

**BC CANNABIS WHOLESALE**

**QUARTERLY**

**SALES**

**REPORT**



**LIQUOR  
DISTRIBUTION  
BRANCH**

FY2024 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.

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)

# CONTENTS

- 1 REPORT SUMMARY**
- 2 DRIED FLOWER**
  - 2 Price per gram bands
  - 3 Sales trend by format
- 4 TOTAL SALES BY PRODUCT CATEGORY**
- 5 SALES MIX BY PRODUCT CATEGORY**
  - 6 Beverages - Sales \$ versus sell units mix percentage
  - 6 Edibles - Sales \$ versus sell units mix percentage
  - 7 Dried flower - Sales \$ versus grams mix percentage
  - 7 Ingestible extracts - Sales \$ versus sell units mix percentage
  - 8 Inhalable extracts - Sales \$ versus sell units mix percentage
  - 9 Pre-roll - Sales \$ versus grams mix percentage
  - 9 Topical - Sales \$ versus sell units mix percentage
- 10 GROWING ACCESS POINTS & SHIPPING ZONES**
- 11 DIRECT DELIVERY SALES SUMMARY**
- 12 DIRECT DELIVERY SUB CATEGORY SALES**
- 13 DIRECT DELIVERY SALES MIX BY PRODUCT CATEGORY**



# REPORT SUMMARY

JUL AUG SEP

FY2024 Q2

JUL AUG SEP

FY2023 Q2

## QUARTER YEAR-OVER-YEAR SUMMARY

	2024 Q2	2023 Q2
<b>+14.2%</b> WHOLESALE GRAMS	<b>38,678,946</b> GRAMS	<b>33,879,106</b> GRAMS
<b>+7.4%</b> WHOLESALE SALES	<b>\$147,211,721</b>	<b>\$137,126,714</b>
<b>-6.0%</b> PRICE ALL CANNABIS	<b>\$3.81</b> PER GRAM	<b>\$4.05</b> PER GRAM
<b>-5.3%</b> PRICE DRIED FLOWER	<b>\$3.15</b> PER GRAM	<b>\$3.33</b> PER GRAM
<b>+4.1%</b> RETAIL STORE GROWTH*	<b>510</b> STORES	<b>490</b> 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  
FY2024 Q2

JUL AUG SEP  
FY2023 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	221,219	273,466	-19.1%	45,307	57,002	-20.5%
	>\$5	150,309	143,217	5.0%	25,426	23,162	9.8%
3.5 GRAMS	\$0 - \$3	8,434	0	-	2,814	0	-
	\$3 - \$5	4,578,195	4,854,911	-5.7%	1,091,717	1,143,688	-4.5%
	>\$5	4,068,954	6,541,533	-37.8%	614,327	958,860	-35.9%
7 GRAMS	\$0 - \$3	755,392	365,745	106.5%	271,425	122,724	121.2%
	\$3 - \$5	4,591,279	3,574,609	28.4%	1,168,209	916,356	27.5%
	>\$5	1,760,572	894,000	96.9%	300,349	148,295	102.5%
14 GRAMS	\$0 - \$3	2,418,717	2,165,677	11.7%	898,170	793,968	13.1%
	\$3 - \$5	3,817,324	3,326,943	14.7%	1,036,112	836,486	23.9%
	>\$5	300,294	1,077,204	-72.1%	52,360	182,868	-71.4%
15 GRAMS	\$0 - \$3	0	5,912	-100.0%	0	1,980	-100.0%
	\$3 - \$5	0	48,823	-100.0%	0	14,190	-100.0%
28 GRAMS	\$0 - \$3	15,836,871	13,654,734	16.0%	6,773,564	5,879,860	15.2%
	\$3 - \$5	6,638,885	7,248,443	-8.4%	2,038,120	2,193,548	-7.1%
	>\$5	0	74,317	-100.0%	0	13,272	-100.0%
30 GRAMS	\$0 - \$3	0	247	-100.0%	0	120	-100.0%

