

BC CANNABIS WHOLESALE

QUARTERLY SALES REPORT



**LIQUOR
DISTRIBUTION
BRANCH**

FY2026 Q1
APR | MAY | JUN

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)

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REPORT SUMMARY

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QUARTER YEAR-OVER-YEAR SUMMARY

	2026 Q1	2025 Q1
+3.1% WHOLESALE GRAMS	40,912,864 GRAMS	39,679,448 GRAMS
+1.1% WHOLESALE SALES	\$152,216,302	\$150,528,995
-1.9% PRICE ALL CANNABIS	\$3.72 PER GRAM	\$3.79 PER GRAM
-0.6% PRICE DRIED FLOWER	\$3.12 PER GRAM	\$3.14 PER GRAM
+1.7% RETAIL STORE GROWTH*	530 STORES	521 STORES

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

DRIED FLOWER PRICE PER GRAM BANDS

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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	75,603	153,490	-50.7%	16,409	31,591	-48.1%
	>\$5	135,770	135,345	0.3%	25,026	23,050	8.6%
3.5 GRAMS	\$0 - \$3	36,442	1,851	1,869.3%	12,159	1,134	972.2%
	\$3 - \$5	3,849,169	4,325,989	-11.0%	921,414	1,039,406	-11.4%
	>\$5	1,912,853	2,252,972	-15.1%	308,098	331,366	-7.0%
7 GRAMS	\$0 - \$3	1,394,321	1,257,854	10.8%	488,593	453,467	7.7%
	\$3 - \$5	5,136,937	4,867,924	5.5%	1,254,414	1,182,524	6.1%
	>\$5	617,181	1,569,907	-60.7%	105,490	268,471	-60.7%
14 GRAMS	\$0 - \$3	1,868,211	1,863,310	0.3%	652,512	665,700	-2.0%
	\$3 - \$5	4,068,425	4,846,393	-16.1%	1,106,434	1,374,142	-19.5%
	>\$5	793,402	563,611	40.8%	146,384	100,982	45.0%
28 GRAMS	\$0 - \$3	16,799,213	16,781,300	0.1%	6,809,740	6,945,624	-2.0%
	\$3 - \$5	4,398,421	4,789,704	-8.2%	1,314,264	1,401,540	-6.2%

