

BC CANNABIS WHOLESALE

QUARTERLY

SALES

REPORT



**LIQUOR
DISTRIBUTION
BRANCH**

FY2025 Q2

JUL | AUG | SEP

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. Note that the Q2 period includes the beginning of the BC General Employees' Union (BCGEU) strike that shut down LDB Cannabis Operations and the ability for orders to be placed and processed, from September 22 to October 27.

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

JUL AUG SEP

FY2025 Q2

JUL AUG SEP

FY2024 Q2

QUARTER YEAR-OVER-YEAR SUMMARY

	2025 Q2	2024 Q2
+6.4% WHOLESALE GRAMS	41,127,103 GRAMS	38,662,033 GRAMS
+4.8% WHOLESALE SALES	\$154,318,810	\$ 147,211,721
-1.5% PRICE ALL CANNABIS	\$3.75 PER GRAM	\$3.81 PER GRAM
-0.8% PRICE DRIED FLOWER	\$3.13 PER GRAM	\$3.15 PER GRAM
+2.4% RETAIL STORE GROWTH*	522 STORES	510 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
 FY2025 Q2

JUL AUG SEP
 FY2024 Q2

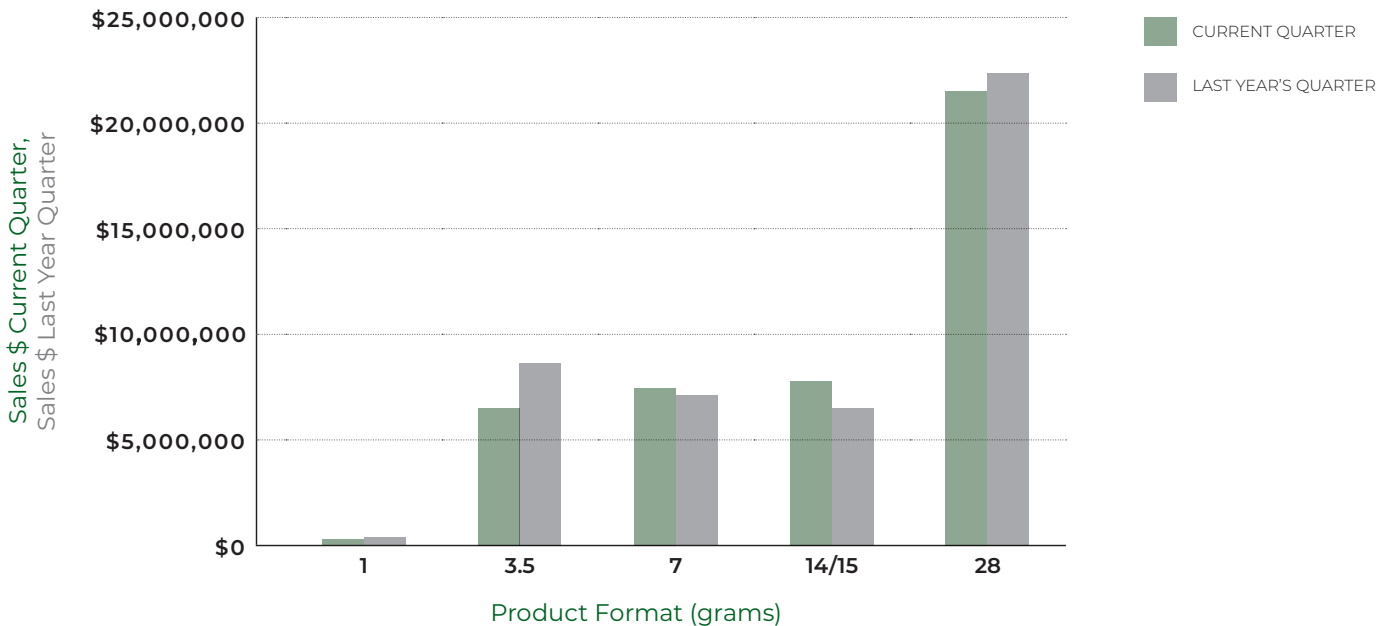
SELL UNIT CONSUMER ITEM SIZE FORMAT	PRICE PER GRAM BAND	SALES \$ CURRENT QUARTER	SALES \$ LAST YEAR'S QUARTER	SALES \$ YOY VARIANCE %	GRAMS CURRENT QUARTER	GRAMS LAST YEAR'S QUARTER	GRAMS YOY VARIANCE %
1 GRAM	\$3 - \$5	134,321	221,219	-39.3%	27,371	45,307	-39.6%
	>\$5	146,769	150,309	-2.4%	25,568	25,426	0.6%
3.5 GRAMS	\$0 - \$3	0	8,434	-100.0%	0	2,814	-100.0%
	\$3 - \$5	4,550,061	4,578,195	-0.6%	1,086,351	1,091,717	-0.5%
	>\$5	1,990,007	4,068,954	-51.1%	299,989	614,327	-51.2%
7 GRAMS	\$0 - \$3	1,529,318	755,371	102.5%	540,204	271,418	99.0%
	\$3 - \$5	4,765,137	4,591,300	3.8%	1,175,552	1,168,216	0.6%
	>\$5	1,171,420	1,760,572	-33.5%	200,515	300,349	-33.2%
14 GRAMS	\$0 - \$3	1,917,093	2,418,717	-20.7%	682,934	898,170	-24.0%
	\$3 - \$5	5,173,056	3,817,324	35.5%	1,412,334	1,036,112	36.3%
	>\$5	683,282	300,294	127.5%	123,354	52,360	135.6%
28 GRAMS	\$0 - \$3	16,908,011	15,836,871	6.8%	7,040,600	6,773,564	3.9%
	\$3 - \$5	4,664,002	6,638,885	-29.7%	1,338,708	2,038,120	-34.3%
	>\$5	414	0	-	28	0	-

