

**A GUIDE TO THE ALCOHOL INDUSTRY**

Major Alcohol  
Sales Outlets

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# Introduction

This is a brief guide to the major alcohol sales outlets in Australia.

Packaged liquor accounts for 80% of all alcohol sold in Australia.<sup>1</sup> It is therefore important to understand who is selling it and how it is made available.

The packaged liquor market in Australia is dominated by the major supermarket chains Woolworths and Coles, who accounted for over 63% of the liquor retail market share in 2015-16.<sup>2</sup>

This guide outlines the numerous retail brands of these two companies, as well as banner groups and several examples of online liquor retailers operating in Australia.

It is important for all those with an interest in alcohol policy to understand the nature of the industry to help inform a broader understanding of how alcohol companies and industry groups seek to influence alcohol policy. For example, knowing who the major players are in the liquor retailing world is helpful when considering policies regarding alcohol availability (e.g. trading hours and outlet density) and liquor licensing issues.

The information in this guide focuses on the off-premise sector and has been collated and summarised from a wide range of sources including company websites, annual reports and industry publications. Due to the constantly changing nature of the industry, this document should be taken as a guide only.

The information is accurate to the best of our knowledge and we welcome any comments or feedback. We will endeavour to regularly update the information.

This guide to the major alcohol sales outlets in Australia is complemented by two other guides, Major Alcohol Companies in Australia: Producers and Distributors and Peak Bodies and Representative Groups.

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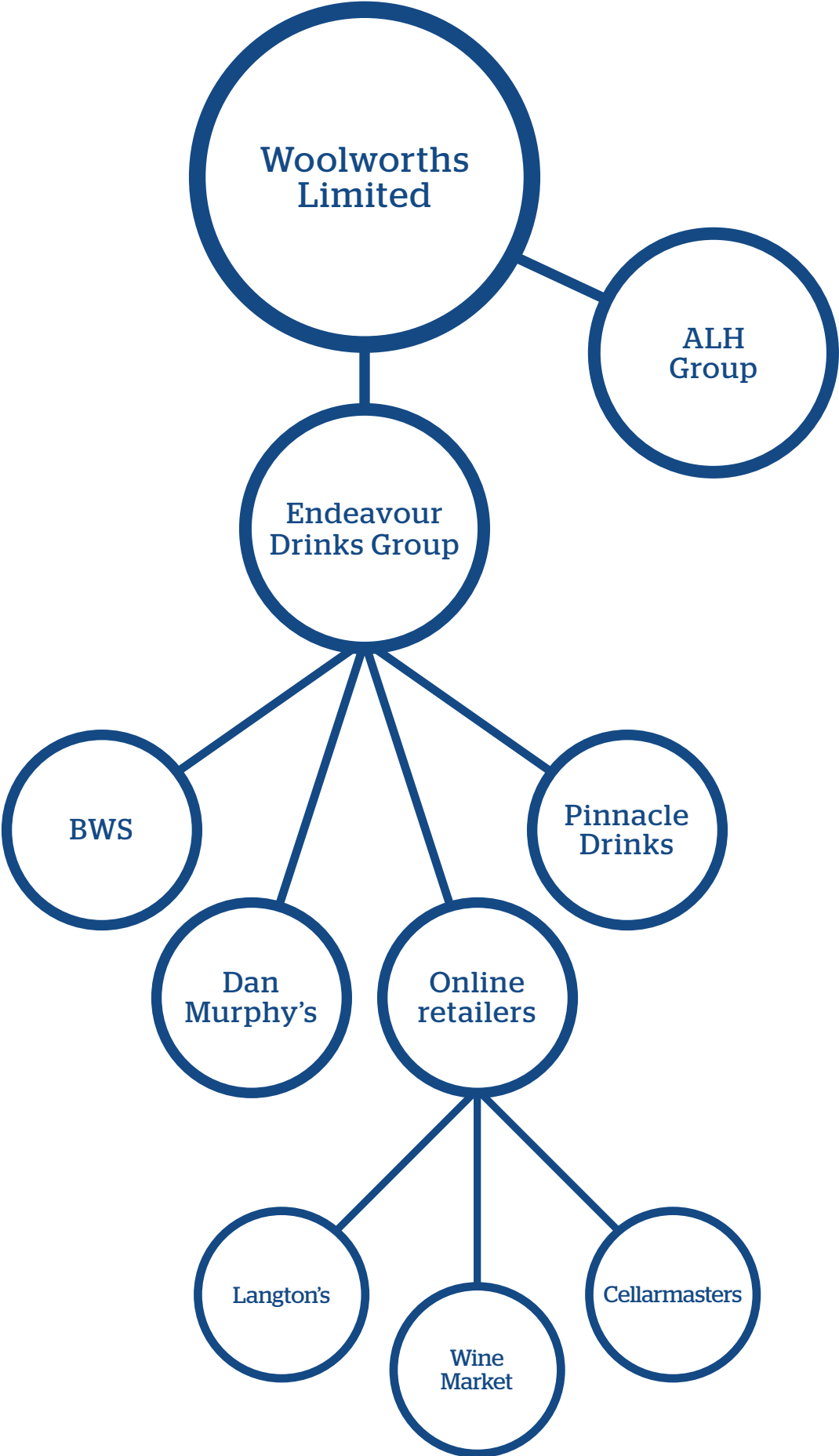
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### Woolworths Limited

- Publicly listed Australian company that covers food and grocery, liquor, tobacco, petrol, general merchandise and hotels.
- Had 42.9% liquor retailing market share<sup>2</sup> and 54.4% of the online liquor retailing market share in Australia in 2015-16.<sup>3</sup>
- Headquarters: Sydney, Australia.

