

**BC CANNABIS WHOLESALE**

**QUARTERLY**

**SALES**

**REPORT**



**LIQUOR  
DISTRIBUTION  
BRANCH**

FY2023 Q4  
JAN | FEB | MAR

# 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

JAN FEB MAR  
FY2023 Q4  
JAN FEB MAR  
FY2022 Q4

## QUARTER YEAR-OVER-YEAR SUMMARY

	2023 Q4	2022 Q4
<b>+20.9%</b> WHOLESALE GRAMS	<b>33,729,299</b> GRAMS	<b>27,891,578</b> GRAMS
<b>+10.3%</b> WHOLESALE SALES	<b>\$132,084,793</b>	<b>\$119,696,932</b>
<b>-8.7%</b> PRICE ALL CANNABIS	<b>\$3.92</b> PER GRAM	<b>\$4.29</b> PER GRAM
<b>-8.2%</b> PRICE DRIED FLOWER	<b>\$3.21</b> PER GRAM	<b>\$3.50</b> PER GRAM
<b>+3.3%</b> RETAIL STORE GROWTH*	<b>501</b> STORES	<b>485</b> STORES

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

# DRIED FLOWER PRICE PER GRAM BANDS

JAN FEB MAR  
 FY2023 Q4

JAN FEB MAR  
 FY2022 Q4

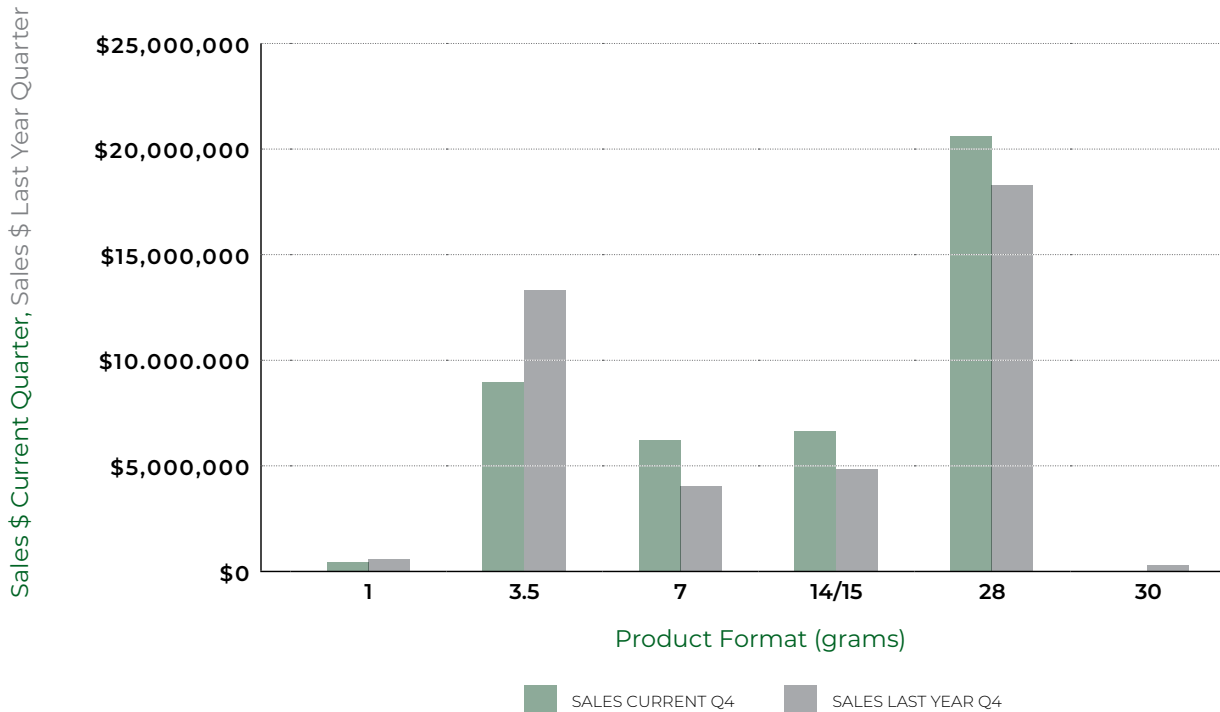
SELL UNIT CONSUMER ITEM SIZE FORMAT	PRICE PER GRAM BAND	SALES \$ CURRENT QUARTER	SALES \$ LAST YEAR'S QUARTER	SALES \$ YOY VARIANCE %	GRAMS CURRENT QUARTER	GRAMS LAST YEAR'S QUARTER	GRAMS YOY VARIANCE %
1 GRAM	\$3 - \$5	262,142	227,799	15.1%	54,217	47,713	13.6%
	>\$5	158,778	273,878	-42.0%	26,954	41,105	-34.4%
3.5 GRAMS	\$0 - \$3	7,913	15,043	-47.4%	3,441	5,373	-36.0%
	\$3 - \$5	4,872,696	4,491,727	8.5%	1,145,823	1,045,233	9.6%
	>\$5	4,039,784	8,863,898	-54.4%	598,224	1,272,282	-53.0%
7 GRAMS	\$0 - \$3	148,308	138,938	6.7%	53,004	49,903	6.2%
	\$3 - \$5	4,135,635	3,303,590	25.2%	1,061,893	847,476	25.3%
	>\$5	1,711,327	530,221	222.8%	292,327	82,649	253.7%
14 GRAMS	\$0 - \$3	1,926,492	779,227	147.2%	693,952	306,040	126.8%
	\$3 - \$5	3,925,358	2,635,916	48.9%	1,008,098	764,722	31.8%
	>\$5	539,552	1,020,526	-47.1%	96,446	177,086	-45.5%
15 GRAMS	\$0 - \$3	0	122,912	-100.0%	0	48,060	-100.0%
	\$3 - \$5	0	261,521	-100.0%	0	78,240	-100.0%
28 GRAMS	\$0 - \$3	14,133,325	12,366,082	14.3%	6,123,516	5,138,252	19.2%
	\$3 - \$5	7,043,632	5,596,046	25.9%	2,204,440	1,689,464	30.5%
	>\$5	0	435,967	-100.0%	0	80,080	-100.0%
30 GRAMS	\$0 - \$3	0	269,142	-100.0%	0	138,720	-100.0%