DRIED FLOWER SALES TREND BY FORMAT

JUL AUG SEP
 FY2025 Q2
 JUL AUG SEP
 FY2024 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	281,090	371,528	-24.3%	52,939	70,733	-25.2%
3.5	6,540,069	8,655,584	-24.4%	1,386,340	1,708,858	-18.9%
7	7,465,874	7,107,243	5.0%	1,916,271	1,739,983	10.1%
14/15	7,773,430	6,536,335	18.9%	2,218,622	1,986,642	11.7%
28	21,572,427	22,475,792	-4.0%	8,379,336	8,811,684	-4.9%

FLOWER SALE TREND BY FORMAT



TOTAL SALES BY PRODUCT CATEGORY

JUL AUG SEP
FY2025 Q2

JUL AUG SEP
FY2024 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	3,404,173	3,001,277	13.4%	738,845	665,801	11.0%
 EDIBLES	8,890,063	7,092,755	25.3%	2,352,119	2,291,851	2.6%
 FLOWER	43,632,890	45,146,482	-3.4%	1,180,524	1,264,153	-6.6%
 INGESTIBLE EXTRACTS ¹	3,642,198	4,154,513	-12.3%	171,074	212,866	-19.6%
 INHALABLE EXTRACTS ²	57,143,406	52,744,677	8.3%	2,799,579	2,706,356	3.4%
 PRE-ROLLS	36,949,978	34,384,453	7.5%	3,227,398	2,978,136	8.4%
 SEEDS	3,439	10,582	-67.5%	165	469	-64.8%
 TOPICALS	652,662	676,982	-3.6%	25,341	27,886	-9.1%


¹Contains ingestible extracts, such as Jolts, Glitches, etc. Availability may be impacted by Health Canada regulations.

²Includes infused pre-rolls.