DRIED FLOWER

SALES TREND

BY FORMAT

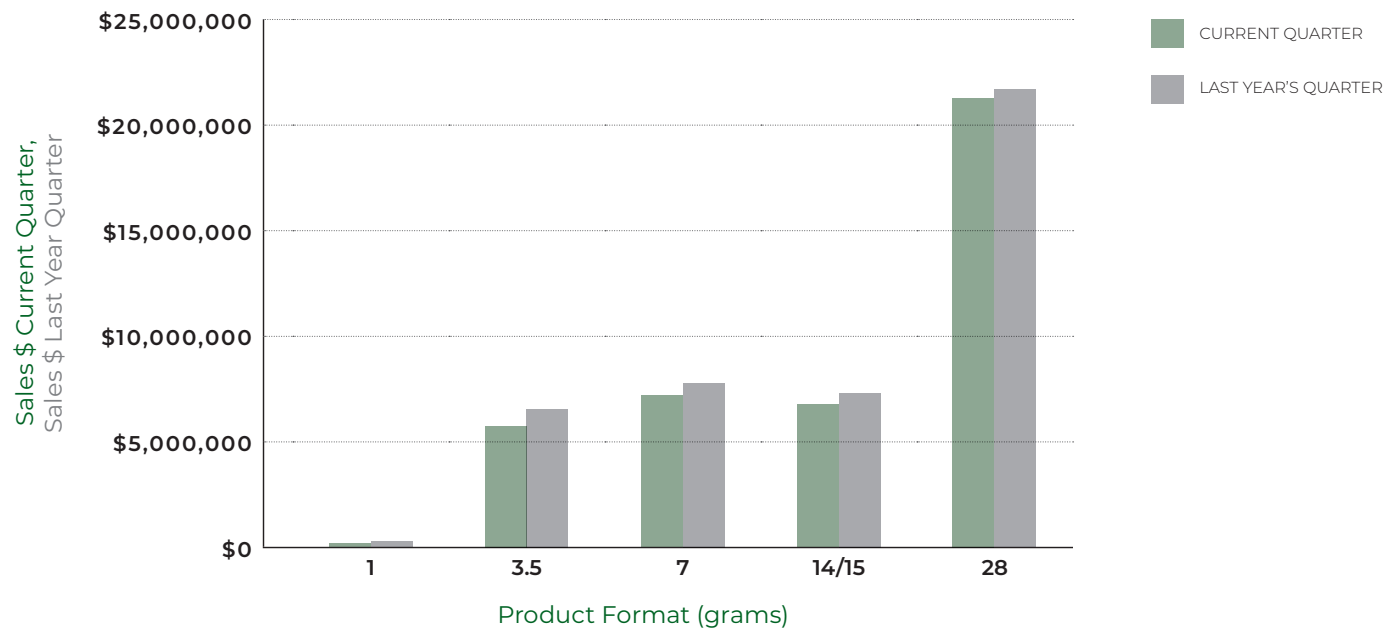
APR MAY JUN
FY2026 Q1

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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	211,373	288,835	-26.8%	41,435	54,641	-24.2%
3.5	5,798,464	6,580,811	-11.9%	1,241,671	1,371,906	-9.5%
7	7,148,439	7,695,685	-7.1%	1,848,497	1,904,462	-2.9%
14/15	6,730,037	7,273,314	-7.5%	1,905,330	2,140,824	-11.0%
28	21,197,634	21,571,004	-1.7%	8,124,004	8,347,164	-2.7%

FLOWER

SALE TREND BY FORMAT



TOTAL SALES BY PRODUCT CATEGORY

APR MAY JUN
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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	3,317,228	3,411,255	-2.8%	671,873	742,018	-9.5%
 EDIBLES	8,879,896	7,662,732	15.9%	1,538,618	2,669,655	-42.4%
 FLOWER	41,085,947	43,409,648	-5.4%	1,086,507	1,169,709	-7.1%
 INGESTIBLE EXTRACTS	3,571,323	4,184,808	-14.7%	160,570	197,414	-18.7%
 INHALABLE EXTRACTS ¹	57,221,244	57,032,091	0.3%	2,827,510	2,772,589	2.0%
 PRE-ROLLS	37,426,649	34,115,571	9.7%	3,355,004	3,040,710	10.3%
 SEEDS	93,752	75,372	24.4%	4,735	3,655	29.5%
 TOPICALS	620,262	637,518	-2.7%	24,203	27,869	-13.2%

¹Includes infused pre-rolls.

