

**BC CANNABIS WHOLESALE**

**QUARTERLY**

SALES

REPORT



**LIQUOR  
DISTRIBUTION  
BRANCH**

FY2025 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

APR MAY JUN

FY2025 Q1

APR MAY JUN

FY2024 Q1

## QUARTER YEAR-OVER-YEAR SUMMARY

	2025 Q1	2024 Q1
<b>+9%</b> WHOLESALE GRAMS	<b>39,677,701</b> GRAMS	<b>36,396,088</b> GRAMS
<b>+7.1%</b> WHOLESALE SALES	<b>\$150,528,995</b>	<b>\$140,504,318</b>
<b>-1.7%</b> PRICE ALL CANNABIS	<b>\$3.79</b> PER GRAM	<b>\$3.86</b> PER GRAM
<b>-1.4%</b> PRICE DRIED FLOWER	<b>\$3.14</b> PER GRAM	<b>\$3.19</b> PER GRAM
<b>+3.2%</b> RETAIL STORE GROWTH*	<b>521</b> STORES	<b>505</b> STORES

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

# DRIED FLOWER PRICE PER GRAM BANDS

APR MAY JUN  
 FY2025 Q1  
 APR MAY JUN  
 FY2024 Q1

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	153,490	229,917	-33.2%	31,591	47,142	-33.0%
	>\$5	135,345	178,696	-24.3%	23,050	29,602	-22.1%
3.5 GRAMS	\$0 - \$3	1,851	1,894	-2.3%	1,134	760	49.3%
	\$3 - \$5	4,325,989	4,748,913	-8.9%	1,039,406	1,118,681	-7.1%
	>\$5	2,252,972	4,164,245	-45.9%	331,366	635,667	-47.9%
7 GRAMS	\$0 - \$3	1,257,854	119,294	954.4%	453,467	42,665	962.9%
	\$3 - \$5	4,867,924	4,756,705	2.3%	1,182,524	1,241,016	-4.7%
	>\$5	1,569,907	2,115,812	-25.8%	268,471	357,721	-24.9%
14 GRAMS	\$0 - \$3	1,863,310	2,005,502	-7.1%	665,700	739,746	-10.0%
	\$3 - \$5	4,846,393	3,565,027	35.9%	1,374,142	943,306	45.7%
	>\$5	563,611	388,739	45.0%	100,982	69,090	46.2%
28 GRAMS	\$0 - \$3	16,781,300	14,516,414	15.6%	6,945,624	6,337,408	9.6%
	\$3 - \$5	4,789,704	7,155,366	-33.1%	1,401,540	2,232,608	-37.2%