### ALH Group

- Woolworths owns 75% of ALH Group in a joint venture with Bruce Mathieson Group.
- ALH Group have a portfolio of pubs, sports bars, bistros, restaurants, cafes, retail liquor, accommodation, nightclubs and wagering.<sup>14</sup>
- Operates 323 licensed venues and over 537 retail liquor outlets across Australia (as at January 2017).<sup>15</sup>
- Had sales of \$1.5 billion in the 2016 financial year.<sup>5</sup>
- Australia's leading pub operator of electronic gaming machines, wagering, sports betting outlets and KENO.<sup>14</sup> ALH has more than 12,000 poker machines in its hotels, and it's estimated that pokies account for at least 80% of ALH's revenue.<sup>16</sup>

### Endeavour Drinks Group

- In April 2016 Woolworths Liquor Group announced its name change to Endeavour Drinks Group.<sup>4</sup>
- Operates 1,486 liquor stores under the Dan Murphy's and BWS brands (as at end of 2016 financial year).<sup>5</sup>
- Had sales of \$7.58 billion in the 2016 financial year.<sup>5</sup>
- Financially contributes to DrinkWise.<sup>6</sup>
- Foundation member of Alcohol Beverages Australia.<sup>7</sup>

### Dan Murphy's

- "A destination "big-box" drinks merchant."<sup>8</sup>
- Lowest liquor price guarantee: "We don't match prices, we beat them daily by employing a dedicated Price Check Team."<sup>8</sup>
- Over 200 stores in Australia (as at January 2017).<sup>9</sup>
- Operates an online store.
- In 2016, Dan Murphy's accounted for nearly 30% of the total dollars spent by Australians on alcohol purchased from liquor retailers.<sup>70</sup>
- In any given week, 1.2 million Australians shop at Dan Murphy's, spending an average of \$67 each.<sup>10</sup>
- Large, liquor barn format. e.g. Dan Murphy's Bicton store in WA has approximately 1,296m<sup>2</sup> of display/sales area.<sup>11</sup>
- Announced in 2016 that over the next three to five years they plan to open 8-10 new stores per annum.<sup>5</sup>

### BWS

- "A small "convenience" drinks merchant, with a range of formats, ranging from high street liquor stores and supermarket attached liquor stores through to drive-through liquor stores."<sup>8</sup>
- "Australia's leading convenience drinks retailer with 1,200 stores across Australia" (as at January 2017).<sup>8</sup>
- "Our intention is to make BWS the value convenience store of choice."<sup>12</sup>
- In any given week, 1.1 million Australians shop at BWS, spending an average of \$48 each.<sup>10</sup>
- Operates an online store.
- In 2013, Woolworths Liquor stores were rebranded to BWS.<sup>13</sup>
- Announced in 2016 that over the next three to five years they plan to open 6-10 standalone new stores per annum.<sup>5</sup>

### Pinnacle Drinks

- Established in 2012, manages its own and exclusive brands on behalf of Endeavour Drinks Group.<sup>17</sup>
- Partners with winemakers, growers, brewers and distillers to exclusively supply wine, beer and spirit brands to BWS, Dan Murphy's and ALH Group.<sup>17</sup>

See *Major Alcohol Companies in Australia: Producers and Distributors guide* for details on

*Pinnacle Drinks brands.*

### Cellarmasters

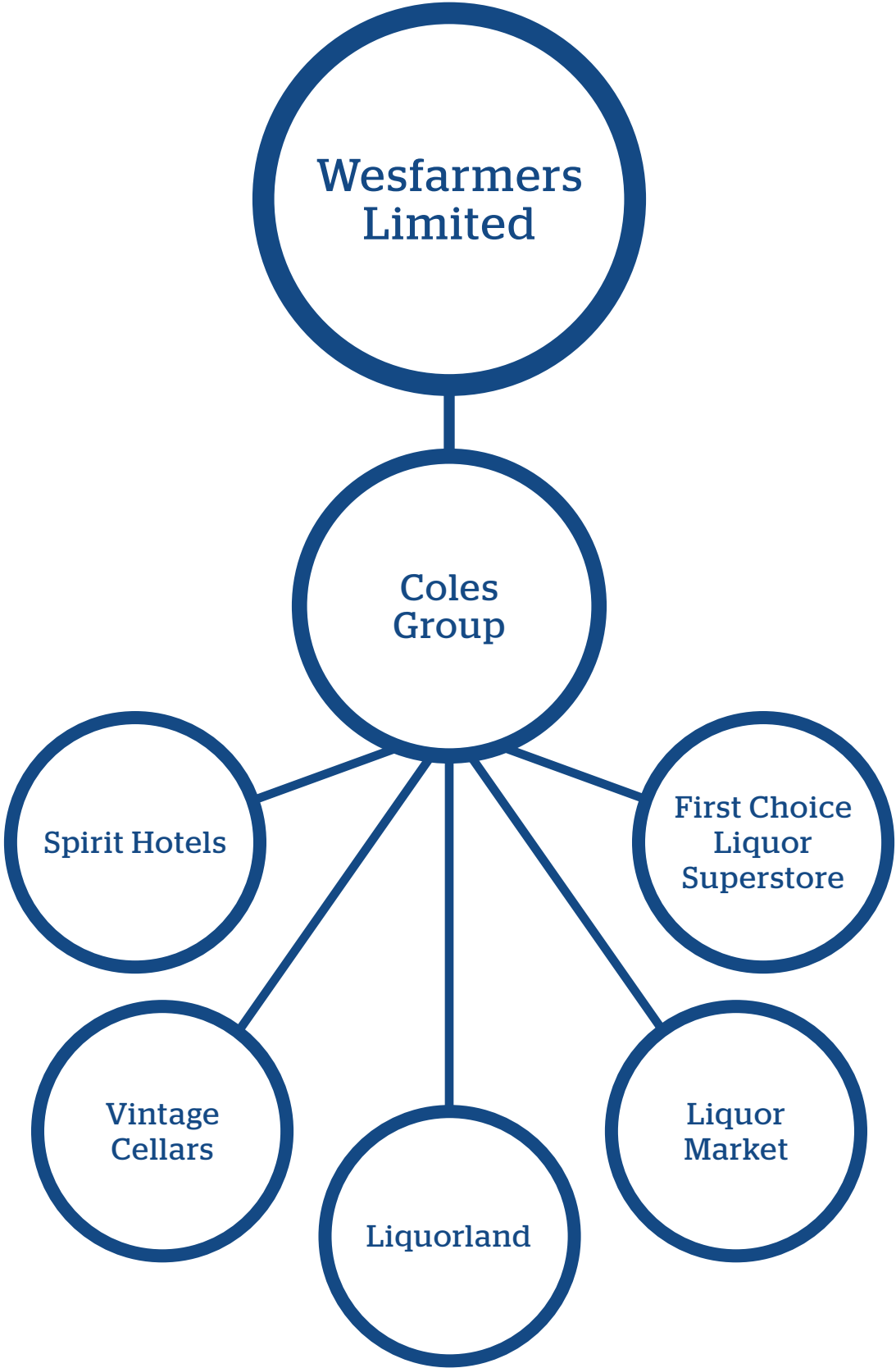
- Online liquor retailer
- Australia's largest provider of home-delivered wines.<sup>18</sup>

### Wine Market

- Online liquor retailer
- "Our industry connections and friendships with winemakers let us grab the best deals in the country before the others have even heard the grapes being picked... WineMarket is your bartender, bargain hunter and BBQ booze-finder in one simple shop. We do the hunting, you do the drinking."<sup>69</sup>

### Langton's

- Australia's leading online fine wine marketplace.<sup>19</sup>



### **Wesfarmers Limited**

- Publicly listed Australian company, with business operations covering supermarkets, liquor stores, tobacco sales, hotels and convenience stores, department stores, home improvement and office supplies, coal mining, energy, chemicals and fertilisers and industrial and safety products.<sup>20</sup>
- Wesfarmers Limited had 20.8% of the liquor retailing market share<sup>2</sup> and 19% of the online liquor retailing market share<sup>3</sup> in Australia in 2015-16.
- Headquarters: Perth, Australia.

