

BC CANNABIS WHOLESALE

QUARTERLY

SALES

REPORT



**LIQUOR
DISTRIBUTION
BRANCH**

FY2024 Q3

OCT | NOV | DEC

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

	2024 Q3	2023 Q3
+13.0% WHOLESALE GRAMS	38,727,543 GRAMS	34,264,046 GRAMS
+7.5% WHOLESALE SALES	\$146,917,548	\$136,679,594
-4.9% PRICE ALL CANNABIS	\$3.79 PER GRAM	\$3.99 PER GRAM
-5.3% PRICE DRIED FLOWER	\$3.14 PER GRAM	\$3.32 PER GRAM
+3.2% RETAIL STORE GROWTH*	512 STORES	496 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	212,137	243,272	-12.8%	43,373	50,343	-13.8%
	>\$5	157,708	160,536	-1.8%	26,203	26,624	-1.6%
3.5 GRAMS	\$0 - \$3	2,029	0	-	882	0	-
	\$3 - \$5	4,403,737	5,060,820	-13.0%	1,059,660	1,197,536	-11.5%
	>\$5	3,582,929	5,497,100	-34.8%	538,451	797,426	-32.5%
7 GRAMS	\$0 - \$3	1,519,584	117,863	1,189.3%	530,341	40,705	1,202.9%
	\$3 - \$5	4,788,512	4,544,485	5.4%	1,153,579	1,158,829	-0.5%
	>\$5	1,124,554	1,237,340	-9.1%	189,609	205,198	-7.6%
14 GRAMS	\$0 - \$3	1,698,073	1,771,502	-4.1%	633,234	624,876	1.3%
	\$3 - \$5	4,278,975	3,862,891	10.8%	1,172,010	996,646	17.6%
	>\$5	386,879	783,245	-50.6%	70,630	134,218	-47.4%
15 GRAMS	\$0 - \$3	0	1,386	-100.0%	0	540	-100.0%
	\$3 - \$5	0	1,858	-100.0%	0	540	-100.0%
28 GRAMS	\$0 - \$3	15,405,141	13,734,139	12.2%	6,636,784	5,911,836	12.3%
	\$3 - \$5	6,619,375	6,817,205	-2.9%	2,004,212	2,068,108	-3.1%

