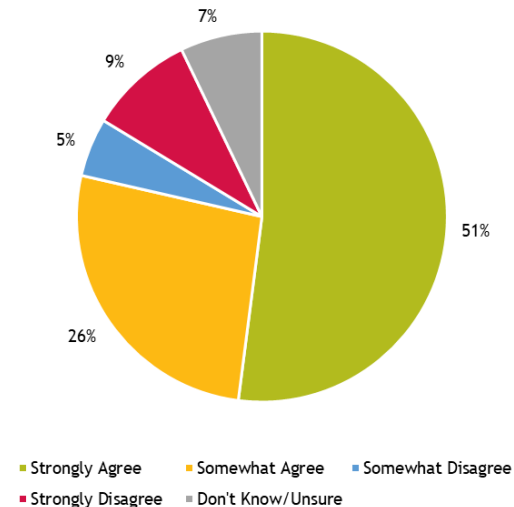
Adopting a freer, fairer, and more competitive market for the sale of alcoholic beverages has the potential to provide possible benefits, such as increased foot traffic to private retailers, at a time when more than half (58%) of small businesses in the retail sector across Canada cite lack of demand as their top limitation to sales and productivity.⁴ Additional private options would also provide more choice, added convenience, and possible savings for consumers. According to the Ontario Ministry of Finance, from time saved by creating more opportunities for one stop shopping, consumers in their province could collectively save hundreds of millions of dollars.⁵

Enhanced liberalization could also provide new sales channels for local producers and introduce new product lines to retail small businesses. This would not just provide producers with additional market access and sales channels but would also give small businesses in the retail sector opportunities for improved consumer foot traffic. According to the CICC, Ontario's move to expand alcoholic beverage sales to small businesses has resulted in a 12 percent increase in revenue for the province's convenience

Close to 8 in 10 Atlantic small businesses want to see private sale of alcoholic beverages in their province

Figure 1

Our provincial government should allow some private retailers to sell alcohol



² Retail Council of Canada, *Alcohol in Ontario: Choice & Convenience Means Jobs & Growth, Retail Perspectives*, Spring 2019.

³ Convenience Industry Council of Canada, *Submission on Alcohol Choice and Convenience for the People*, May 2023.

⁴ CFIB, *Monthly Business Barometer* - July 2025

⁵ Government of Ontario, *A Case for Change: Increasing Choice and Expanding Opportunity in Ontario's Alcohol Sector*

stores compared to last year, mainly driven by increased foot traffic.⁶ The recent opportunity to sell alcoholic beverages has been a “saving grace” for some convenience stores in Ontario.⁷ Therefore, it is not surprising that close to 8 in 10 (77%) small businesses in Atlantic Canada believe their province should welcome private competition in the sale of alcoholic beverages.⁸

Allowing more private competition could also provide provincial liquor corporations with possible cost savings by moving to more wholesale activity rather than depending on retail sales. A recent report by the Financial Accountability Office of Ontario found that moving to a model with added private retailers has the potential to add \$353 million in net income to the Liquor Control Board of Ontario by 2030, driven by wholesale activity to private retailers.

In provinces that allow private retailers to sell alcoholic beverages, local producers have seen benefits from increased shelf space. In British Columbia, where a mix of public and private retailers are allowed, local beer, wine, and cider outsell their non-domestic counterparts, with B.C. beer sales topping every specific type of alcohol product sold.⁹ The Province of Newfoundland and Labrador has also shown that more private competition can be a success in Atlantic Canada. Currently, Newfoundland and Labrador is the only province in Atlantic Canada to allow some form of private alcohol sales at convenience stores. However, where Newfoundland and Labrador’s model differs from other provinces in Canada is that shelf space is only given to products that have been brewed locally. This has resulted in local beer making up almost one-third (32%) of the total volume of alcoholic beverages sold in the province.¹⁰ An additional \$70.1 million in revenue for the NLC has also come from commissions on the sale of beer through Brewers’ Agents Licensees in convenience and corner stores.¹¹

Ultimately it is clear that any private model must include small businesses. With sixty-six cents out of every dollar spent at a small business staying in the local community,¹² excluding small businesses is to the detriment of local businesses and the communities in which they operate.¹³ In fact, a 2019 report to the Ontario Minister of Finance by Ken Hughes, Ontario Special Advisor for the Beverage Alcohol Review,

⁶ CTV News, “Convenience Stores See Sales Boost One Year After Booze Sales Approved by Ford Government,” September 6, 2025.