### **Coles Group**

- The Coles division of Wesfarmers is a food, liquor and fuel retailer.
- National liquor retailer and hotel operator with over 860 stores and 89 hotels (as at March 2017).<sup>21</sup>
- Coles liquor sales revenue in 2015-16 was estimated to be \$2.09 billion.<sup>2</sup>
- Financially contributes to DrinkWise.<sup>6</sup>

### **Spirit Hotels**

- As at March 2017, Coles operates 89 hotels in Queensland, Western Australia, South Australia and New South Wales under the Spirit Hotels brand.<sup>21</sup>

### **First Choice Liquor Superstore**

- "First Choice Liquor has a huge range and some of the cheapest prices around.... With the convenience of over 80 stores across Australia and the ability to buy online and have it delivered to your door, First Choice Liquor is a one stop shop for all your liquor needs."<sup>22</sup>
- 97 First Choice Liquor stores in Australia (as at June 2016).<sup>23</sup>
- Liquor barn format. "The size of each store (on average 1,000m<sup>2</sup>) and the volume of liquor product purchased enables First Choice stores to offer a greater range and depth of stock holding than is currently found at Coles Liquor's other (Liquorland or Vintage Cellars) branded stores. It also enables First Choice to provide these products at competitive prices".<sup>24</sup>
- Operates an online store.

### **Liquorland**

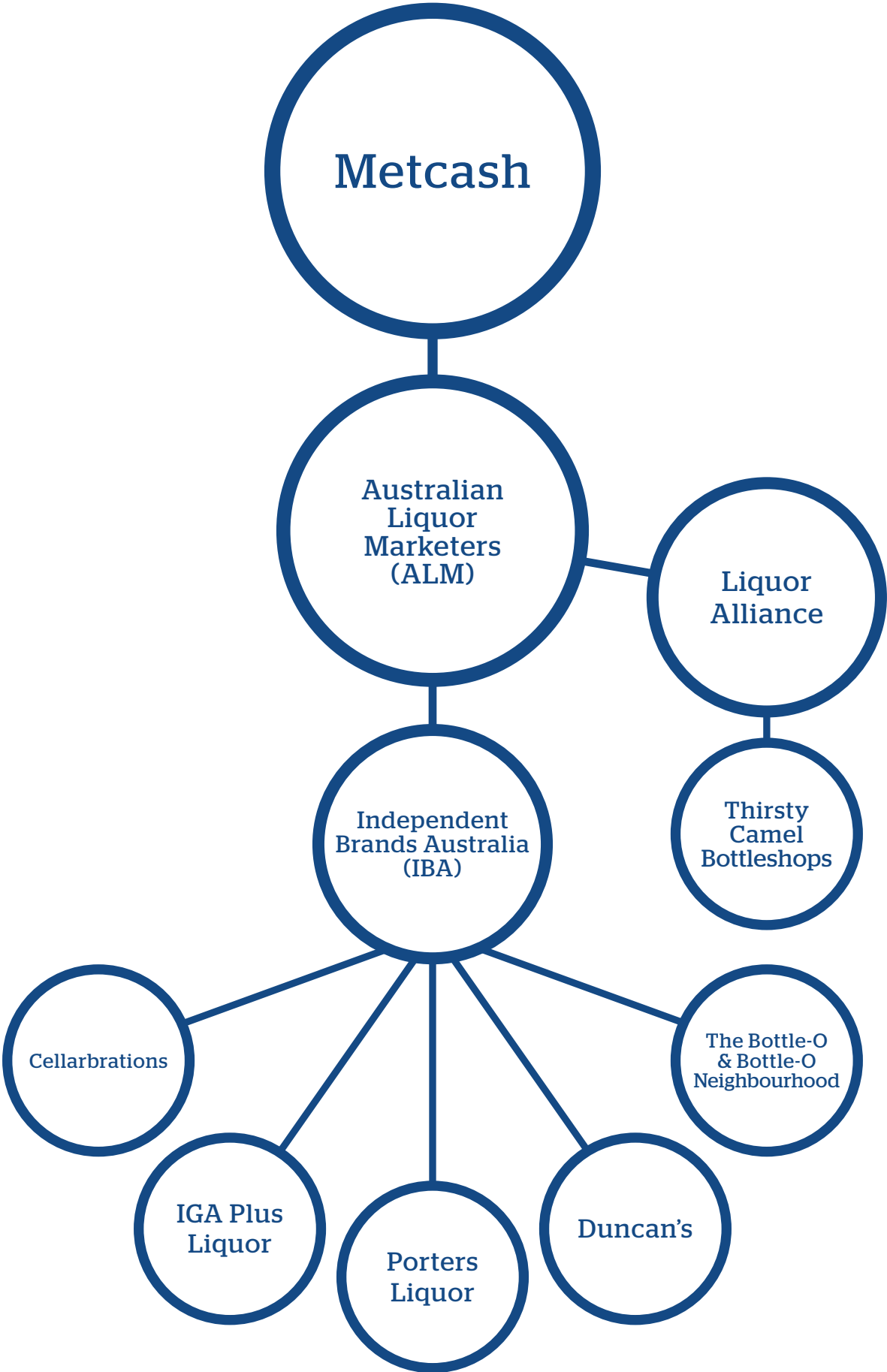
- "Liquorland is one of Australia's largest alcohol stores, stocking a wide range of local and imported wines, beers, ciders, Champagne, spirits and premixed drinks across more than 600 locations nationwide."<sup>25</sup>
- 687 Liquorland stores in Australia (as at June 2016).<sup>23</sup>
- Operates an online store.

### **Vintage Cellars**

- "Vintage Cellars is Australia's Fine Wine Specialist"; stocks wine, champagne, spirits and beer.<sup>26</sup>
- 81 Vintage Cellars stores in Australia (as at June 2016).<sup>23</sup>
- Operates an online store.

### **Liquor Market**

- "Low cost and so much more".<sup>27</sup>
- Liquor barn format. First store launched in 2016 in Ringwood, Victoria is 1000m<sup>2</sup>.<sup>28</sup>
- Two stores: Ringwood and Ashburton in Victoria.