# DRIED FLOWER

## SALES TREND

### BY FORMAT

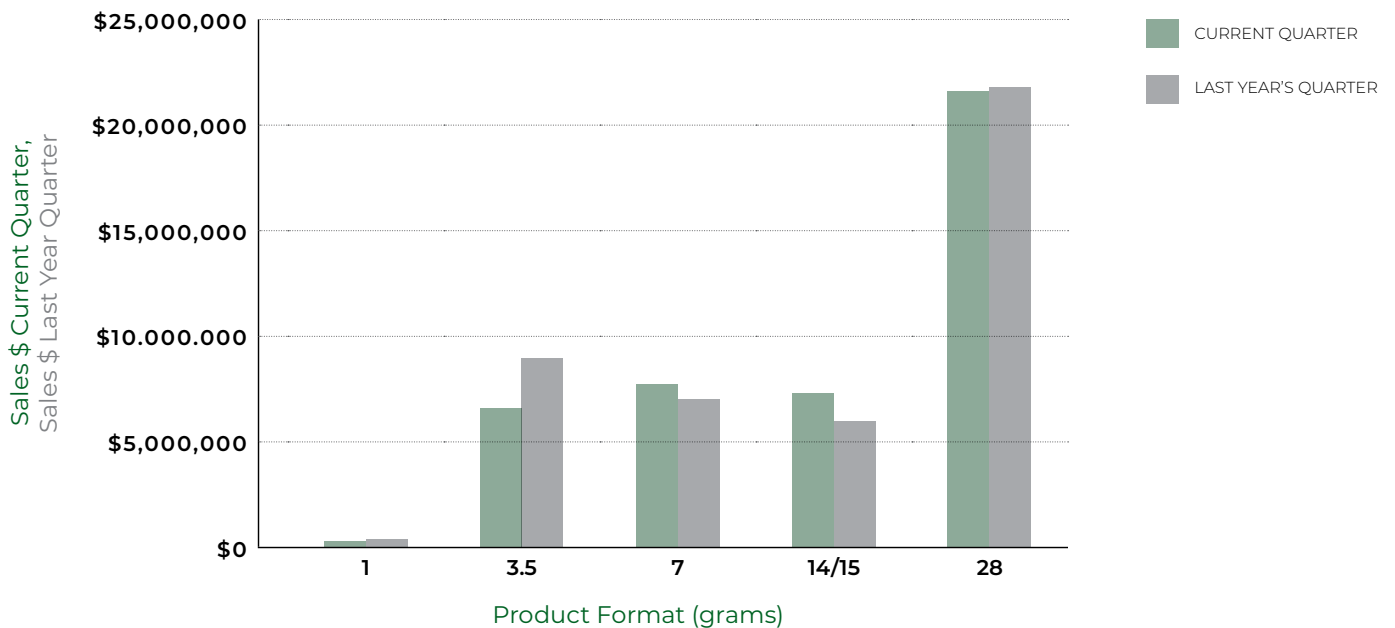
APR MAY JUN  
 FY2025 Q1

APR MAY JUN  
 FY2024 Q1

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	288,835	408,613	-29.3%	54,641	76,744	-28.8%
3.5	6,580,811	8,915,053	-26.2%	1,371,906	1,755,107	-21.8%
7	7,695,685	6,991,811	10.1%	1,904,462	1,641,402	16.0%
14/15	7,273,314	5,959,268	22.1%	2,140,824	1,752,142	22.2%
28	21,571,004	21,671,780	-0.5%	8,347,164	8,570,016	-2.6%

### FLOWER






#### SALE TREND BY FORMAT



# TOTAL SALES BY PRODUCT CATEGORY

APR MAY JUN  
FY2025 Q1

APR MAY JUN  
FY2024 Q1


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	3,411,255	3,177,166	7.4%	742,018	720,053	3.1%
 EDIBLES	7,662,732	7,247,445	5.7%	2,669,655	2,205,006	21.1%
 FLOWER	43,409,648	43,946,524	-1.2%	1,169,709	1,243,914	-6.0%
 INGESTIBLE EXTRACTS <sup>1</sup>	4,184,808	4,330,297	-3.4%	197,414	222,232	-11.2%
 INHALABLE EXTRACTS <sup>2</sup>	57,032,091	49,652,255	14.9%	2,772,589	2,566,742	8.0%
 PRE-ROLLS	34,115,571	31,436,572	8.5%	3,040,710	2,749,363	10.6%
 SEEDS	75,372	94,598	-20.3%	3,655	4,460	-18.0%
 TOPICALS	637,518	619,461	2.9%	27,869	26,633	4.6%

<sup>1</sup>Contains ingestible extracts, such as Jolts, Glitches, etc. Availability may be impacted by Health Canada regulations.  
<sup>2</sup>Includes infused pre-rolls.