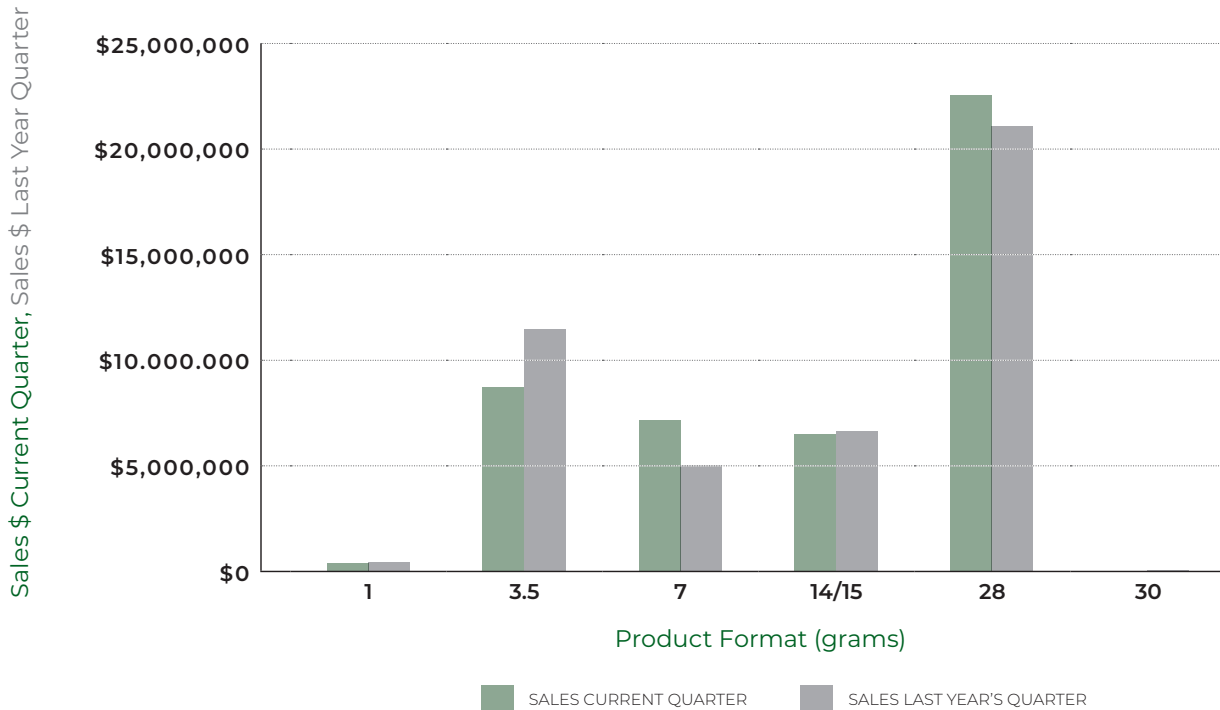
# DRIED FLOWER SALES TREND BY FORMAT

JUL AUG SEP  
 FY2024 Q2

JUL AUG SEP  
 FY2023 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	371,528	416,683	-10.8%	70,733	80,164	-11.8%
3.5	8,655,584	11,396,444	-24.1%	1,708,858	2,102,548	-18.7%
7	7,107,243	4,834,354	47.0%	1,739,983	1,187,375	46.5%
14/15	6,536,335	6,624,559	-1.3%	1,986,642	1,829,492	8.6%
28	22,475,792	20,977,494	7.1%	8,811,684	8,086,680	9.0%
30	0	247	-100.0%	0	120	-100.0%









## FLOWER SALE TREND BY FORMAT



# TOTAL SALES BY PRODUCT CATEGORY

JUL AUG SEP  
FY2024 Q2

JUL AUG SEP  
FY2023 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	3,001,277	2,664,577	12.6%	665,801	614,930	8.3%
 EDIBLES	7,092,755	7,360,664	-3.6%	2,291,851	1,923,036	19.2%
 FLOWER	45,146,482	44,249,780	2.0%	1,264,153	1,269,932	-0.5%
 INGESTIBLE EXTRACTS <sup>1</sup>	4,154,513	4,306,682	-3.5%	212,866	208,541	2.1%
 INHALABLE EXTRACTS <sup>2</sup>	52,744,677	46,120,036	14.4%	2,706,356	2,365,101	14.4%
 PRE-ROLL	34,384,453	31,663,959	8.6%	2,978,136	2,668,904	11.6%
 SEEDS	10,582	12,929	-18.2%	469	590	-20.5%
 TOPICALS	676,982	748,087	-9.5%	27,886	32,702	-14.7%








