BC CANNABIS WHOLESALE

QUARTERLY SALES REPORT

BRITISH COLUMBIA | **LIQUOR DISTRIBUTION BRANCH**

FY2026 Q2

JUL | AUG | SEPT

ABOUT
THIS PUBLICATION

The BC Liquor Distribution Branch's (LDB) BC Cannabis Wholesale Quarterly Sales Report is a resource for emerging trends, historical facts and figures, and key sales data for the non-medical cannabis industry in British Columbia.

Wholesale sales represent the cost value (wholesale price) of cannabis products shipped to all wholesale customers, which includes private stores, BC Cannabis Stores (BCCS), and the BCCS online channel, from the LDB's distribution centre.

This report includes sales from the LDB's Direct Delivery Program, which launched in August 2022. Sales of products registered under the Direct Delivery Program are reported separately to the LDB's central delivery stream, and are therefore not included in overall sales.

The BC Cannabis Wholesale Quarterly Sales Report is produced four times per year for reporting periods ending in March, June, September, and December.

While every effort has been made to ensure accuracy and completeness of figures, this is not guaranteed. It is the express condition of the use of this publication that the LDB shall incur no liability.

We hope you find this report insightful.

Report note

The LDB fiscal calendar is comprised of 12 periods.

A period can vary in length but roughly follows a calendar month:

- **Q1 reflects Periods 1 – 3 (April, May, June)**
- **Q2 reflects Periods 4 – 6 (July, August, September)**
- **Q3 reflects Periods 7 – 9 (October, November, December)**
- **Q4 reflects Periods 10 – 12 (January, February, March)**

CONTENTS

1 **REPORT SUMMARY**

2 **DRIED FLOWER**

- 2 Price per gram bands
- 3 Sales trend by format

4 **TOTAL SALES BY PRODUCT CATEGORY**

5 **SALES MIX BY PRODUCT CATEGORY**

- 6 Beverages - Sales $ versus sell units mix percentage
- 6 Edibles - Sales $ versus sell units mix percentage
- 7 Dried flower - Sales $ versus grams mix percentage
- 7 Ingestible extracts - Sales $ versus sell units mix percentage
- 8 Inhalable extracts - Sales $ versus sell units mix percentage
- 9 Pre-rolls - Sales $ versus grams mix percentage
- 9 Topicals - Sales $ versus sell units mix percentage

10 **GROWING ACCESS POINTS & SHIPPING ZONES**

11 **DIRECT DELIVERY SALES SUMMARY**

12 **DIRECT DELIVERY SUB CATEGORY SALES**

13 **DIRECT DELIVERY SALES MIX BY PRODUCT CATEGORY**



REPORT SUMMARY

JUL AUG SEP
FY2026 Q2

JUL AUG SEP
FY2025 Q2

QUARTER YEAR-OVER-YEAR SUMMARY

	2026 Q2	2025 Q2
+2.7% WHOLESALE GRAMS	**42,254,829** GRAMS	**41,128,864** GRAMS
+1.4% WHOLESALE SALES	**$156,414,761**	**$154,318,810**
-1.3% PRICE ALL CANNABIS	**$3.70** PER GRAM	**$3.75** PER GRAM
-0.3% PRICE DRIED FLOWER	**$3.12** PER GRAM	**$3.13** PER GRAM
+2.7% RETAIL STORE GROWTH*	**536** STORES	**522** STORES

** Includes private and public retail stores. Store must have sales to be considered for either quarter.*

DRIED FLOWER PRICE PER GRAM BANDS

JUL AUG SEP
FY2026 Q2

JUL AUG SEP
FY2025 Q2

SELL UNIT CONSUMER ITEM SIZE FORMAT	PRICE PER GRAM BAND	SALES $ CURRENT QUARTER	SALES $ LAST YEAR'S QUARTER	SALES $ YOY VARIANCE %	GRAMS CURRENT QUARTER	GRAMS LAST YEAR'S QUARTER	GRAMS YOY VARIANCE %
1 GRAM	$3 - $5	72,133	134,321	-46.3%	15,742	27,371	-42.5%
	>$5	120,857	146,769	-17.7%	22,378	25,568	-12.5%
3.5 GRAMS	$0 - $3	3,399	0		1,134	0	
	$3 - $5	3,767,599	4,550,061	-17.2%	894,310	1,086,351	-17.7%
	>$5	2,078,963	1,990,007	4.5%	344,036	299,989	14.7%
7 GRAMS	$0 - $3	1,186,964	1,529,318	-22.4%	411,082	540,204	-23.9%
	$3 - $5	5,236,620	4,765,137	9.9%	1,290,856	1,175,552	9.8%
	>$5	410,838	1,171,420	-64.9%	69,286	200,515	-65.4%
14 GRAMS	$0 - $3	1,684,403	1,917,093	-12.1%	576,716	682,934	-15.6%
	$3 - $5	4,734,985	5,173,056	-8.5%	1,316,042	1,412,334	-6.8%
	>$5	839,593	683,282	22.9%	155,722	123,354	26.2%
28 GRAMS	$0 - $3	17,577,689	16,908,011	4.0%	7,092,064	7,040,600	0.7%
	$3 - $5	3,414,377	4,664,002	-26.8%	996,968	1,338,708	-25.5%
	>$5	0	414	-100.0%	0	28	-100.0%