# SALES MIX BY PRODUCT CATEGORY

APR MAY JUN  
FY2025 Q1

APR MAY JUN  
FY2024 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	3,105,673	2,834,072	9.6%	678,004	645,830	5.0%
	Drink Mix	0	1,945	-100.0%	0	636	-100.0%
	Dry Tea and Coffee	0	21,101	-100.0%	0	2,484	-100.0%
	Non Carbonated	305,582	320,047	-4.5%	64,014	71,103	-10.0%
 EDIBLES	Baked Goods	76,913	85,087	-9.6%	17,316	20,287	-14.6%
	Chews	7,115,266	6,645,095	7.1%	2,492,257	2,022,628	23.2%
	Chocolate	438,545	495,844	-11.6%	137,110	157,553	-13.0%
	Hard Candy	32,008	5,930	439.7%	22,972	1,692	1,257.7%
	Other Edibles	0	15,488	-100.0%	0	2,846	-100.0%
 FLOWER	Hybrid	5,546,227	5,708,548	-2.8%	153,166	186,929	-18.1%
	Indica	23,009,023	24,431,784	-5.8%	610,053	654,475	-6.8%
	Sativa	13,821,922	13,211,339	4.6%	391,385	393,489	-0.5%
	Variety Pack	1,032,477	594,853	73.6%	15,105	9,021	67.4%
 INGESTIBLE EXTRACTS	Capsules and Pills	2,480,202	2,118,791	17.1%	121,161	111,354	8.8%
	Oils and Tinctures	1,527,305	1,764,743	-13.5%	65,572	74,464	-11.9%
	Other Ingestibles <sup>1</sup>	177,301	446,763	-60.3%	10,681	36,414	-70.7%
 INHALABLE EXTRACTS	Cartridges	22,203,220	22,648,503	-2.0%	944,121	966,704	-2.3%
	Disposable Pens	7,693,556	3,400,520	126.2%	322,261	175,763	83.3%
	Dry Sift	28,693	53,326	-46.2%	2,495	4,637	-46.2%
	Hash	1,154,982	1,168,627	-1.2%	63,360	62,198	1.9%
	Infused Pre-rolls	22,146,623	18,599,951	19.1%	1,276,984	1,197,754	6.6%
	Other Inhalables <sup>2</sup>	1,062,856	1,122,699	-5.3%	48,557	50,795	-4.4%
	Resin and Rosin	1,483,661	1,378,198	7.7%	49,344	47,681	3.5%
	Shatter	1,258,500	1,200,174	4.9%	65,467	57,702	13.5%
	Vape Kits	0	80,257	-100.0%	0	3,508	-100.0%
 PRE-ROLLS	Blend	1,087,304	1,857,673	-41.5%	84,160	188,566	-55.4%
	Hybrid	4,067,652	3,587,509	13.4%	351,085	339,131	3.5%
	Indica	13,496,999	12,479,418	8.2%	1,228,209	1,090,433	12.6%
	Sativa	13,392,868	11,611,066	15.3%	1,289,129	1,053,322	22.4%
	Variety Pack	2,070,749	1,900,906	8.9%	88,127	77,911	13.1%
 SEEDS	Same Strain	52,760	54,920	-3.9%	2,578	2,662	-3.2%
	Variety Pack	22,612	39,678	-43.0%	1,077	1,798	-40.1%
 TOPICALS	Balms	262,390	273,037	-3.9%	8,643	9,706	-11.0%
	Bath Products	119,258	93,617	27.4%	8,370	6,964	20.2%
	Creams and Lotions	243,876	221,775	10.0%	10,183	8,487	20.0%
	Massage Oils and Lubricants	2,331	3,310	-29.6%	193	274	-29.6%
	Other Topicals <sup>3</sup>	9,662	27,722	-65.1%	480	1,202	-60.1%

<sup>1</sup>Includes ingestible extracts, such as Jolts, Glitches, etc. Availability may be impacted by Health Canada regulations.

<sup>2</sup>Includes diamonds, wax, crumble, etc.

<sup>3</sup>Includes face masks, other topical oils/ sprays, etc.

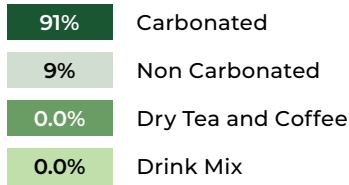
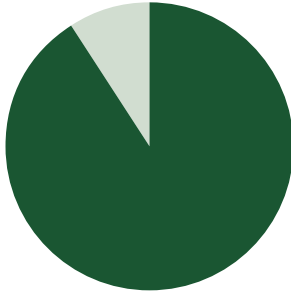
# SALES MIX BY PRODUCT CATEGORY

APR MAY JUN  
 FY2025 Q1  
 APR MAY JUN  
 FY2024 Q1

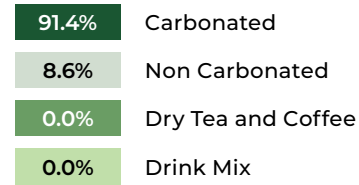
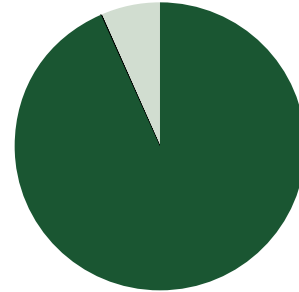