<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

JUL AUG SEP  
FY2024 Q2

JUL AUG SEP  
FY2023 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 Drink	2,728,815	2,263,194	20.6%	606,666	525,334	15.5%
	Drink Mix	1,855	8,680	-78.6%	672	2,388	-71.9%
	Dry Tea and Coffee	7,437	27,561	-73.0%	709	4,253	-83.3%
	Non Carbonated Drink	263,170	365,142	-27.9%	57,754	82,955	-30.4%
 EDIBLES	Baked Goods	87,198	101,723	-14.3%	22,067	27,965	-21.1%
	Chews	6,573,707	6,817,476	-3.6%	2,132,081	1,749,390	21.9%
	Chocolate	426,479	427,386	-0.2%	136,450	142,717	-4.4%
	Hard Candy	2,297	0	-	660	0	-
	Other Edibles	3,075	14,079	-78.2%	593	2,964	-80.0%
 FLOWER	Blend	0	69,875	-100.0%	0	3,131	-100.0%
	Hybrid	5,867,526	8,267,883	-29.0%	180,023	242,490	-25.8%
	Indica	24,385,482	21,396,729	14.0%	659,926	599,767	10.0%
	Sativa	13,807,876	14,368,096	-3.9%	408,166	421,915	-3.3%
	Variety Pack	1,085,599	147,198	637.5%	16,038	2,629	510.0%
 INGESTIBLE EXTRACTS	Capsule and Pills	2,152,766	2,108,072	2.1%	114,078	113,552	0.5%
	Oils and Tinctures	1,686,445	2,059,956	-18.1%	71,839	87,987	-18.4%
	Other Ingestibles <sup>1</sup>	315,302	138,654	127.4%	26,949	7,002	284.9%
 INHALABLE EXTRACTS	Cartridge	23,071,175	22,353,994	3.2%	984,542	930,448	5.8%
	Disposable Pens	4,823,567	1,970,145	144.8%	226,291	135,316	67.2%
	Dry Sift	51,359	36,605	40.3%	4,466	3,183	40.3%
	Hash	1,256,359	1,219,646	3.0%	68,254	63,423	7.6%
	Infused Pre-roll	20,033,608	16,656,886	20.3%	1,274,548	1,074,214	18.6%
	Other Inhalables <sup>2</sup>	1,091,540	1,129,592	-3.4%	47,850	44,290	8.0%
	Resin and Rosin	1,222,453	1,253,434	-2.5%	43,069	41,775	3.1%
	Shatter	1,184,804	1,314,469	-9.9%	56,936	60,414	-5.8%
	Vape Kits	9,813	185,265	-94.7%	400	12,038	-96.7%
 PRE-ROLL	Blend	2,038,564	1,991,055	2.4%	190,932	202,228	-5.6%
	Hybrid	3,615,378	4,275,921	-15.4%	339,682	348,947	-2.7%
	Indica	13,010,391	12,245,382	6.2%	1,147,807	1,045,725	9.8%
	Sativa	13,124,967	12,130,529	8.2%	1,197,485	1,026,799	16.6%
	Variety Pack	2,595,153	1,021,072	154.2%	102,230	45,205	126.1%
 SEEDS	Same Strain	7,133	9,824	-27.4%	322	482	-33.2%
	Variety Pack	3,449	3,105	11.1%	147	108	36.1%
 TOPICALS	Balms	282,408	272,463	3.6%	9,691	11,148	-13.1%
	Bath Products	94,035	89,354	5.2%	6,523	7,124	-8.4%
	Creams and Lotions	282,319	374,560	-24.6%	10,728	13,768	-22.1%
	Massage Oils and Lubricants	3,793	5,340	-29.0%	314	398	-21.1%
	Other Topicals <sup>3</sup>	14,426	6,370	126.5%	630	264	138.6%

<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.