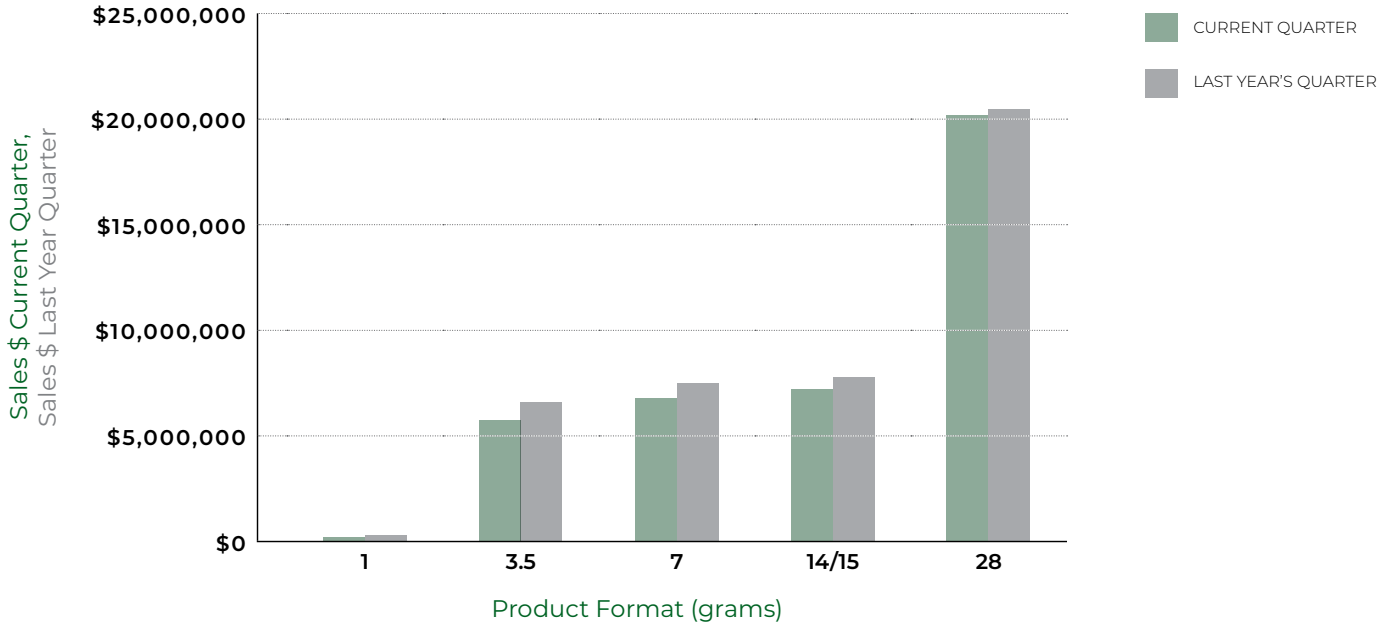
DRIED FLOWER
SALES TREND BY FORMAT

JUL AUG SEP
FY2026 Q2

JUL AUG SEP
FY2025 Q2

SELL UNIT CONSUMER ITEM SIZE FORMAT	SALES $ CURRENT QUARTER	SALES $ LAST YEAR'S QUARTER	SALES $ YOY VARIANCE %	GRAMS CURRENT QUARTER	GRAMS LAST YEAR'S QUARTER	GRAMS YOY VARIANCE %
1	192,990	281,090	-31.3%	38,120	52,939	-28.0%
3.5	5,849,960	6,540,069	-10.6%	1,239,480	1,386,340	-10.6%
7	6,834,422	7,465,874	-8.5%	1,771,224	1,916,271	-7.6%
14/15	7,258,981	7,773,430	-6.6%	2,048,480	2,218,622	-7.7%
28	20,992,066	21,572,427	-2.7%	8,089,032	8,379,336	-3.5%