## BEVERAGES

SALES \$ MIX PERCENTAGE

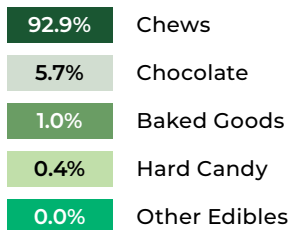
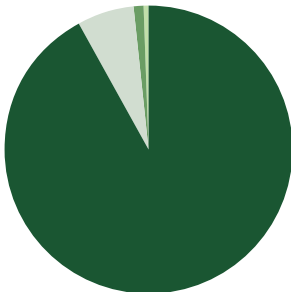


SELL UNITS MIX PERCENTAGE

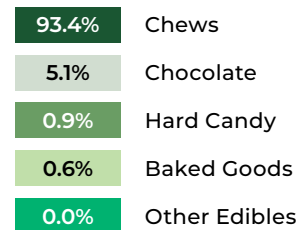
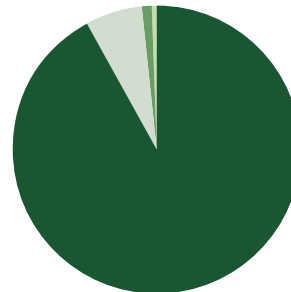


## EDIBLES

SALES \$ MIX PERCENTAGE



SELL UNITS MIX PERCENTAGE



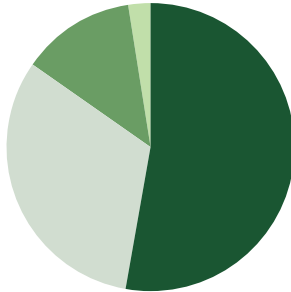
# SALES MIX BY PRODUCT CATEGORY

APR MAY JUN  
FY2025 Q1  
APR MAY JUN  
FY2024 Q1



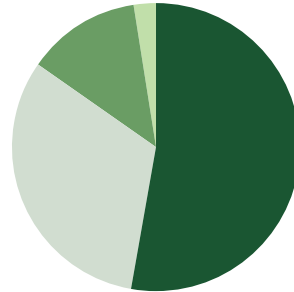
## FLOWER

SALES \$ MIX PERCENTAGE



53.0%	Indica
31.8%	Sativa
12.8%	Hybrid
2.4%	Variety Pack

GRAMS MIX PERCENTAGE

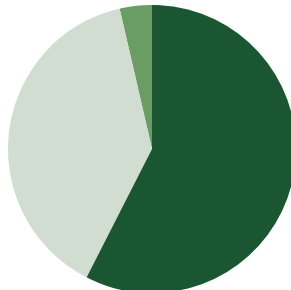


52.1%	Indica
33.1%	Sativa
12.2%	Hybrid
2.6%	Variety Pack



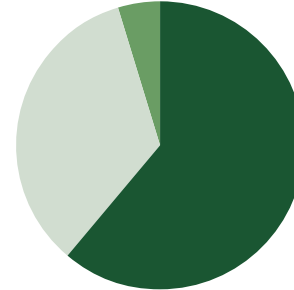
## INGESTIBLE EXTRACTS

SALES \$ MIX PERCENTAGE



59.3%	Capsules and Pills
36.5%	Oils and Tinctures
4.2%	Other Ingestible Extracts

SELL UNITS MIX PERCENTAGE



61.4%	Capsules and Pills
33.2%	Oils and Tinctures
5.4%	Other Ingestible Extracts

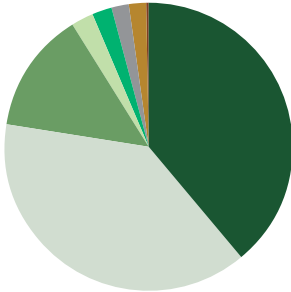
# SALES MIX BY PRODUCT CATEGORY

APR MAY JUN  
 FY2025 Q1  
 APR MAY JUN  
 FY2024 Q1



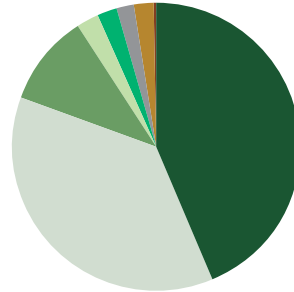
## INHALABLE EXTRACTS

SALES \$ MIX PERCENTAGE



38.9%	Cartridges
38.8%	Infused Pre-rolls
13.5%	Disposable Pens
2.6%	Resin and Rosin
2.2%	Shatter
2.0%	Hash
1.9%	Other Inhalable Extracts
0.1%	Dry Sift
0.0%	Vape Kits