⁷ D’Andrea, Aaron, and Isaac Callan. “Alcohol Potentially a ‘Saving Grace’ for Ontario Convenience Stores as Sales Begin.”

⁸ CFIB, Your Voice Survey - February 2024

⁹ BC Liquor Distribution Branch, *Liquor Market Review F24-25 Q4: March 2025*

¹⁰ Newfoundland and Labrador Liquor Corporation, *NLCC Annual Report 2023-2024*

¹¹ Newfoundland and Labrador Liquor Corporation, “Newfoundland and Labrador Liquor Corporation (NLC) Announces Fourth Quarter (Q4) Performance,” May 29, 2025,

¹² Canadian Federation of Independent Business, “66 cents of every dollar spent at a small business stays local versus only 11 cents spent at a multinational retailer,” news release, Toronto, August 29, 2023.

¹³ Government of Ontario, A Case for Change: Increasing Choice and Expanding Opportunity in Ontario’s Alcohol Sector.

found that Ontario previously only allowing alcoholic beverages to be sold at big box stores shut small businesses out of any potential economic growth and was “a terrible deal for Ontario consumers and small businesses.”¹⁴

Private Models Across Canada

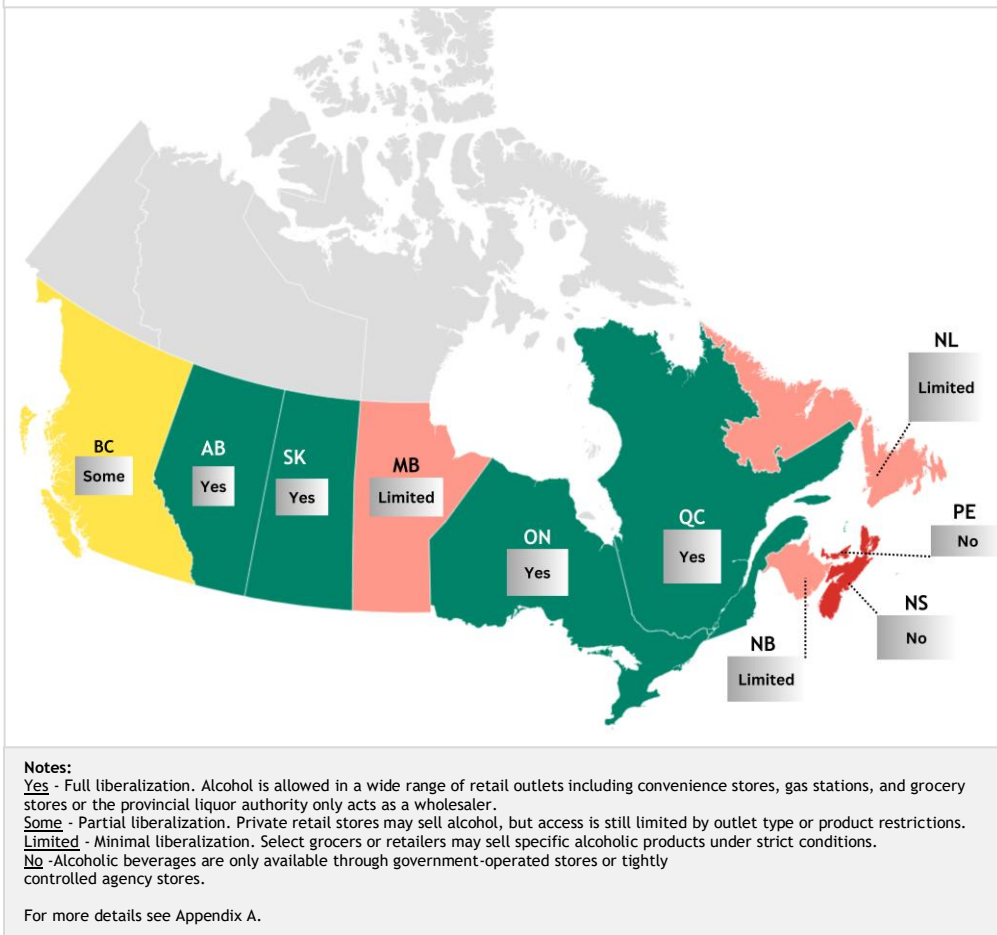
As shown in Figure 2, Atlantic provinces are outliers from most other provinces, in terms of how alcoholic beverages can be sold in their jurisdictions. Provincial models range from totally private sales in provinces like Saskatchewan and Alberta to government-owned monopolies, as seen in Nova Scotia and Prince Edward Island.