# DRIED FLOWER SALES TREND BY FORMAT

JAN FEB MAR  
 FY2023 Q4  
 JAN FEB MAR  
 FY2022 Q4

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	420,920	501,676	-16.1%	81,171	88,818	-8.6%
3.5	8,920,392	13,370,669	-33.3%	1,747,487	2,322,887	-24.8%
7	5,995,270	3,972,749	50.9%	1,407,224	980,028	43.6%
14/15	6,391,402	4,820,103	32.6%	1,798,496	1,374,148	30.9%
28	21,176,914	18,398,094	15.1%	8,327,956	6,907,796	20.6%
30	0	269,142	-100.0%	0	138,720	-100.0%


## FLOWER SALE TREND BY FORMAT



# TOTAL SALES BY PRODUCT CATEGORY

JAN FEB MAR  
FY2023 Q4








JAN FEB MAR  
FY2022 Q4

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	2,476,704	2,077,470	19.2%	564,152	471,580	19.6%
 EDIBLES	7,135,710	6,683,445	6.8%	2,080,356	1,549,682	34.2%
 FLOWER	42,904,900	41,332,433	3.8%	1,207,376	1,241,387	-2.7%
 INGESTIBLE EXTRACTS <sup>1</sup>	4,646,577	5,806,567	-20.0%	237,549	327,748	-27.5%
 INHALABLE EXTRACTS <sup>2</sup>	46,222,273	37,688,364	22.6%	2,340,280	1,895,954	23.4%
 PRE-ROLL	27,934,625	25,374,696	10.1%	2,409,098	2,125,495	13.3%
 SEEDS	148,277	119,090	24.5%	7,029	5,264	33.5%
 TOPICALS	615,727	614,867	0.1%	28,182	32,609	-13.6%