FLOWER
SALE TREND BY FORMAT



TOTAL SALES BY PRODUCT CATEGORY

JUL AUG SEP
FY2026 Q2

JUL AUG SEP
FY2025 Q2

CATEGORY	SALES $ CURRENT QUARTER	SALES $ LAST YEAR'S QUARTER	SALES $ YOY VARIANCE %	SELL UNITS CURRENT QUARTER	SELL UNITS LAST YEAR'S QUARTER	SELL UNITS YOY VARIANCE %
 BEVERAGES	3,372,894	3,404,173	-0.9%	670,671	738,845	-9.2%
 EDIBLES	9,026,402	8,890,063	1.5%	1,530,663	2,352,119	-34.9%
 FLOWER	41,128,419	43,632,890	-5.7%	1,080,503	1,180,524	-8.5%
 INGESTIBLE EXTRACTS	3,586,929	3,642,198	-1.5%	159,862	171,074	-6.6%
 INHALABLE EXTRACTS[1]	58,826,167	57,143,406	2.9%	2,914,378	2,799,579	4.1%
 PRE-ROLLS	39,828,200	36,949,978	7.8%	3,443,811	3,227,398	6.7%
 SEEDS	6,616	3,439	92.4%	311	165	88.5%
 TOPICALS	639,134	652,662	-2.1%	23,433	25,341	-7.5%

[1]*Includes infused pre-rolls.*

SALES MIX BY PRODUCT CATEGORY

JUL AUG SEP
FY2026 Q2

JUL AUG SEP
FY2025 Q2

CATEGORY	SUB CATEGORY	SALES $ CURRENT QUARTER	SALES $ LAST YEAR'S QUARTER	SALES $ YOY VARIANCE %	SELL UNITS CURRENT QUARTER	SELL UNITS LAST YEAR'S QUARTER	SELL UNITS YOY VARIANCE %
 BEVERAGES	Carbonated Drink	2,935,772	3,136,721	-6.4%	578,373	682,797	-15.3%
	Drink Mix	97,353	0	0.0%	5,730	0	0.0%
	Non Carbonated Drink	339,769	267,452	27.0%	86,568	56,048	54.5%
 EDIBLES	Baked Goods	54,824	51,024	7.4%	9,585	11,587	-17.3%
	Chews	8,613,159	8,419,128	2.3%	1,425,433	2,200,094	-35.2%
	Chocolate	358,418	397,618	-9.9%	95,645	123,549	-22.6%
	Hard Candy	0	22,293	-100.0%	0	16,889	-100.0%
 FLOWER	Blend	93,673	0	0.0%	4,686	0	0.0%
	Hybrid	6,310,799	5,646,943	11.8%	158,344	152,184	4.0%
	Indica	21,117,855	23,090,217	-8.5%	549,872	603,683	-8.9%
	Sativa	13,319,019	14,213,713	-6.3%	363,119	413,810	-12.2%
	Variety Pack	287,072	682,017	-57.9%	4,482	10,847	-58.7%
 INGESTIBLE EXTRACTS	Capsules and Pills	2,119,726	2,081,954	1.8%	98,363	102,624	-4.2%
	Oils and Tinctures	1,467,203	1,508,867	-2.8%	61,499	65,118	-5.6%
	Other Ingestibles	0	51,377	-100.0%	0	3,332	-100.0%
 INHALABLE EXTRACTS	Cartridges	20,008,164	21,056,869	-5.0%	892,238	902,571	-1.1%
	Disposable Pens	13,121,731	9,203,168	42.6%	564,343	389,581	44.9%
	Hash	1,150,568	1,192,923	-3.6%	63,694	65,410	-2.6%
	Infused Pre-rolls	20,875,766	22,465,200	-7.1%	1,225,734	1,295,681	-5.4%
	Other Inhalables[1]	1,194,826	968,568	23.4%	54,755	46,613	17.5%
	Resin	743,736	451,888	64.6%	34,847	20,625	69.0%
	Rosin	682,872	714,964	-4.5%	18,547	18,624	-0.4%
	Shatter	1,048,504	1,089,827	-3.8%	60,220	60,474	-0.4%
 PRE-ROLLS	Blend	1,209,335	1,123,334	7.7%	71,607	87,831	-18.5%
	Hybrid	5,382,531	4,334,156	24.2%	455,935	385,582	18.2%
	Indica	15,767,040	14,409,372	9.4%	1,399,411	1,280,057	9.3%
	Sativa	15,608,455	14,661,277	6.5%	1,441,107	1,365,496	5.5%
	Variety Pack	1,860,839	2,421,840	-23.2%	75,751	108,432	-30.1%
 SEEDS	Same Strain	5,586	2,948	89.5%	264	141	87.2%
	Variety Pack	1,030	491	109.7%	47	24	95.8%
 TOPICALS	Balms	319,564	289,497	10.4%	8,800	8,516	3.3%
	Bath Products	81,847	76,236	7.4%	5,591	5,229	6.9%
	Creams and Lotions	228,544	279,900	-18.3%	8,586	11,242	-23.6%
	Massage Oils and Lubricants	0	145	-100.0%	0	12	-100.0%
	Other Topicals[2]	9,179	6,884	33.3%	456	342	33.3%

[1]Includes diamonds, wax, crumble, etc.
[2]Includes face masks, other topical oils/ sprays, etc.