Government Monopoly

Under a government monopoly, consumers have limited choice and can only purchase from government-operated stores that control pricing, regulation, distribution, markup structure, and product availability. All provinces, apart from Saskatchewan and Alberta, where the provincial liquor commissions only act as distributors, have government-operated stores. However, only Nova Scotia and Prince Edward Island have a total government monopoly over sales.

Evaluating Private Competition in Provincial Alcohol Sales Market

Figure 2



¹⁴ Government of Ontario, A Case for Change: Increasing Choice and Expanding Opportunity in Ontario's Alcohol Sector.

Agency Stores

In all provinces where government-operated alcohol retailers exist, privately operated agency stores are permitted. These stores are located in, and operated by, private retail stores, however, they are heavily regulated. For example, most agency stores are only able to operate in areas where a government-operated retail store does not exist, largely in rural communities. Additionally, the government authority regulates the prices that agency stores can charge.

In provinces like Nova Scotia, agency stores also face restrictions on which local products they can carry,¹⁵ restricting access for some local microbreweries to agency stores in their own community.

Alcohol Authority Only Acts as a Distributor

In the Provinces of Alberta and Saskatchewan, the sale of alcoholic beverages is only done by private alcohol retailers. In 1993, Alberta became the first Canadian province to privatize liquor retailing. In October 2022, the Saskatchewan Liquor and Gaming Authority announced it would exit liquor retailing but would maintain its responsibilities of distribution of alcohol after “year-over-year declines in net revenue at SLGA retail stores.”¹⁶

Privately Licensed Retail Stores

Alberta, British Columbia, Manitoba, Ontario, Quebec, and Saskatchewan all permit private retailers to operate within their respective provinces. These private stores allow for product specialization, provide additional selection, and, in some cases, competitive pricing for consumers. However, the type of private retailers differs.

In Alberta and Saskatchewan, private retailers are stores where the sole purpose is to sell alcoholic beverages. In British Columbia, privately owned Licensee Retail Stores are permitted to sell beer, wine, cider, and spirits; however, the provincially run BC Liquor Distribution Branch

¹⁵ Nova Scotia Liquor Corporation, “Agency Stores,” *MyNSLC - Doing Business with Us*

¹⁶ Government of Saskatchewan, “Government of Saskatchewan to Exit Liquor Retailing,” news release, October 27, 2022

acts as the sole wholesaler for the province. Additionally, the province has placed a moratorium on new licensees which has been in place almost continuously since the 1990s.¹⁷

Similarly, Manitoba allows retail beer vendors; however, the vendor must be located in a hotel operated by the licensee, on a building located on the same land as the hotel, or on land adjacent to the hotel such that the hotel and beer vendor operate as a single establishment.¹⁸

Sale of Alcoholic Beverages at Retail Small Businesses

At the time of release, only Quebec and Ontario allow the sale of alcoholic beverages in retail stores like convenience and corner stores, while Newfoundland and Labrador only allow private retail for the sale of locally brewed beer.

State of Alcohol Sales in Atlantic Canada

The level of private competition in the sale of alcoholic beverages across Atlantic Canada vary, but overall, the region lacks the level of private sales most provinces enjoy. Unfortunately, due to a lack of public data, it is challenging to assess the current economic benefits of private sales in Nova Scotia and New Brunswick. However, in Newfoundland and Labrador and Prince Edward Island, current private sales generated over \$211 million and \$271 thousand in sales, respectively.¹⁹

Apart from Newfoundland and Labrador, the average consumer in the Atlantic region does not have the same level of convenience as the average Canadian. The maritime provinces have some of the lowest density of establishments



¹⁷ British Columbia Ministry of Public Safety and Solicitor General, news release, “B.C. safeguards public health, retail liquor landscape,” October 4, 2021

¹⁸ Liquor, Gaming and Cannabis Authority of Manitoba, “Retail Beer Vendor.”

¹⁹ 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),” release date March 7, 2025

that sell alcoholic beverages in the country, well below the national average of 6 stores per 10,000 people above 18 years of age.²⁰ The following outlines the current state of alcohol sales in the Atlantic provinces and the potential benefits that more liberalized sales would bring.