SALES MIX BY PRODUCT CATEGORY

JUL AUG SEP
FY2025 Q2

JUL AUG SEP
FY2024 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	3,136,721	2,728,815	14.9%	682,797	606,666	12.5%
	Drink Mix	0	1,855	-100.0%	0	672	-100.0%
	Dry Tea and Coffee	0	7,437	-100.0%	0	709	-100.0%
	Non Carbonated	267,452	263,170	1.6%	56,048	57,754	-3.0%
 EDIBLES	Baked Goods	51,024	87,198	-41.5%	11,587	22,067	-47.5%
	Chews	8,419,128	6,573,707	28.1%	2,200,094	2,132,081	3.2%
	Chocolate	397,618	426,479	-6.8%	123,549	136,450	-9.5%
	Hard Candy	22,293	2,297	870.6%	16,889	660	2,458.9%
	Other Edibles	0	3,075	-100.0%	0	593	-100.0%
 FLOWER	Hybrid	5,646,943	5,992,799	-5.8%	152,184	185,700	-18.0%
	Indica	23,090,217	24,293,353	-5.0%	603,683	656,144	-8.0%
	Sativa	14,213,713	13,774,732	3.2%	413,810	406,271	1.9%
	Variety Pack	682,017	1,085,599	-37.2%	10,847	16,038	-32.4%
 INGESTIBLE EXTRACTS	Capsules and Pills	2,081,954	2,152,766	-3.3%	102,624	114,078	-10.0%
	Oils and Tinctures	1,387,510	1,686,445	-17.7%	59,414	71,839	-17.3%
	Other Ingestibles ¹	172,733	315,302	-45.2%	9,036	26,949	-66.5%
 INHALABLE EXTRACTS	Cartridges	21,056,869	23,071,175	-8.7%	902,571	984,542	-8.3%
	Disposable Pens	9,203,168	4,823,567	90.8%	389,581	226,291	72.2%
	Dry Sift	0	51,359	-100.0%	0	4,466	-100.0%
	Hash	1,192,923	1,256,359	-5.0%	65,410	68,254	-4.2%
	Infused Pre-rolls	22,465,200	20,033,608	12.1%	1,295,681	1,274,548	1.7%
	Other Inhalables ²	968,568	1,091,540	-11.3%	46,613	47,850	-2.6%
	Resin and Rosin	1,166,852	1,222,453	-4.5%	39,249	43,069	-8.9%
	Shatter	1,089,827	1,184,804	-8.0%	60,474	56,936	6.2%
	Vape Kits	0	9,813	-100.0%	0	400	-100.0%
 PRE-ROLLS	Blend	1,123,334	2,038,564	-44.9%	87,831	190,932	-54.0%
	Hybrid	4,413,952	3,718,444	18.7%	393,514	345,861	13.8%
	Indica	14,329,576	13,010,391	10.1%	1,272,125	1,147,807	10.8%
	Sativa	14,661,277	13,021,902	12.6%	1,365,496	1,191,306	14.6%
	Variety Pack	2,421,840	2,595,153	-6.7%	108,432	102,230	6.1%
 SEEDS	Same Strain	2,948	7,133	-58.7%	141	322	-56.2%
	Variety Pack	491	3,449	-85.8%	24	147	-83.7%
 TOPICALS	Balms	289,497	282,408	2.5%	8,516	9,691	-12.1%
	Bath Products	76,236	94,035	-18.9%	5,229	6,523	-19.8%
	Creams and Lotions	279,900	282,319	-0.9%	11,242	10,728	4.8%
	Massage Oils and Lubricants	145	3,793	-96.2%	12	314	-96.2%
	Other Topicals ³	6,884	14,426	-52.3%	342	630	-45.7%

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

²Includes diamonds, wax, crumble, etc.

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

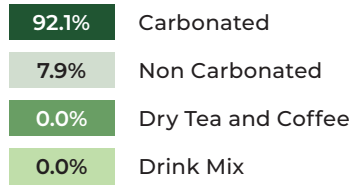
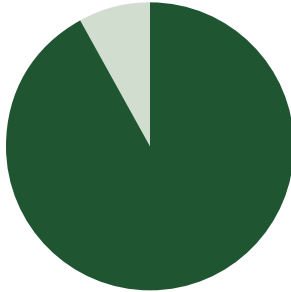
SALES MIX BY PRODUCT CATEGORY

JUL AUG SEP
 FY2025 Q2
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 FY2024 Q2

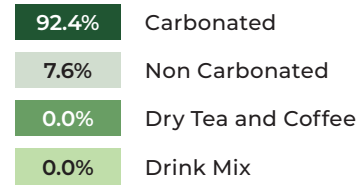
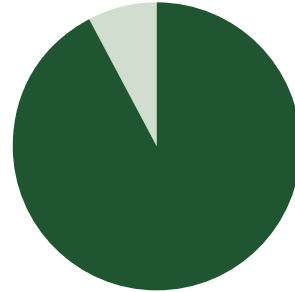


