

# **A Report Identifying Interprovincial Trade Barriers in the Canadian Beer Industry**

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**We would like to thank the members of Beer Canada's Internal Trade Task Force for their contribution to the development of this report:**

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## EXECUTIVE SUMMARY

This document contains an inventory of provincial policies and practices that are considered to impede the free movement of beer between provinces or provide financial incentives exclusively to in-province brewers. In 2015, Beer Canada's Board of Directors struck an Internal Trade Task Force to investigate these issues.

Based on the Task Force's research, the general categories under which barriers may reside were identified as follows: Distribution, Charges/Costs of Service, Access to Points of Sale, and Pricing.

When it comes to beer, the Canadian Interprovincial trade landscape can be characterized as follows:

- Trade barriers exist in every province in one or more of the four general categories.
- Feedback from the Task Force identified two different types of barriers; 1. Those that reside in regulation and policy, 2. Those that reside at the operational level and relate to listing policies that may put out of province brewers at a disadvantage.
- In some cases, regional and reciprocal trade agreements have been established to benefit brewers.
- Mark-up policies favouring in-province or regional brewers of particular sizes appear to be a popular means of promoting the local or regional industry, although this mechanism has come under scrutiny in recent years.
- Provincial financial incentives for in-province small brewers are becoming a more common option for encouraging growth in the local beer industry.
- All provinces permit inter-plant shipments, while some charge a fee/tariff on out of province beer to do so.
- Aside from inter-plant shipments, all out of province brewers must go through a designated warehousing system.

This resource is updated in the first month of every calendar year to reflect changes in the interprovincial trade landscape that occurred in the previous 12 months, and is current to January 2017. It is our intention that this document will serve as a source of information for brewers and regulators so that they can better understand the challenges that brewers face in their efforts to grow beyond their provincial borders.

## NEWFOUNDLAND

<b>Distribution</b>	<ul style="list-style-type: none"> <li>Out of province brewers can only distribute beer through Newfoundland and Labrador Liquor Corporation (NLLC). In province brewers, can self-deliver to Brewers Agents and NLC.</li> </ul>
<b>Charges/Costs of Services</b>	<ul style="list-style-type: none"> <li>Out of province beer incurs a handling charge of \$0.67 per litre for NLC warehousing services<sup>1</sup>.</li> <li>An out of province brewer has no other option but to utilize NLC warehouse and distribution system<sup>2</sup></li> </ul>
<b>Access to Points of Sale</b>	<ul style="list-style-type: none"> <li>Out of province beer cannot be sold through brewers' agents (retail).</li> </ul>
<b>Pricing</b>	<ul style="list-style-type: none"> <li>Microbreweries based in a province other than Newfoundland and Labrador must pay full mark-up<sup>3</sup>.</li> <li>The microbrewery can request a rebate, if applicable, based upon total HL produced annually.</li> <li>For a microbrewery based in Newfoundland the reduced markup is applied immediately.</li> </ul>
<b>Notes</b>	<ul style="list-style-type: none"> <li>None Applicable</li> </ul>

## PRINCE EDWARD ISLAND

<b>Distribution</b>	<ul style="list-style-type: none"> <li>The PEI Liquor Control Commission (PEILCC) is the sole distributor of beer. However, in the case where a manufacturer has more than one separate producing facility in the province of PEI, the transfer of product between facilities for retail sales may be permitted<sup>4</sup>.</li> <li>Micro-breweries who possess a license issued by the PEILCC will be permitted to deliver keg beer product to licensees<sup>5</sup></li> </ul>
<b>Charges/Costs of Services</b>	<ul style="list-style-type: none"> <li>None Applicable</li> </ul>
<b>Access to Points of Sale</b>	<ul style="list-style-type: none"> <li>The Package Sales Licence allows the person holding a Dining Room, Club or Special Premises license to obtain a licence to sell unopened beer, wine and spirits for off sales. This is only available to products produced by in-province brewers<sup>6</sup>.</li> </ul>
<b>Pricing</b>	<ul style="list-style-type: none"> <li>A higher mark-up applies to products produced by out of province brewers<sup>7</sup></li> </ul>
<b>Notes</b>	<ul style="list-style-type: none"> <li>In 2015, PEILCC made a request for larger brewers to deliver directly to their stores, rather than go through their warehouse.</li> </ul>

