

**BC CANNABIS WHOLESALE**

**QUARTERLY**

**SALES**

**REPORT**



**LIQUOR  
DISTRIBUTION  
BRANCH**

FY2025 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. Note that the Q3 period includes 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

OCT NOV DEC  
FY2025 Q3  
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FY2024 Q3

## QUARTER YEAR-OVER-YEAR SUMMARY

	2025 Q3	2024 Q3
<b>-21.9%</b> WHOLESALE GRAMS	<b>30,215,090</b> GRAMS	<b>38,706,339</b> GRAMS
<b>-22.8%</b> WHOLESALE SALES	<b>\$113,425,503</b>	<b>\$146,917,548</b>
<b>-1.1%</b> PRICE ALL CANNABIS	<b>\$3.75</b> PER GRAM	<b>\$3.80</b> PER GRAM
<b>-1.3%</b> PRICE DRIED FLOWER	<b>\$3.10</b> PER GRAM	<b>\$3.14</b> PER GRAM
<b>+2.0%</b> RETAIL STORE GROWTH*	<b>522</b> STORES	<b>512</b> STORES

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

# DRIED FLOWER PRICE PER GRAM BANDS

OCT NOV DEC  
 FY2025 Q3

OCT NOV DEC  
 FY2024 Q3

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	88,209	212,137	-58.4%	18,732	43,373	-56.8%
	>\$5	130,924	157,708	-17.0%	23,543	26,203	-10.2%
3.5 GRAMS	\$0 - \$3	132	2,029	-93.5%	81	882	-90.9%
	\$3 - \$5	3,249,626	4,403,737	-26.2%	764,691	1,059,660	-27.8%
	>\$5	1,333,751	3,582,929	-62.8%	202,717	538,451	-62.4%
7 GRAMS	\$0 - \$3	1,026,780	1,519,584	-32.4%	360,871	530,341	-32.0%
	\$3 - \$5	3,726,684	4,788,512	-22.2%	916,461	1,153,579	-20.6%
	>\$5	594,922	1,124,554	-47.1%	102,704	189,609	-45.8%
14 GRAMS	\$0 - \$3	1,360,207	1,698,073	-19.9%	480,998	633,234	-24.0%
	\$3 - \$5	3,012,383	4,278,975	-29.6%	822,668	1,172,010	-29.8%
	>\$5	460,852	386,879	19.1%	81,690	70,630	15.7%
28 GRAMS	\$0 - \$3	13,147,701	15,405,141	-14.7%	5,381,796	6,636,784	-18.9%
	\$3 - \$5	3,176,591	6,619,375	-52.0%	935,088	2,004,212	-53.3%