<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

JAN FEB MAR  
FY2023 Q4  
JAN FEB MAR  
FY2022 Q4

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	2,198,056	1,722,303	27.6%	502,119	391,039	28.4%
	Drink Mix	6,613	16,373	-59.6%	1,596	4,445	-64.1%
	Dry Tea and Coffee	15,547	16,227	-4.2%	1,888	4,045	-53.3%
	Non Carbonated Drink	246,917	322,451	-23.4%	55,830	72,027	-22.5%
	Other Beverages	9,571	115	8,242.8%	2,719	24	11,229.2%
 EDIBLES	Baked Goods	82,501	130,940	-37.0%	20,563	38,348	-46.4%
	Chews	6,540,605	5,967,375	9.6%	1,897,522	1,316,457	44.1%
	Chocolate	493,012	584,554	-15.7%	157,840	194,637	-18.9%
	Hard Candy	7,063	576	1,126.3%	1,620	240	575.0%
	Other Edibles	12,529	0	-	2,811	0	-
 FLOWER	Blend	178,205	276,214	-35.5%	7,847	12,186	-35.6%
	Hybrid	6,382,933	8,722,341	-26.8%	189,437	292,173	-35.2%
	Indica	23,445,364	21,058,131	11.3%	644,483	603,193	6.8%
	Sativa	12,361,859	11,275,747	9.6%	357,409	333,835	7.1%
	Variety Pack	536,538	0	-	8,200	0	-
 INGESTIBLE EXTRACTS	Capsule and Pills	2,235,071	1,836,611	21.7%	116,695	105,321	10.8%
	Oils and Tinctures	1,937,256	2,303,423	-15.9%	82,032	98,530	-16.7%
	Other Ingestibles <sup>1</sup>	474,250	1,666,534	-71.5%	38,822	123,897	-68.7%
 INHALABLE EXTRACTS	Cartridge	22,637,049	20,386,624	11.0%	954,521	841,474	13.4%
	Disposable Pens	2,405,852	1,253,679	91.9%	144,488	83,904	72.2%
	Dry Sift	50,543	38,686	30.6%	4,395	3,269	34.4%
	Hash	1,185,583	1,084,962	9.3%	62,354	54,172	15.1%
	Other Inhalables <sup>2</sup>	16,955,005	12,295,686	37.9%	1,050,204	802,408	30.9%
	Resin and Rosin	1,414,902	997,558	41.8%	50,262	32,680	53.8%
	Shatter	1,382,198	1,382,574	0.0%	64,525	63,061	2.3%
	Vape Kits	191,141	204,856	-6.7%	9,531	13,311	-28.4%
	Wax	0	43,740	-100.0%	0	1,675	-100.0%
 PRE-ROLL	Blend	1,631,998	1,121,083	45.6%	169,652	112,817	50.4%
	Hybrid	3,446,885	3,298,606	4.5%	311,135	307,945	1.0%
	Indica	10,862,188	10,518,450	3.3%	967,816	880,273	9.9%
	Sativa	9,914,007	9,383,087	5.7%	867,763	782,899	10.8%
	Variety Pack	2,079,547	1,053,469	97.4%	92,732	41,561	123.1%
 SEEDS	Same Strain	100,038	90,627	10.4%	4,781	4,274	11.9%
	Variety Pack	48,239	28,463	69.5%	2,248	990	127.1%
 TOPICALS	Balms	210,855	149,129	41.4%	8,066	6,832	18.1%
	Bath Products	146,208	133,993	9.1%	9,942	12,382	-19.7%
	Creams and Lotions	246,583	290,289	-15.1%	9,528	11,020	-13.5%
	Massage Oils and Lubricants	3,515	24,919	-85.9%	291	1,686	-82.7%
	Other Topicals <sup>3</sup>	8,566	16,537	-48.2%	355	689	-48.5%

<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.

<sup>3</sup>Includes face masks and other topical oils.



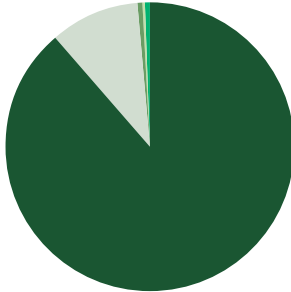
# SALES MIX BY PRODUCT CATEGORY

JAN FEB MAR  
 FY2023 Q4  
 JAN FEB MAR  
 FY2022 Q4



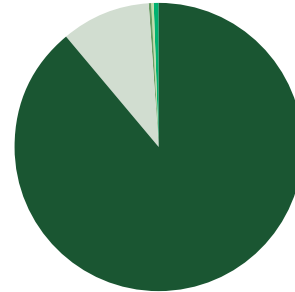
## BEVERAGES

SALES \$ MIX PERCENTAGE



- 88.7%** Carbonated Drink
- 10.0%** Non Carbonated Drink
- 0.6%** Dry Tea and Coffee
- 0.4%** Other Beverages
- 0.3%** Drink Mix