<sup>1</sup> NLC Pricing and Mark-up Policy

<sup>2</sup> NLC Pricing and Mark-up Policy

<sup>3</sup> NLC Pricing and Mark-up Policy

<sup>4</sup> PEILCC Manufacturers Policy Manual

<sup>5</sup> PEILCC Microbrewery Distribution Policy

<sup>6</sup> CBC News Article, March 12, 2014

<sup>7</sup> PEILCC Product Markup Structure

## NOVA SCOTIA

<p><b>Distribution</b></p>	<ul style="list-style-type: none"> <li>• Out of province brewers are not permitted to self-deliver<sup>8</sup>. Note that an exception applies to New Brunswick brewers due to a reciprocal beer trade and distribution agreement reached between Nova Scotia and New Brunswick<sup>9</sup></li> <li>• Nova Scotia treats New Brunswick microbreweries the same way as Nova Scotia microbreweries providing lower distribution costs and enhanced access<sup>10</sup></li> <li>• The NSLC Board will consider, on a business case basis, granting the privilege to self-distribute to high volume brewers not manufacturing in the province. The criteria to be considered before granting a permit/contract to self-distribute will be: (1) sales within Nova Scotia of 1M equivalent dozen (2) impact on NSLC administration and operations; (3) requirement to ensure the NSLC right of audit and monitoring the distribution system is respected; (4) warehouse to be fully owned, or leased and operated by the supplier in Nova Scotia, as opposed to a 3rd party warehouse; or alternatively, services contracted through the NSLC; (5) the right to self-distribute does not include the ability to set up a manufacturers' retail store; (6) annual permit fee of \$2,000 + \$1.00/equivalent dozen for product shipped into Nova Scotia<sup>11</sup> (*Refer to footnote link for complete criteria*)</li> </ul>
<p><b>Charges/Costs of Services</b></p>	<ul style="list-style-type: none"> <li>• Out of province brewers incur NSLC cost of service and warehouse fees. In-province brewers can bypass the NSLC distribution and warehousing system<sup>12</sup></li> <li>• For inter-plant shipments, volumes imported into Nova Scotia more than the amount shipped outside of Nova Scotia will be subject to NSLC costs of service<sup>13</sup></li> <li>• Nova Scotia manufacturers importing non-Canadian beer brands into Nova Scotia that they as a corporate entity represent in Canada pay a NSLC right of first receipt fee of \$1.00 per equivalent dozen<sup>14</sup></li> </ul>
<p><b>Access to Points of Sale</b></p>	<ul style="list-style-type: none"> <li>• Nova Scotia microbreweries can sample and sell their products at Nova Scotia farmers markets.</li> <li>• Direct to consumer importation from other provinces of Canadian wine that is 100% certified as locally grown, is permitted. This same benefit is not extended to beer<sup>15</sup></li> </ul>

8 NSLC Beer Trade and Distribution Policy

9 Nova Scotia and New Brunswick Beer Accord News Release

10 Nova Scotia and New Brunswick Beer Accord News Release

11 NSLC Beer Trade and Distribution Policy

12 NSLC Beer Trade and Distribution Policy

13 NSLC Beer Trade and Distribution Policy

14 NSLC Beer Trade and Distribution Policy

15 Importation of Wine for Personal Use Legislation

<p><b>Pricing</b></p>	<ul style="list-style-type: none"> <li>• A small brewer must be producing in Nova Scotia to qualify for the discounted mark-up rate<sup>16</sup></li> <li>• Nova Scotia has opened the province’s licensee market to New Brunswick beer mark-up free.<sup>17</sup> NB small brewers have the option of selling their products directly to NS Licensees without first going through the NSLC, thereby avoiding any NSLC markup. (This option is not available to NS small brewers wishing to sell in NB.) NB beer goes in without markup collected in either province, while NS small brewers in comparison are paying .50 per liter Retail Sales Markup Allocation for all beer sold out of the brewery (i.e. do not make use of NSLC services or sell beer through the NSLC). The gap will be narrowed on April 1, 2017 as the NS Retail Sales Markup Allocation goes to 5% of wholesale, reducing the amount to be paid by NS brewers.<sup>17</sup></li> <li>• Nova Scotia wine which is comprised of 85% Nova Scotia grapes draws a mark-up of 43% of landed cost versus 140% of landed cost for other wines<sup>18</sup>.</li> <li>• Nova Scotia has introduced a non-transparent variable mark-up which means two different suppliers selling the same product (beer) could be charged different mark-up rates.</li> </ul>
<p><b>Notes</b></p>	<ul style="list-style-type: none"> <li>• Brewers in New Brunswick and Nova Scotia have reciprocal access (local brewer status) to their respective markets including the option to self-deliver<sup>19</sup></li> <li>• Inter-plant transfers (plant to plant) are permitted for Nova Scotia brewers<sup>20</sup>.</li> <li>• In December 2006, the Nova Scotia and Québec governments announced a reciprocal agreement to remove significant trade restrictions on beer produced in the two provinces. The terms of the <i>Nova Scotia-Québec Beer Trade Agreement</i> specified that Nova Scotia brewers were no longer subject to a tariff or surcharge on products entering Québec. Similarly, Québec no longer required fees for various products entering from Nova Scotia. <b>Note: This agreement was not renewed in 2013.</b></li> </ul>