# DRIED FLOWER

## SALES TREND

### BY FORMAT

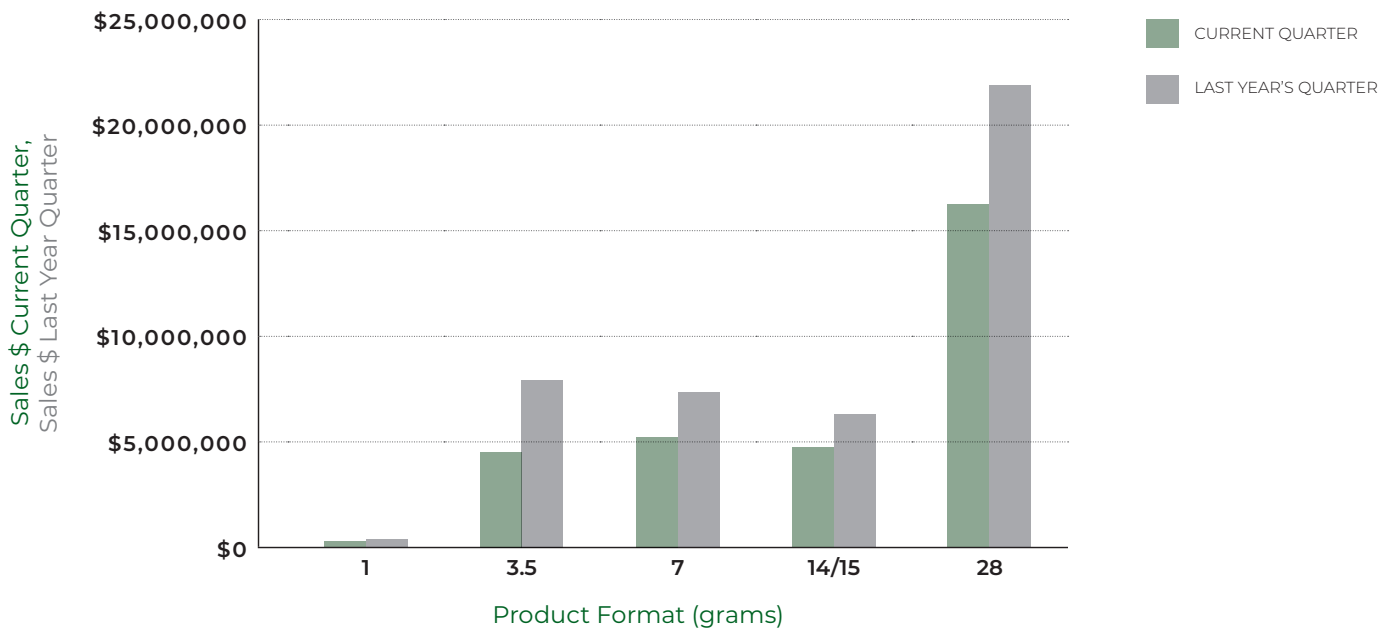
OCT NOV DEC  
 FY2025 Q3

OCT NOV DEC  
 FY2024 Q3

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	219,133	369,846	-40.8%	42,275	69,576	-39.2%
3.5	4,583,510	7,988,694	-42.6%	967,526	1,598,993	-39.5%
7	5,348,386	7,432,649	-28.0%	1,380,036	1,873,529	-26.3%
14/15	4,833,442	6,363,928	-24.0%	1,385,468	1,875,874	-26.1%
28	16,324,292	22,024,516	-25.9%	6,316,884	8,640,996	-26.9%

### FLOWER

#### SALE TREND BY FORMAT



# TOTAL SALES BY PRODUCT CATEGORY

OCT NOV DEC  
FY2025 Q3

OCT NOV DEC  
FY2024 Q3

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	2,370,158	2,707,244	-12.5%	503,514	592,069	-15.0%
 EDIBLES	7,427,765	7,836,808	-5.2%	1,592,170	2,604,457	-38.9%
 FLOWER	31,308,762	44,179,634	-29.1%	840,424	1,236,676	-32.0%
 INGESTIBLE EXTRACTS <sup>1</sup>	3,410,650	4,151,586	-17.8%	161,815	199,879	-19.0%
 INHALABLE EXTRACTS <sup>2</sup>	44,566,665	55,350,988	-19.5%	2,156,360	2,763,568	-22.0%
 PRE-ROLLS	23,741,362	31,934,285	-25.7%	2,067,131	2,776,308	-25.5%
 SEEDS	2,621	5,600	-53.2%	132	309	-57.3%
 TOPICALS	597,519	751,403	-20.5%	26,902	38,178	-29.5%