SALES MIX BY PRODUCT CATEGORY

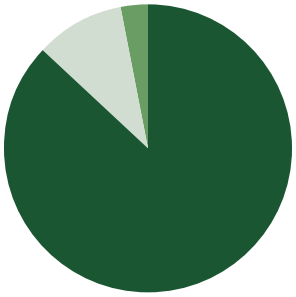
JUL AUG SEP
FY2026 Q2

JUL AUG SEP
FY2025 Q2



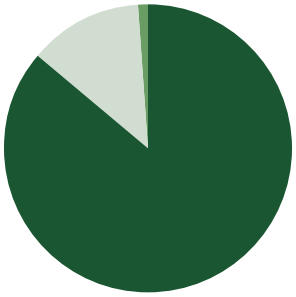
BEVERAGES

SALES $ MIX PERCENTAGE



87.0%	Carbonated Drink
10.1%	Non Carbonated Drink
2.9%	Drink Mix

SELL UNITS MIX PERCENTAGE

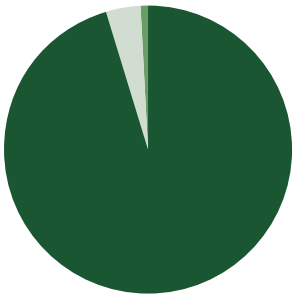


86.2%	Carbonated Drink
12.9%	Non Carbonated Drink
0.9%	Drink Mix



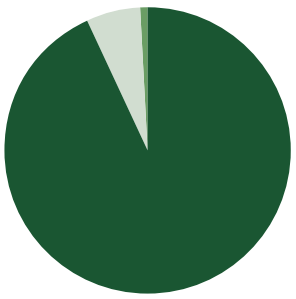
EDIBLES

SALES $ MIX PERCENTAGE



95.4%	Chews
4.0%	Chocolate
0.6%	Baked Goods
0.0%	Hard Candy

SELL UNITS MIX PERCENTAGE



93.1%	Chews
6.2%	Chocolate
0.6%	Baked Goods
0.0%	Hard Candy

SALES MIX BY PRODUCT CATEGORY

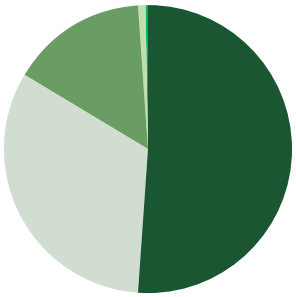
JUL AUG SEP
FY2026 Q2

JUL AUG SEP
FY2025 Q2



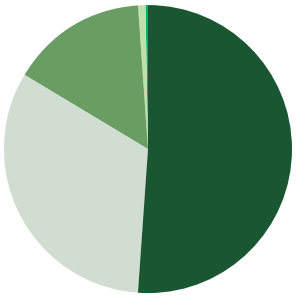
FLOWER

SALES $ MIX PERCENTAGE



51.3%	Indica
32.4%	Sativa
15.3%	Hybrid
0.7%	Variety Pack
0.2%	Blend

GRAMS MIX PERCENTAGE

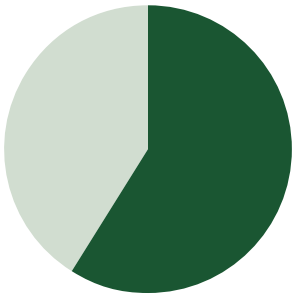


51.3%	Indica
33.4%	Sativa
14.1%	Hybrid
1.0%	Variety Pack
0.2%	Blend



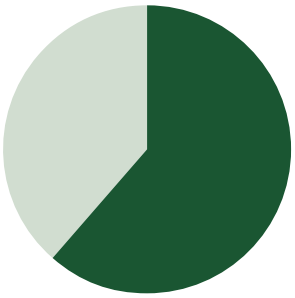
INGESTIBLE EXTRACTS

SALES $ MIX PERCENTAGE



59.1%	Capsules and Pills
40.9%	Oils and Tinctures
0.0%	Other Ingestible Extracts