SELL UNITS MIX PERCENTAGE



46.1%	Infused Pre-rolls
34.1%	Cartridges
11.6%	Disposable Pens
2.4%	Shatter
2.3%	Hash
1.8%	Other Inhalable Extracts
1.8%	Resin and Rosin
0.1%	Dry Sift
0.0%	Vape Kits



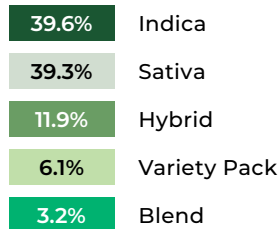
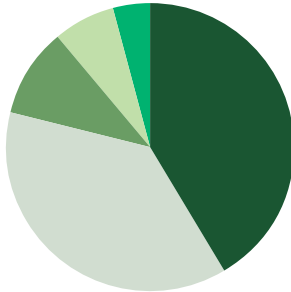
# SALES MIX BY PRODUCT CATEGORY

APR MAY JUN  
 FY2025 Q1  
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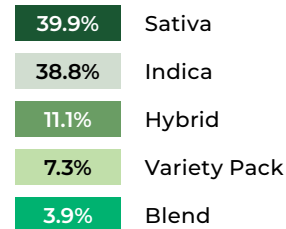
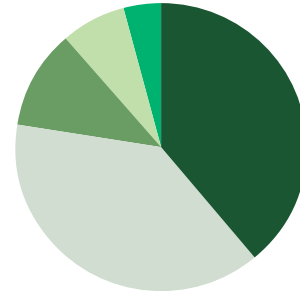


## PRE-ROLLS

SALES \$ MIX PERCENTAGE

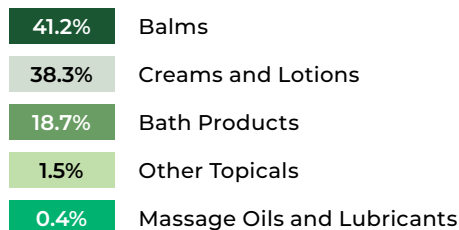
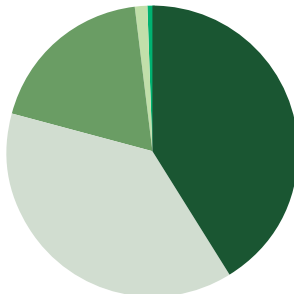


GRAMS MIX PERCENTAGE

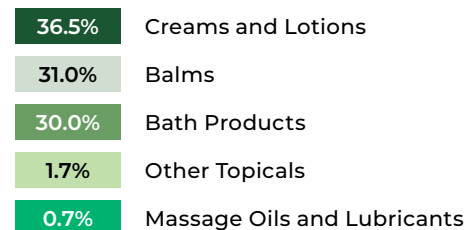
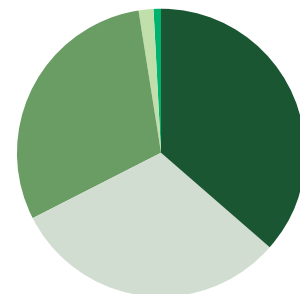


