

Major Alcohol Sales Outlets

This document is a guide to the major alcohol sales outlets in Australia. The information has been collated and summarised from a wide range of sources including company websites and annual reports. 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.

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Woolworths Limited

- Food & grocery, liquor, petrol, general merchandise and consumer electronics brands.
- In 2011, Woolworths Limited operated 1,250 liquor outlets and group liquor sales (including ALH liquor sales) totalled \$5.9 billion.
- Woolworths Limited have 37% of liquor retailing market share in Australia.
- Headquartered in NSW, Australia.

Australian Leisure and Hospitality Group (ALH)

75% of ALH is owned by Woolworths.

ALH Group have a portfolio of pubs, bars, night clubs and retail liquor stores across Australia (large liquor barns, drive through outlets and walk in bottle shops).

Bruce Mathieson Group (owned by Mathieson family) and Woolworths started a joint venture in Queensland called MGW Hotels in 2000 – purchased 30 hotels in less than 3 years under the vehicle Bruandwo Pty Ltd. ALH was established as a business unit of CUB in the mid 1990's; Fosters Group floated ALH in 2003 and in late 2004 Bruandwo took over and ALH was delisted. In 2005 Bruandwo changed its name to ALH and the operations of ALH, MGH Hotels and the Hotel interests of the Mathieson family were merged into ALH Group.

Woolworths Liquor

- Over 400 Woolworths and Safeway liquor stores in Australia

Cellarmasters

- Online liquor retailer
- 330,000 online members

Langton's

- Australia's leading online fine wine auction site

Dan Murphy's

- Over 140 stores in Australia
- Operates an online store
- Liquor barn format

BWS

- Over 650 stores in Australia

Wesfarmers Limited

- Business operations cover supermarkets, department stores, home improvement and office supplies, coal mining, energy, insurance, chemicals and fertilisers and industrial and safety products.
- Wesfarmers Limited have 21.3% of liquor retailing market share in Australia.
- Headquartered in Perth, Western Australia.

Coles

- The Coles division of Wesfarmers is a leading food, liquor and convenience retailer. Coles is a national liquor retailer and hotel operator with over 785 stores and 93 hotels.

Liquorland

- More than 600 Liquorland stores in Australia with 300 of them located next to a Coles Supermarket.
- Operates an online store.

Vintage Cellars

- Over 80 Vintage Cellars stores in Australia.
- Operates an online store.

1st Choice Liquor

- 76 1st Choice Liquor stores in Australia.
- Liquor barn format

Metcash

- Australia's leading wholesale distribution and marketing company, operating in the grocery, liquor and hardware wholesale industries – clients are independent retailers. Generates revenue through wholesale distribution,
- Has 4 divisions – IGA Distribution, Australian Liquor Marketers, Campbells Wholesale and Mitre 10. All divisions are fully owned by Metcash (except Mitre 10 which is 50.1% owned).
- Headquartered in NSW, Australia

Australian Liquor Marketers (ALM)

- ALM is a broad range liquor wholesaler supplying over 15,000 hotels, liquor stores and restaurants throughout Australia.
- ALM also markets three major independent retail brands across Australia (see below).

Liquor Alliance

- ALM is a strategic partner with Liquor Alliance – Liquor Alliance trades under the **Thirsty Camel** banner

Independent Brands Australia

- 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.
- Represents over 2,000 independent liquor retailers operating under three brands.

Thirsty Camel Bottleshop

- Over 450 Thirsty Camel bottle shops around Australia

Cellarbrations

- Over 500 outlets operating in every state and territory in Australia

IGA Liquor

Bottle-O and Bottle-O Neighbourhood

- Over 300 outlets in Australia

Hofer AG

- Headquartered in Germany
- ALDI stores in Australia, Europe and the US

ALDI Stores Supermarkets

- Wholly owned subsidiary of Hofer AG, based in Germany.
- Supermarkets sell wine, beer, spirits and RTD products
- Has over 200 stores operating in NSW, ACT, Queensland and Victoria.
- Headquartered in NSW, Australia

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.
- Products include groceries, appliances, automotive supplies, toys, hardware, sporting good, jewellery, tobacco and office supplies.
- Open to members of Costco only, both business and individual
- Headquartered in Washington, USA

Costco

- Wholly run by US based Costco Wholesale International Inc
- 3 locations in Australia – Auburn, Melbourne and Canberra
- Warehouses sell beer, wine and spirits
- Headquartered in NSW, Australia

Liquor Marketing Group

- Company formed in 1977 to support independent retailers.
- Owns and operates wide range warehouses via Hotel Liquor Wholesalers and South Australia Liquor Distributers throughout mainland Australia.
- Headquartered in NSW, 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.
- Over 700 stores throughout Australia.

Down Under Cellars

- Banner group for independent stores focused on wine.
- Stores in Western Australia, Queensland, NSW and Victoria

Harry Brown

- Liquor barn option for independent stores.

Sip'n Save

- South Australian banner group.

Independent Liquor Group Co-operative

- A member owned co-operative organisation open to all licensed liquor outlets.
- Membership consists of hotels, bottle shops, clubs, bars and restaurants.
- ILG has over 750 members and services over 1200
- Headquartered in NSW, Australia

Pubmart

- A banner group for hotels with bottle shops.

Super Cellars

- Banner group established in January 2012.

Little Bottler

- Established in January 2009.
- 117 stores in NSW.

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.

Liquor Barons

- West 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.

Liquor Home Delivery

- Online home delivery store that delivers across Australia. Physical premise located in Dianella, Western Australia but main focus is online.
- Headquartered in Perth, WA

Independent Liquor Retailers (ILR)

- ILR formed in 2002 to support independent ACT businesses under the 'Local Liquor' banner.
- 292 members across the ACT and NSW.
- Progression into the QLD market occurred in January 2012.
- Headquartered in ACT, Australia