

# ***Protecting the Public Interest***

## **The Threat of Privatization and the LCBO's Agency Store Program**

**Submitted to:**

**the Standing Committee on Government Agencies'  
Operational Review of the Liquor Control Board of Ontario**

**by**

**the Ontario Public Service Employees Union (OPSEU)**

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***[www.opseu.org](http://www.opseu.org)***

## ***Executive Summary***

### **The LCBO, Privatization and Agency Stores**

The Liquor Control Board of Ontario (LCBO) is extremely important to the people of Ontario, our communities and the public services on which we all rely. As a provincial government agency, the LCBO delivers on its mandate to ensure the safe and responsible sale of alcohol. At the same time, the LCBO has become a world-class retailer, providing Ontarians with excellent service and convenient access to alcohol products, while generating more than \$1 billion in provincial government revenues that help pay for vital public services in Ontario communities.

The LCBO's ability to ensure social responsibility while maximizing customer service and provincial revenue is a direct result of its status as a public agency. Yet, the LCBO remains the target of repeated proposals for privatization. Most recently, the province commissioned a report from a four-member Beverage Alcohol System Review (BASR) Panel. In July 2005, this panel called for the total privatization of the LCBO's wholesale and retail operations and its replacement with a system of private retailers subject to provincial licencing and enforcement.

On the same day the BASR report was released, Finance Minister Greg Sorbara wisely rejected privatization and clearly committed the government to maintaining the LCBO as a public agency.

Nonetheless, the LCBO's network of publicly operated retail outlets continues to be at risk, through the rapid expansion of the LCBO's private agency store program. This risk has been compounded by the government's announcement, in May 2006, of plans to open another 20 agency stores. This decision contradicts a pre-election commitment by Premier McGuinty to halt any further increase in the number of these privately owned and operated liquor outlets. It also represents a direct threat to the LCBO's social responsibility mandate, the health and safety of Ontario communities and the long-term future of the LCBO's public retail stores.

### **Recommendations**

OPSEU therefore calls on the Government of Ontario and the LCBO to take the following steps to address the serious risks and problems inherent in the current agency store program:

#### ***Moratorium and legislative review***

1. Declare an immediate moratorium on all future agency store openings – including those announced on May 15, 2006 – pending a thorough public review of the agency store program. This public review should:
  - o include public hearings in communities served by LCBO-run C and D stores and by private agency stores;
  - o focus specifically on the implications of the agency store program for public health and community safety, the LCBO's social-responsibility mandate, and the LCBO's future as Ontario's public alcohol retailer;

#### ***Immediate policy changes***

2. Prevent existing agency stores from maintaining hours of operation that exceed those of neighboring LCBO stores;
3. Ensure that all agency stores are supplied and monitored by the closest regular LCBO store;

4. Replace existing agency stores with regular LCBO stores where the current or projected agency store sales volumes meet the minimum level to sustain an LCBO-run outlet;
5. Replace existing agency stores with LCBO-run and staffed outlets – including "kiosk stores" located within an existing retail outlet, and/or other viable retail models – in areas deemed to be under-serviced but not able to sustain a stand-alone LCBO outlet;

***Transparency and public accountability***

If, following the public review, it is decided that the agency store program is to continue, the government and LCBO should:

6. Introduce regulations requiring prior public notification in the local media, public hearings and approval by a vote of the local Municipal Council for both i) the selection of any future agency store host community and ii) the approval of any individual store operator;
7. Ensure that no new agency store location will be considered unless it is demonstrated that:
  - There is no existing LCBO outlet within 15 km of the proposed agency store location;
  - The proposed host community cannot be served through an existing LCBO store;
  - Current and future demand is not sufficient to sustain either a regular “stand alone” LCBO store or an LCBO-operated kiosk;
  - The approval of an agency store will have no serious negative impact on other area businesses or put them at a significant competitive disadvantage;
8. Ensure, as a clear condition of the approval of any future agency store licence – and the renewal of any existing agency store licence – that:
  - No agency store will be located in a host business or in a location that could raise risks regarding social responsibility, including the risk of increased sales to minors or drinking and driving;
  - Any agency store will be replaced by an LCBO-operated outlet if and when its sales volume reaches the minimum level to sustain either a regular LCBO store or an LCBO kiosk.