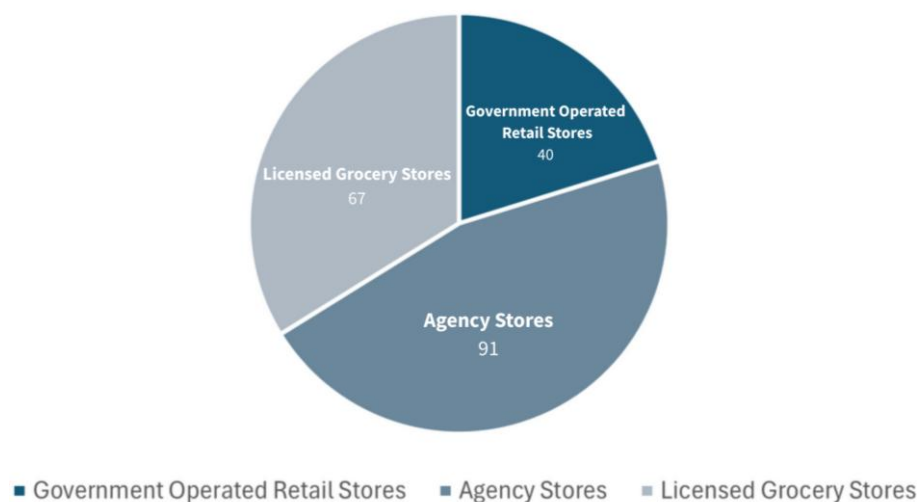
New Brunswick

Relative to the rest of the Atlantic Provinces, New Brunswick has one of the more liberal markets; however, private sales are restricted to agency stores and only 67 licensed grocery stores, which can sell beer, wine, and cider. Even with these licensed grocery stores, New Brunswick sits below the national average of alcohol retail outlet density with four retail outlets per 10,000 people over the age of 18.²¹ This means that the average New Brunswicker still does not have the same level of access as the average Canadian, despite access to select private retailers.

In 2020, New Brunswick furthered its liberalization of alcoholic beverage sales by allowing cross-selling, a method where producers may sell their New Brunswick produced-and-packaged products to each other's Manufacturers Agency Store (MAS) locations.²²

However, there is still more work to be done to open opportunities for producers in the province. In a 2022 report authored by New Brunswick's Auditor General, it was revealed that

New Brunswick # of Establishments



Source: ANBL Annual Report 2023-2024

²⁰ Author calculations based on 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)," release date March 7, 2025

²¹ Author calculations based on 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)," release date March 7, 2025

²² Inda Intiar, "Craft Alcohol Producers Can Now Sell Each Other's Products," 91.9 The Bend (Moncton, NB).

the province has ineffective planning and engagement to develop the province's liquor industry. The report also found that the province's authority had no outcomes-based plan or documented strategy detailing how it would participate in the development of the liquor industry.²³

By introducing more sales channels, the New Brunswick Government could improve their work to develop the local industry, while at the same time, supporting local retail small businesses and giving local consumers more ways to support local producers.

It is crucial that moving forward, the New Brunswick Government no longer exclude small businesses from the sale of alcoholic beverages. Only allowing alcoholic beverages to be sold in grocery stores and selected agency stores excludes small businesses who are unfairly left out of any potential economic growth and limits the competition in the marketplace. Concerns have been raised by local groups that under the current system of only allowing alcohol sales in grocery stores in New Brunswick, the government could be providing an unfair advantage and diverting demand from local convenience stores.²⁴

Newfoundland and Labrador

The Newfoundland and Labrador Liquor Corporation (NLC) controls most retail alcohol sales through its 28 retail and 144 agency stores²⁵. However, the province is showing that a private retail model for locally brewed beer is possible. According to Statistics Canada the province currently allows 620 private retailers, mainly convenience stores, to sell locally produced beer through the acquisition of a Brewer's Agent License. While there is some administrative burden to acquire this license, such as completing a detailed floor plan, getting municipal approval for a new location, having an inspection

Newfoundland and Labrador # of Establishments



Source: NLC Annual Report 2023-2024 and Statistics Canada Table 10-10-0013-01

²³ Office of the Auditor General of New Brunswick, *Report of the Auditor General of New Brunswick, Volume I 2022, Chapter 2*

²⁴ The Canadian Press, "Convenience Stores Concerned with Beer Sales in New Brunswick Grocery Stores," *CTV News Atlantic*, October 31, 2019

²⁵ NLC Annual Report 2023-2024.

completed by the NLC, and an annual fee of \$125, this policy has proven to be a boon to the local brewing industry.