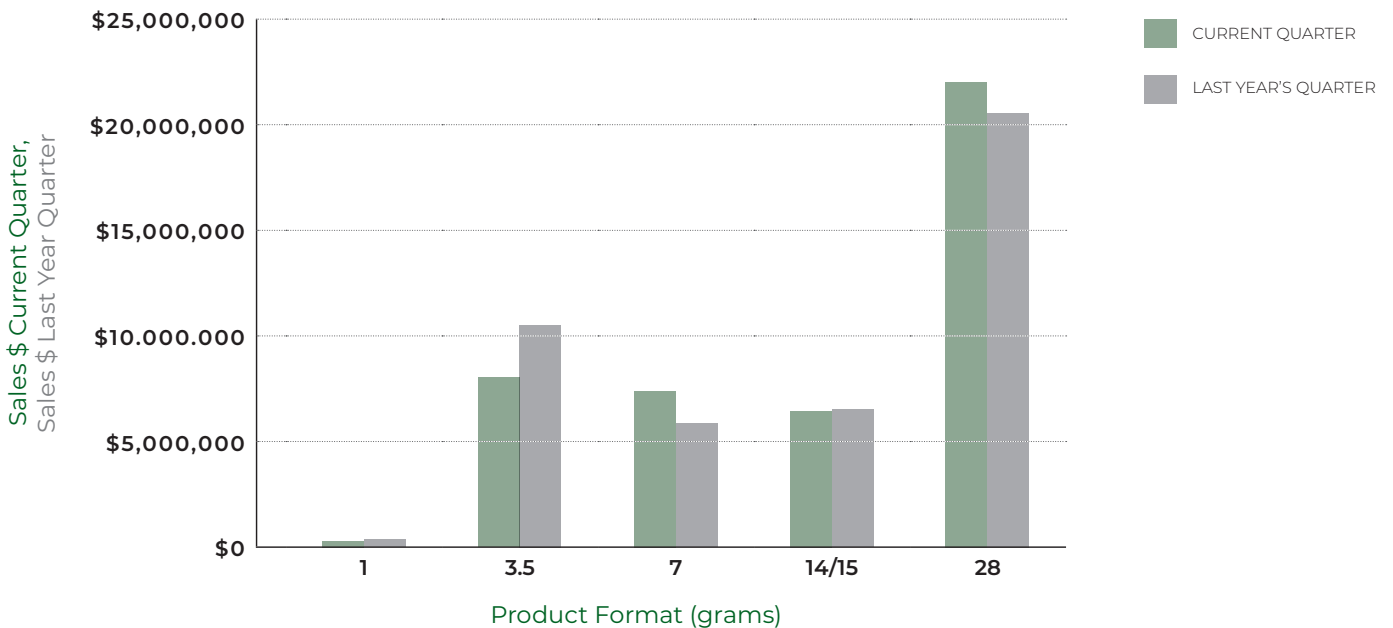
DRIED FLOWER SALES TREND BY FORMAT

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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	369,846	403,808	-8.4%	69,576	76,967	-9.6%
3.5	7,988,694	10,557,921	-24.3%	1,598,993	1,994,962	-19.8%
7	7,432,649	5,899,687	26.0%	1,873,529	1,404,732	33.4%
14/15	6,363,928	6,420,882	-0.9%	1,875,874	1,756,820	6.8%
28	22,024,516	20,551,344	7.2%	8,640,996	7,979,944	8.3%

FLOWER SALE TREND BY FORMAT



TOTAL SALES BY PRODUCT CATEGORY

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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	2,707,244	2,284,278	18.5%	592,069	528,565	12.0%
 EDIBLES	7,836,808	7,677,737	2.1%	2,604,457	2,190,279	18.9%
 FLOWER	44,179,634	43,833,642	0.8%	1,236,676	1,258,112	-1.7%
 INGESTIBLE EXTRACTS ¹	4,151,586	4,653,188	-10.8%	199,879	235,937	-15.3%
 INHALABLE EXTRACTS ²	55,350,988	47,854,009	15.7%	2,763,568	2,428,271	13.8%
 PRE-ROLLS	31,934,285	29,509,765	8.2%	2,776,308	2,546,693	9.0%
 SEEDS	5,600	13,837	-59.5%	309	873	-64.6%
 TOPICALS	751,403	853,138	-11.9%	38,178	46,254	-17.5%