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## **OPSEU Members and the LCBO Today**

The Ontario Public Service Employees Union (OPSEU) represents more than 6,000 LCBO employees. These members joined OPSEU in June 2005 through the voluntary merger of the Ontario Liquor Boards Employees Union with OPSEU.

The members of OPSEU's Liquor Board Employees Division are proud of their contributions to the province and Ontario's communities. Our members remain committed to preserving and strengthening the LCBO's status as a provincial agency that operates in the public interest and remains accountable to the people of Ontario.

As a public agency, the Liquor Control Board of Ontario represents a unique success story for the people of Ontario.

- From its creation in 1927, a central feature of the LCBO's mandate has been to ensure that the sale of alcohol is managed in a way that reduces the risk to community health and safety.
- Since the 1980s, the LCBO has developed into a dynamic retailer, with annual sales of more than \$4 billion.
- Today the LCBO's staff provides Ontarians with excellent, knowledgeable customer service and convenient access to thousands of products and brands.
- In 2005/06, the LCBO generated \$1.2 billion in provincial government revenue (\$5.2 billion over 5 years), not including taxes, to help fund vital public services for Ontario communities
- At the same time, trained LCBO staff ensure that community safety and social responsibility are integral the LCBO's operations. In 2005/06, staff
  - challenged more than 1.7 million customers who appeared intoxicated or under-age, and
  - refused service to more than 112,000 individuals, most for being unable to provide proof of legal age.

## **The LCBO and the Public Interest**

The LCBO has demonstrated a unique ability to provide excellent customer service and generate a reliable and growing stream of public revenue while delivering on its mandate for social responsibility. This success is a direct result of the LCBO's status as a publicly owned and operated agency of the province.

- As a provincial agency with a partial monopoly on alcohol distribution and sales, the LCBO is able to benefit from economies of scale that are not available under a competitive market structure.
- The LCBO is the world's largest buyer, distributor and retailer of beverage alcohol, and operates an integrated province-wide network of warehouses, depots and almost 600 LCBO stores.
- These efficiencies – and the fact that earnings are not diverted to private shareholders – ensure that the province, the public, communities and LCBO customers reap maximum benefits in terms of public revenue, product selection, stable prices and customer service.
- The LCBO supports Ontario's domestic wine industry and Ontario craft brewers by profiling their products in its stores and building their share of the provincial alcohol market
- The LCBO's status as a public agency also ensures that there is no conflict between a private owner's interest in maximizing profits and the community's interest in ensuring that alcohol is sold safely and responsibly.

- As a single provincial agency, the LCBO is in a position to support its social responsibility mandate through comprehensive staff training, consistent pricing, and the implementation of appropriate policies and practices throughout its operations.
- As Crown Employees, OPSEU members at the LCBO understand the importance of protecting the health and safety of the communities in which they live and work.
- None of these structural supports for community health and social responsibility are available under a system of regulated private retailers.

## **The Threat of Privatization**

Despite the clear value to the people of Ontario in maintaining the LCBO as a public agency, the last two decades have seen repeated proposals to privatize the LCBO and/or open the alcohol market to private retailers.

While the circumstances and details of these proposals have varied, they have tended to reflect both:

- i) the interests of private businesses anxious to tap into a multi-billion dollar market, and
- ii) the neo-conservative ideology that governments should remove themselves from the direct delivery of public services.

### ***The Beverage Alcohol System Review***

The most recent such proposal was put forward in July 2005, in the report of the province's own Beverage Alcohol Systems Review (BASR) Panel.

- Of the panel's four members, three had extensive private sector backgrounds as senior managers in the retail, financial services and resource industries.
- According to their report, all four panel members shared the general view that "open, competitive markets have enormous capacity to generate benefits for individuals, firms and society at large."
- Among the Panel's key recommendations were that the government should:
  - Withdraw entirely from alcohol retailing and wholesale operations
  - Auction off licences to operate private alcohol retail and wholesale businesses – along with the LCBO's existing stores and warehouses – to the highest bidders
  - Limit its role to establishing a provincial licencing, regulatory and enforcement system, including measures intended to ensure that private operators maintain standards for social responsibility.

### ***The Government's Response***

In response, on July 18, Finance Minister Greg Sorbara announced the government's rejection of the BASR's recommendation to privatize the LCBO and made the following statement:

*Let me be clear – we are not selling the LCBO. We will not turn the LCBO into an income trust. And, we will not permit the selling of beer and wine in corner stores... It is our very strong view that the public interest of Ontarians is best served by the continued public ownership of the LCBO.*

OPSEU members welcome this statement, which reflects both the real benefits to the public and the province of maintaining the LCBO as a provincial agency, as well as the strong public opposition to privatization.