<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

OCT NOV DEC  
FY2025 Q3  
OCT NOV DEC  
FY2024 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	2,171,328	2,493,392	-12.9%	461,377	547,032	-15.7%
	Dry Tea and Coffee	0	11,959	-100.0%	0	1,140	-100.0%
	Non Carbonated	198,830	201,894	-1.5%	42,137	43,897	-4.0%
 EDIBLES	Baked Goods	40,331	83,627	-51.8%	7,950	20,542	-61.3%
	Chews	6,986,753	7,116,085	-1.8%	1,466,835	2,379,673	-38.4%
	Chocolate	365,564	604,695	-39.5%	104,716	182,260	-42.5%
	Hard Candy	11,838	31,401	-62.3%	8,968	21,766	-58.8%
	Other Edibles	23,279	999	2,229.1%	3,701	216	1,613.4%
 FLOWER	Hybrid	4,241,485	5,760,810	-26.4%	110,769	172,725	-35.9%
	Indica	17,066,056	23,996,371	-28.9%	445,248	657,118	-32.2%
	Sativa	9,686,782	12,850,944	-24.6%	279,211	384,921	-27.5%
	Variety Pack	314,439	1,571,509	-80.0%	5,196	21,912	-76.3%
 INGESTIBLE EXTRACTS	Capsules and Pills	1,976,522	2,329,181	-15.1%	98,878	117,771	-16.0%
	Oils and Tinctures	1,291,407	1,689,261	-23.6%	55,853	73,595	-24.1%
	Other Ingestibles <sup>1</sup>	142,721	133,144	7.2%	7,084	8,513	-16.8%
 INHALABLE EXTRACTS	Cartridges	17,203,513	23,565,494	-27.0%	738,813	1,004,523	-26.5%
	Disposable Pens	7,322,990	5,910,992	23.9%	303,929	258,418	17.6%
	Dry Sift	0	56,546	-100.0%	0	4,917	-100.0%
	Hash	981,285	1,212,364	-19.1%	54,378	68,341	-20.4%
	Infused Pre-rolls	16,429,203	20,571,063	-20.1%	934,885	1,258,219	-25.7%
	Other Inhalables <sup>2</sup>	836,323	1,106,144	-24.4%	40,040	48,875	-18.1%
	Resin and Rosin	931,749	1,525,112	-38.9%	34,893	51,863	-32.7%
	Shatter	861,602	1,403,351	-38.6%	49,422	68,415	-27.8%
Vape Kits	0	-79	-100.0%	0	-3	-100.0%	
 PRE-ROLLS	Blend	794,151	1,455,551	-45.4%	64,935	128,350	-49.4%
	Hybrid	2,769,510	3,350,502	-17.3%	235,710	310,161	-24.0%
	Indica	9,383,550	12,633,180	-25.7%	852,755	1,142,450	-25.4%
	Sativa	8,569,521	11,570,876	-25.9%	820,171	1,083,086	-24.3%
	Variety Pack	2,224,631	2,924,176	-23.9%	93,560	112,261	-16.7%
 SEEDS	Same Strain	2,007	3,608	-44.4%	102	189	-46.0%
	Variety Pack	614	1,992	-69.2%	30	120	-75.0%
 TOPICALS	Balms	224,551	260,764	-13.9%	6,568	8,728	-24.7%
	Bath Products	153,733	213,872	-28.1%	11,231	15,352	-26.8%
	Creams and Lotions	213,558	257,104	-16.9%	8,821	13,062	-32.5%
	Massage Oils and Lubricants	0	4,421	-100.0%	0	366	-100.0%
	Other Topicals <sup>3</sup>	5,677	15,243	-62.8%	282	670	-57.9%

<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.