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

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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	2,493,392	1,969,352	26.6%	547,032	460,236	18.9%
	Drink Mix	0	16,753	-100.0%	0	4,235	-100.0%
	Dry Tea and Coffee	11,959	29,561	-59.5%	1,140	3,879	-70.6%
	Non Carbonated	201,894	268,612	-24.8%	43,897	60,215	-27.1%
 EDIBLES	Baked Goods	83,627	121,789	-31.3%	20,542	31,257	-34.3%
	Chews	7,116,085	6,840,571	4.0%	2,379,673	1,938,376	22.8%
	Chocolate	604,695	634,471	-4.7%	182,260	202,810	-10.1%
	Hard Candy	31,401	18,783	67.2%	21,766	4,308	405.2%
	Other Edibles	999	62,122	-98.4%	216	13,528	-98.4%
 FLOWER	Blend	0	59,114	-100.0%	0	2,603	-100.0%
	Hybrid	5,732,074	7,862,956	-27.1%	171,082	232,176	-26.3%
	Indica	23,996,371	22,242,685	7.9%	657,118	632,761	3.8%
	Sativa	12,879,680	13,248,545	-2.8%	386,564	383,719	0.7%
	Variety Pack	1,571,509	420,342	273.9%	21,912	6,853	219.7%
 INGESTIBLE EXTRACTS	Capsules and Pills	2,329,181	2,193,714	6.2%	117,771	114,953	2.5%
	Oils and Tinctures	1,689,261	2,044,324	-17.4%	73,595	88,152	-16.5%
	Other Ingestibles ¹	133,144	415,150	-67.9%	8,513	32,832	-74.1%
 INHALABLE EXTRACTS	Cartridges	23,565,494	23,153,478	1.8%	1,004,523	969,980	3.6%
	Disposable Pens	5,910,992	2,011,395	193.9%	258,418	134,198	92.6%
	Dry Sift	56,546	45,989	23.0%	4,917	3,999	23.0%
	Hash	1,212,364	1,318,862	-8.1%	68,341	68,207	0.2%
	Infused Pre-rolls	20,571,063	17,237,482	19.3%	1,258,219	1,081,417	16.3%
	Other Inhalables ²	1,106,144	1,193,713	-7.3%	48,875	48,086	1.6%
	Resin and Rosin	1,525,112	1,365,823	11.7%	51,863	48,620	6.7%
	Shatter	1,403,351	1,357,238	3.4%	68,415	62,716	9.1%
	Vape Kits	-79	170,029	-100.0%	-3	11,048	-100.0%
 PRE-ROLLS	Blend	1,455,551	1,959,696	-25.7%	128,350	204,317	-37.2%
	Hybrid	3,271,889	3,800,308	-13.9%	305,448	329,209	-7.2%
	Indica	12,633,180	11,440,222	10.4%	1,142,450	1,025,077	11.5%
	Sativa	11,649,489	10,527,103	10.7%	1,087,799	902,044	20.6%
	Variety Pack	2,924,176	1,782,437	64.1%	112,261	86,046	30.5%
 SEEDS	Same Strain	3,608	12,112	-70.2%	189	813	-76.8%
	Variety Pack	1,992	1,725	15.5%	120	60	100.0%
 TOPICALS	Balms	260,764	231,269	12.8%	8,728	11,324	-22.9%
	Bath Products	213,872	333,396	-35.9%	15,352	23,614	-35.0%
	Creams and Lotions	257,104	270,153	-4.8%	13,062	10,386	25.8%
	Massage Oils and Lubricants	4,421	4,131	7.0%	366	342	7.0%
	Other Topicals ³	15,243	14,188	7.4%	670	588	13.9%

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.

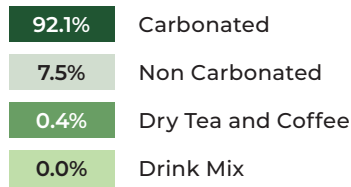
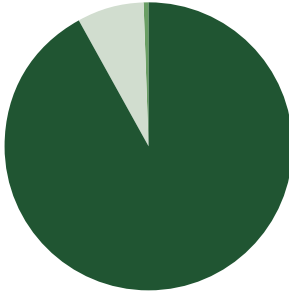
SALES MIX BY PRODUCT CATEGORY

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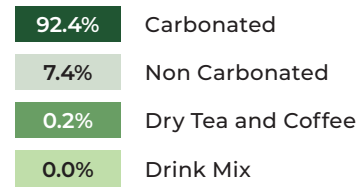
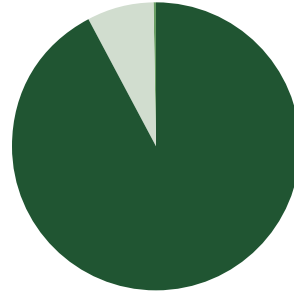


BEVERAGES

SALES \$ MIX PERCENTAGE

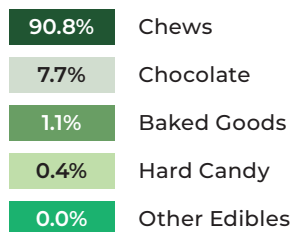
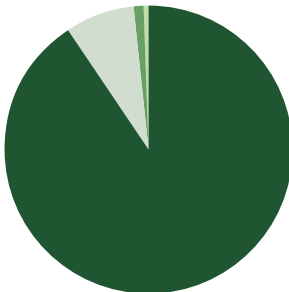