BEVERAGES

SALES \$ MIX PERCENTAGE

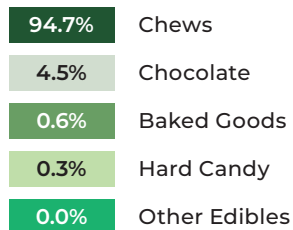
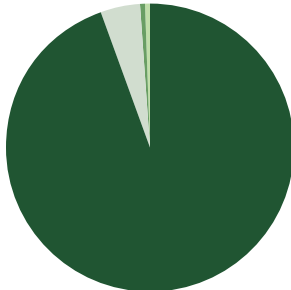


SELL UNITS MIX PERCENTAGE

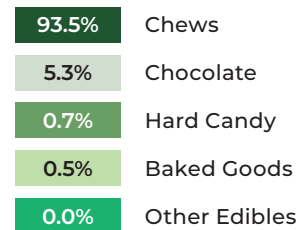
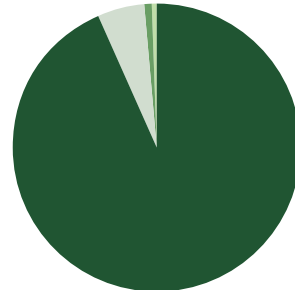


EDIBLES

SALES \$ MIX PERCENTAGE



SELL UNITS MIX PERCENTAGE



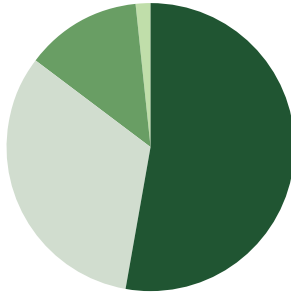
SALES MIX BY PRODUCT CATEGORY

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 JUL AUG SEP
 FY2024 Q2



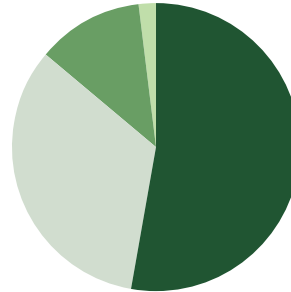
FLOWER

SALES \$ MIX PERCENTAGE



- 52.9% Indica
- 32.6% Sativa
- 12.9% Hybrid
- 1.6% Variety Pack

GRAMS MIX PERCENTAGE

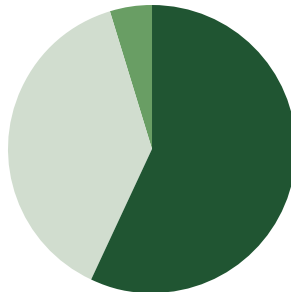


- 52.8% Indica
- 33.4% Sativa
- 12.0% Hybrid
- 1.7% Variety Pack



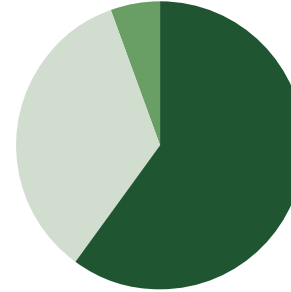
INGESTIBLE EXTRACTS

SALES \$ MIX PERCENTAGE



- 57.2% Capsules and Pills
- 38.1% Oils and Tinctures
- 4.7% Other Ingestible Extracts

SELL UNITS MIX PERCENTAGE



- 60.0% Capsules and Pills
- 34.7% Oils and Tinctures
- 5.3% Other Ingestible Extracts

SALES MIX BY PRODUCT CATEGORY

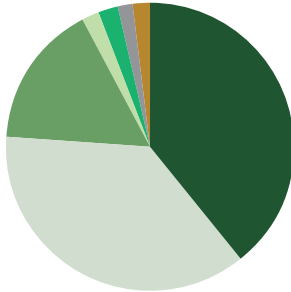
JUL AUG SEP
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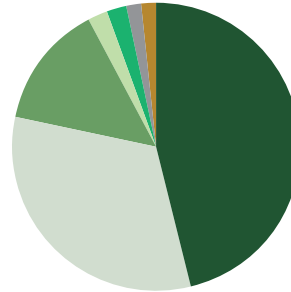
INHALABLE EXTRACTS