SALES MIX BY PRODUCT CATEGORY

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FY2025 Q1

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	2,964,259	3,105,673	-4.6%	587,847	678,004	-13.3%
	Non Carbonated	352,970	305,582	15.5%	84,026	64,014	31.3%
	EDIBLES						
	Baked Goods	66,502	76,913	-13.5%	11,294	17,316	-34.8%
	Chews	8,434,457	7,115,266	18.5%	1,421,525	2,492,257	-43.0%
	Chocolate	376,981	438,545	-14.0%	105,465	137,110	-23.1%
	Hard Candy	38	32,008	-99.9%	29	22,972	-99.9%
	Other Edibles	1,918	0	-	305	0	-
	FLOWER						
	Hybrid	6,413,268	5,546,227	15.6%	163,615	153,166	6.8%
	Indica	21,681,503	23,009,023	-5.8%	564,458	610,053	-7.5%
	Sativa	12,867,411	13,821,922	-6.9%	356,682	391,385	-8.9%
	Variety Pack	123,765	1,032,477	-88.0%	1,752	15,105	-88.4%
	INGESTIBLE EXTRACTS						
	Capsules and Pills	2,107,619	2,480,202	-15.0%	98,595	121,161	-18.6%
	Oils and Tinctures	1,460,438	1,644,197	-11.2%	61,828	72,255	-14.4%
	Other Ingestibles	3,266	60,409	-94.6%	147	3,998	-96.3%
	INHALABLE EXTRACTS						
	Cartridges	20,165,018	22,203,220	-9.2%	891,773	944,121	-5.5%
	Disposable Pens	11,055,242	7,693,556	43.7%	468,757	322,261	45.5%
	Hash	1,174,754	1,183,674	-0.8%	65,854	65,855	0.0%
	Infused Pre-rolls	20,872,230	22,146,623	-5.8%	1,223,277	1,276,984	-4.2%
	Other Inhalables ¹	1,195,722	1,062,856	12.5%	55,520	48,557	14.3%
	Resin	775,117	664,211	16.7%	34,903	27,329	27.7%
	Rosin	863,501	819,450	5.4%	23,014	22,015	4.5%
	Shatter	1,119,660	1,258,500	-11.0%	64,412	65,467	-1.6%
	PRE-ROLLS						
	Blend	1,016,539	1,087,304	-6.5%	61,477	84,160	-27.0%
	Hybrid	4,712,393	3,989,787	18.1%	377,415	343,345	9.9%
	Indica	15,150,314	13,574,863	11.6%	1,395,641	1,235,949	12.9%
	Sativa	14,608,492	13,392,868	9.1%	1,427,926	1,289,129	10.8%
	Variety Pack	1,938,911	2,070,749	-6.4%	92,545	88,127	5.0%
	SEEDS						
	Same Strain	71,030	52,760	34.6%	3,698	2,578	43.4%
	Variety Pack	22,722	22,612	0.5%	1,037	1,077	-3.7%
	TOPICALS						
	Balms	293,776	262,390	12.0%	8,199	8,643	-5.1%
	Bath Products	103,064	119,258	-13.6%	6,965	8,370	-16.8%
	Creams and Lotions	217,263	243,876	-10.9%	8,733	10,183	-14.2%
	Massage Oils and Lubricants	0	2,331	-100.0%	0	193	-100.0%
	Other Topicals ²	6,160	9,662	-36.3%	306	480	-36.3%

¹Includes diamonds, wax, crumble, etc.

²Includes face masks, other topical oils/sprays, etc.

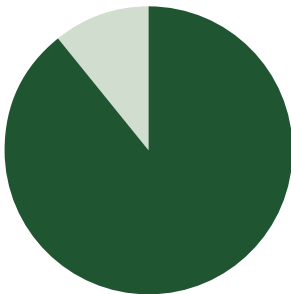
SALES MIX BY PRODUCT CATEGORY

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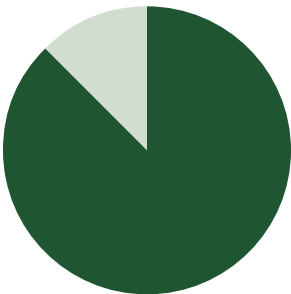
BEVERAGES