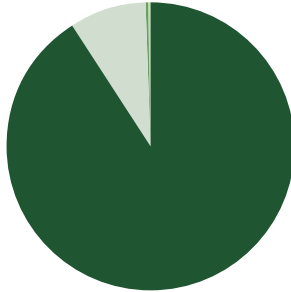
# SALES MIX BY PRODUCT CATEGORY

JUL AUG SEP  
 FY2024 Q2  
 JUL AUG SEP  
 FY2023 Q2



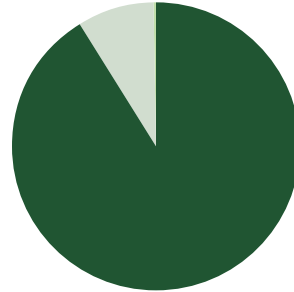
## BEVERAGES

SALES \$ MIX PERCENTAGE



90.9%	Carbonated Drink
8.8%	Non Carbonated Drink
0.2%	Dry Tea and Coffee
0.1%	Other Beverages

SELL UNITS MIX PERCENTAGE

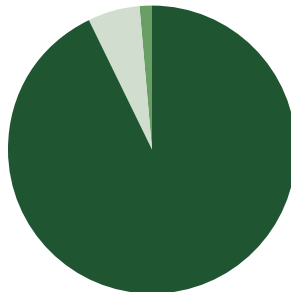


91.1%	Carbonated Drink
8.7%	Non Carbonated Drink
0.1%	Dry Tea and Coffee
0.1%	Other Beverages