## The Case against Privatization

The LCBO has demonstrated its ability to combine the safe and responsible sale of alcohol with excellent customer service and the generation of significant public revenues. Yet supporters of privatization claim it could increase government revenue and improve customer service with no risk to public health and community safety. Evidence gathered by Ontario's Centre for Addiction and Mental Health (CAMH), the Ontario Public Health Association (OPHA) and others does not bear this out.

### **Social Responsibility and Public Health**

- While many people drink moderately, research shows that one in 10 Ontarians are at high risk of alcohol dependence, while three per cent are severely dependent on alcohol. Studies have also found that when overall rates of alcohol use rise, so do rates of serious alcohol problems.
- In Ontario today, it is estimated that problem alcohol use costs society \$2.9 billion annually in lost productivity, and increased health care and law enforcement costs.
- Experience in many other jurisdictions shows that privatization is typically linked with an increase in the number of retail outlets, longer opening hours, increased consumption, increased sales to minors, increased drinking and driving, and more health and social problems.
- In Alberta, after the privatization of that province's liquor control board in 1993:
  - The number of liquor outlets more than tripled, from 310 to 983 in 10 years
  - Per capita alcohol consumption increased in the years following privatization. In 1993/94, Alberta was the only Canadian province to experience a rise in per capita consumption. Today, Alberta has the highest consumption rate among Canadian provinces
  - Following privatization, there was an increase in a number of alcohol-related criminal offences and violations of the Alberta Liquor Act, including liquor store break-ins and sales to minors.
- In a joint submission to Ontario's Beverage Alcohol System Review Panel, a group of eight provincial public health and addiction organizations, including CAMH, OPHA and Mothers Against Drunk Driving (MADD) concluded that:

*Maintaining public alcohol retail distribution systems with a strong duty of social responsibility is one of the most effective ways of minimizing harm caused by alcohol...[Public systems] are typically more restrained than their private counterparts in promoting alcohol sales and more likely to aggressively challenge and refuse to sell alcohol to underage youth and the already-intoxicated.*

### **Lost Public Revenue**

The privatization of the LCBO would likely result in a one-time spike in provincial revenue through the sale of capital assets and licences. However, evidence from other jurisdictions suggests that over the long term privatization is likely to result in a net loss of provincial revenue, due to reduced revenue from alcohol sales and taxes and increased regulation and enforcement costs. Privatization strategies are therefore out of step with the province's need for stable, increasing revenue over the long term to fund health and social services.

Following privatization in Alberta, for example:

- Retail prices for alcohol *increased* by more than 4% in the year following privatization, compared to less than 1% for Canada as a whole.

- To offset the increase in retail prices, the Alberta government *reduced* its excise tax on alcohol starting in 1994.
- Despite higher retail prices and increased sales, there was a significant *drop* in per capita government revenue from alcohol between 1992 and 2002. Accounting for inflation, the decrease in annual per capita revenue was equal to 19.5% over this period.
- Over the first 10 years of privatization in Alberta, the loss to the provincial treasury due to alcohol tax reductions totaled approximately \$511 million.

### **Public Opinion**

Despite claims made by advocates of privatization, Ontarians continue to strongly support the LCBO's status as a public agency and its role in reducing the risk of alcohol-related problems.

In 1999, for example, a public opinion survey found that:

- 73% of Ontario adults were opposed to the privatization of alcohol retailing.
- 79% opposed the sale of beer and wine in corner stores.

In 2002, a similar survey found that:

- 72% of respondents disagreed that Ontario should “close all LCBO stores and allow privately run stores to sell alcohol.”
- 80% believed that “the number of places where you can buy alcohol in your community” is “about right” while another 9% said there were “too many.”
- 92% said it was somewhat or very convenient to get to the nearest liquor or beer store.
- 73% said that before making legislative or policy changes to the way alcohol is sold, governments should be required to consult with health experts.

Finally, in 2005, a survey of Ontario voters found that most had serious concerns that allowing the sale of beer and wine in corner stores would result in increases in under-age sales (70%), sales to people who are intoxicated (64%); and drinking and driving (53%).