SALES \$ MIX PERCENTAGE



89.4%	Carbonated
10.6%	Non Carbonated

SELL UNITS MIX PERCENTAGE

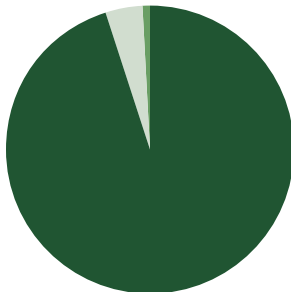


87.5%	Carbonated
12.5%	Non Carbonated



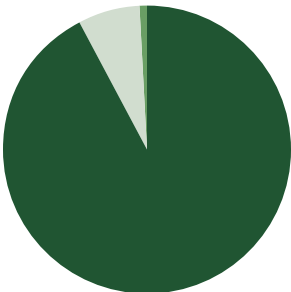
EDIBLES

SALES \$ MIX PERCENTAGE



95.0%	Chews
4.2%	Chocolate
0.7%	Baked Goods
0.0%	Other Edibles
0.0%	Hard Candy

SELL UNITS MIX PERCENTAGE



92.4%	Chews
6.9%	Chocolate
0.7%	Baked Goods
0.0%	Other Edibles
0.0%	Hard Candy

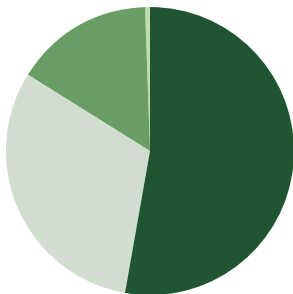
SALES MIX BY PRODUCT CATEGORY

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FY2025 Q1



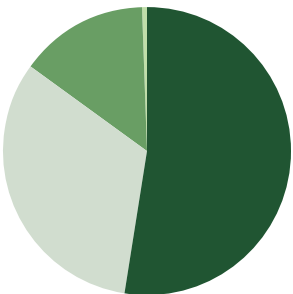
FLOWER

SALES \$ MIX PERCENTAGE



52.8%	Indica
31.3%	Sativa
15.6%	Hybrid
0.3%	Variety Pack

GRAMS MIX PERCENTAGE

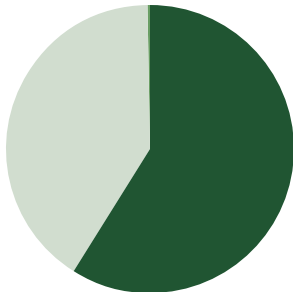


52.5%	Indica
32.6%	Sativa
14.5%	Hybrid
0.4%	Variety Pack



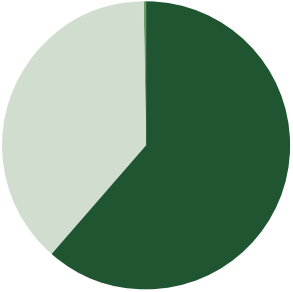
INGESTIBLE EXTRACTS

SALES \$ MIX PERCENTAGE



59.0%	Capsules and Pills
40.9%	Oils and Tinctures
0.1%	Other Ingestible Extracts

SELL UNITS MIX PERCENTAGE



61.4%	Capsules and Pills
38.5%	Oils and Tinctures
0.1%	Other Ingestible Extracts

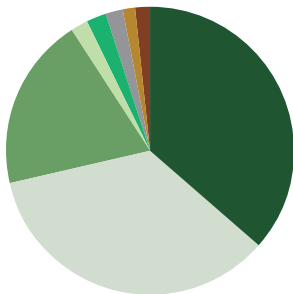
SALES MIX BY PRODUCT CATEGORY

APR MAY JUN
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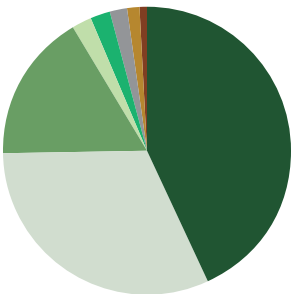
INHALABLE EXTRACTS

SALES \$ MIX PERCENTAGE



36.5%	Infused Pre-rolls
35.2%	Cartridges
19.3%	Disposable Pens
2.1%	Other Inhalable Extracts
2.1%	Hash
2.0%	Shatter
1.5%	Rosin
1.4%	Resin

SELL UNITS MIX PERCENTAGE



43.3%	Infused Pre-rolls
31.5%	Cartridges
16.6%	Disposable Pens
2.3%	Hash
2.3%	Shatter
2.0%	Other Inhalable Extracts
1.2%	Rosin
0.8%	Resin