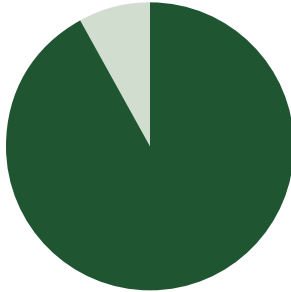
# SALES MIX BY PRODUCT CATEGORY

OCT NOV DEC  
FY2025 Q3  
OCT NOV DEC  
FY2024 Q3



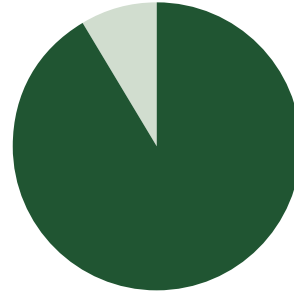
## BEVERAGES

SALES \$ MIX PERCENTAGE



91.6%	Carbonated
8.4%	Non Carbonated
0.0%	Dry Tea and Coffee

SELL UNITS MIX PERCENTAGE

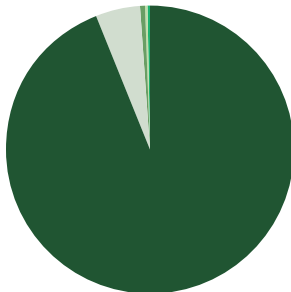


91.6%	Carbonated
8.4%	Non Carbonated
0.0%	Dry Tea and Coffee



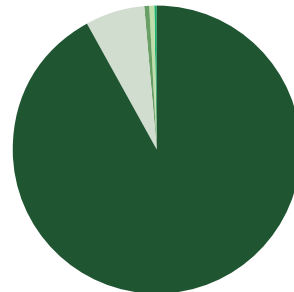
## EDIBLES

SALES \$ MIX PERCENTAGE



94.1%	Chews
4.9%	Chocolate
0.5%	Baked Goods
0.3%	Other Edibles
0.2%	Hard Candy

SELL UNITS MIX PERCENTAGE



92.1%	Chews
6.6%	Chocolate
0.6%	Hard Candy
0.5%	Baked Goods
0.2%	Other Edibles

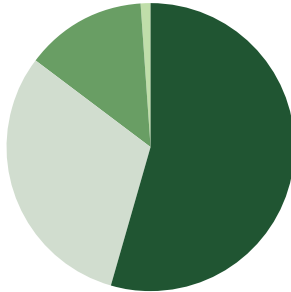
# SALES MIX BY PRODUCT CATEGORY

OCT NOV DEC  
FY2025 Q3  
OCT NOV DEC  
FY2024 Q3



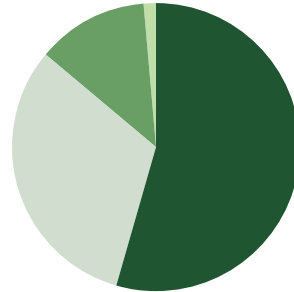
## FLOWER

SALES \$ MIX PERCENTAGE



54.5%	Indica
30.9%	Sativa
13.5%	Hybrid
1.0%	Variety Pack

GRAMS MIX PERCENTAGE

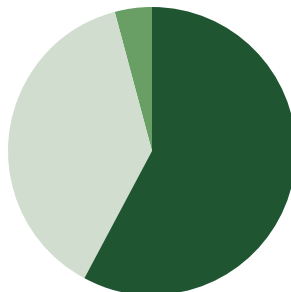


54.6%	Indica
31.7%	Sativa
12.6%	Hybrid
1.2%	Variety Pack



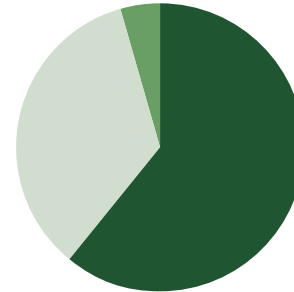
## INGESTIBLE EXTRACTS

SALES \$ MIX PERCENTAGE



58.0%	Capsules and Pills
37.9%	Oils and Tinctures
4.2%	Other Ingestible Extracts

SELL UNITS MIX PERCENTAGE



61.1%	Capsules and Pills
34.5%	Oils and Tinctures
4.4%	Other Ingestible Extracts

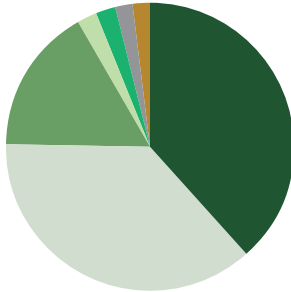
# SALES MIX BY PRODUCT CATEGORY

OCT NOV DEC  
 FY2025 Q3  
 OCT NOV DEC  
 FY2024 Q3



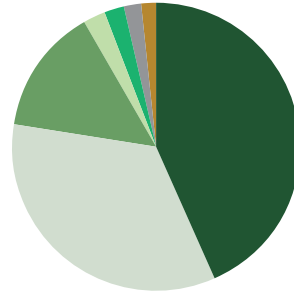
## INHALABLE EXTRACTS

SALES \$ MIX PERCENTAGE



- 38.6%** Cartridges
- 36.9%** Infused Pre-rolls
- 16.4%** Disposable Pens
- 2.2%** Hash
- 2.1%** Resin and Rosin
- 1.9%** Shatter
- 1.9%** Other Inhalable Extracts
- 0.0%** Dry Sift
- 0.0%** Vape Kits