### **Metcash**

- Leading wholesale distribution and marketing company specialising in grocery, fresh produce, liquor, hardware and other fast moving consumer goods – customers are independent retailers.<sup>29</sup>
- Has three divisions – Metcash Food & Grocery, Australian Liquor Marketers, and Independent Hardware Group.
- Headquarters: Sydney, Australia.

### **Australian Liquor Marketers (ALM)**

- ALM is a broad range liquor wholesaler supplying over 12,000 hotels, liquor stores and restaurants throughout Australia.<sup>29</sup>
- Has a specialist on-premise liquor division operating as Harbottle On-Premise that supplies bars, pubs, restaurants and hotels.<sup>29</sup>
- In 2012, signed a major distribution contract with Liquor Marketing Group to distribute supplies to approximately 1700 stores.<sup>29</sup>
- In June 2014, acquired the shares of Liquor Traders Pty Ltd which controls the marketing of the Thirsty Camel brand in Queensland, 140 stores.<sup>29</sup>
- In 2015 acquired Southern Independent Liquor Group, which trades under the Duncan's and OzLiquor brands.<sup>30</sup>
- In 2016 acquired Porters Liquor<sup>31</sup> and the NSW and Tasmanian licenses and day-to-day operations of the Thirsty Camel business.<sup>32</sup>
- Foundation member of Alcohol Beverages Australia.<sup>7</sup>
- Total sales of \$3.2 billion for the year ended April 2016.<sup>33</sup>

### **Liquor Alliance**

- Joint venture with ALM.<sup>37</sup>
- Trades under Thirsty Camel banner.

### **Thirsty Camel Bottleshops**

- "One of Thirsty Camel bottleshops core brand value is irreverence".<sup>38</sup>
- "We're not your average bottleshop because let's face it, the bottleshop is probably your last stop before a good time and we like to have one too."<sup>39</sup>
- Over 450 Thirsty Camel bottle shops around Australia (as at January 2017).<sup>39</sup>

### **Independent Brands Australia (IBA)**

- IBA is a Metcash subsidiary established in 2003 to create strong national brands and a suitable framework for independent liquor retailers to compete equally with the chains and secure long-term sustainability.<sup>29</sup>
- Provides marketing support and retail services.<sup>29</sup>
- Represents over 1,600 independent liquor retailers.<sup>2</sup>
- Estimated 9% of liquor retailing market share in 2015-16.<sup>2</sup>

### **Cellarbrations**

- One of the largest independent retail liquor brands in Australia.<sup>34</sup>
- Over 500 outlets nationally (as at January 2017).<sup>34</sup>

### **IGA Plus Liquor**

- Unable to find store numbers.

### **Porters Liquor**

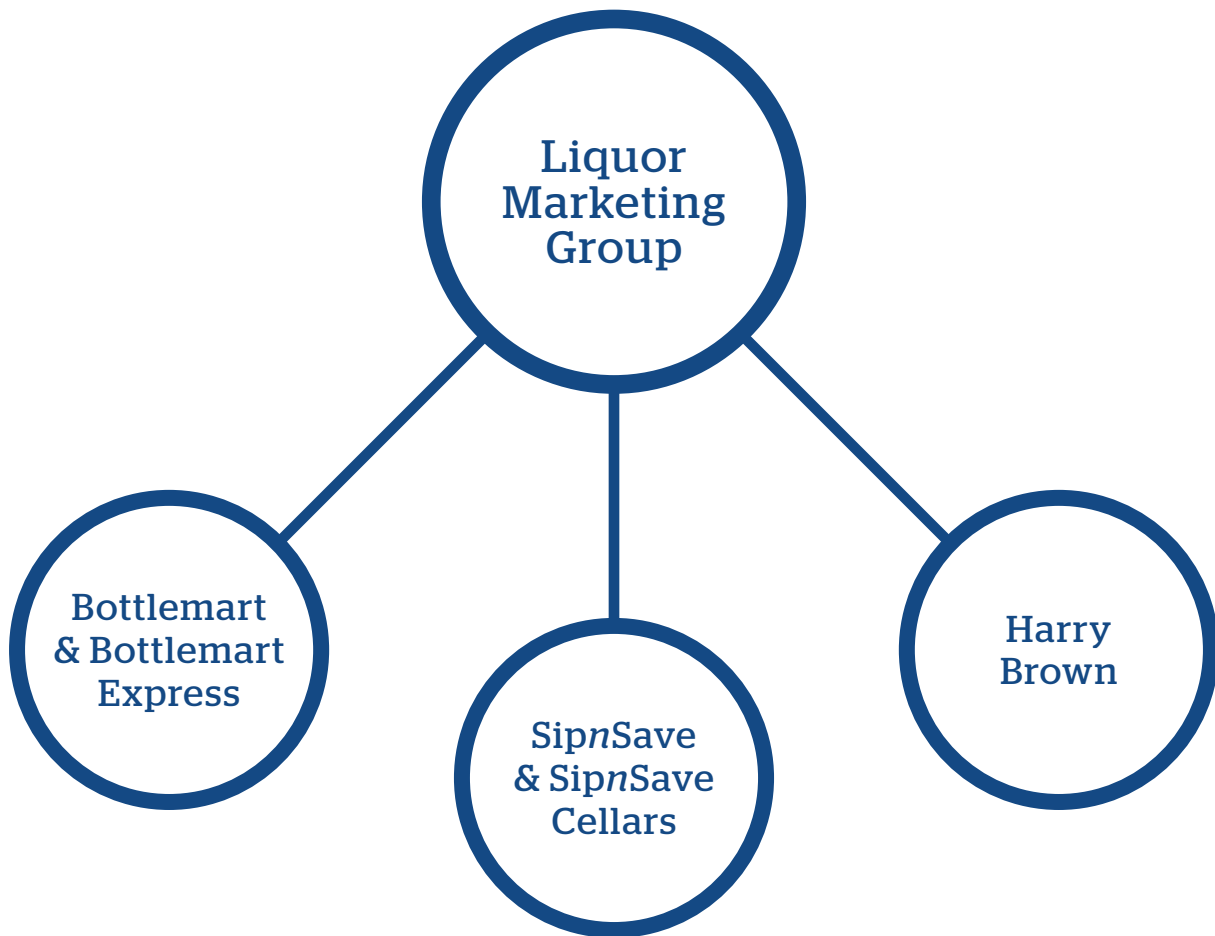
- "a group of independently owned and operated liquor retailers across NSW."<sup>35</sup>
- As at December 2016 had 30 stores; acquisition by ALM will see this increase to 100 nationally.<sup>31</sup>

### **The Bottle-O and Bottle-O Neighbourhood**

- "The Bottle-O is committed to delivering local customers genuine value with every purchase."<sup>36</sup>
- Over 300 outlets in Australia (as at January 2017).<sup>36</sup>

### **Duncan's**

- "At Duncan's we're all about good times with friends and family...we like to call them our mates. That is why we love to sell you the best of beer, spirits, and wine across Victoria and Tasmania."<sup>40</sup>
- Unable to find store numbers.