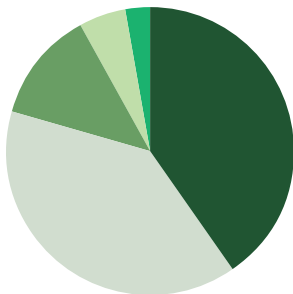
SALES MIX BY PRODUCT CATEGORY

APR MAY JUN
FY2026 Q1
APR MAY JUN
FY2025 Q1



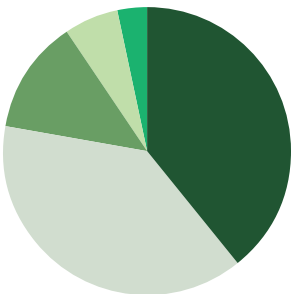
PRE-ROLLS

SALES \$ MIX PERCENTAGE



40.5%	Indica
39.0%	Sativa
12.6%	Hybrid
5.2%	Variety Pack
2.7%	Blend

GRAMS MIX PERCENTAGE

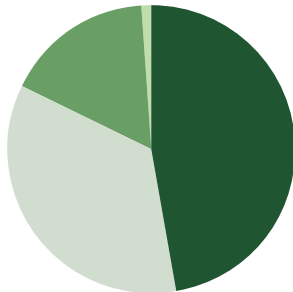


39.2%	Indica
38.7%	Sativa
12.8%	Hybrid
6.2%	Variety Pack
3.1%	Blend



TOPICALS

SALES \$ MIX PERCENTAGE



47.4%	Balms
35.0%	Creams and Lotions
16.6%	Bath Products
1.0%	Other Topicals
0.0%	Massage Oils and Lubricants

SELL UNITS MIX PERCENTAGE



36.1%	Creams and Lotions
33.9%	Balms
28.8%	Bath Products
1.3%	Other Topicals
0.0%	Massage Oils and Lubricants