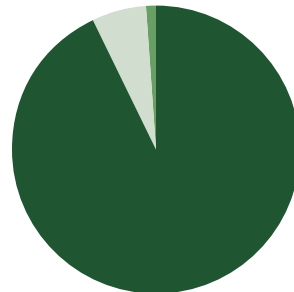
## EDIBLES

SALES \$ MIX PERCENTAGE



92.7%	Chews
6.0%	Chocolate
1.2%	Baked Goods
0.0%	Hard Candy
0.0%	Other Edibles

SELL UNITS MIX PERCENTAGE



93.0%	Chews
6.0%	Chocolate
1.0%	Baked Goods
0.0%	Hard Candy
0.0%	Other Edibles

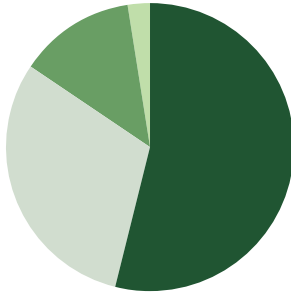
# SALES MIX BY PRODUCT CATEGORY

JUL AUG SEP  
FY2024 Q2  
JUL AUG SEP  
FY2023 Q2



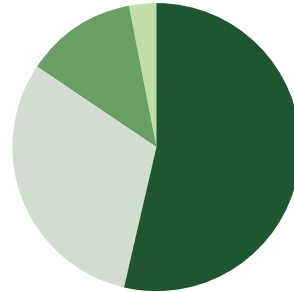
## FLOWER

SALES \$ MIX PERCENTAGE



54.0%	Indica
30.6%	Sativa
13.0%	Hybrid
2.4%	Variety Pack
0.0%	Blend

GRAMS MIX PERCENTAGE

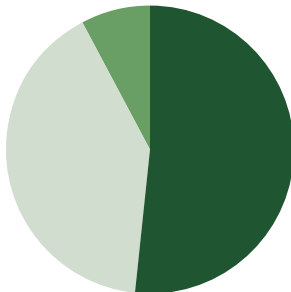


53.7%	Indica
30.8%	Sativa
12.7%	Hybrid
2.8%	Variety Pack
0.0%	Blend



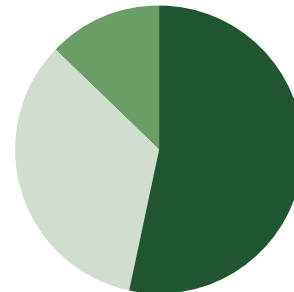
## INGESTIBLE EXTRACTS

SALES \$ MIX PERCENTAGE



51.8%	Capsule and Pills
40.6%	Oils and Tinctures
7.6%	Other Ingestible Extracts

SELL UNITS MIX PERCENTAGE



53.6%	Capsule and Pills
33.7%	Oils and Tinctures
12.7%	Other Ingestible Extracts

# SALES MIX BY PRODUCT CATEGORY

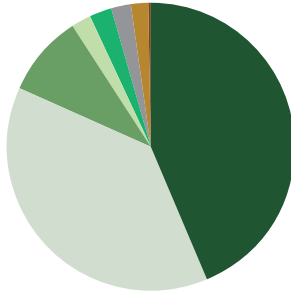
JUL AUG SEP  
 FY2024 Q2

JUL AUG SEP  
 FY2023 Q2



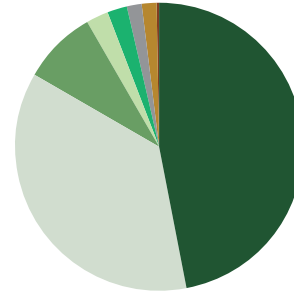
## INHALABLE EXTRACTS

SALES \$ MIX PERCENTAGE



- 43.7%** Cartridge
- 38.0%** Infused Pre-roll
- 9.1%** Disposable Pens
- 2.4%** Hash
- 2.3%** Resin and Rosin
- 2.2%** Shatter
- 2.1%** Other Inhalable Extracts
- 0.1%** Dry Sift
- 0.0%** Vape Kits

SELL UNITS MIX PERCENTAGE



- 47.1%** Infused Pre-roll
- 36.4%** Cartridge
- 8.4%** Disposable Pens
- 2.5%** Hash
- 2.1%** Shatter
- 1.8%** Other Inhalable Extracts
- 1.6%** Resin and Rosin
- 0.2%** Dry Sift
- 0.0%** Vape Kits



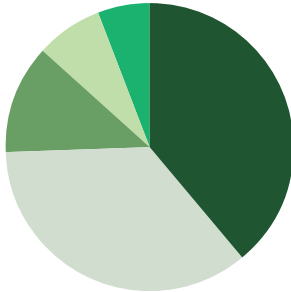
# SALES MIX BY PRODUCT CATEGORY

JUL AUG SEP  
 FY2024 Q2  
 JUL AUG SEP  
 FY2023 Q2



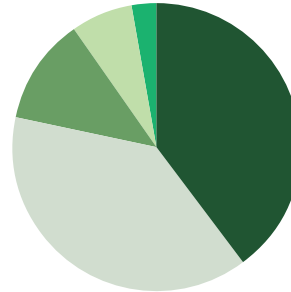
## PRE-ROLL

SALES \$ MIX PERCENTAGE



- 38.2%** Sativa
- 37.8%** Indica
- 10.5%** Hybrid
- 7.5%** Variety Pack
- 5.9%** Blend

GRAMS MIX PERCENTAGE

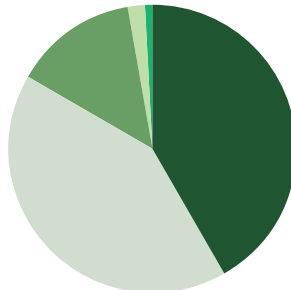


- 37.1%** Indica
- 36.6%** Sativa
- 9.7%** Hybrid
- 9.4%** Variety Pack
- 7.2%** Blend



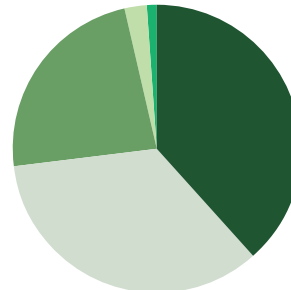
## TOPICALS

SALES \$ MIX PERCENTAGE



- 41.7%** Balms
- 41.7%** Creams and Lotions
- 13.9%** Bath Products
- 2.1%** Other Topicals\*
- 0.6%** Massage Oils and Lubricants

SELL UNITS MIX PERCENTAGE



- 38.5%** Creams and Lotions
- 34.8%** Balms
- 23.4%** Bath Products
- 2.3%** Other Topicals\*
- 1.1%** Massage Oils and Lubricants

\*Includes face masks and other topical oils.