### **Agency Stores: Privatization by Stealth**

The Government of Ontario's decisive rejection of LCBO privatization in July 2005 was an important victory for Ontario communities. This decision reflects both the clear evidence of the risks and costs associated with alcohol privatization, and the LCBO's demonstrated ability to balance social responsibility with customer service and the generation of a reliable stream of public revenue.

But while the door has been closed to outright privatization – at least for the time being – the LCBO's system of public retail outlets and the health and safety of Ontario communities continue to be at risk from the gradual privatization of liquor sales through the LCBO's growing network of private “agency stores.”

Agency stores are privately owned and operated retail businesses (usually grocery stores, general stores or tourist outfitters) that are licenced by the LCBO to sell alcohol along with other goods. Under this program, agency stores are required to:

- buy alcohol from the LCBO (usually through a nearby regular LCBO store). Stores receive a 10% discount and are required to sell alcohol at the same price as regular LCBO outlets
- use LCBO branding, signage and bags, which are provided to the stores at no cost
- keep alcohol physically separated from other items in the store

- sell alcohol within hours approved by the LCBO
- provide the LCBO's social responsibility training program to staff and document all challenges and refusals.

### **Expansion of the agency store program**

The agency store program was established in 1962 to provide service to remote communities in Northern Ontario that did not have reasonable access to a nearby LCBO store, and where market demand would not sustain a regular LCBO outlet.

- In the 1990s the program was slowly expanded to communities in Southern Ontario. Over the decade, the total number of agency stores rose from 80 in 1990, to 102 in 1999.
- There has been an exponential increase in the number of agency stores over the past six years, from 107 in 2002 to 194 in 2005.
- In May 2006, the Ministry of Public Infrastructure Renewal announced plans to open 20 new private agency stores, most of them in Southern Ontario communities, bringing the total to 215. This announcement reversed a pre-election commitment by Premier McGuinty that a Liberal government would halt any further expansion of the agency store program.
- While they still represent a small proportion of the LCBO's total revenue, since 1990, there has been a substantial increase in agency store sales, in sales per agency store, and as a percentage of total LCBO sales.

	<b>1995</b>	<b>2000</b>	<b>2005</b>
<b>Number of Agency Stores</b>	82	107	194
<b>Total Agency Store Sales</b>	\$17 million	\$32.4 million	\$77.9 million
<b>Average Sales per Agency Store</b>	\$207,000	\$303,000	\$ 402,000
<b>Agency Sales as a % of LCBO Sales</b>	0.8%	1.1%	1.9%

- The rapid growth in average sales per agency store reflects the expansion of the program into Southern Ontario communities where demand is both higher and growing
- Anecdotal evidence suggests that there are a number of agency stores with annual alcohol sales in excess of \$800,000 – well above both the level that could sustain a regular LCBO outlet and the sales of some existing regular LCBO outlets.
- To date, there is no case in which an agency store has been replaced with a regular LCBO store, despite the LCBO's policy that agency stores should only be licenced in communities that cannot support a public LCBO outlet.

### **Agency Stores: A Threat to Ontario Communities**

The continued expansion of the agency store program – including the 20 new stores announced in May, 2006 – represents a direct threat to the LCBO's social responsibility mandate, to the health and safety of Ontario communities and to the long-term future of the LCBO's network of publicly owned and operated retail outlets.

#### **Social Responsibility & Community Safety**

- The LCBO's social responsibility mandate is supported by corporate policy, staff training and an active challenge and refusal program in each LCBO store. In 1995/96, LCBO staff challenged more than 1.7 million customers and refused service to more than 112,000 individuals, most for being unable to provide proof of legal age.

- The responsible sale of alcohol in regular LCBO stores is supported by the LCBO's status as a provincial government agency, which is better able to balance the goal of generating (public) revenue with the public's interest in community health and safety.
- Unlike employees at a regular LCBO store, private agency store operators have a direct stake in maximizing alcohol sales and profits. This interest will always be in potential conflict with the community's interest in preventing alcohol-related problems.
- This risk is compounded by the fact that independent agency stores operate outside of the LCBO's organizational culture and managerial structure.
- While LCBO policy requires agency stores to maintain LCBO pricing, train staff regarding social responsibility and implement a challenge and refusal program, the LCBO lacks an adequate monitoring and enforcement system to ensure that outside agency stores do not sell alcohol at a discount, or sell to minors, people who are intoxicated or those who may drink and drive. For example,
  - While the LCBO does investigate individual complaints regarding agency stores sales practices, it does not have a proactive system for confirming that agency stores do not sell to customers who appear under-age or intoxicated.
  - The LCBO's "agency store mystery shopper" program focuses primarily on checking stores' appearance, merchandising and customer service, not on policing social responsibility.
  - While agency stores receive monthly visits by an LCBO store manager, these visits are scheduled in advance.