16 NSLC Correspondence

17 ANBL Notice to NB Microbrewers re Direct Sales to NS Licensees & NSLC News Release, December 20, 2016

18 NSLC Correspondence

19 Nova Scotia and New Brunswick Beer Accord News Release

20 NSLC Beer Trade and Distribution Policy

## NEW BRUNSWICK

<b>Distribution</b>	<ul style="list-style-type: none"> <li>Out of province brewers are not permitted to self-deliver. Note that in New Brunswick an exception applies to Nova Scotia brewers under a reciprocal arrangement<sup>21</sup></li> </ul>
<b>Charges/Costs of Service</b>	<ul style="list-style-type: none"> <li>For inter-plant shipments, volumes imported into New Brunswick in excess of the amount shipped outside of New Brunswick will be subject to ANBL full costs of service, first receipt charges and penalties<sup>22</sup></li> <li>Brewers in New Brunswick who have entered into agreements with other brewers to warehouse and distribute out of province beer are subject to full ANBL cost of service/first receipt charges. Charges will be waived for beer imported into New Brunswick produced in Nova Scotia by Nova Scotia brewers up to a maximum of 4,000 HL per year<sup>23</sup></li> </ul>
<b>Access to Points of Sale</b>	<ul style="list-style-type: none"> <li>None Applicable.</li> </ul>
<b>Pricing</b>	<ul style="list-style-type: none"> <li>A reduced "Craft Brewer" markup applies to brewers with total sales up to and including the first 150,000 hectolitres sold in New Brunswick<sup>24</sup></li> <li>This contrasts with wine, cider and spirits where only New Brunswick in province producers receive a reduction.<sup>25</sup></li> </ul>
<b>Notes</b>	<ul style="list-style-type: none"> <li>Brewers in New Brunswick and Nova Scotia have reciprocal access (local brewer status) to their respective markets including the option to self-deliver<sup>26</sup></li> <li>Brewers in New Brunswick may transfer their products from other Canadian plants for the purpose of supplying the Maritime markets<sup>27</sup></li> </ul>

## QUEBEC

<b>Distribution</b>	<ul style="list-style-type: none"> <li>An out of province brewer without a Quebec warehouse and distributor's permit must sell through the SAQ<sup>28</sup></li> <li>On May 26, 2016, legislation received Royal Assent, permitting Quebec microbreweries and brewpubs to sell growlers (container size range of 900 ml to 2 litres, specified in regulation) at the place where they are produced, for consumption elsewhere. Prior to this change, legislation only allowed permit holders to sell for consumption onsite at the brewery.</li> </ul>
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21 ANBL Beer Listing and Distribution Policy