## TOPICALS

SALES \$ MIX PERCENTAGE

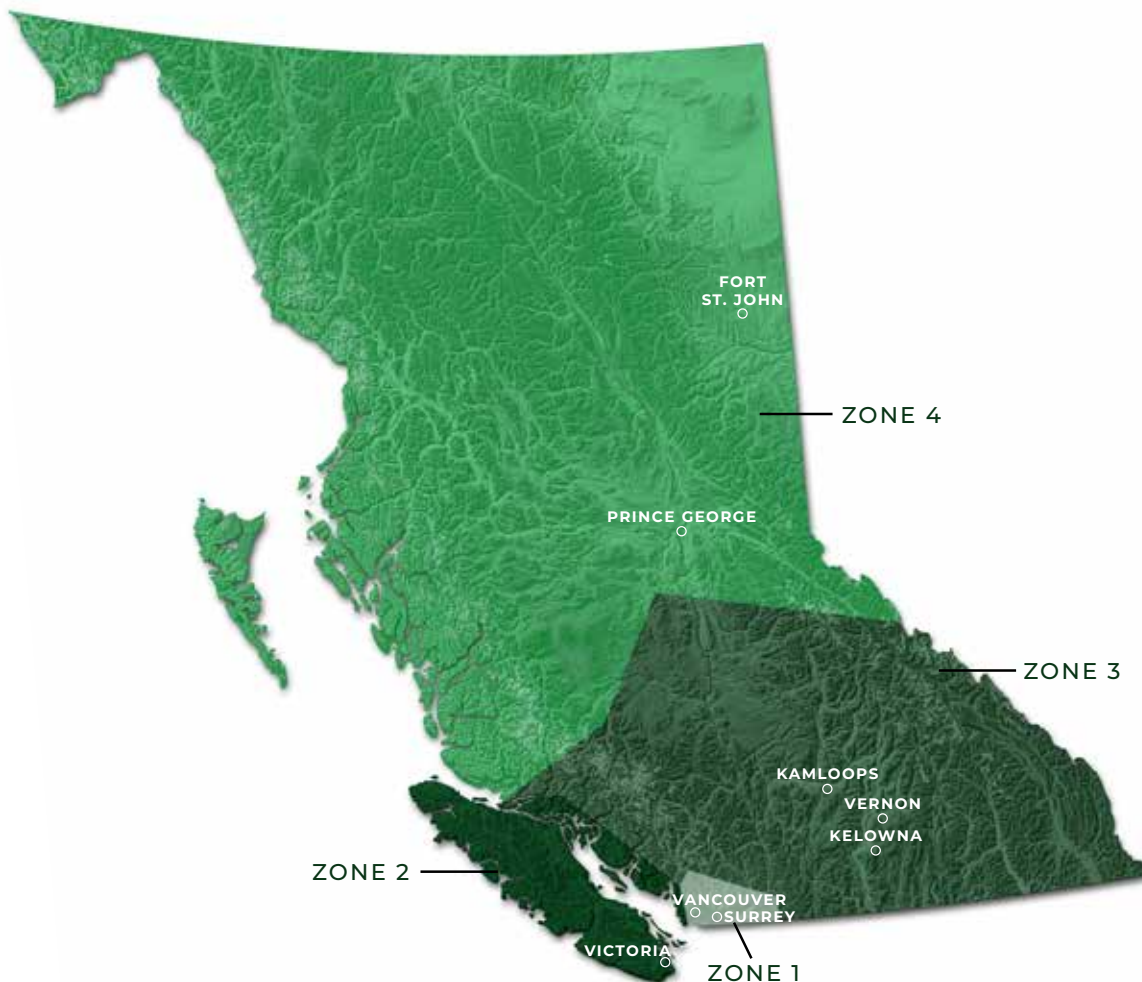


SELL UNITS MIX PERCENTAGE



# GROWING ACCESS POINTS

APR MAY JUN  
 FY2025 Q1  
 APR MAY JUN  
 FY2024 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	63,545,548	59,680,924	6.5%	4,825,530	4,436,347	8.8%	156	150
2	34,566,831	31,527,056	9.6%	2,444,027	2,195,250	11.3%	135	130
3	32,297,558	30,402,865	6.2%	2,209,368	2,035,342	8.6%	165	163
4	20,118,226	18,893,427	6.5%	1,144,629	1,071,462	6.8%	69	66

\*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

FY2025 Q1

APR MAY JUN

FY2024 Q1

## QUARTER YEAR-OVER-YEAR SUMMARY

	2025 Q1	2024 Q1
<b>+23.4%</b> WHOLESALE GRAMS	<b>761,891</b> GRAMS	<b>617,359</b> GRAMS
<b>+10.2%</b> WHOLESALE SALES	<b>\$3,273,229</b>	<b>\$2,971,136</b>
<b>-10.7%</b> PRICE ALL CANNABIS	<b>\$4.30</b> PER GRAM	<b>\$4.81</b> PER GRAM
<b>-1.5%</b> PRICE DRIED FLOWER	<b>\$4.09</b> PER GRAM	<b>\$4.15</b> PER GRAM