SELL UNITS MIX PERCENTAGE



61.5%	Capsules and Pills
38.5%	Oils and Tinctures
0.0%	Other Ingestible Extracts

SALES MIX BY PRODUCT CATEGORY

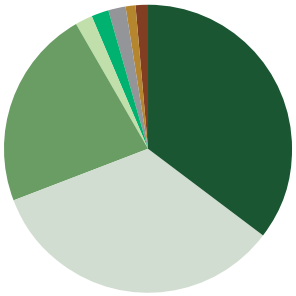
JUL AUG SEP
FY2026 Q2

JUL AUG SEP
FY2025 Q2



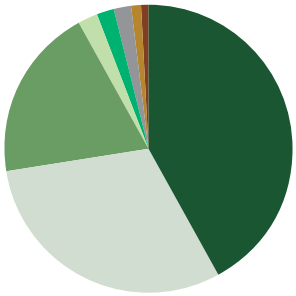
INHALABLE EXTRACTS

SALES $ MIX PERCENTAGE



35.5%	Infused Pre-rolls
34.0%	Cartridges
22.3%	Disposable Pens
2.0%	Other Inhalable Extracts
2.0%	Hash
1.8%	Shatter
1.3%	Resin
1.2%	Rosin

SELL UNITS MIX PERCENTAGE



42.1%	Infused Pre-rolls
30.6%	Cartridges
19.4%	Disposable Pens
2.2%	Hash
2.1%	Shatter
1.9%	Other Inhalable Extracts
1.2%	Resin
0.6%	Rosin



SALES MIX BY PRODUCT CATEGORY

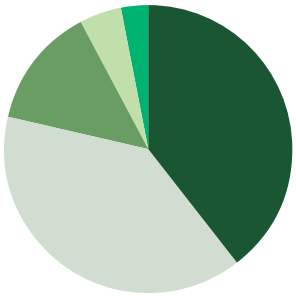
JUL AUG SEP
FY2026 Q2

JUL AUG SEP
FY2025 Q2



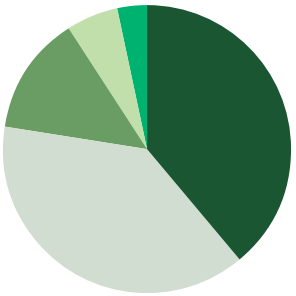
PRE-ROLLS

SALES $ MIX PERCENTAGE



39.6%	Indica
39.2%	Sativa
13.5%	Hybrid
4.7%	Variety Pack
3.0%	Blend

GRAMS MIX PERCENTAGE

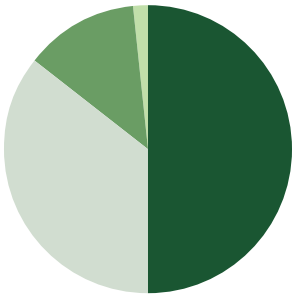


39.0%	Sativa
38.6%	Indica
13.6%	Hybrid
5.6%	Variety Pack
3.3%	Blend



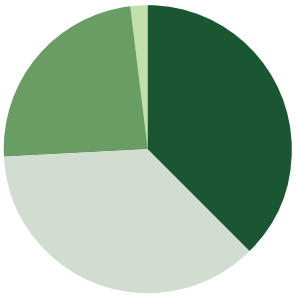
TOPICALS

SALES $ MIX PERCENTAGE



50.0%	Balms
35.8%	Creams and Lotions
12.8%	Bath Products
1.4%	Other Topicals
0.0%	Massage Oils and Lubricants