SALES \$ MIX PERCENTAGE



- 39.3%** Infused Pre-rolls
- 36.8%** Cartridges
- 16.1%** Disposable Pens
- 2.1%** Hash
- 2.0%** Resin and Rosin
- 1.9%** Shatter
- 1.7%** Other Inhalable Extracts
- 0.0%** Dry Sift
- 0.0%** Vape Kits

SELL UNITS MIX PERCENTAGE

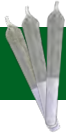


- 46.3%** Infused Pre-rolls
- 32.2%** Cartridges
- 13.9%** Disposable Pens
- 2.3%** Hash
- 2.2%** Shatter
- 1.7%** Other Inhalable Extracts
- 1.4%** Resin and Rosin
- 0.0%** Dry Sift
- 0.0%** Vape Kits



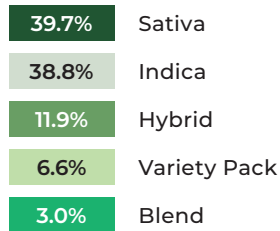
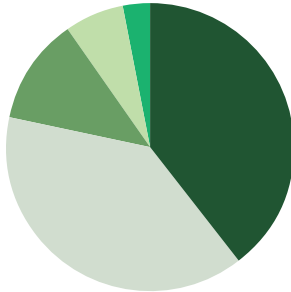
SALES MIX BY PRODUCT CATEGORY

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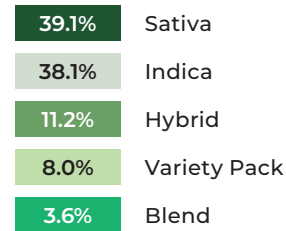
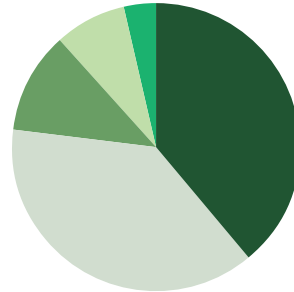


PRE-ROLLS

SALES \$ MIX PERCENTAGE

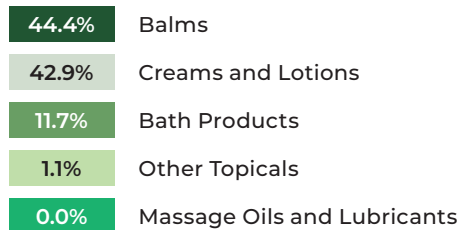
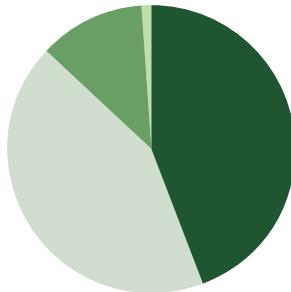


GRAMS MIX PERCENTAGE

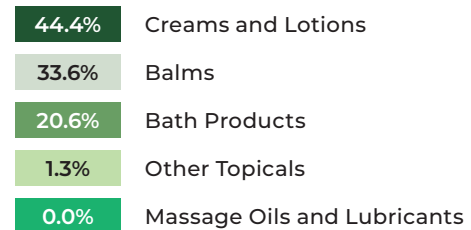
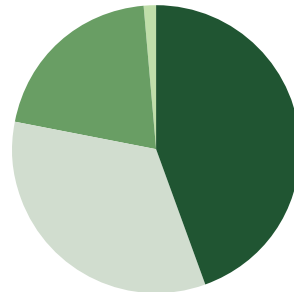