SELL UNITS MIX PERCENTAGE

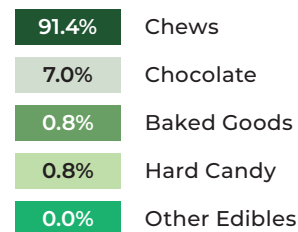
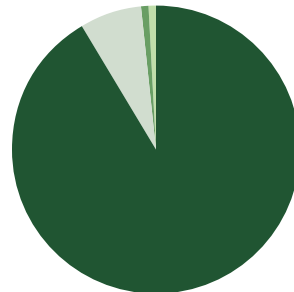


EDIBLES

SALES \$ MIX PERCENTAGE



SELL UNITS MIX PERCENTAGE



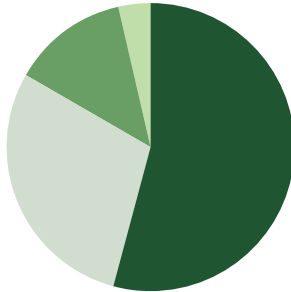
SALES MIX BY PRODUCT CATEGORY

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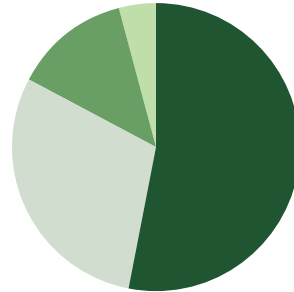
FLOWER

SALES \$ MIX PERCENTAGE



- 54.3%** Indica
- 29.2%** Sativa
- 13.0%** Hybrid
- 3.6%** Variety Pack
- 0.0%** Blend

GRAMS MIX PERCENTAGE

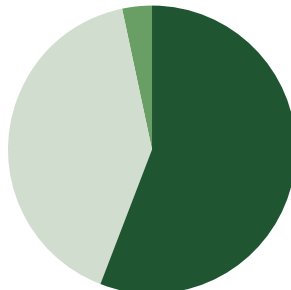


- 53.1%** Indica
- 29.7%** Sativa
- 13.2%** Hybrid
- 4.0%** Variety Pack
- 0.0%** Blend



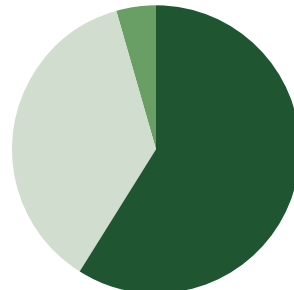
INGESTIBLE EXTRACTS

SALES \$ MIX PERCENTAGE



- 56.1%** Capsules and Pills
- 40.7%** Oils and Tinctures
- 3.2%** Other Ingestible Extracts

SELL UNITS MIX PERCENTAGE



- 58.9%** Capsules and Pills
- 36.8%** Oils and Tinctures
- 4.3%** Other Ingestible Extracts

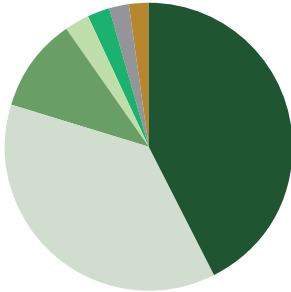
SALES MIX BY PRODUCT CATEGORY

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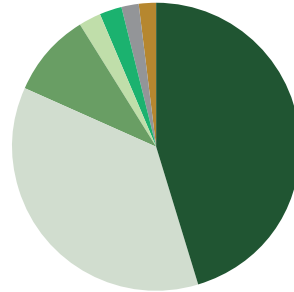
INHALABLE EXTRACTS