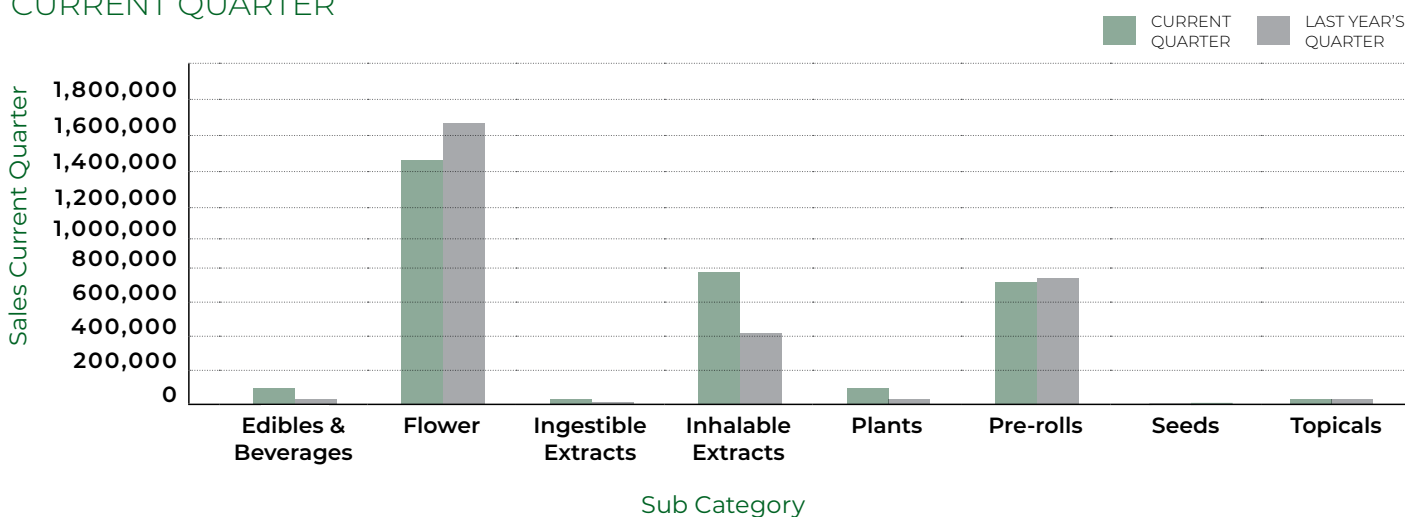
\*Sales reported during the quarter as sold.

# DIRECT DELIVERY SUB CATEGORY SALES\*

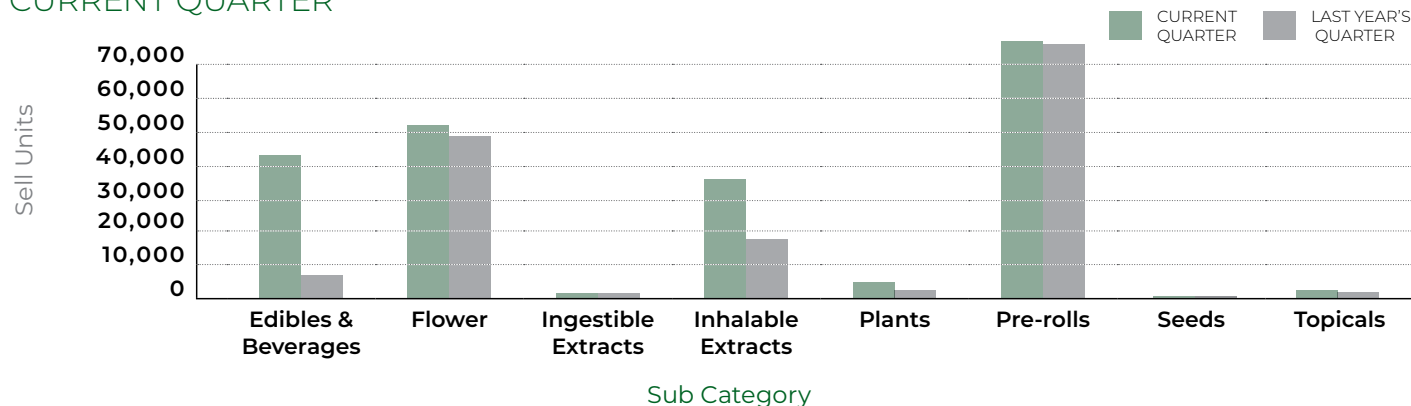
APR MAY JUN  
 FY2025 Q1  
 APR MAY JUN  
 FY2024 Q1