TOPICALS

SALES \$ MIX PERCENTAGE

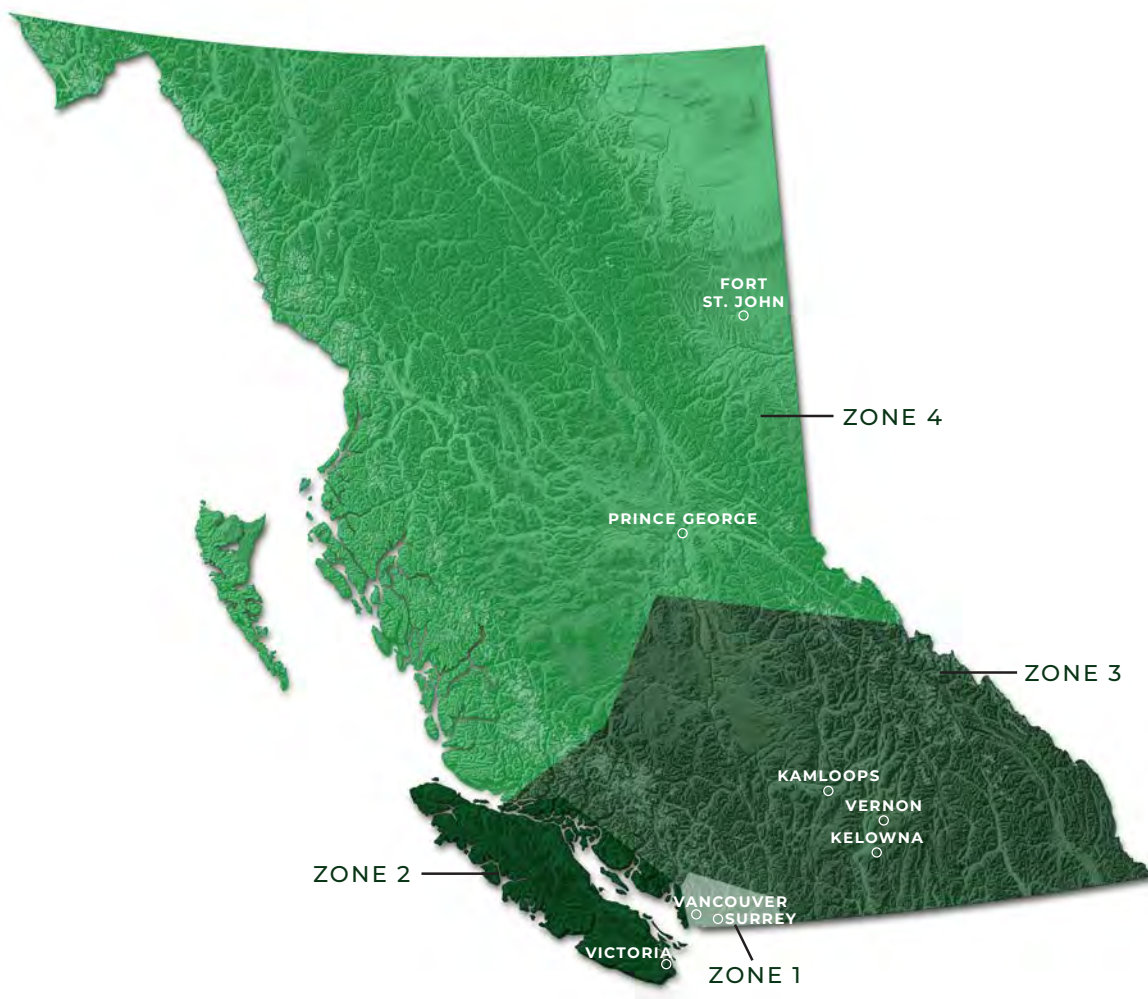


SELL UNITS MIX PERCENTAGE



GROWING ACCESS POINTS

JUL AUG SEP
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 FY2024 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	65,110,321	61,786,892	5.4%	4,773,011	4,570,315	4.4%	157	152
2	34,636,941	33,258,844	4.1%	2,369,126	2,297,737	3.1%	135	131
3	34,143,683	32,402,559	5.4%	2,251,406	2,172,942	3.6%	165	165
4	20,427,570	19,762,553	3.4%	1,101,471	1,106,406	-0.4%	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*

JUL AUG SEP

FY2025 Q2

JUL AUG SEP

FY2024 Q2

QUARTER YEAR-OVER-YEAR SUMMARY

	2025 Q2	2024 Q2
+52.0% WHOLESALE GRAMS	741,026 GRAMS	487,600 GRAMS
+33.1% WHOLESALE SALES	\$3,083,274	\$2,317,140
-12.4% PRICE ALL CANNABIS	\$4.16 PER GRAM	\$4.75 PER GRAM
-4.3% PRICE DRIED FLOWER	\$4.16 PER GRAM	\$4.34 PER GRAM

*Sales reported during the quarter as sold.