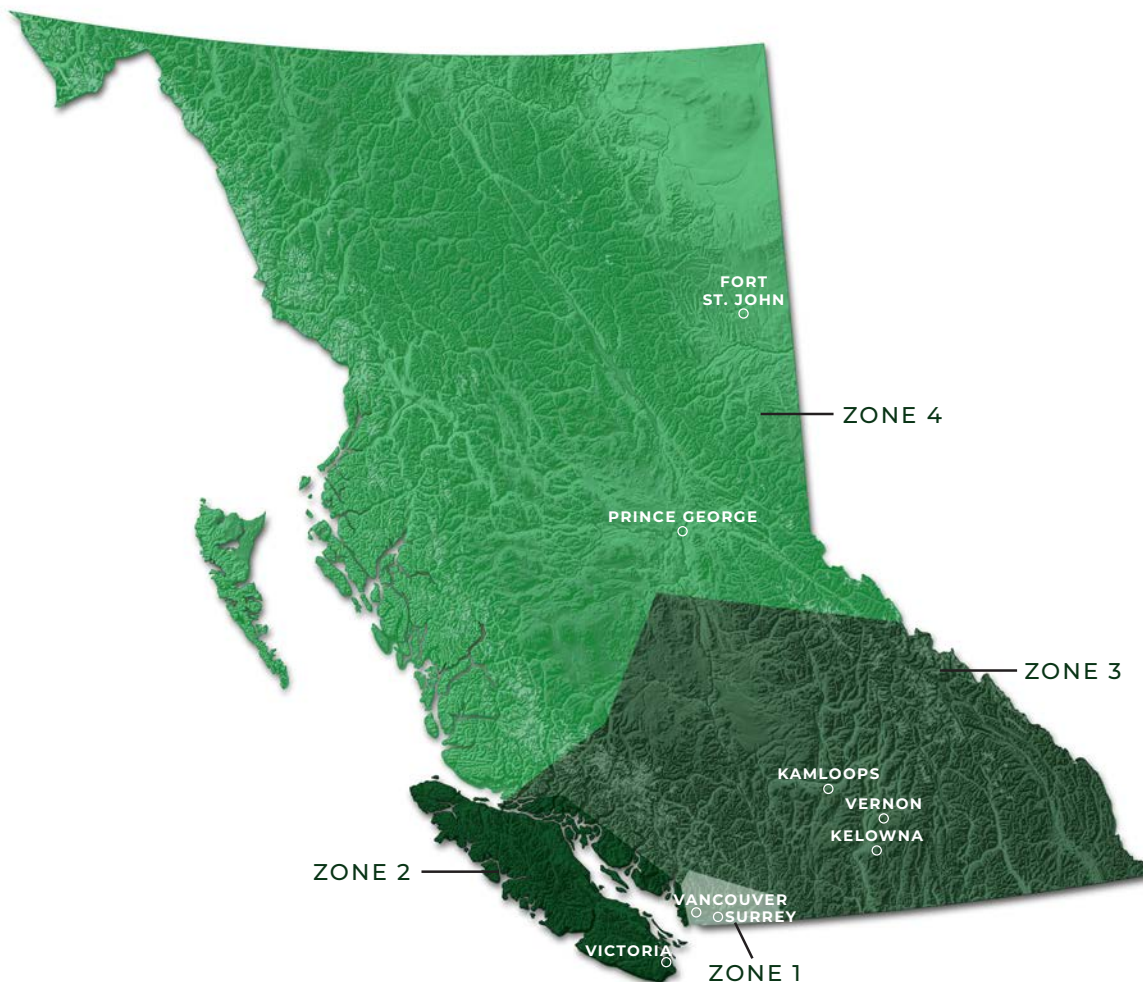
# GROWING ACCESS POINTS

JUL AUG SEP

FY2024 Q2

JUL AUG SEP

FY2023 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	61,609,404	56,721,479	8.6%	4,555,741	4,019,599	13.3%	151	141
2	33,258,844	30,059,343	10.6%	2,297,737	2,007,422	14.5%	131	121
3	32,402,559	31,061,603	4.3%	2,172,942	1,998,238	8.7%	165	167
4	19,762,553	19,131,604	3.3%	1,106,406	1,046,459	5.7%	66	64

\*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  
FY2024 Q2  
JUL AUG SEP  
FY2023 Q2