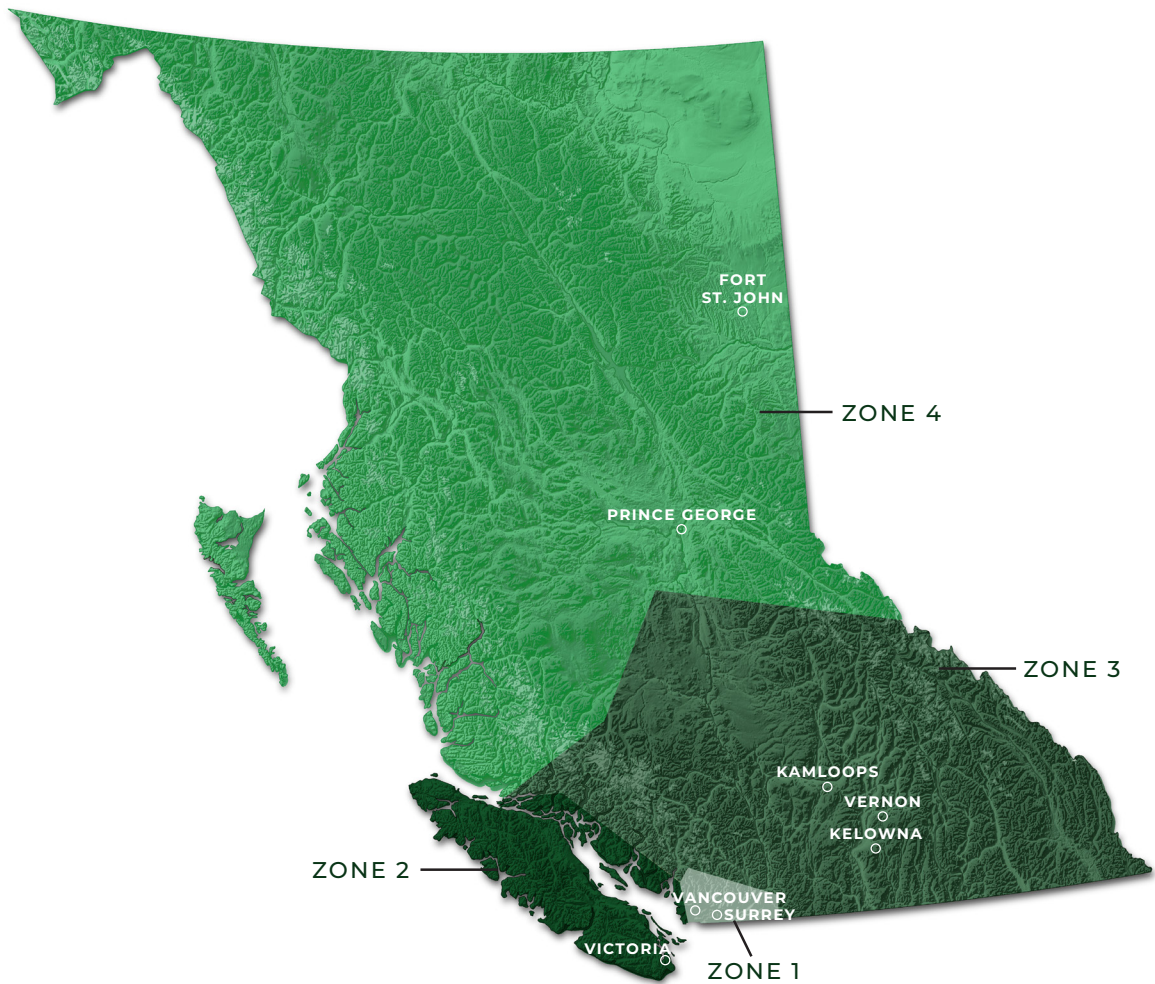
GROWING ACCESS POINTS

APR MAY JUN

FY2026 Q1

APR MAY JUN

FY2025 Q1



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	66,791,858	64,010,110	4.3%	4,589,416	4,857,761	-5.5%	173	159
2	33,937,143	33,769,458	0.5%	2,136,355	2,382,486	-10.3%	128	130
3	31,712,985	32,630,370	-2.8%	1,929,832	2,238,678	-13.8%	164	167
4	19,773,663	20,118,226	-1.7%	1,013,391	1,144,629	-11.5%	69	69

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

DIRECT DELIVERY SALES SUMMARY*

APR MAY JUN
FY2026 Q1
APR MAY JUN
FY2025 Q1

QUARTER YEAR-OVER-YEAR SUMMARY

	2026 Q1	2025 Q1
+12.9% WHOLESALE GRAMS	860,051 GRAMS	761,812 GRAMS
+19.2% WHOLESALE SALES	\$3,901,291	\$3,273,229
+5.6% PRICE ALL CANNABIS	\$4.54 PER GRAM	\$4.30 PER GRAM
+2.0% PRICE DRIED FLOWER	\$4.17 PER GRAM	\$4.09 PER GRAM

*Direct delivery wholesale sales appear higher this quarter due to the receipt of late reported transactions related to prior quarter activity.