SALES \$ MIX PERCENTAGE



- 42.6% Cartridges
- 37.2% Infused Pre-rolls
- 10.7% Disposable Pens
- 2.8% Resin and Rosin
- 2.5% Shatter
- 2.2% Hash
- 2.0% Other Inhalable Extracts
- 0.1% Dry Sift
- 0.0% Vape Kits

SELL UNITS MIX PERCENTAGE



- 45.5% Infused Pre-rolls
- 36.3% Cartridges
- 9.4% Disposable Pens
- 2.5% Shatter
- 2.5% Hash
- 1.9% Resin and Rosin
- 1.8% Other Inhalable Extracts
- 0.2% Dry Sift
- 0.0% Vape Kits



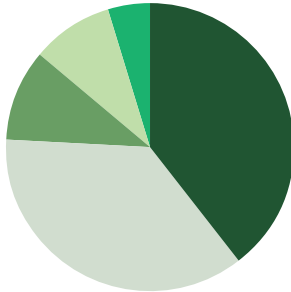
SALES MIX BY PRODUCT CATEGORY

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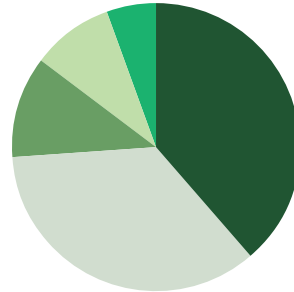
PRE-ROLLS

SALES \$ MIX PERCENTAGE



- 39.6%** Indica
- 36.5%** Sativa
- 10.2%** Hybrid
- 9.2%** Variety Pack
- 4.6%** Blend

GRAMS MIX PERCENTAGE

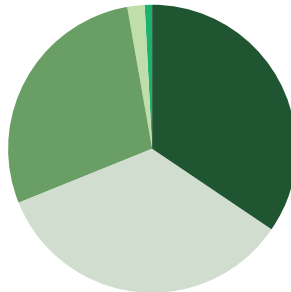


- 38.7%** Indica
- 35.3%** Sativa
- 11.3%** Variety Pack
- 9.3%** Hybrid
- 5.4%** Blend



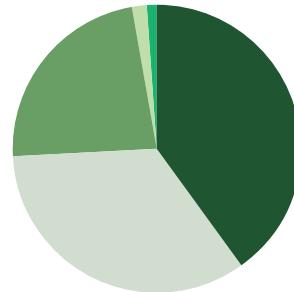
TOPICALS

SALES \$ MIX PERCENTAGE



- 34.7%** Balms
- 34.2%** Creams and Lotions
- 28.5%** Bath Products
- 2.0%** Other Topicals*
- 0.6%** Massage Oils and Lubricants