#### **Liquor Marketing Group**

- One of Australia's leading alcohol marketing groups; provides independent retailers with negotiating power, consumer brand expertise and support to compete in the off-premise retail marketplace.<sup>41</sup>
- Represents more than 1,400 independent operators in the off-premise market (as at January 2017).<sup>41</sup>
- Headquarters: Sydney, Australia.

#### **Bottlemart and Bottlemart Express**

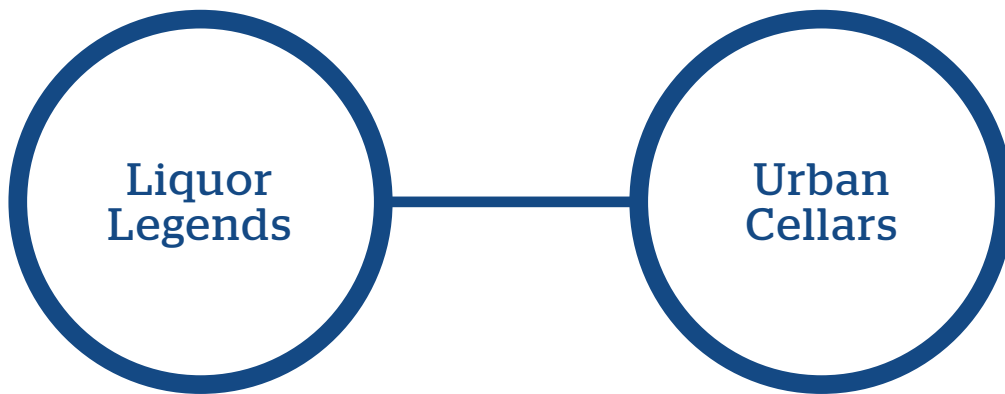
- Bottlemart and Bottlemart Express are the trading names for a group of independently owned hotels and bottle shops which form part of the Liquor Marketing Group.<sup>42</sup>
- Over 700 stores throughout Australia (as at January 2017).<sup>42</sup>

#### **SipsnSave and SipsnSave Cellars**

- Over 100 outlets throughout South Australia, Broken Hill and Alice Springs (as at January 2017).<sup>42</sup>
- An additional 140 outlets in South Australia are represented by the LMG banner, Bargains – a buying group that caters for the needs of smaller country hotels.<sup>42</sup>

#### **Harry Brown**

- Banner group for independent stores wanting a liquor barn format.<sup>42</sup>
- Four outlets around Australia – three in Queensland and one in Western Australia (as at January 2017).<sup>43</sup>

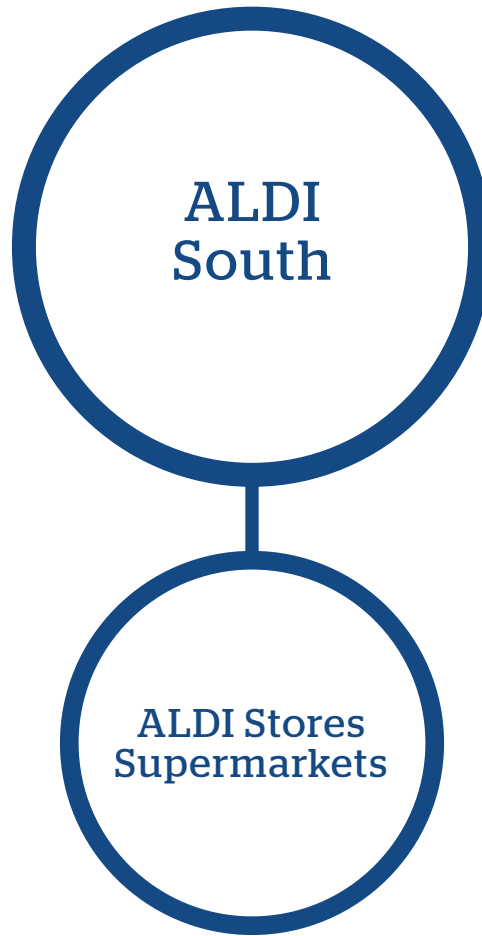


#### **Liquor Legends**

- Banner group for independently owned and managed outlets including drive-throughs, bottleshops and liquor barns/superstores.<sup>44</sup>
- Over 300 outlets across Queensland, NSW, ACT, South Australia and Victoria (as at January 2017).<sup>44</sup>

#### **Urban Cellars**

- Alternative banner group to Liquor Legends.
- Independently owned and managed outlets in Queensland, NSW, ACT, South Australia and Victoria.<sup>45</sup>
- Unable to find store numbers.