SELL UNITS MIX PERCENTAGE



- 43.4%** Infused Pre-rolls
- 34.3%** Cartridges
- 14.1%** Disposable Pens
- 2.5%** Hash
- 2.3%** Shatter
- 1.9%** Other Inhalable Extracts
- 1.6%** Resin and Rosin
- 0.0%** Dry Sift
- 0.0%** Vape Kits



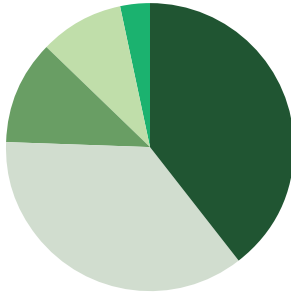
# SALES MIX BY PRODUCT CATEGORY

OCT NOV DEC  
 FY2025 Q3  
 OCT NOV DEC  
 FY2024 Q3



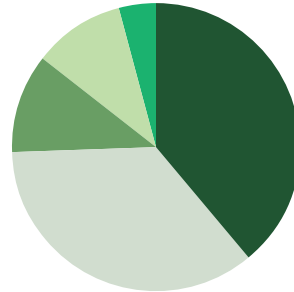
## PRE-ROLLS

SALES \$ MIX PERCENTAGE



- 39.5%** Indica
- 36.1%** Sativa
- 11.7%** Hybrid
- 9.4%** Variety Pack
- 3.3%** Blend

GRAMS MIX PERCENTAGE

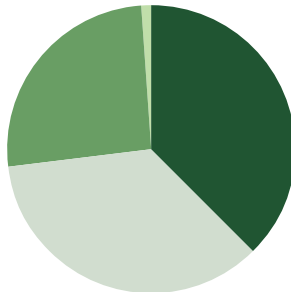


- 39.0%** Indica
- 35.7%** Sativa
- 10.9%** Hybrid
- 10.5%** Variety Pack
- 3.9%** Blend



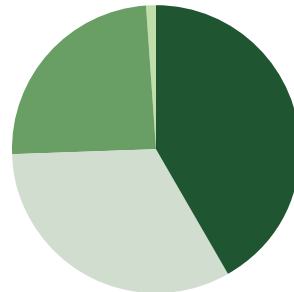
## TOPICALS

SALES \$ MIX PERCENTAGE



- 37.6%** Balms
- 35.7%** Creams and Lotions
- 25.7%** Bath Products
- 1.0%** Other Topicals
- 0.0%** Massage Oils and Lubricants