SELL UNITS MIX PERCENTAGE

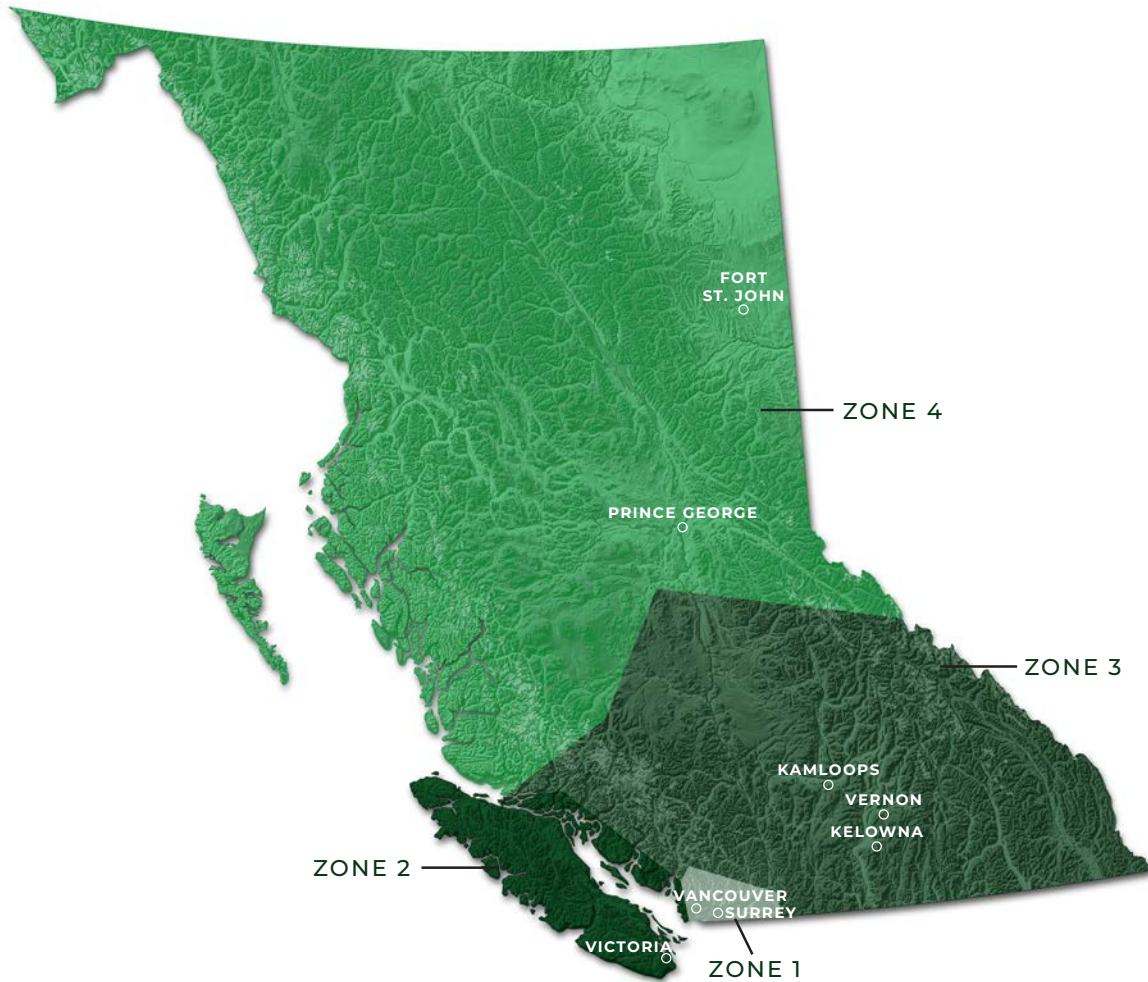


- 40.2%** Bath Products
- 34.2%** Creams and Lotions
- 22.9%** Balms
- 1.8%** Other Topicals*
- 1.0%** Massage Oils and Lubricants

*Includes face masks and other topical oils.

GROWING ACCESS POINTS

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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	62,910,031	58,326,864	7.9%	4,698,580	4,232,336	11.0%	151	142
2	32,933,097	29,919,156	10.1%	2,297,017	2,030,581	13.1%	133	123
3	30,886,999	29,385,712	5.1%	2,073,681	1,903,188	9.0%	165	168
4	20,006,637	18,882,098	6.0%	1,127,657	1,056,009	6.8%	66	66

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

DIRECT DELIVERY SALES SUMMARY*

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QUARTER YEAR-OVER-YEAR SUMMARY

	2024 Q3	2023 Q3
-21.1% WHOLESALE GRAMS	554,102 GRAMS	702,478 GRAMS
-19.8% WHOLESALE SALES	\$2,539,856	\$3,167,456
+1.7% PRICE ALL CANNABIS	\$4.58 PER GRAM	\$4.51 PER GRAM
-0.5% PRICE DRIED FLOWER	\$3.91 PER GRAM	\$3.93 PER GRAM