22 ANBL Beer Listing and Distribution Policy

23 ANBL Beer Listing and Distribution Policy

24 ANBL Pricing Policy

25 ANBL Pricing Policy

26 ANBL Beer Listing and Distribution Policy

27 ANBL Beer Listing and Distribution Policy

28 SAQ First Receivership Requirements

<b>Charges/Costs of Service</b>	<ul style="list-style-type: none"> <li>• An out of province brewer without a licensed warehousing facility in Quebec is subject to all SAQ cost of service, markups, and tariffs<sup>29</sup></li> <li>• Out of province brewers importing into Quebec through private distributors are subject to import receipt and inspection charges of \$205 per shipment for out of province beer<sup>30</sup></li> </ul>
<b>Access to Points of Sale</b>	<ul style="list-style-type: none"> <li>• A brewer licensed to produce beer in Quebec has access to the private retail (corner/grocery stores) system<sup>31</sup></li> <li>• An out of province brewer requires a licensed warehouse facility to sell through the private retail system<sup>32</sup></li> <li>• A brewer cannot sell product through both retail channels (SAQ and corner/grocery stores)<sup>33</sup></li> <li>• In province brewers can sell beer out of their own breweries and are exempt from the SAQ mark-ups<sup>34</sup></li> </ul>
<b>Pricing</b>	<ul style="list-style-type: none"> <li>• A supplier may not sell a product to the SAQ at a warehouse price that is higher than the warehouse price charged to any other provincial liquor board<sup>35</sup></li> <li>• Beer sold and distributed through the private retail system including on-site brewery retail stores does not draw the SAQ mark-up<sup>36</sup></li> <li>• Prior to June 1, 2016 Quebec-based brewers producing less than 300,000 hectolitres worldwide qualified for a reduction on the specific tax for beer<sup>37</sup>. As of June 1, 2016, any Quebec-based brewer, regardless of production amounts, qualifies for the reduced specific tax on the first 150,000 hectolitres of beer produced and sold in Quebec.<sup>38</sup></li> </ul>
<b>Notes</b>	<ul style="list-style-type: none"> <li>• Inter-plant shipments are permitted. A \$19 per shipment charge is applied to inter-plant transfers<sup>39</sup></li> <li>• In December 2006, the Nova Scotia and Québec governments announced the terms of the reciprocal <i>Nova Scotia-Québec Beer Trade Agreement</i> which specified brewers in either province were no longer subject to a tariff or surcharge on products entering the respective province. This agreement was not renewed in 2013.</li> </ul>

29 SAQ First Receivership Requirements  
30 SAQ First Receivership Requirements  
31 SAQ First Receivership Requirements  
32 SAQ First Receivership Requirements  
33 SAQ First Receivership Requirements  
34 SAQ First Receivership Requirements  
35 SAQ Purchasing and Merchandising Policy  
36 SAQ First Receivership Requirements  
37 Quebec Sales Tax Act  
38 Quebec Finance Document 2016-3  
39 SAQ First Receivership Requirements

## ONTARIO

<b>Distribution</b>	<ul style="list-style-type: none"> <li>Out of province beer from a brewer that does not maintain a local production facility must pass through a LCBO warehouse. However, from the warehouse to retail, the out of province brewer has the option to self-deliver, but must commit to this for a minimum one year period<sup>40</sup> To be eligible for interplant shipments an Ontario brewery must have a minimum annual capacity of 10,000 hl and a minimum annual production of 2,500 hl<sup>41</sup></li> </ul>
<b>Charges/Costs of Service</b>	<ul style="list-style-type: none"> <li>The TBS/LCBO charge an out of store cost of service of \$0.164 per litre for out of province beer for delivery (a reduced COS applies for self-delivery). This COS does not apply to Ontario beer<sup>42</sup></li> </ul>
<b>Access to Points of Sale</b>	<ul style="list-style-type: none"> <li>Only the TBS/LCBO may deliver packaged beer to on premise consumption licensees. An exception, however, is made for Ontario microbrewers producing less than 25,000 hectolitres, who are permitted to direct deliver to on premise licensees<sup>43</sup></li> <li>Wineries that hold a manufacturer's licence from the AGCO (this means an Ontario winery) can obtain an authorization from the AGCO to sell VQA wine at Farmers' Markets. This has not been extended to beer as of yet.</li> <li>Brewers and vintners are not permitted to sell competitor's products through an on-site manufacturer retail outlet.</li> </ul>
<b>Pricing</b>	<ul style="list-style-type: none"> <li>Refundable corporate tax credit (small beer manufacturer's tax credit) is available to a qualifying manufacturer with a permanent establishment in Ontario<sup>44</sup></li> <li>Following not available for beer: Reduced markup for Ontario table wines versus out-of-province table wine<sup>45</sup></li> <li>Reduced floor price for Ontario wine compared to non-Ontario wine. The floor price is reduced further for Ontario wine using 100% Canadian agricultural products<sup>46</sup></li> </ul>
<b>Notes</b>	<ul style="list-style-type: none"> <li>Interplant shipments are permitted. However, a brewer has to take the product from the out-of-province plant directly to the in-province plant and cannot stop and drop off at a distribution centre or warehouse along the way to the in-province plant.<sup>47</sup></li> </ul>