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	102,084	37,320	173.5%	43,764	7,004	524.8%
Flower	1,463,627	1,620,351	-9.7%	51,259	46,136	11.1%
Ingestible Extracts	28,193	20,134	40.0%	1,383	1,137	21.6%
Inhalable Extracts	786,005	413,209	90.2%	36,290	18,970	91.3%
Plants	101,856	59,491	71.2%	4,681	2,537	84.5%
Pre-roll	765,467	794,294	-3.6%	74,197	72,980	1.7%
Seeds	848	1,162	-27.0%	41	53	-22.6%
Topicals	25,148	25,176	-0.1%	1,020	963	5.9%

## SALES CURRENT QUARTER



## SELL UNITS CURRENT QUARTER



\*Sales reported during the quarter as sold.

# DIRECT DELIVERY SALES MIX BY PRODUCT CATEGORY\*

APR MAY JUN  
FY2025 Q1

APR MAY JUN  
FY2024 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	9,626	6,801	41.54%	1,404	1,092	28.57%
	Drink Mix	0	160	-100.00%	0	20	-100.00%
	Non Carbonated	139	951	-85.41%	48	336	-85.71%
 EDIBLES	Chews	91,989	21,641	325.06%	42,252	4,611	816.33%
	Chocolate	0	291	-100.00%	0	108	-100.00%
	Hard Candy	0	0	-	0	0	-
	Other Edibles	331	7,476	-95.58%	60	837	-92.83%
 FLOWER	Blend	0	5,469	-100.00%	0	320	-100.00%
	Hybrid	473,108	342,305	38.21%	18,229	11,200	62.76%
	Indica	565,895	883,733	-35.97%	19,839	25,262	-21.47%
	Sativa	323,073	361,129	-10.54%	11,265	8,971	25.57%
	Variety Pack	101,550	27,715	266.40%	1,926	383	402.87%
 INGESTIBLE EXTRACTS	Capsules and Pills	6,229	8,541	-27.07%	250	367	-31.88%
	Oils and Tinctures	18,417	6,641	177.34%	900	331	171.90%
	Other Ingestibles <sup>1</sup>	3,546	4,952	-28.39%	233	439	-46.92%
 INHALABLE EXTRACTS	Cartridges	179,497	111,711	60.68%	7,114	5,290	34.48%
	Disposable Pens	144,125	60,811	137.00%	5,706	2,365	141.27%
	Dry Sift	3,761	0	-	358	0	-
	Hash	9,464	12,041	-21.40%	479	632	-24.21%
	Infused Pre-rolls	201,524	72,902	176.43%	13,541	5,336	153.77%
	Other Inhalables <sup>2</sup>	70,466	13,573	419.18%	3,506	539	550.46%
	Resin and Rosin	151,564	118,135	28.30%	4,323	3,527	22.57%
	Shatter	25,604	24,035	6.53%	1,263	1,281	-1.41%
 PLANTS	Same Strain	52,452	42,068	24.68%	1,843	1,527	20.69%
	Variety Pack	49,404	17,423	183.57%	2,838	1,010	180.99%
 PRE-ROLLS	Blend	9,422	32,673	-71.16%	663	1,984	-66.58%
	Hybrid	216,609	112,131	93.18%	25,553	12,030	112.41%
	Indica	281,770	407,343	-30.83%	26,239	39,343	-33.31%
	Sativa	238,292	184,184	29.38%	20,992	16,163	29.88%
	Variety Pack	19,375	57,962	-66.57%	750	3,460	-78.32%
 SEEDS	Same Strain	848	1,162	-27.01%	41	53	-22.64%
 TOPICALS	Balms	6,526	7,250	-9.98%	245	290	-15.52%
	Creams and Lotions	9,324	11,384	-18.09%	298	489	-39.06%
	Massage Oils and Lubricants	455	5,497	-91.72%	13	157	-91.72%
	Other Topicals <sup>3</sup>	8,843	1,046	745.64%	464	27	1,618.52%

<sup>1</sup>Includes ingestible extracts, such as Jolts, Glitches, etc. Availability may be impacted by Health Canada regulations.

<sup>2</sup>Includes diamonds, wax, crumble, etc.

<sup>3</sup>Includes face masks, other topical oils/sprays, etc.



**LIQUOR  
DISTRIBUTION  
BRANCH**

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APR | MAY | JUN