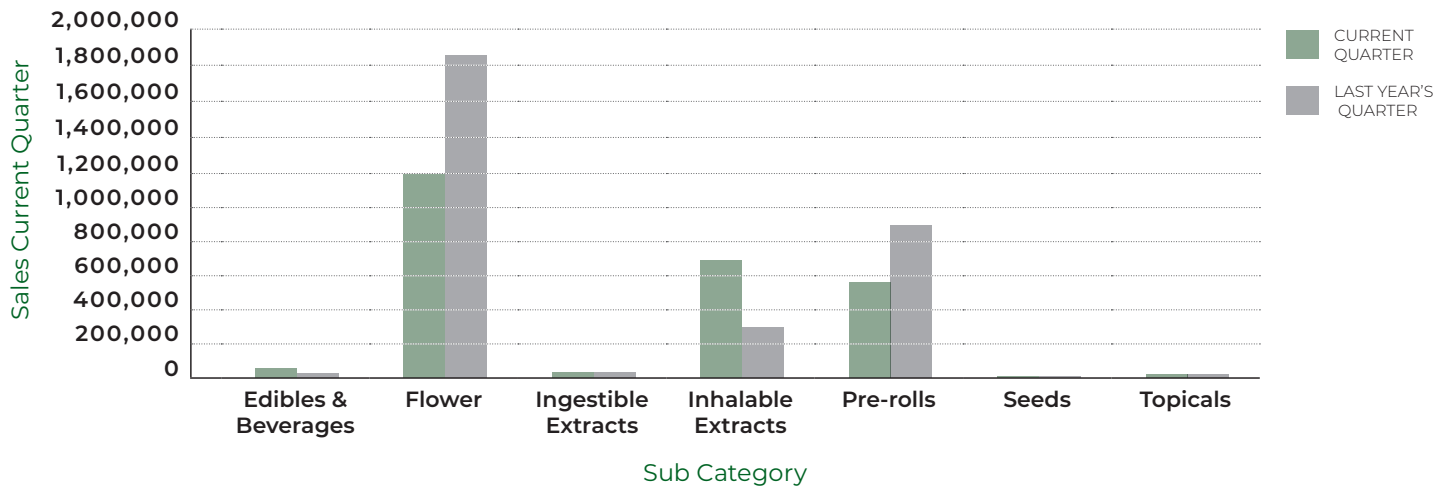
*Sales reported during the quarter as sold.

DIRECT DELIVERY SUB CATEGORY SALES*

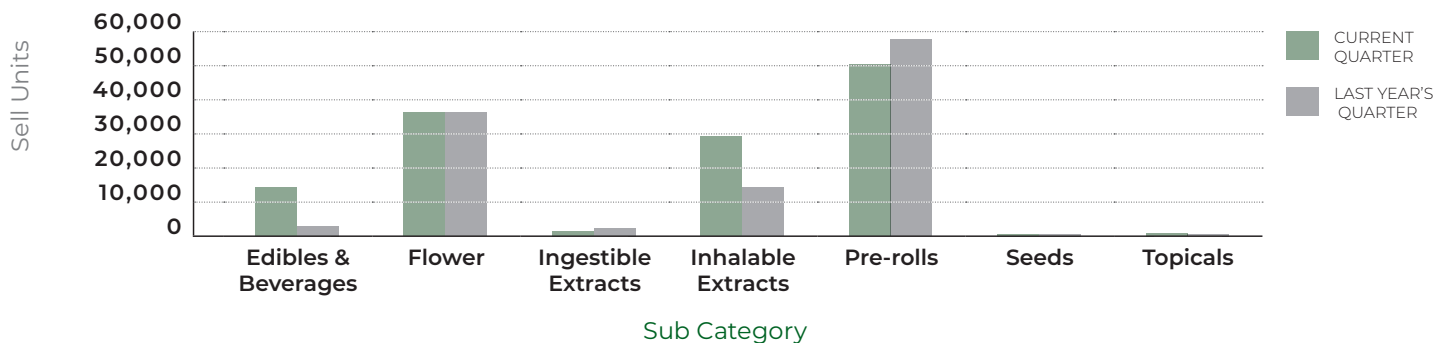
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SUB CATEGORY	SALES \$ CURRENT QUARTER	SALES \$ LAST YEAR'S QUARTER	SALES \$ YOY VARIANCE %	SELL UNITS CURRENT QUARTER	SELL UNITS LAST YEAR'S QUARTER	SELL UNITS YOY VARIANCE %
Edibles & Beverages	57,047	16,169	252.8%	14,417	3,439	319.2%
Flower	1,200,972	1,863,265	-35.5%	36,500	37,852	-3.6%
Ingestible Extracts	29,629	24,502	20.9%	1,459	2,214	-34.1%
Inhalable Extracts	679,782	358,054	89.9%	29,352	15,637	87.7%
Pre-rolls	555,664	896,215	-38.0%	50,541	57,987	-12.8%
Seeds	248	761	-67.4%	12	30	-60.0%
Topicals	16,515	8,489	94.5%	637	288	121.2%