## QUARTER YEAR-OVER-YEAR SUMMARY

	2024 Q2	2023 Q2
<b>-41.1%</b> WHOLESALE GRAMS	<b>484,000</b> GRAMS	<b>821,717</b> GRAMS
<b>-38.7%</b> WHOLESALE SALES	<b>\$2,317,140</b>	<b>\$3,777,539</b>
<b>+4.1%</b> PRICE ALL CANNABIS	<b>\$4.79</b> PER GRAM	<b>\$4.60</b> PER GRAM
<b>+8.6%</b> PRICE DRIED FLOWER	<b>\$4.34</b> PER GRAM	<b>\$4.00</b> PER GRAM

\*Sales reported during the quarter as sold.

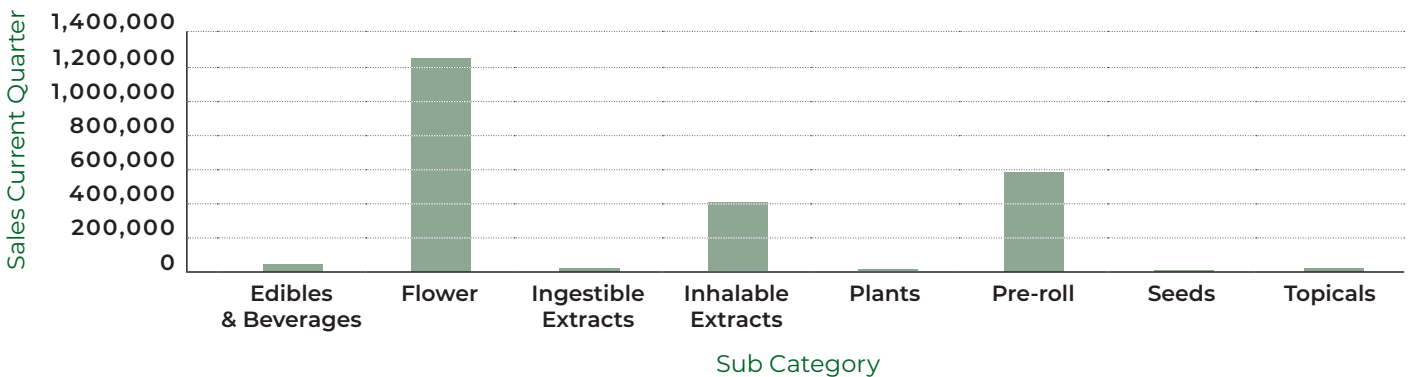
# DIRECT DELIVERY SUB CATEGORY SALES\*

JUL AUG SEP  
 FY2024 Q2

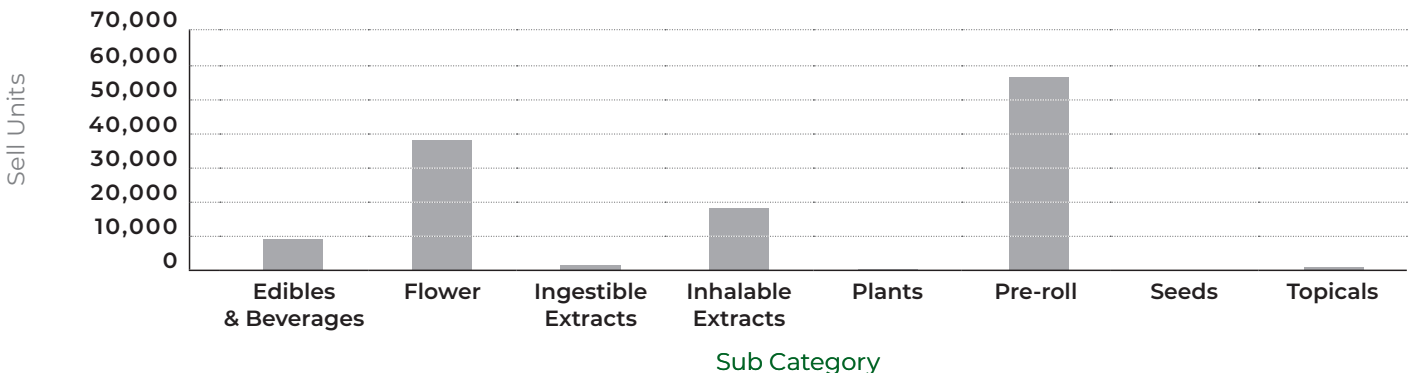
JUL AUG SEP  
 FY2023 Q2

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	47,831	3,806	1,156.9%	9,251	1,244	643.6%
Flower	1,245,542	2,259,307	-44.9%	38,611	51,714	-25.3%
Ingestible Extracts	21,740	12,923	68.2%	1,246	748	66.6%
Inhalable Extracts	405,931	516,322	-21.4%	18,245	22,236	-17.9%
Plants	3,278	5,741	-42.9%	190	236	-19.5%
Pre-roll	577,353	968,026	-40.4%	57,517	70,413	-18.3%
Seeds	103	3,618	-97.1%	5	150	-96.7%
Topicals	15,363	7,797	97.0%	633	311	103.5%

## SALES CURRENT QUARTER



## SELL UNITS CURRENT QUARTER





\*Sales reported during the quarter as sold.

# DIRECT DELIVERY SALES MIX BY PRODUCT CATEGORY\*

JUL AUG SEP  
FY2024 Q2

JUL AUG SEP  
FY2023 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 Drink	17,274	0	-	2,736	0	-
	Drink Mix	0	322	-100.00%	0	20	-100.00%
	Non Carbonated Drink	408	0	-	144	0	-
 EDIBLES	Chews	28,989	3,294	780.20%	6,222	1,212	413.37%
	Other Edibles	1,160	190	510.30%	149	12	1,141.67%
 FLOWER	Blend	1,035	11,821	-91.24%	60	312	-80.77%
	Hybrid	439,568	374,743	17.30%	14,486	9,982	45.12%