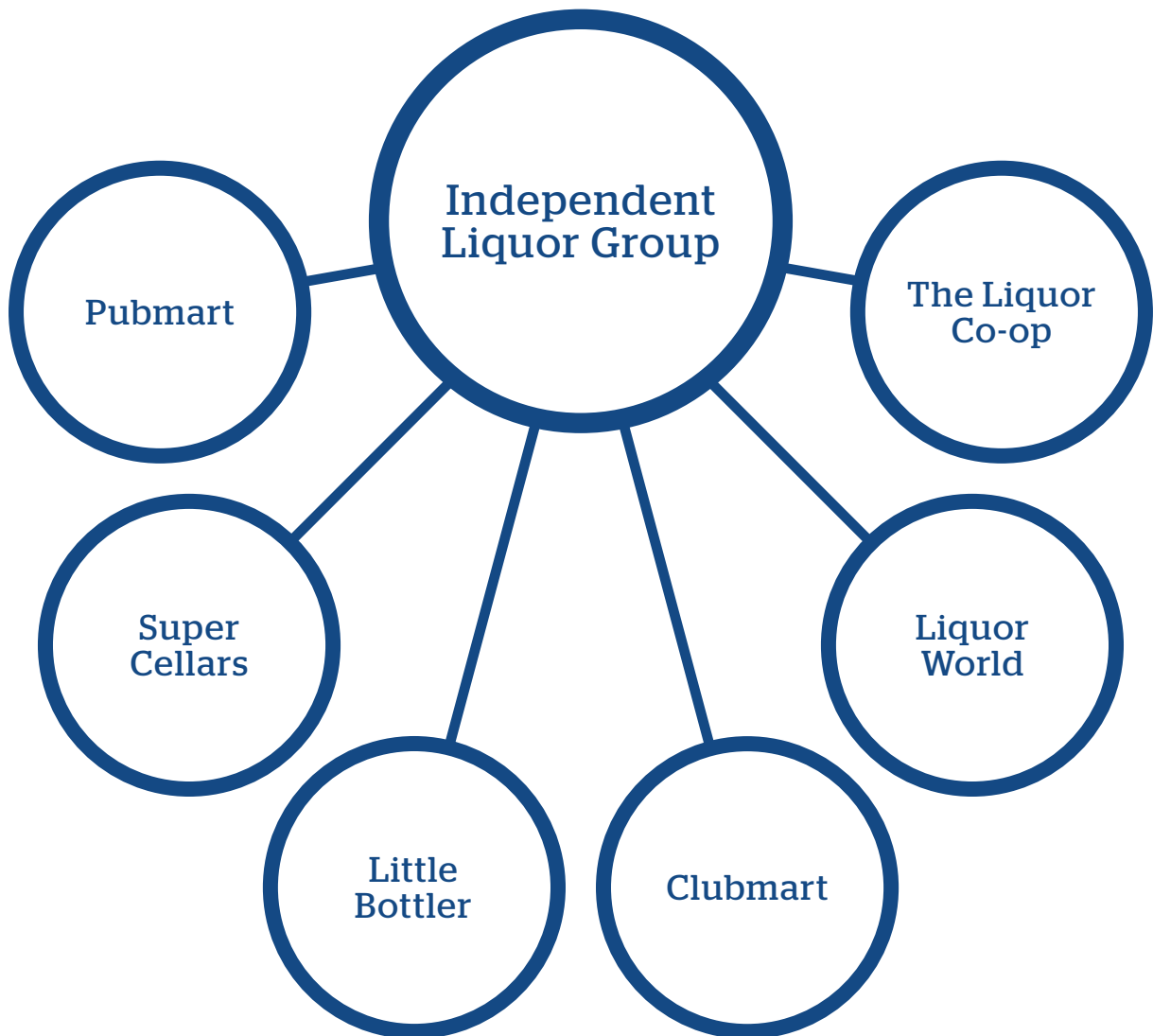
#### **ALDI South**

- ALDI South is responsible for ALDI stores in some European countries, UK, USA and Australia.<sup>46</sup>
- Headquarters: Germany.

#### **ALDI Stores Supermarkets**

- Australian entity of global ALDI company.<sup>46</sup>
- Some ALDI supermarkets sell wine, beer, spirits and RTD products; "Whether you prefer beer, wine, spirits or premium sparkling, we have just the right drop for you – without all the usual fuss. Just like all of the products available at ALDI, our award-winning liquor range offers excellent quality at an everyday low price."<sup>47</sup>

- As at January 2017, has over 450 stores operating in NSW, ACT, Queensland, South Australia, Victoria and WA.<sup>46</sup> Holds more than 260 liquor licences nationally, with liquor available in selected stores in NSW, ACT and Victoria; two liquor licences have been granted in WA (as at January 2017).<sup>48</sup>
- Financially contributes to DrinkWise.<sup>6</sup>
- Headquarters: Sydney, Australia.



### Independent Liquor Group

- A member-owned co-operative wholesaler that services hotels, bottle shops, licensed clubs, bars and restaurants across NSW and Queensland.<sup>49</sup>
- ILG has over 1,200 shareholder members and supplies to over 1,500 outlets, with an annual turnover of \$371 million.<sup>49</sup>
- 350 Little Bottler and Super Cellars stores in NSW and almost 200 in QLD (as at June 2016).<sup>50</sup>
- Headquarters: Sydney, Australia.

### Pubmart

- A banner group for hotels with bottle shops that want the benefits of group buying power and a planned advertising program.
- Outlet will maintain its independent identity.

### Super Cellars

- Banner group established in January 2012 as an alternative branding to Little Bottler.

### Little Bottler

- Banner group established in January 2009.

### Clubmart

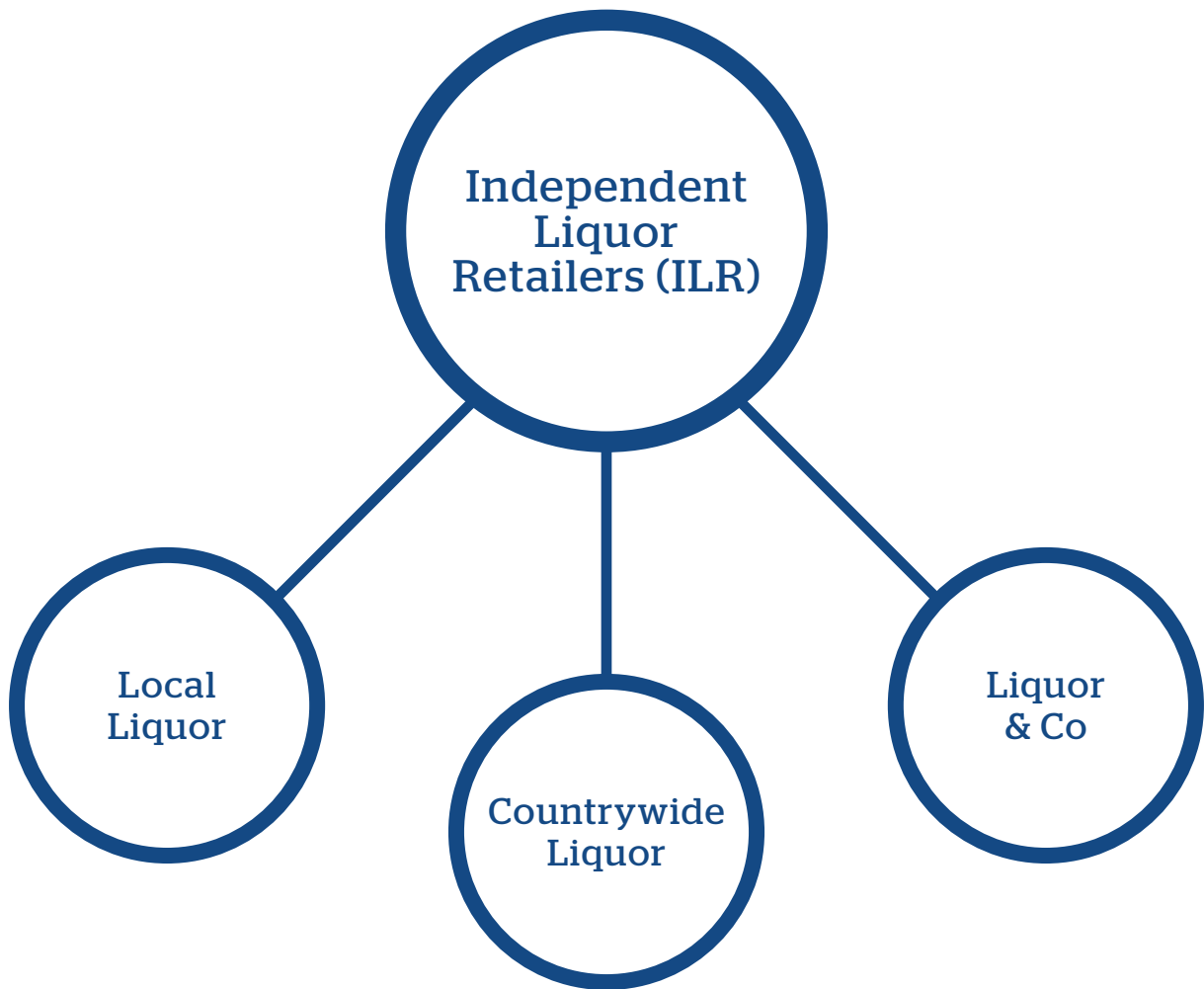
- A banner group for large clubs that want group buying power.