SELL UNITS MIX PERCENTAGE

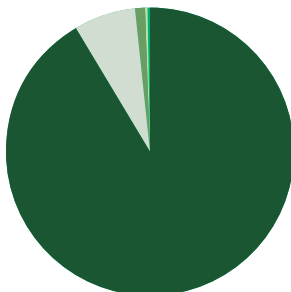


- 89.0%** Carbonated Drink
- 9.9%** Non Carbonated Drink
- 0.5%** Other Beverages
- 0.3%** Dry Tea and Coffee
- 0.3%** Drink Mix



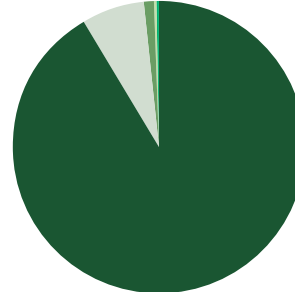
## EDIBLES

SALES \$ MIX PERCENTAGE



- 91.7%** Chews
- 6.9%** Chocolate
- 1.2%** Baked Goods
- 0.2%** Other Edibles
- 0.1%** Hard Candy

SELL UNITS MIX PERCENTAGE



- 91.2%** Chews
- 7.6%** Chocolate
- 1.0%** Baked Goods
- 0.1%** Other Edibles
- 0.1%** Hard Candy

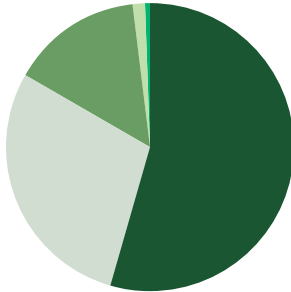
# SALES MIX BY PRODUCT CATEGORY

JAN FEB MAR  
FY2023 Q4  
JAN FEB MAR  
FY2022 Q4



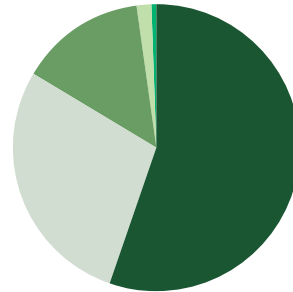
## FLOWER

SALES \$ MIX PERCENTAGE



54.6%	Indica
28.8%	Sativa
14.9%	Hybrid
1.3%	Variety Pack
0.4%	Blend

GRAMS MIX PERCENTAGE

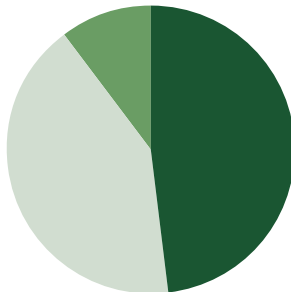


55.5%	Indica
28.2%	Sativa
14.3%	Hybrid
1.6%	Variety Pack
0.4%	Blend



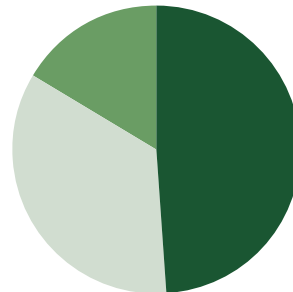
## INGESTIBLE EXTRACTS

SALES \$ MIX PERCENTAGE



48.1%	Capsule and Pills
41.7%	Oils and Tinctures
10.2%	Other Ingestible Extracts

SELL UNITS MIX PERCENTAGE



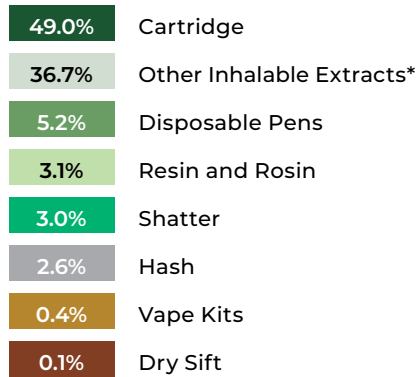
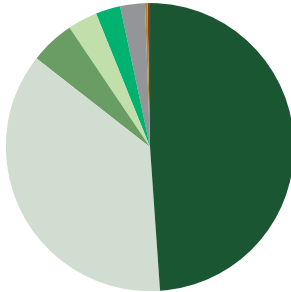
49.1%	Capsule and Pills
34.5%	Oils and Tinctures
16.3%	Other Ingestible Extracts