	Indica	490,544	1,175,199	-58.26%	15,237	26,605	-42.73%
	Sativa	265,717	697,544	-61.91%	7,790	14,815	-47.42%
	Variety Pack	48,679	0	-	1,038	0	-
 INGESTIBLE EXTRACTS	Capsule and Pills	4,595	0	-	253	0	-
	Oils and Tinctures	11,945	11,424	4.56%	585	666	-12.16%
	Other Ingestibles <sup>1</sup>	5,200	1,499	246.92%	408	82	397.56%
 INHALABLE EXTRACTS	Cartridge	79,941	142,233	-43.80%	3,011	5,098	-40.94%
	Disposable Pens	69,850	106,070	-34.15%	2,838	4,984	-43.06%
	Dry Sift	0	2,164	-100.00%	0	168	-100.00%
	Hash	8,380	29,580	-71.67%	417	1,443	-71.10%
	Infused Pre-roll	99,903	72,688	37.44%	7,198	4,835	48.87%
	Other Inhalables <sup>2</sup>	24,555	17,533	40.05%	987	689	43.25%
	Resin and Rosin	108,565	107,720	0.78%	2,988	3,363	-11.15%
	Shatter	14,737	38,334	-61.56%	806	1,656	-51.33%
 PLANTS	Plants Same Strain	0	5,741	-100.00%	0	236	-100.00%
	Plants Variety Pack	3,278	0	-	190	0	-
 PRE-ROLL	Blend	22,811	21,022	8.51%	1,552	1,950	-20.41%
	Hybrid	122,585	150,975	-18.80%	12,067	11,644	3.63%
	Indica	263,130	577,769	-54.46%	29,046	40,939	-29.05%
	Sativa	132,513	199,207	-33.48%	11,444	15,027	-23.84%
	Variety Pack	36,314	19,053	90.59%	3,408	853	299.53%
 SEEDS	Same Strain	103	3,618	-97.14%	5	150	-96.67%
 TOPICALS	Balms	1,641	717	128.88%	84	24	250.00%
	Bath Products	748	299	150.42%	30	24	25.00%
	Creams and Lotions	8,227	6,669	23.37%	353	261	35.25%
	Massage Oils and Lubricants	770	0	-	22	0	-
	Other Topicals <sup>3</sup>	3,975	113	3,431.77%	144	2	7,100.00%

<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**

FY2024 Q2  
JUL | AUG | SEP