DIRECT DELIVERY

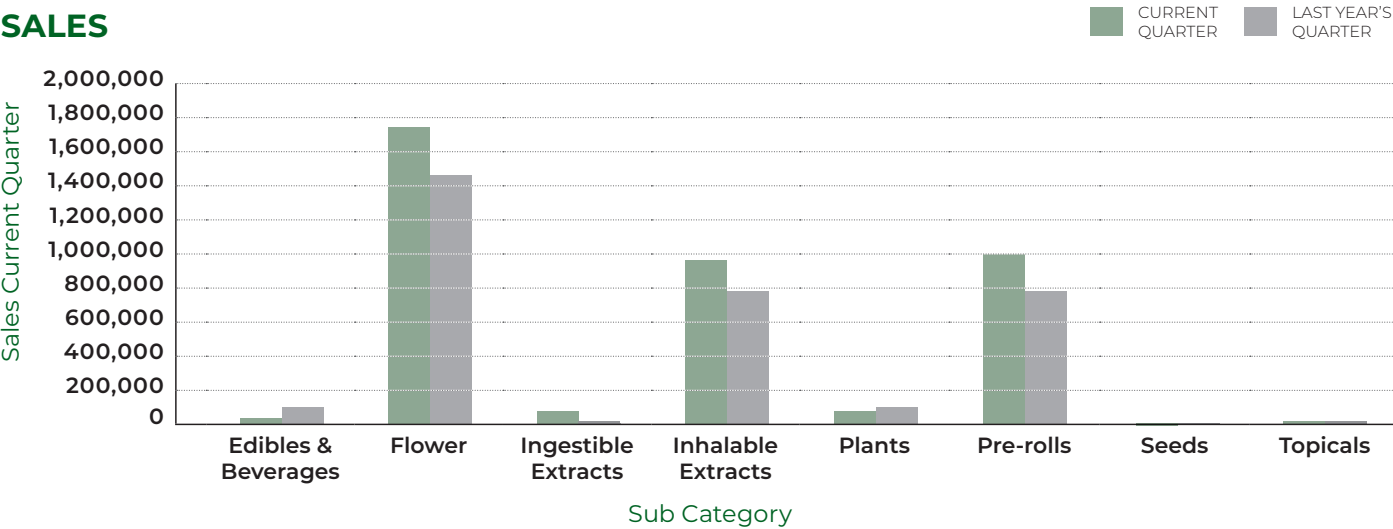
SUB CATEGORY SALES*

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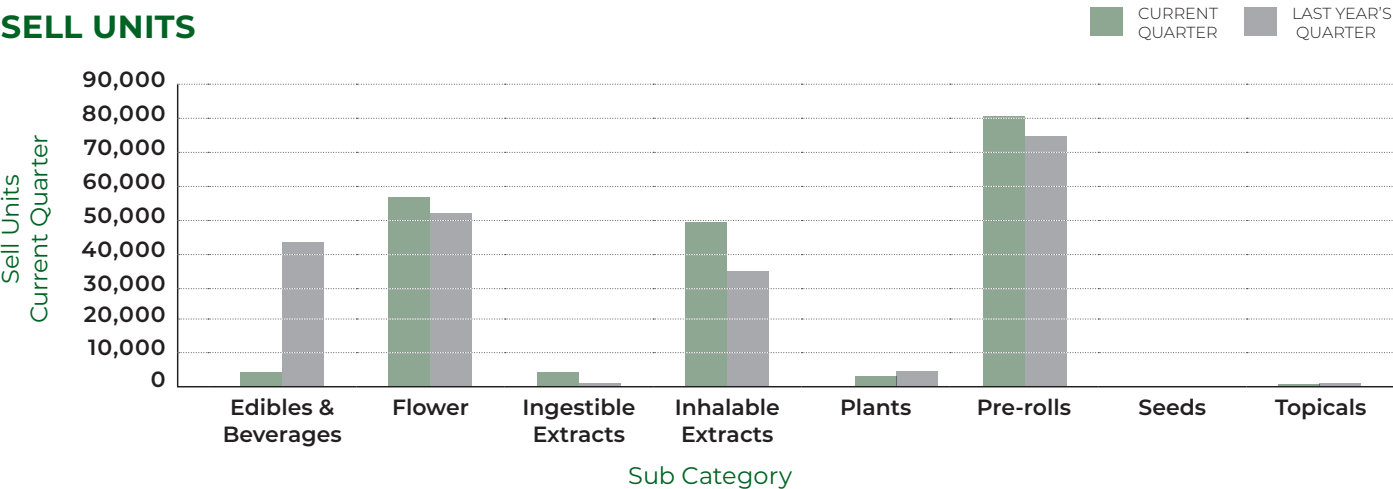
APR MAY JUN
FY2025 Q1