Despite current policy the LCBO does not maintain the kind of rigorous, proactive monitoring of agency store sales practices that is possible in regular LCBO stores, where social responsibility is integrated into daily operations.

### ***A Threat to the LCBO's Network of Public Stores***

Over the long-term, the continued expansion of the agency store program into communities that are already served by nearby LCBO outlets threatens to erode the network of public LCBO stores – and their ability to ensure that alcohol is sold safely and responsibly.

- With the gradual relaxing of geographic restrictions, there are now numerous examples of agency stores that operate within 15 kilometers or less of an existing LCBO outlet
- While the government has recently re-established a 10-kilometer limit, it continues to select agency store locations that will divert sales from existing LCBO outlets.
- This trend is aggravated by the LCBO's approval of agency store hours of operation – including opening on public holidays – that exceed those of LCBO outlets.
  - Agency stores are typically permitted to open as many as 83 hours per week (8 a.m. to 11 p.m. from Monday to Saturday; 12 to 5 p.m. on Sundays).
  - Meanwhile, the LCBO has ordered many of its stores in smaller communities to reduce their hours of operation – often to 56 hours per week or less. Typical hours for smaller LCBO outlets are now from 10 a.m. to 6 p.m., Monday to Thursday and Saturday, 10 a.m. to 9 p.m. on Friday, and 12 to 5 p.m. on Sundays.
  - Agency stores are often permitted to open on public holidays - when communities and police are making special efforts to reduce drinking and driving – while the LCBO directs many of its own stores in neighboring communities to remain shut.
  - Many LCBO outlets in smaller communities are being directed to close one day per week between September and May, while some have been told to close at lunch.

- Meanwhile, the LCBO has recently loosened its policy of servicing agency stores from nearby LCBO outlets – and crediting the LCBO stores with their sales. Since store sales are used to establish staffing levels and opening hours, this change will put affected LCBO outlets at a further competitive disadvantage in their local markets.
- Finally, the opening of new agency stores in areas of future population growth, particularly in Southern Ontario, represents a threat to further expansion of the LCBO's own retail network and risks establishing a precedent for future attempts to open the alcohol market up to private retailers.

Taken together, these policies put regular LCBO stores at a competitive disadvantage, divert sales to private agency stores, and threaten to erode the LCBO's network of public stores now and into the future. This jeopardizes not only the public system's social responsibility mandate, but also customer's access to the service and selection provided by a genuine LCBO outlet and the LCBO's ability to generate public revenue over the long-term.

### ***Lack of Transparency & Public Accountability***

Currently agency stores are approved through a complicated process – involving both technical review by the LCBO and political decisions at the ministerial level – that provides neither transparency nor public accountability.

- Proposals to establish an agency store in a given community are first reviewed by the LCBO to determine whether there is a need for an alcohol outlet, whether the market could support an agency store, and whether the market could be served by a regular LCBO store.
- In theory, the selection of a host community for an agency store requires community approval. However, there is no policy requiring public notification or review or establishing a process for local approval, such as a vote by municipal council. There are also anecdotal reports that agency stores have been approved without the knowledge of local municipal authorities.
- Following the technical review by the LCBO, the names of communities that are considered eligible are forwarded to the office of the Minister of Public Infrastructure and Renewal, which makes the final decision on establishing an agency store in any given community. Here again, there is no clearly stated policy for how such decisions are to be made.
- Following the initial approval of a host community, the LCBO selects the store operator through a competitive process that includes a detailed application, site surveys and the review of each application based on a number of technical criteria. Once again, there is no clear mechanism for obtaining local input on a decision that could have a direct impact on community health and public safety.

Given the importance of the LCBO's mandate as a public agency and the each community's interest in reducing the risks of alcohol-related problems, the lack of a clear, transparent and accountable process for selecting host communities or approving agency store applications represents a major problem for both the LCBO and the provincial government.