According to the most recent annual report from the Newfoundland and Labrador Liquor Corporation, local beer makes up over 62% of all beer sold in the province.²⁶

The Province of Newfoundland and Labrador stands to grow their alcoholic beverage industry further by adding locally produced wine and cider to the available selection of products included in the Brewer's Agent License. The sale of local beer alone at convenience stores has resulted in privately sold locally produced beer making up 40% of all sales of alcoholic beverages in the province.

Nova Scotia

As of 2024, there are 110 Nova Scotia Liquor Corporation (NSLC) retail stores, 63 agency stores, and four private stores that are only located in the Halifax Regional Municipality.²⁷ Local brewers and vintners' growth have been largely dependent on the availability of shelf space at the NSLC. While local producers are allowed to sell their products through retail stores at their breweries, there is limited control over prices, affecting their ability to compete with government-owned stores.

Additionally, in transactions outside of the NSLC's network, such as deliveries directly to households, hospitality businesses, or sales through retail stores located at breweries, producers must still pay a five percent markup on the wholesale cost of sale to the NSLC, known as the

²⁶ 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)," released March 7, 2025

²⁷ Nova Scotia Liquor Corporation, Annual Report 2023-2024 (Halifax: NSLC, 2024),

Retail Sales Markup Allocation.²⁸ In comparison, in neighbouring New Brunswick, brewers in their province pay no retail sales markup allocation fees on transaction outside of the Alcool New Brunswick Liquor (ANBL) network.²⁹

Anecdotally, Local producers have also raised concerns about the NSLC's work to promote local products. This concern was corroborated by a 2020 Auditor General's report that found the NSLC had an overall lack of adequate planning, evaluation, and clarity around how they support the local alcohol manufacturing industry.³⁰ In an additional report in 2021, the auditor general also found that while product listing decisions can have a direct impact on the success of a supplier, the NSLC's shelf management process has no clear processes or documentation and that shelf management plans are not verified for accuracy³¹.

By providing additional shelf space through private retail small businesses, the province can both address the NSLC's current need to improve support for the local industry and provide more options for consumers who have less access than the average Canadian, with four retail outlets per 10,000 people 18 or over. As the province with Atlantic Canada's most restrictive alcohol monopoly, Nova

Nova Scotia # of Establishments



Source: NSLC Annual Report 2023-2024

²⁸ Office of the Auditor General of Nova Scotia, Report of the Auditor General to the Nova Scotia House of Assembly: Nova Scotia Liquor Corporation - Phase I (Halifax: Office of the Auditor General of Nova Scotia, June 2020).

²⁹ New Brunswick Liquor Corporation. General Mark-up Policy 2022. Effective April 1, 2025. Accessed at "Markup Rates 2025-2026."

³⁰ Office of the Auditor General of Nova Scotia, *Nova Scotia Liquor Corporation - Phase II* (Halifax: Office of the Auditor General of Nova Scotia, May 25, 2021).

³¹ Ibid.

Scotia must modernize its sales framework to better support the local alcoholic beverage industry, particularly as other provinces advance liberalization. Under the current model, local producers, consumers, and even the NSLC miss out on the potential economic benefits from more liberalization, which has added millions of dollars to jurisdictions that have liberalized the sale of alcoholic beverages in their province.

Prince Edward Island

In the province of Prince Edward Island, almost all sales of alcoholic beverages are through the 18 PEI Liquor retail stores, and 12 agency stores even though they make up only half of the retail establishments in the province.³² The Province of Prince Edward Island does permit the unique practice of allowing microbreweries to establish one or more off site retail stores which results in private retailers making up half of the number of permitted establishments to sell alcoholic beverages, however these establishments only make up less than 10% of the volume of sales in the province³³. These stores are only permitted to sell products produced by the holder of the microbrewery license, as well as other products produced by other local breweries, known as cross-selling.

While it is positive to see cross-selling and local craft breweries given the unique opportunity to establish off-premises retail stores, there are significant start-up costs to create these new brick-and-mortar stores. By expanding

Prince Edward Island # of Establishments



Source: PEILCC Annual Report 2023-2024 and Statistics Canada Table 10-10-0013-01

³² 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)," released March 7, 2025

³³ 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)," released March 7, 2025

distribution to private retail, the province would allow a more cost-effective and accessible way for local craft breweries to access new sales methods at a lower cost and provide a greater economic impact to the industry and retail sector.

A Better Way Forward

Atlantic provinces can welcome private sales of alcoholic beverages into their province and create a more competitive environment that benefits consumers and local businesses. Provinces should level the playing field for local producers and retailers. While New Brunswick, Newfoundland and Labrador, and Prince Edward Island do allow some level of private sales, market liberalization is an opportunity to boost the local economy.