SELL UNITS MIX PERCENTAGE

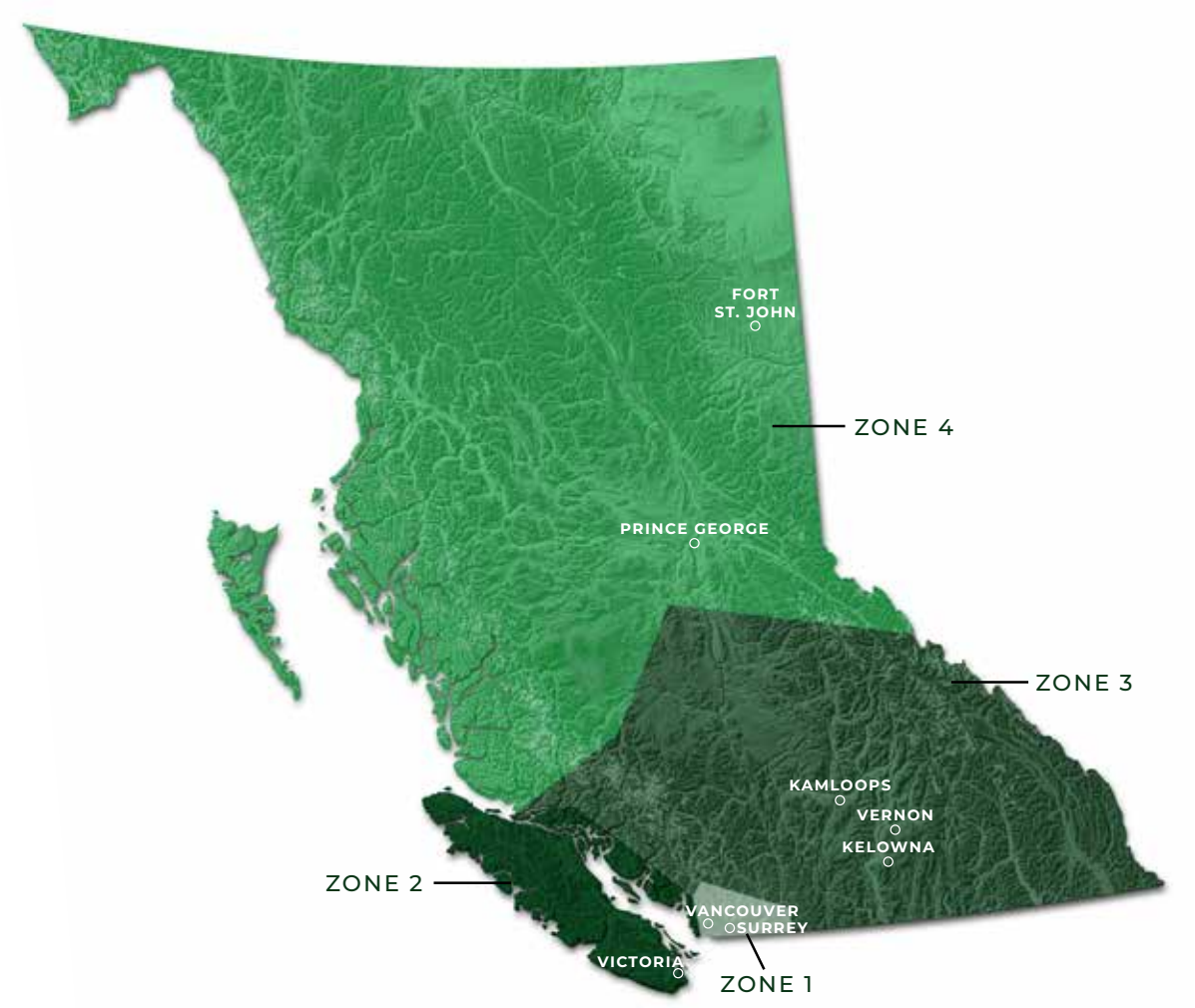


37.6%	Balms
36.6%	Creams and Lotions
23.9%	Bath Products
1.9%	Other Topicals
0.0%	Massage Oils and Lubricants

GROWING ACCESS POINTS

JUL AUG SEP
FY2026 Q2

JUL AUG SEP
FY2025 Q2



SHIPPING ZONES	SALES $ CURRENT QUARTER	SALES $ LAST YEAR'S QUARTER	SALES $ YOY VARIANCE %	SELL UNITS CURRENT QUARTER	SELL UNITS LAST YEAR'S QUARTER	SELL UNITS YOY VARIANCE %	STORE COUNT CURRENT QUARTER*	STORE COUNT LAST YEAR'S QUARTER*
1	67,119,765	65,794,694	2.0%	4,565,003	4,825,775	-5.4%	177	161
2	35,079,210	33,771,576	3.9%	2,179,177	2,301,527	-5.3%	129	130
3	33,878,263	34,324,676	-1.3%	2,049,637	2,266,241	-9.6%	166	166
4	20,336,728	20,427,570	-0.4%	1,029,786	1,101,471	-6.5%	68	69

**Includes private and public retail stores. These are counted regardless of whether product has been shipped in the quarter.*

DIRECT DELIVERY SALES SUMMARY*

JUL AUG SEP
FY2026 Q2

JUL AUG SEP
FY2025 Q2

QUARTER YEAR-OVER-YEAR SUMMARY

	2026 Q2	2025 Q2
+35.7% WHOLESALE GRAMS	1,005,380 GRAMS	740,933 GRAMS
+42.3% WHOLESALE SALES	$4,387,335	$3,083,274
+4.9% PRICE ALL CANNABIS	$4.36 PER GRAM	$4.16 PER GRAM
-4.4% PRICE DRIED FLOWER	$3.97 PER GRAM	$4.16 PER GRAM