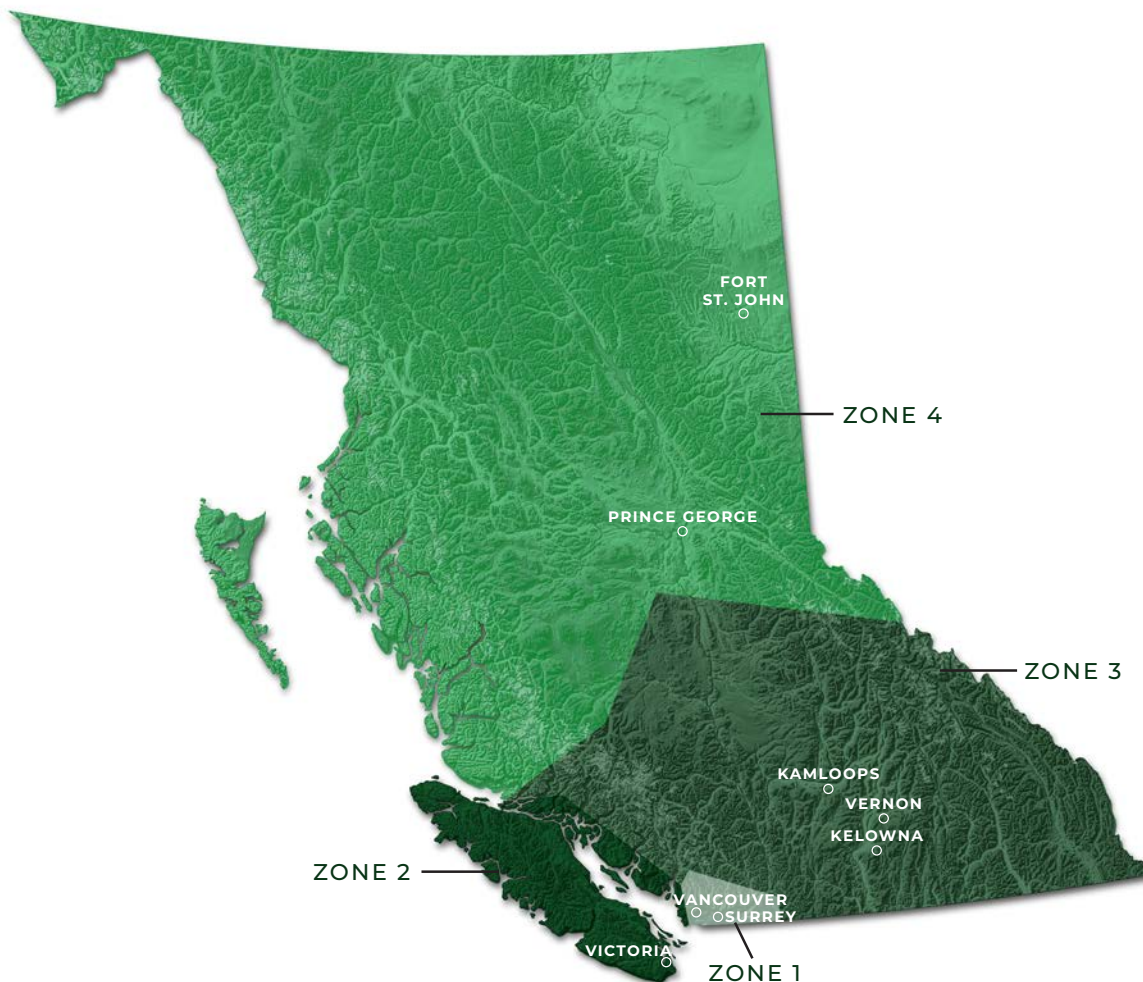
SELL UNITS MIX PERCENTAGE



- 41.7%** Bath Products
- 32.8%** Creams and Lotions
- 24.4%** Balms
- 1.0%** Other Topicals
- 0.0%** Massage Oils and Lubricants

# GROWING ACCESS POINTS

OCT NOV DEC  
 FY2025 Q3  
 OCT NOV DEC  
 FY2024 Q3



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	46,042,158	63,090,271	-27.0%	3,215,505	4,713,010	-31.8%	159	152
2	26,569,786	32,933,097	-19.3%	1,733,914	2,297,017	-24.5%	132	133
3	24,394,856	30,886,999	-21.0%	1,535,966	2,073,681	-25.9%	166	165
4	16,418,080	20,006,637	-17.9%	863,030	1,127,657	-23.5%	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\*

OCT NOV DEC  
FY2025 Q3  
OCT NOV DEC  
FY2024 Q3

## QUARTER YEAR-OVER-YEAR SUMMARY

	2025 Q3	2024 Q3
<b>+679.6%</b> WHOLESALE GRAMS	<b>4,329,514</b> GRAMS	<b>555,362</b> GRAMS
<b>+684.7%</b> WHOLESALE SALES	<b>\$19,929,908</b>	<b>\$2,539,856</b>
<b>+0.7%</b> PRICE ALL CANNABIS	<b>\$4.60</b> PER GRAM	<b>\$4.57</b> PER GRAM
<b>+8.2%</b> PRICE DRIED FLOWER	<b>\$4.23</b> PER GRAM	<b>\$3.91</b> PER GRAM