Private Retail Sale

Small businesses across Atlantic Canada believe their provinces should embrace a larger representation of private retailers in the marketplace. Ontario has shown that liberalizing the alcoholic beverage market can benefit local producers and retailers such as convenience stores and grocers. Ending the government monopoly on sales could also increase shelf space and provide a new way for local independent breweries, wineries, and cideries to expand their access into the marketplace. By expanding the market, provinces could give local producers the space and access they need to grow.

New Brunswick and Newfoundland and Labrador should continue their progress and expand the local selection available and how private retailers can sell to consumers.

In New Brunswick, the Provincial Government should end the practice of only allowing the 67 licensed grocery stores to sell alcoholic beverages and should allow small businesses to sell beer, cider, ready-to-drink beverages, and wine.

In Newfoundland and Labrador, the Provincial government should expand the allowable products to be sold in convenience stores to include cider, wine, and ready-to-drink alcoholic beverages.



Finally, both Nova Scotia and Prince Edward Island should allow local private retailers to sell locally produced beer, cider, wine, and ready-to-drink alcoholic beverages.

Cross-Selling

Cross-selling policies allow local producers such as breweries, ciders, and wineries to sell other locally produced alcoholic beverages, as currently seen in New Brunswick. By allowing local producers to support local, provinces can increase the competition in the market while also expanding and bolstering the local industry. Additionally, jurisdictions should eliminate any retail markup as this sales method does not engage the distribution channels run by provincial alcohol authorities (see No-Touch-No-Tax).

No-Touch-No-Tax Policy

For sales methods where the provincial alcohol authority's distribution network is not used, such as direct sales to restaurants and other businesses as well as direct sales to consumers, there should be no markup charged. This would provide much-needed tax relief and also provide an incentive for local producers to develop distribution chains.

Direct-to-Consumer (DTC)

Atlantic Provinces should move forward with DTC shipment of alcoholic beverages inter provincially unilaterally as is being done in Manitoba rather than depending on memorandums of understanding (MOUs or individual agreements that could result in a patchwork of 80 separate agreements.

Improved data and transparency

In the Atlantic provinces, only Nova Scotia and Newfoundland provide detailed public data on sale of local alcoholic beverages. It is crucial for provincial alcohol authorities to publish at the very least annual data on the sales for local producers to ensure the public and stakeholders are able to hold the authorities and government accountable to build the provinces respective local industries.

Additionally, governments should consider publishing or providing support to local association to publish online tools for consumers to easily find local breweries and other alternatives to their province's alcohol authority. For example, the Government of Ontario recently published an [interactive map](#) that helps consumers find nearby stores to purchase local alcoholic beverages.

Appendix A: Methodology Summary Evaluating Provincial Alcohol Sales Liberalization

This analysis evaluates the relative liberalization of alcohol retail sales across Canadian provinces using a 0–10 scoring system. The score reflects how restrictive each province’s regulatory approach is toward the private sale of alcoholic beverages. Higher scores indicate more liberalized, consumer-accessible systems; lower scores denote more restrictive, government-controlled models.

Provinces were assessed on two key dimensions:

1. **Retail Accessibility** – whether alcohol is permitted for sale in non-traditional retail outlets such as convenience stores, corner stores, and gas stations.
2. **Market Structure** – the degree to which private retailers can participate in alcohol sales and whether government monopolies dominate retail operations.

Scoring was applied as follows:

- **10 points (Yes):** Full liberalization. Alcohol is allowed in a wide range of retail outlets including convenience stores, gas stations, and grocery stores or provincial authorities only act as wholesalers. Examples: *Alberta, Saskatchewan, Quebec, and Ontario*.
- **5 points (Some):** Partial liberalization. Private retail stores may sell alcohol, but access is still limited by outlet type or product restrictions. Examples: *British Columbia*
- **3 points (Limited):** Minimal liberalization. Select grocers or retailers may sell specific alcoholic products under strict conditions. Example: *Manitoba, New Brunswick, Newfoundland and Labrador*.
- **0 points (No):** No liberalization. Alcohol is only available through government-operated stores or tightly controlled agency stores. Examples: *Nova Scotia, Prince Edward Island*.

This framework enables a comparative understanding of the provinces' regulatory openness to alcohol retail reform, with implications for consumer choice, local producer access, and private sector participation.

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