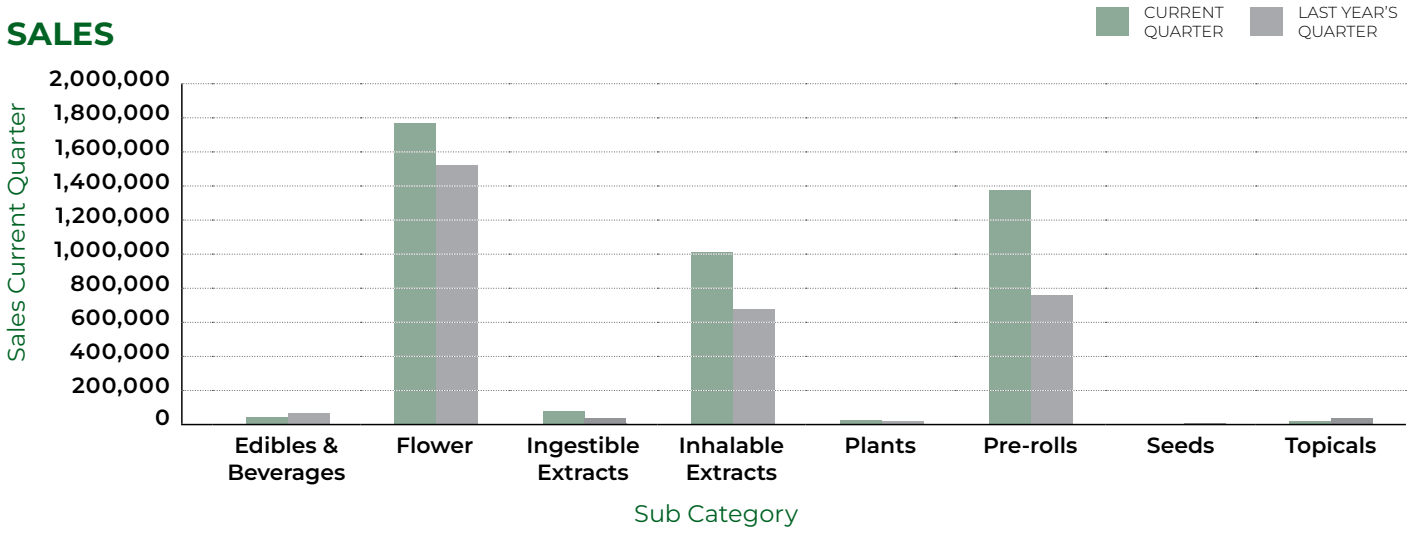
DIRECT DELIVERY
SUB CATEGORY SALES*

JUL AUG SEP
FY2026 Q2

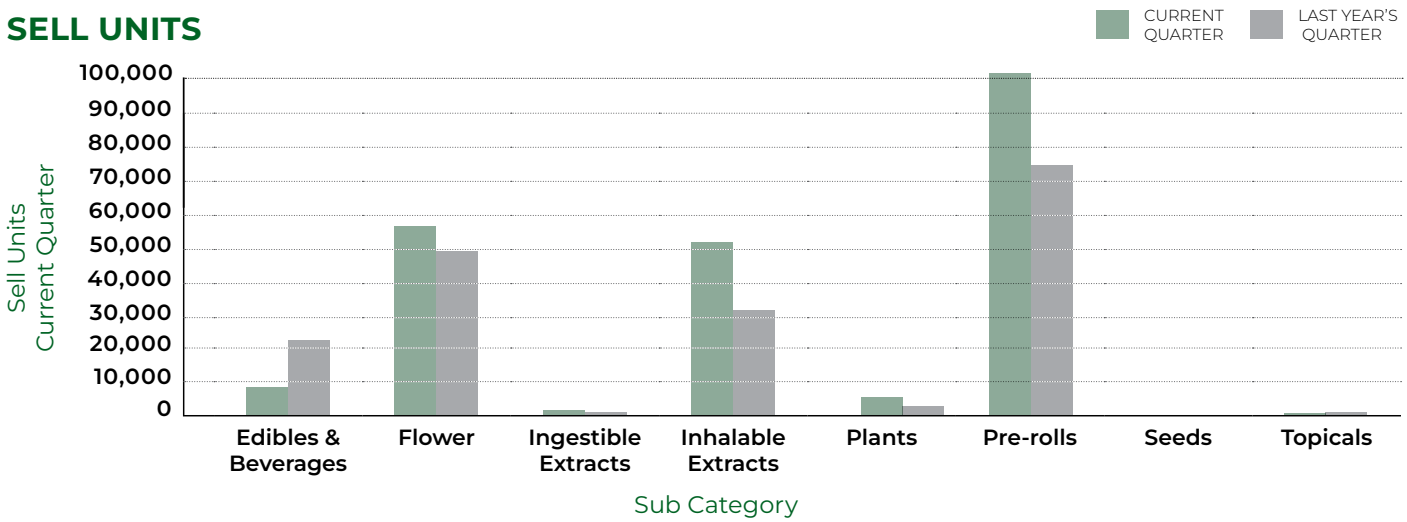
JUL AUG SEP
FY2025 Q2

SUB CATEGORY	SALES $ CURRENT QUARTER	SALES $ LAST YEAR'S QUARTER	SALES $ YOY VARIANCE %	SELL UNITS CURRENT QUARTER	SELL UNITS LAST YEAR'S QUARTER	SELL UNITS YOY VARIANCE %
Edibles & Beverages	38,397	58,689	-34.6%	9,019	23,055	-60.9%
Flower	1,791,860	1,533,649	16.8%	57,883	50,177	15.4%
Ingestible Extracts	44,166	24,738	78.5%	2,838	1,002	183.2%
Inhalable Extracts	1,096,090	685,857	59.8%	53,097	33,827	57.0%
Plants	16,522	6,068	172.3%	612	335	82.7%
Pre-roll	1,391,257	748,726	85.8%	123,014	64,660	90.2%
Seeds	0	265	-100.0%	0	19	-100.0%
Topicals	9,043	25,282	-64.2%	462	1,016	-54.5%

SALES



SELL UNITS



**Sales reported during the quarter as sold.*

DIRECT DELIVERY SALES MIX BY PRODUCT CATEGORY*

JUL AUG SEP
FY2026 Q2

JUL AUG SEP
FY2025 Q2

CATEGORY	SUB CATEGORY	SALES $ CURRENT QUARTER	SALES $ LAST YEAR'S QUARTER	SALES $ YOY VARIANCE %	SELL UNITS CURRENT QUARTER	SELL UNITS LAST YEAR'S QUARTER	SELL UNITS YOY VARIANCE %
 BEVERAGES	Carbonated	1,206	2,287	-47.24%	192	420	-54.29%
 EDIBLES	Chews	25,936	50,038	-48.17%	7,975	21,287	-62.54%
	Hard Candy	0	6,344	-100.00%	0	1,344	-100.00%
	Other Edibles	11,255	21	54,219.11%	852	4	21,200.00%
 FLOWER	Hybrid	345,685	473,611	-27.01%	10,335	15,921	-35.09%
	Indica	807,382	744,958	8.38%	27,138	24,185	12.21%
	Sativa	600,491	257,113	133.55%	19,920	9,051	120.09%
	Variety Pack	38,303	57,967	-33.92%	490	1,020	-51.96%