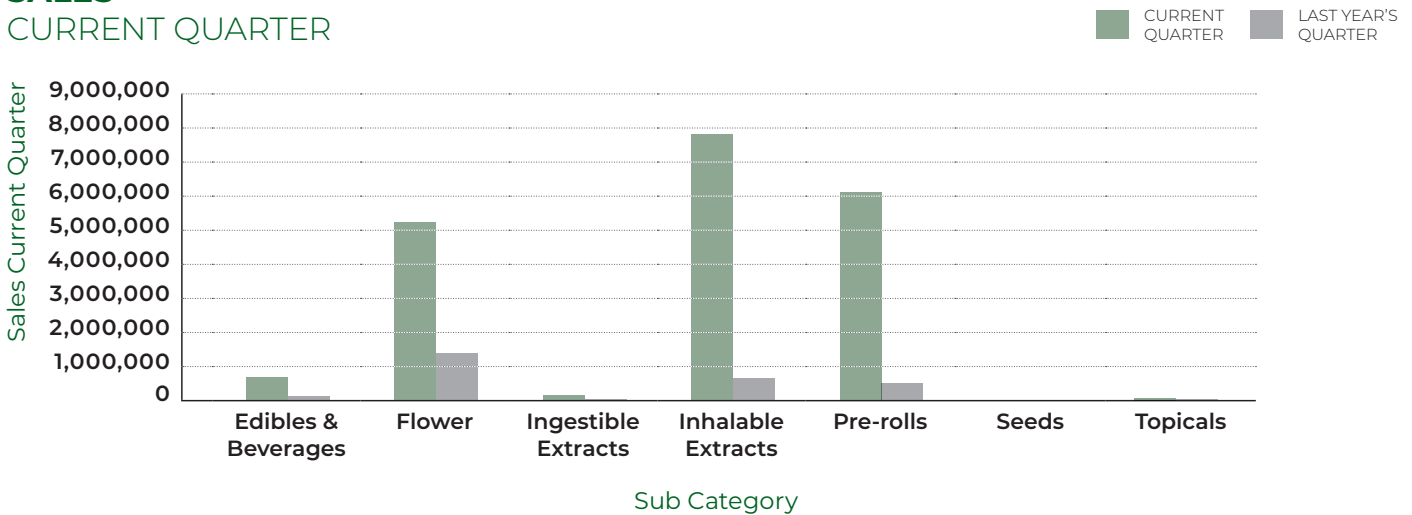
\*Sales reported during the quarter as sold.

# DIRECT DELIVERY SUB CATEGORY SALES\*

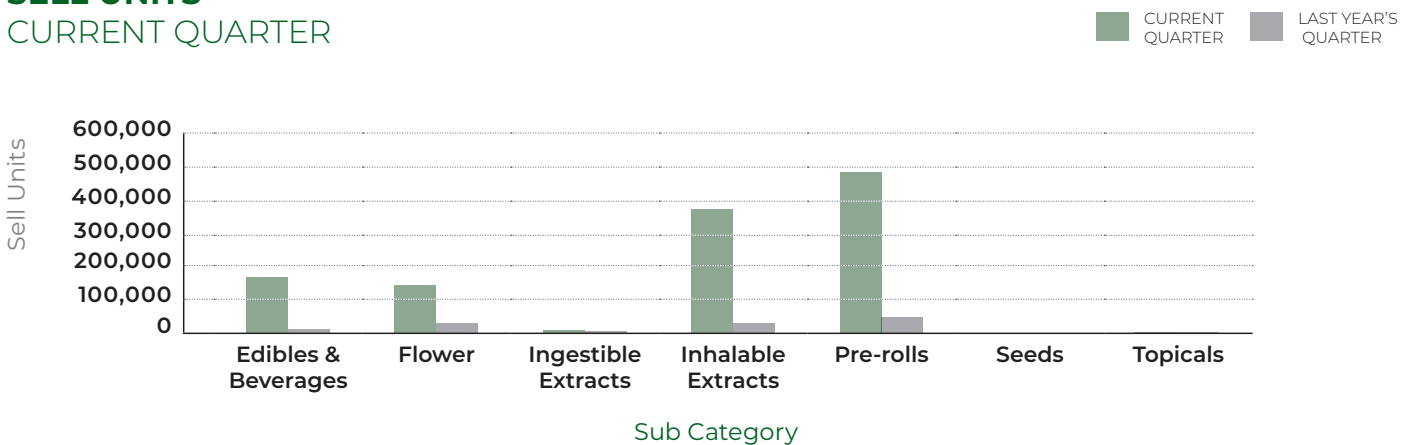
OCT NOV DEC  
 FY2025 Q3  
 OCT NOV DEC  
 FY2024 Q3