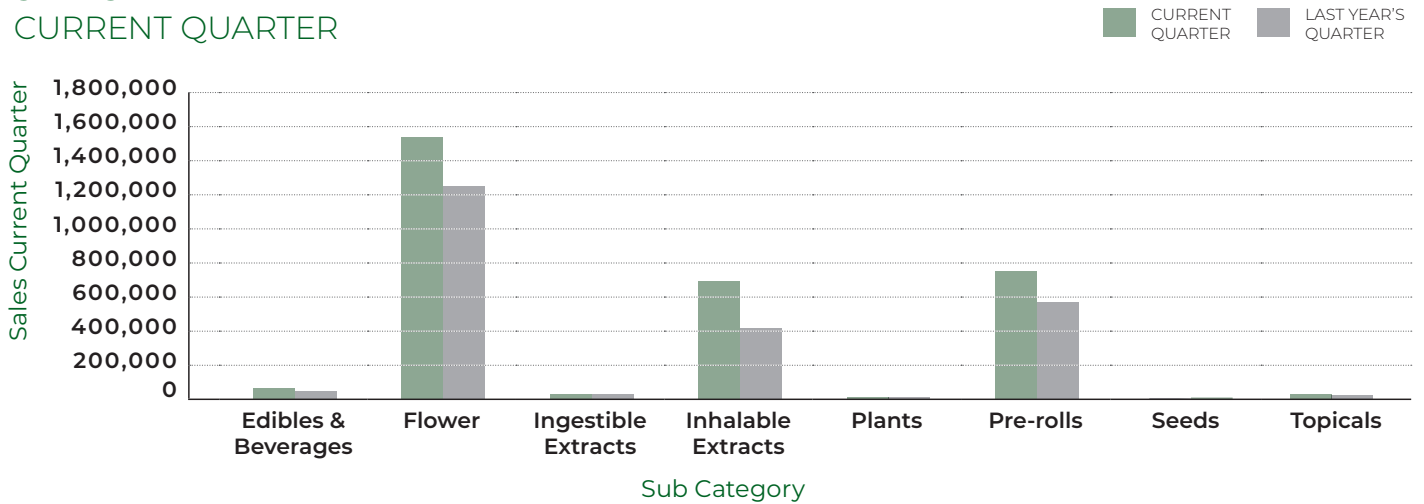
DIRECT DELIVERY SUB CATEGORY SALES*

JUL AUG SEP
 FY2025 Q2

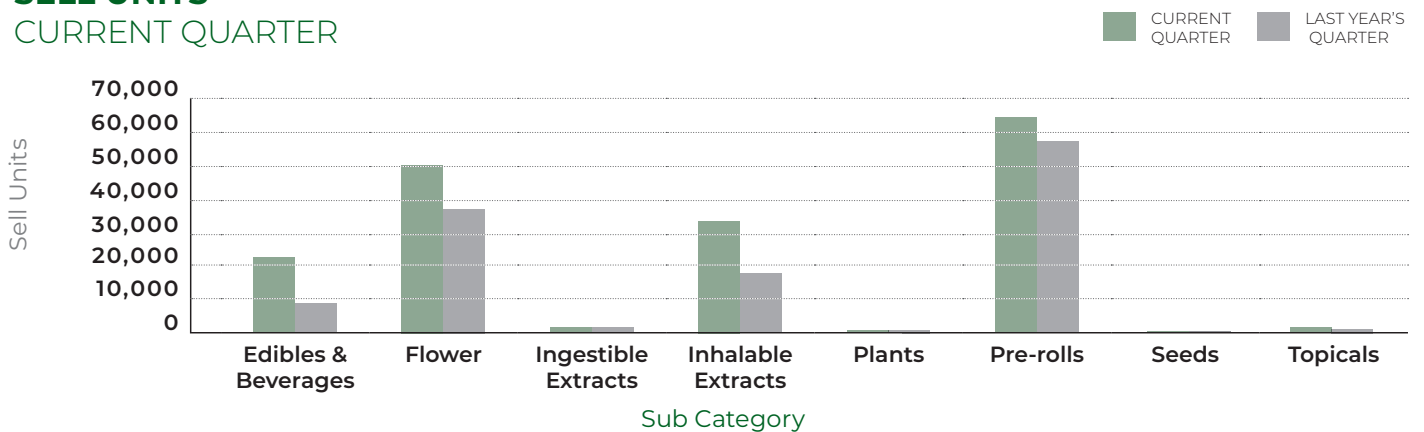
JUL AUG SEP
 FY2024 Q2

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	58,689	47,831	22.7%	23,055	9,251	149.2%
Flower	1,533,649	1,245,542	23.1%	50,177	38,611	30.0%
Ingestible Extracts	24,738	21,740	13.8%	1,002	1,246	-19.6%
Inhalable Extracts	685,857	405,931	69.0%	33,827	18,245	85.4%
Plants	6,068	3,278	85.1%	335	190	76.3%
Pre-roll	748,726	577,353	29.7%	64,660	57,517	12.4%
Seeds	265	103	156.0%	19	5	280.0%
Topicals	25,282	15,363	64.6%	1,016	633	60.5%

SALES CURRENT QUARTER



SELL UNITS CURRENT QUARTER



*Sales reported during the quarter as sold.

DIRECT DELIVERY SALES MIX BY PRODUCT CATEGORY*

JUL AUG SEP
FY2025 Q2

JUL AUG SEP
FY2024 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	2,287	17,274	-86.76%	420	2,736	-84.65%
	Non Carbonated	0	408	-100.00%	0	144	-100.00%
 EDIBLES	Chews	50,038	28,989	72.61%	21,287	6,222	242.12%
	Hard Candy	6,344	0	-	1,344	0	-
	Other Edibles	21	1,160	-98.21%	4	149	-97.32%
 FLOWER	Blend	0	1,035	-100.00%	0	60	-100.00%
	Hybrid	483,829	439,568	10.07%	16,189	14,486	11.76%
	Indica	741,120	490,544	51.08%	23,993	15,237	57.47%
	Sativa	250,733	265,717	-5.64%	8,975	7,790	15.21%
	Variety Pack	57,967	48,679	19.08%	1,020	1,038	-1.73%
 INGESTIBLE EXTRACTS	Capsules and Pills	7,078	4,595	54.04%	268	253	5.93%