### Liquor World

- A banner group for outlets that do not want advertising or promotional activity.

### The Liquor Co-op

- Outlets are able to maintain their independent identity if they wish.



**Independent Liquor Retailers (ILR)**

- ILR formed in 2002 to enhance the position of independent liquor retailers.<sup>51</sup>
- Membership base includes hotels, bottle shops, clubs, bars and supermarkets.
- Over 350 stores across NSW and ACT (as at January 2017).<sup>51</sup>
- Headquarters: Canberra, Australia.

**Local Liquor**

- Launched in 2002; provides membership benefits including high-profile advertising and competitive pricing.<sup>52</sup>
- Around 300 stores (as at January 2017).<sup>53</sup>

**Countrywide Liquor**

- Banner group dedicated to smaller retailers who prefer to maintain their own identity while still enjoying benefits of ILR membership and marketing support.<sup>52</sup>

**Liquor & Co**

- “A contemporary brand for the retailer who likes to be a little different with all the benefits of Local Liquor.”<sup>52</sup>



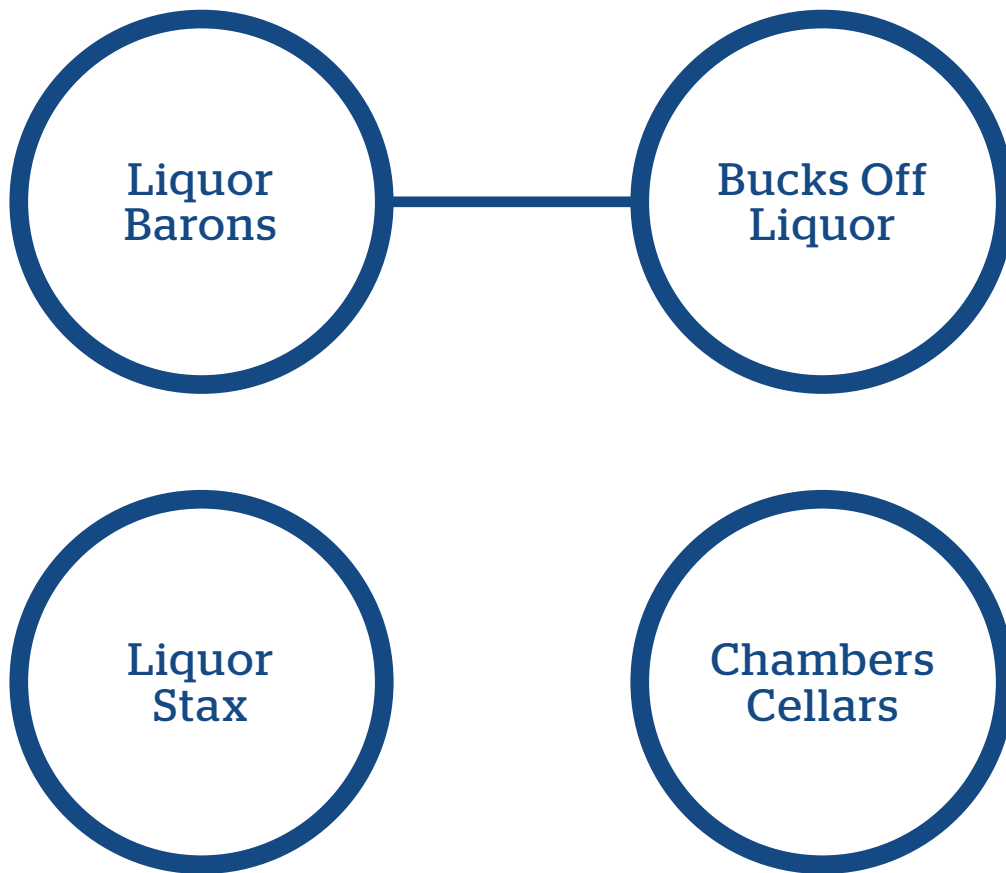
**Costco Wholesale International Inc**

- International chain of membership warehouses that carry brand name merchandise at substantially lower prices than are typically found at conventional wholesale or retail sources.<sup>54</sup>
- Products include groceries, appliances, automotive supplies, toys, hardware, sporting goods, jewellery, tobacco and office supplies.
- Open to members of Costco only, both business and individual members.
- Headquarters: Washington, USA.

**Costco**

- Wholly run by US based Costco Wholesale International Inc.
- 8 locations across Melbourne, Sydney, Canberra and Adelaide.<sup>55</sup>
- Several warehouses sell beer, wine and spirits.
- Headquarters: Sydney, Australia.

Numerous smaller liquor banner groups operate around Australia. We have included several examples across the following two pages.



#### **Liquor Barons**

- Western Australian based independently owned and operated retail liquor co-operative; not part of a national group or chain but operate under Liquor Barons banner to combine buying power.<sup>56</sup>
- Around 70 outlets across WA (as at October 2016).<sup>57</sup>
- Headquarters: Perth, Australia.