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	31,629	102,084	-69.0%	4,388	43,764	-90.0%
Flower	1,751,925	1,463,627	19.7%	56,394	51,259	10.0%
Ingestible Extracts	68,805	28,193	144.1%	4,148	1,383	199.9%
Inhalable Extracts	964,959	786,005	22.8%	49,342	36,290	36.0%
Plants	76,181	101,856	-25.2%	2,815	4,681	-39.9%
Pre-roll	991,807	765,467	29.6%	80,369	74,197	8.3%
Seeds	48	848	-94.3%	2	41	-95.1%
Topicals	15,937	25,148	-36.6%	753	1,020	-26.2%

SALES



SELL UNITS



*Sales reported during the quarter as sold.

DIRECT DELIVERY

SALES MIX BY PRODUCT CATEGORY*

APR MAY JUN
FY2026 Q1

APR MAY JUN
FY2025 Q1

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	2,831	9,626	-70.59%	516	1,404	-63.25%
	Non Carbonated	0	139	-100.00%	0	48	-100.00%
 EDIBLES	Chews	28,798	91,989	-68.69%	3,872	42,252	-90.84%
	Hard Candy	0	0	-	0	0	-
	Other Edibles	0	331	-100.00%	0	60	-100.00%
 FLOWER	Hybrid	540,373	470,470	14.86%	13,165	18,097	-27.25%
	Indica	741,810	568,534	30.48%	26,143	19,971	30.90%
	Sativa	391,769	323,073	21.26%	15,852	11,265	40.72%
	Variety Pack	77,974	101,550	-23.22%	1,234	1,926	-35.93%
 INGESTIBLE EXTRACTS	Capsules and Pills	23,538	6,229	277.86%	2,020	250	708.00%
	Oils and Tinctures	29,627	18,417	60.87%	1,102	900	22.44%
	Other Ingestibles	15,640	3,546	341.04%	1,026	233	340.34%
 INHALABLE EXTRACTS	Cartridges	217,667	179,497	21.26%	8,968	7,114	26.06%
	Disposable Pens	222,656	144,125	54.49%	10,325	5,706	80.95%
	Hash	6,496	13,225	-50.88%	342	837	-59.14%
	Infused Pre-rolls	401,788	201,524	99.37%	25,125	13,541	85.55%
	Other Inhalables ¹	31,094	70,466	-55.87%	1,548	3,506	-55.85%
	Resin	14,699	18,395	-20.09%	612	735	-16.73%
	Rosin	49,588	133,169	-62.76%	1,390	3,588	-61.26%
	Shatter	20,971	25,604	-18.09%	1,032	1,263	-18.29%
 PLANTS	Same Strain	54,768	52,452	4.42%	1,959	1,843	6.29%
	Variety Pack	21,413	49,404	-56.66%	856	2,838	-69.84%
 PRE-ROLLS	Blend	7,238	9,422	-23.18%	504	663	-23.98%
	Hybrid	186,751	216,609	-13.78%	16,993	25,553	-33.50%
	Indica	500,019	281,770	77.46%	38,352	26,239	46.16%
	Sativa	248,107	238,292	4.12%	22,186	20,992	5.69%
	Variety Pack	49,693	19,375	156.48%	2,334	750	211.20%
 SEEDS	Same Strain	0	848	-100.00%	0	41	-100.00%
	Variety Pack	48	0	-	2	0	-
 TOPICALS	Balms	192	6,526	-97.06%	6	245	-97.55%
	Creams and Lotions	1,344	9,324	-85.58%	55	298	-81.54%
	Massage Oils and Lubricants	1,375	455	202.13%	60	13	361.54%
	Other Topicals ²	13,026	8,843	47.31%	632	464	36.21%

¹Includes diamonds, wax, crumble, etc.

²Includes face masks, other topical oils/sprays, etc.



**LIQUOR
DISTRIBUTION
BRANCH**

FY2026 Q1
APR | MAY | JUN