40 LCBO Internal Delivery Policy

41 LCBO Interplant Shipment Policy

42 LCBO Pricing Policy

43 LCBO Licensee Delivery Policy

44 Budget 2010, Implementing Legislation

45 LCBO Pricing Policy

46 LCBO Pricing Policy

47 LCBO Interplant Shipment Policy

## MANITOBA

<b>Distribution</b>	<ul style="list-style-type: none"> <li>• When a brewers' volume is lower than 0.5% share of market, it may be distributed either through the MLLC or the private beer distribution systems; if it exceeds 0.5%, it can only be distributed through the private beer distribution system<sup>48</sup></li> <li>• All package sizes of a brand must be distributed either through the MLLC system or through private distribution system, but not through both<sup>49</sup></li> </ul>
<b>Charges/Costs of Service</b>	<ul style="list-style-type: none"> <li>• None Applicable.</li> </ul>
<b>Access to Points of Sale</b>	<ul style="list-style-type: none"> <li>• None Applicable.</li> </ul>
<b>Pricing</b>	<ul style="list-style-type: none"> <li>• None Applicable.</li> </ul>
<b>Notes</b>	<ul style="list-style-type: none"> <li>• Interplant shipments are permitted.</li> <li>• Previously, the MLLC had applied a commercial consideration (warehouse fee) to all foreign and out of province beer – this now applies only to foreign beer<sup>50</sup></li> <li>• On January 18, 2016, as part of the province's Supporting Manitoba Craft Brewing Strategy, Manitoba Liquor &amp; Lotteries is introducing a loan program of up to \$5 million. This has been allocated towards the issuing of loans of up to \$250,000 towards the purchase of brewing or distilling equipment for in-province producers just starting their businesses; or towards the expansion of existing production or sales capacity for brewers already in operation.<sup>51</sup></li> </ul>

48 MLLC Beer Distribution Policy

49 MLLC Beer Distribution Policy

50 MLLC Pricing and Listing Information

51 MLLC Loan Program for Craft Producers

## SASKATCHEWAN

<b>Distribution</b>	<ul style="list-style-type: none"> <li>• Brewers have the option of distributing their own beer or distributing through the SLGA warehousing system. Due to operational constraints, the SLGA will arrange the distribution of out of province beer it lists until the annual volume exceeds a specific limit.</li> </ul>
<b>Charges/Costs of Service</b>	<ul style="list-style-type: none"> <li>• None Applicable.</li> </ul>
<b>Access to Points of Sale</b>	<ul style="list-style-type: none"> <li>• There are about 190 franchises in Saskatchewan. Of those franchises, about 84 are allowed to sell popular beer (for example, Molson Canadian, Budweiser, Coors Light). The rest of the franchisees can only sell specialty beer, which is any brand selling at a premium<sup>52</sup></li> <li>• In 2014, changes were made to Saskatchewan liquor legislation<sup>53</sup> to permit direct shipments to Saskatchewan consumers of British Columbia produced wine and craft spirits. Beer is not included in these changes<sup>54</sup></li> </ul>
<b>Pricing</b>	<ul style="list-style-type: none"> <li>• A production levy is remitted to SLGA for all products sold by Saskatchewan small breweries who sell directly to consumers, retailers or commercial permittees and is lower than the markup that would apply if the products were distributed by SLGA.</li> <li>• As of October 9, 2016, changes were made increasing production thresholds for all small alcohol manufacturers in the province and introducing a graduated markup structure based on annual production. In addition, in-province small alcohol producers can determine their own retail prices, whether the product is sold through SLGA (subject to social reference pricing), and can establish warehousing and aging premises separate from their manufacturing site.<sup>55</sup></li> </ul>
<b>Notes</b>	<ul style="list-style-type: none"> <li>• Inter-plant shipments are permitted.</li> <li>• The New West Partnership Trade Agreement succeeds the Trade, Investment and Labour Mobility Agreement (Saskatchewan now part of the NWPTA). Provincial rights of first receipt remain unchanged.</li> </ul>