SALES CURRENT QUARTER



SELL UNITS CURRENT QUARTER











*Sales reported during the quarter as sold.

DIRECT DELIVERY SALES MIX BY PRODUCT CATEGORY*

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FY2023 Q3

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	8,348	0	-	1,320	0	-
	Drink Mix	0	706	-100.00%	0	184	-100.00%
	Non Carbonated	169	270	-37.19%	48	96	-50.00%
 EDIBLES	Baked Goods	315	274	14.96%	168	132	27.27%
	Chews	47,545	11,266	322.04%	12,765	1,836	595.26%
	Chocolate	0	2,874	-100.00%	0	930	-100.00%
	Hard Candy	0	264	-100.00%	0	96	-100.00%
	Other Edibles	670	516	29.68%	116	165	-29.70%
 FLOWER	Blend	0	5,515	-100.00%	0	187	-100.00%
	Hybrid	382,863	285,986	33.87%	13,753	7,680	79.08%
	Indica	513,040	1,021,936	-49.80%	14,495	20,015	-27.58%
	Sativa	201,016	549,827	-63.44%	5,938	9,970	-40.44%
	Variety Pack	104,052	0	-	2,314	0	-
 INGESTIBLE EXTRACTS	Capsules and Pills	7,039	0	-	269	0	-
	Oils and Tinctures	14,747	4,451	231.34%	653	324	101.54%
	Other Ingestibles ¹	7,843	20,052	-60.88%	537	1,890	-71.59%
 INHALABLE EXTRACTS	Cartridges	112,751	93,591	20.47%	4,394	3,758	16.92%
	Disposable Pens	184,104	81,319	126.40%	7,564	2,952	156.23%
	Dry Sift	0	1,236	-100.00%	0	96	-100.00%
	Hash	12,587	14,027	-10.27%	606	783	-22.61%
	Infused Pre-rolls	127,978	67,140	90.62%	9,351	4,519	106.93%
	Other Inhalables ²	41,041	33,974	20.80%	1,820	897	102.90%
	Resin and Rosin	187,232	35,603	425.89%	4,931	1,152	328.04%
	Shatter	14,089	31,164	-54.79%	686	1,480	-53.65%
 PRE-ROLLS	Blend	19,985	22,296	-10.37%	1,268	2,160	-41.30%
	Hybrid	106,949	94,232	13.50%	11,743	7,390	58.90%
	Indica	240,718	531,828	-54.74%	23,448	34,363	-31.76%
	Sativa	133,625	166,894	-19.93%	12,835	13,688	-6.23%
	Variety Pack	54,387	80,966	-32.83%	1,247	386	223.06%
 SEEDS	Same Strain	248	761	-67.41%	12	30	-60.00%
 TOPICALS	Balms	5,284	2,151	145.60%	216	72	200.00%
	Bath Products	674	1,347	-50.00%	24	48	-50.00%
	Creams and Lotions	10,207	4,146	146.20%	387	153	152.94%
	Massage Oils and Lubricants	350	0	-	10	0	-
	Other Topicals ³	0	844	-100.00%	0	15	-100.00%

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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FY2024 Q3
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