# SALES MIX BY PRODUCT CATEGORY

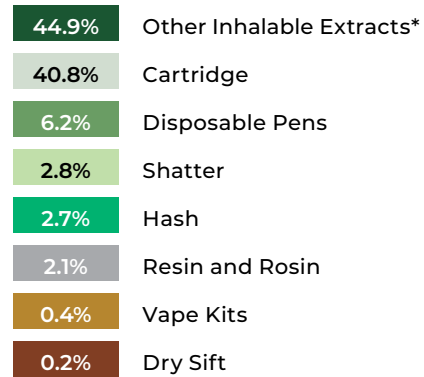
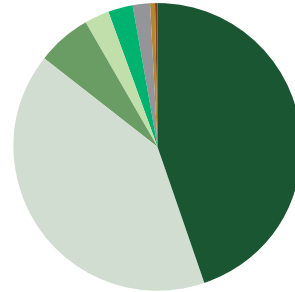
JAN FEB MAR  
FY2023 Q4  
JAN FEB MAR  
FY2022 Q4

## INHALABLE EXTRACTS

SALES \$ MIX PERCENTAGE



SELL UNITS MIX PERCENTAGE



\*Includes infused pre-rolls.

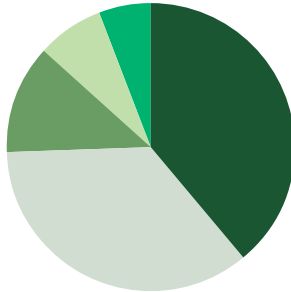
# SALES MIX BY PRODUCT CATEGORY

JAN FEB MAR  
 FY2023 Q4  
 JAN FEB MAR  
 FY2022 Q4



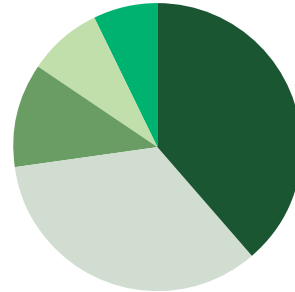
## PRE-ROLL

SALES \$ MIX PERCENTAGE



- 38.9%** Indica
- 35.5%** Sativa
- 12.3%** Hybrid
- 7.4%** Variety Pack
- 5.8%** Blend

GRAMS MIX PERCENTAGE

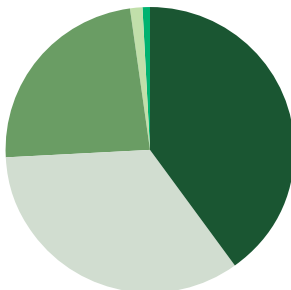


- 38.6%** Indica
- 34.2%** Sativa
- 11.7%** Hybrid
- 8.4%** Variety Pack
- 7.0%** Blend



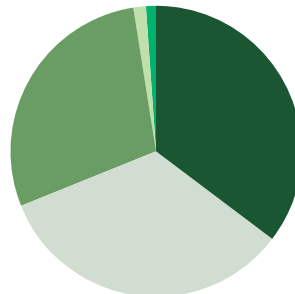
## TOPICALS

SALES \$ MIX PERCENTAGE



- 40.0%** Creams and Lotions
- 34.2%** Balms
- 23.7%** Bath Products
- 1.4%** Other Topicals\*
- 0.6%** Massage Oils and Lubricants