52 Government of Saskatchewan Future Options for Liquor Retailing

53 Saskatchewan Alcohol and Gaming Regulation Amendment Act, 2014

54 Government of Saskatchewan News Release, November 27, 2014

55 SLGA Backgrounder, October 9, 2016

## ALBERTA

<b>Distribution</b>	<ul style="list-style-type: none"> <li>• None Applicable.</li> </ul>
<b>Charges/Costs of Service</b>	<ul style="list-style-type: none"> <li>• None Applicable.</li> </ul>
<b>Access to Points of Sale</b>	<ul style="list-style-type: none"> <li>• None Applicable.</li> </ul>
<b>Pricing</b>	<ul style="list-style-type: none"> <li>• As of August 5, 2016, the AGLC applies, the existing standard markup rate of \$1.25/L to all regular beers sold in Alberta, regardless of brewery origin or volume. Regular beer is beer with less than or equal to 11.9 per cent alcohol content. However, <u>Alberta-based brewers who produce and sell no more than 300,000 hectolitres in Alberta annually will be eligible to participate in the Alberta Small Brewers Development Program.</u> The grants will be allocated based on sales volumes of Alberta-made beer sold in the province.<sup>56 57</sup></li> </ul>
<b>Notes</b>	<ul style="list-style-type: none"> <li>• All beer sold in Alberta must be stored prior to distribution in an AGLC authorized warehouse<sup>58</sup></li> <li>• Inter-plant shipments are permitted.</li> <li>• The New West Partnership Trade Agreement succeeds the Trade, Investment and Labour Mobility Agreement (TILMA) (Saskatchewan is now part of the NWPTA). Provincial rights of first receipt remain unchanged.</li> <li>• Out of province beer can go through Connects Logistics or private distributors authorized by the AGLC.</li> </ul>

## BRITISH COLUMBIA

<b>Distribution</b>	<ul style="list-style-type: none"> <li>• Beer produced by out-of-province brewers must be imported into a private warehouse in the province, after which it may then be sold directly to retail outlets and licensees. In-province brewers may import their brands from other jurisdictions into BDL or may choose to subcontract the warehousing and distribution of their products.</li> <li>• As of January 23, 2017, licensed B.C. manufacturers no longer require a separate agent licence as they are now permitted to promote and market their products off-site under their basic manufacturing licence. <u>An agent's licence is still required by anyone representing non-B.C. manufacturers.</u><sup>59</sup></li> </ul>
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<sup>56</sup> AGLC FAQ Beer Markup Changes August 5, 2016

<sup>57</sup> Alberta Small Brewers Development Program – Terms and Conditions

<sup>58</sup> AGLC Liquor Suppliers, Representatives and Agents Handbook

<sup>59</sup> LCLB Policy Directive 16-17, Manufacturers and Agents

<b>Charges/Costs of Service</b>	<ul style="list-style-type: none"> <li>• None Applicable.</li> </ul>
<b>Access to Points of Sale</b>	<ul style="list-style-type: none"> <li>• An in-province brewer with an on-site store can sell its products at farmers and artisan markets. The required on-site retail effectively excludes this retail channel for out of province brewers<sup>60</sup></li> <li>• BC VQA and Independent Wine Licensees have the option of receiving shelf space in grocery stores in areas other than the segregated liquor retail area<sup>61</sup>.</li> <li>• In 2012 the province approved a regulation permitting the possession of unlimited quantities of wine from other provinces (either shipped or imported “in-person”) if the wine is purchased from a winery in another province and is made entirely from agricultural products grown or produced in the province where the winery is located<sup>62</sup></li> <li>• In 2014, an agreement was reached with Saskatchewan, which permits the direct to consumer importation of Saskatchewan wine and craft spirits by B.C. consumers from Saskatchewan<sup>63</sup></li> </ul>
<b>Pricing</b>	<ul style="list-style-type: none"> <li>• The following is not available to brewers:</li> <li>• B.C. wine that is sold through government liquor stores receives a rebate on a portion of the markup. (VQA Support Program) or QEP (Quality Enhancement Program).</li> </ul>
<b>Notes</b>	<ul style="list-style-type: none"> <li>• Inter-plant transfers are permitted.</li> <li>• The New West Partnership Trade Agreement succeeds the Trade, Investment and Labour Mobility Agreement (Saskatchewan now part of the NWPTA). Provincial rights of first receipt remain unchanged.</li> </ul>

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60 LCLB Liquor Policy Directive 15-11, Farmers Markets  
61 LCLB Wine Stores Terms and Conditions  
62 B.C. Liquor Possession Regulation  
63 BC Government News Release, August 29, 2014