### **Agency Stores: A Framework for Protecting the Public Interest**

The public has a clear interest in maintaining and strengthening the LCBO's mandate as a publicly owned and operated, socially responsible alcohol retailer. Despite the decision by the Government of Ontario in July 2005 to reject large scale privatization, the continued expansion of the LCBO's private agency store program represents a growing threat to that public mandate.

OPSEU therefore calls on the government and the LCBO to adopt the following steps to address the serious risks and problems inherent in the current agency store program:

### ***Moratorium and legislative review***

1. Declare an immediate moratorium on all future agency store openings – including those announced on May 15, 2006 – pending a thorough public review of the agency store program. This public review should:
  - o include public hearings in communities served by LCBO-run C and D stores and by private agency stores;
  - o focus specifically on the implications of the agency store program for public health and community safety, the LCBO's social-responsibility mandate, and the LCBO's future as Ontario's public alcohol retailer;

### ***Immediate policy changes***

2. Prevent existing agency stores from maintaining hours of operation that exceed those of neighboring LCBO stores;
3. Ensure that all agency stores are supplied and monitored by the closest regular LCBO store;
4. Replace existing agency stores with regular LCBO stores where the current or projected agency store sales volumes meet the minimum level to sustain an LCBO-run outlet;
5. Replace existing agency stores with LCBO-run and staffed outlets – including "kiosk stores" located within an existing retail outlet, and/or other viable retail models – in areas deemed to be under-serviced but not able to sustain a stand-alone LCBO outlet;

### ***Transparency and public accountability***

If, following the public review, it is decided that the agency store program is to continue, the government and LCBO should:

6. Introduce regulations requiring prior public notification in the local media, public hearings and approval by a vote of the local Municipal Council for both i) the selection of any future agency store host community and ii) the approval of any individual store operator;
7. Ensure that no new agency store location will be considered unless it is demonstrated that:
  - o There is no existing LCBO outlet within 15 km of the proposed agency store location;
  - o The proposed host community cannot be served through an existing LCBO store;
  - o Current and future demand is not sufficient to sustain either a regular "stand alone" LCBO store or an LCBO-operated kiosk;
  - o The approval of an agency store will have no serious negative impact on other area businesses or put them at a significant competitive disadvantage;
8. Ensure, as a clear condition of the approval of any future agency store licence – and the renewal of any existing agency store licence – that:
  - o No agency store will be located in a host business or in a location that could raise risks regarding social responsibility, including the risk of increased sales to minors or drinking and driving.
  - o Any agency store will be replaced by an LCBO-operated outlet if and when its sales volume reaches meet the minimum level to sustain either a regular LCBO store or an LCBO kiosk.

## References

For information on the public health implications of alcohol retailing and the risks of privatization, please see:

Addictions Ontario, Association of Local Public Health Agencies, Centre for Addiction and Mental Health, Mothers Against Drunk Driving, Ontario Drug Awareness Partnership, Ontario Public Health Association, Parent Action on Drugs, Toronto Public Health (1995) Alcohol and the Public Health: The Implications of Changes to Ontario's Beverage Alcohol System. Submitted to the Beverage Alcohol System Review Panel (February 25, 2005).

Centre for Addiction and Mental Health (2004) Retail Alcohol Monopolies and Regulation: Preserving the Public Interest. CAMH Position Paper (January 2004).

Mann, Robert E., Rehm, Jurgen T., Giesbrecht, Norman, et. al. (2005) Alcohol Distribution, Alcohol Retailing and Social Responsibility. Report Submitted to the Beverage Alcohol System Review Panel.

For information on the impact of the privatization of the Alberta Liquor Control Board, please see:

Centre for Addiction and Mental Health (2004) Retail Alcohol Monopolies and Regulation: Preserving the Public Interest. CAMH Position Paper (January 2004).

Flannagan, Greg (2003) Sobering Result: The Alberta Liquor Retailing Industry Ten Years after Privatization. Canadian Centre for Policy Alternatives and Parkland Institute.

For the recommendations of the Beverage Alcohol System Review Panel please see:

Beverage Alcohol System Review Panel (2005) Strategy for Transforming Ontario's Beverage Alcohol System: A Report of the Beverage Alcohol System Review Panel. Toronto: Queen's Printer for Ontario (July 2005)

Statistical and other information on LCBO sales, provincial revenue and the agency store program are available from LCBO annual reports and the LCBO web site ([www.lcbo.com](http://www.lcbo.com)).