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	708,543	57,047	1,142.0%	168,978	14,417	1,072.1%
Flower	5,179,186	1,200,972	331.2%	141,566	36,500	287.9%
Ingestible Extracts	137,709	29,629	364.8%	5,931	1,459	306.5%
Inhalable Extracts	7,803,968	679,782	1,048.0%	369,425	29,352	1,158.6%
Pre-roll	6,081,272	555,664	994.4%	488,218	50,541	866.0%
Seeds	740	248	198.4%	48	12	300.0%
Topicals	18,488	16,515	12.0%	796	637	25.0%

## SALES CURRENT QUARTER



## SELL UNITS CURRENT QUARTER











\*Sales reported during the quarter as sold.

# DIRECT DELIVERY SALES MIX BY PRODUCT CATEGORY\*

OCT NOV DEC  
FY2025 Q3

OCT NOV DEC  
FY2024 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	20,104	8,348	140.82%	3,552	1,320	169.09%
	Non Carbonated	0	169	-100.00%	0	48	-100.00%
 EDIBLES	Baked Goods	9,263	315	2,837.21%	3,960	168	2,257.14%
	Chews	671,870	47,545	1,313.13%	159,918	12,765	1,152.78%
	Hard Candy	7,307	0	-	1,548	0	-
	Other Edibles	0	670	-100.00%	0	116	-100.00%
 FLOWER	Hybrid	1,418,148	382,863	270.41%	38,628	13,753	180.87%
	Indica	2,518,790	513,040	390.95%	66,326	14,495	357.58%
	Sativa	1,153,555	201,016	473.86%	35,040	5,938	490.10%
	Variety Pack	88,692	104,052	-14.76%	1,572	2,314	-32.07%
 INGESTIBLE EXTRACTS	Capsules and Pills	10,574	7,039	50.22%	363	269	34.94%
	Oils and Tinctures	100,291	14,747	580.10%	4,227	653	547.32%
	Other Ingestibles <sup>1</sup>	26,845	7,843	242.26%	1,341	537	149.72%
 INHALABLE EXTRACTS	Cartridges	3,135,444	112,751	2,680.85%	125,042	4,394	2,745.74%
	Disposable Pens	1,593,463	184,104	765.52%	62,536	7,564	726.76%
	Hash	80,607	12,587	540.42%	4,031	606	565.18%
	Infused Pre-rolls	2,308,990	127,978	1,704.21%	148,670	9,351	1,489.88%
	Other Inhalables <sup>2</sup>	246,834	41,041	501.43%	11,610	1,820	537.91%
	Resin and Rosin	246,771	187,232	31.80%	8,143	4,931	65.14%
	Shatter	191,859	14,089	1,261.79%	9,393	686	1,269.24%
 PRE-ROLLS	Blend	261,864	19,985	1,210.32%	18,046	1,268	1,323.19%
	Hybrid	1,459,814	106,949	1,264.97%	144,366	11,743	1,129.38%
	Indica	2,256,686	240,718	837.48%	150,852	23,448	543.35%
	Sativa	1,894,032	133,625	1,317.42%	161,676	12,835	1,159.65%
	Variety Pack	208,877	54,387	284.06%	13,278	1,247	964.80%
 SEEDS	Same Strain	497	248	100.19%	36	12	200.00%
	Variety Pack	244	0	-	12	0	-
 TOPICALS	Balms	2,509	5,284	-52.51%	118	216	-45.37%
	Bath Products	2,510	674	272.63%	210	24	775.00%
	Creams and Lotions	9,555	10,207	-6.39%	332	387	-14.21%
	Massage Oils and Lubricants	144	350	-58.73%	8	10	-20.00%
	Other Topicals <sup>3</sup>	3,770	0	-	128	0	-

<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  
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FY2025 Q3  
OCT | NOV | DEC