	Oils and Tinctures	10,846	11,945	-9.20%	458	585	-21.71%
	Other Ingestibles ¹	6,814	5,200	31.04%	276	408	-32.35%
 INHALABLE EXTRACTS	Cartridges	170,732	79,941	113.57%	7,139	3,011	137.10%
	Disposable Pens	112,559	69,850	61.15%	4,768	2,838	68.01%
	Hash	18,428	8,380	119.90%	906	417	117.27%
	Infused Pre-rolls	200,441	99,903	100.63%	14,449	7,198	100.74%
	Other Inhalables ²	50,215	24,555	104.50%	2,561	987	159.47%
	Resin and Rosin	128,318	108,565	18.20%	3,757	2,988	25.74%
	Shatter	5,164	14,737	-64.96%	247	806	-69.35%
 PLANTS	Same Strain	874	0	-	46	0	-
	Variety Pack	5,195	3,278	58.50%	289	190	52.11%
 PRE-ROLLS	Blend	3,485	22,811	-84.72%	258	1,552	-83.38%
	Hybrid	222,940	122,585	81.87%	21,332	12,067	76.78%
	Indica	288,097	263,130	9.49%	23,777	29,046	-18.14%
	Sativa	219,024	132,513	65.28%	18,579	11,444	62.35%
	Variety Pack	15,180	36,314	-58.20%	714	3,408	-79.05%
 SEEDS	Same Strain	265	103	155.97%	19	5	280.00%
 TOPICALS	Balms	6,857	4,941	38.77%	257	216	18.98%
	Bath Products	2,754	748	268.06%	197	30	556.67%
	Creams and Lotions	8,173	8,227	-0.67%	195	353	-44.76%
	Massage Oils and Lubricants	35	770	-95.45%	1	22	-95.45%
	Other Topicals ³	7,464	675	1,005.14%	366	12	2,950.00%

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

²Includes diamonds, wax, crumble, etc.

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



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