#### **Bucks Off Liquor**

- New WA banner group established by Liquor Barons in 2015.<sup>58</sup>
- "Bucks Off gives us a capability to build a consumer-focused brand that's very differentiated from Liquor Barons and is focused on the convenience space, particularly with an outstanding beer offer and premix offer."<sup>58</sup>

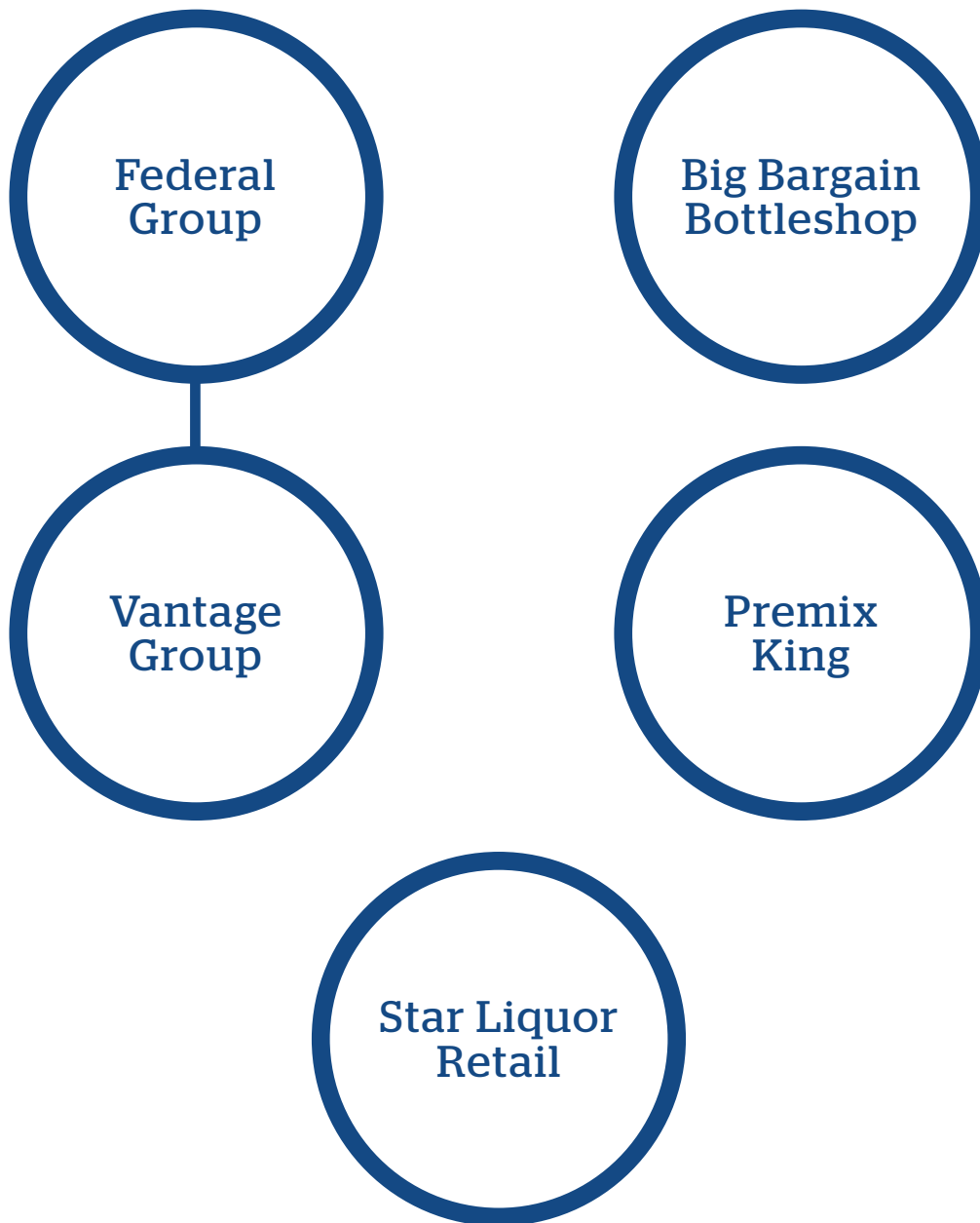
#### **Liquor Stax**

- Group of family owned and operated hotels and bottleshops; independent retailers who want to maximise their buying power.
- 419 outlets in NSW, QLD, VIC, TAS and WA (as at January 2017).<sup>59</sup>
- Headquarters: Sydney, Australia.

#### **Chambers Cellars**

- Banner group for independent liquor retailers in NSW.
- 40 stores (as at January 2017).<sup>60</sup>
- Headquarters: Sydney, Australia.





**Federal Group**

- Privately owned family company operating tourism, hospitality, retail, casino and gaming assets in Tasmania.<sup>61</sup>

**Vantage Group**

- Operates 11 hotels and 15 9/11 bottleshops across Tasmania (as at March 2017).<sup>62</sup>

**Big Bargain Bottleshop**

- Locally owned and operated banner with over 50 outlets throughout Tasmania (as at January 2017).<sup>63</sup>

**Premix King**

- Premix King: "Home of the alcopop"; "Wholesale prices directly to the public".<sup>64</sup>
- Independent liquor retailer with 19 outlets across regional Victoria (as at March 2017).<sup>64</sup>

**Star Liquor Retail**

- Liquor retailer operating across Queensland.
- Has 8 liquor warehouses, 21 liquor bottleshops and 9 liquor express drive-thru outlets (as at March 2017).<sup>65</sup>

There are many online liquor stores operating in Australia. Several have already been noted in this guide (e.g. Dan Murphy's, First Choice). Due to the number of stores, we are unable to list all online liquor stores. Some operate exclusively as online stores, while others have physical premises also. Below are four examples of online liquor stores operating in Australia.



### Get Wines Direct



### MyBottle ShopOnline



### Vinomofo



### Liquor Home Delivery

#### Get Wines Direct

- Specialist online wine company providing home-delivery; also sells premium and specialty wines with a showcase centre where wines are displayed for potential customers to view and sample.<sup>3</sup>
- Estimated online liquor retailing market share of 4% in 2016.<sup>3</sup>
- Based in Melbourne, Australia.

#### MyBottleShopOnline

- "Australia's #1 Online Drinks Shop."<sup>67</sup>
- Has over 80,000 subscribers and members (as at January 2017).<sup>67</sup>
- Warehouse located in Sydney, Australia.

#### Vinomofo

- Members-only wine site with over 500,000 members (as at March 2017).<sup>66</sup>
- Headquarters: Melbourne, Victoria.

#### Liquor Home Delivery

- Online home delivery store that delivers across Australia. Physical premises located in Dianella, WA but main focus is online.<sup>68</sup>
- Headquarters: Perth, Australia.

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