 INGESTIBLE EXTRACTS	Capsules and Pills	17,194	7,078	142.93%	1,500	268	459.70%
	Oils and Tinctures	15,986	10,967	45.77%	618	464	33.19%
	Other Ingestibles	10,986	6,693	64.14%	720	270	166.67%
 INHALABLE EXTRACTS	Cartridges	273,968	170,732	60.47%	11,642	7,139	63.08%
	Disposable Pens	250,857	112,559	122.87%	11,575	4,768	142.76%
	Hash	7,711	18,428	-58.16%	570	906	-37.09%
	Infused Pre-rolls	349,028	200,441	74.13%	21,622	14,449	49.64%
	Other Inhalables[1]	33,828	50,215	-32.63%	1,589	2,561	-37.95%
	Resin	22,041	35,730	-38.31%	948	1,416	-33.05%
	Rosin	105,284	92,588	13.71%	2,611	2,341	11.53%
	Shatter	53,374	5,164	933.59%	2,540	247	928.34%
 PLANTS	Same Strain	10,587	874	1,111.98%	372	46	708.70%
	Variety Pack	5,935	5,195	14.26%	240	289	-16.96%
 PRE-ROLLS	Blend	6,367	3,485	82.72%	408	258	58.14%
	Hybrid	342,366	222,940	53.57%	28,808	21,332	35.05%
	Indica	619,089	288,097	114.89%	51,164	23,777	115.18%
	Sativa	402,398	219,024	83.72%	41,536	18,579	123.56%
	Variety Pack	21,037	15,180	38.58%	1,098	714	53.78%
 SEEDS	Same Strain	0	265	-100.00%	0	19	-100.00%
 TOPICALS	Balms	0	6,857	-100.00%	0	257	-100.00%
	Bath Products	72	2,754	-97.37%	6	197	-96.95%
	Creams and Lotions	1,249	8,173	-84.71%	126	195	-35.38%
	Massage Oils and Lubricants	150	35	328.45%	6	1	500.00%
	Other Topicals[2]	7,572	7,464	1.44%	324	366	-11.48%

[1]Includes diamonds, wax, crumble, etc.
[2]Includes face masks, other topical oils/ sprays, etc.

BRITISH COLUMBIA

LIQUOR DISTRIBUTION BRANCH

FY2026 Q2
JUL | AUG | SEPT