SELL UNITS MIX PERCENTAGE

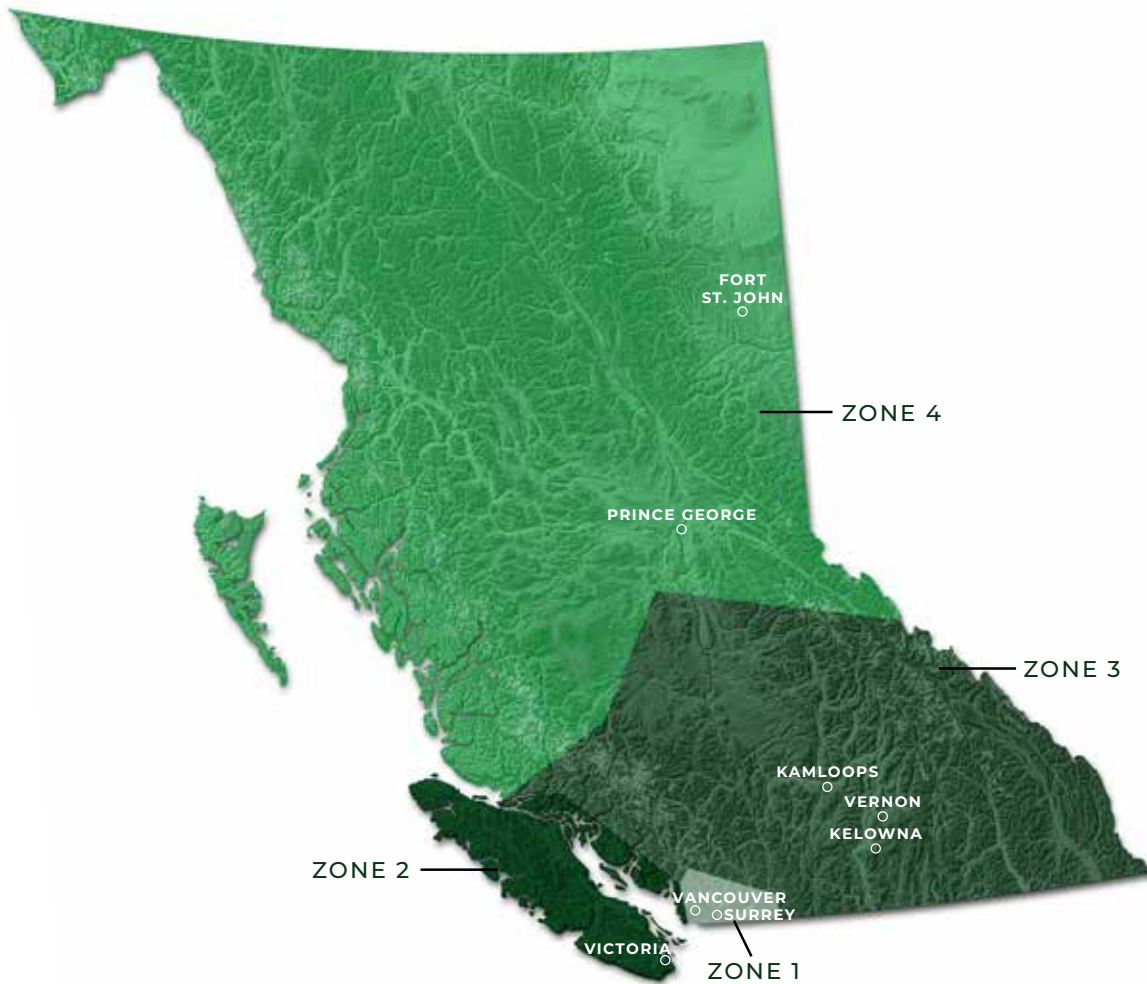


- 35.3%** Bath Products
- 33.8%** Creams and Lotions
- 28.6%** Balms
- 1.3%** Other Topicals\*
- 1.0%** Massage Oils and Lubricants

\*Includes face masks and other topical oils.

# GROWING ACCESS POINTS

JAN FEB MAR  
**FY2023 Q4**  
 JAN FEB MAR  
 FY2022 Q4



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	55,682,287	50,141,762	11.0%	4,018,885	3,411,533	17.8%	147	134
2	30,215,473	26,540,914	13.8%	2,032,542	1,701,794	19.4%	127	124
3	28,185,726	26,295,227	7.2%	1,826,925	1,643,737	11.1%	164	168
4	17,853,175	16,571,707	7.7%	984,065	881,157	11.7%	66	62

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

# DIRECT DELIVERY SALES SUMMARY\*

JAN FEB MAR  
FY2023 Q4  
JAN FEB MAR  
FY2022 Q4

## QUARTER YEAR-OVER-YEAR SUMMARY

	2023 Q4	2022 Q4
<b>+28.4%</b> WHOLESALE GRAMS	<b>602,525</b> GRAMS	<b>469,421</b> GRAMS
<b>+21.1%</b> WHOLESALE SALES	<b>\$2,978,775</b>	<b>\$2,459,766</b>
<b>-5.7%</b> PRICE ALL CANNABIS	<b>\$4.94</b> PER GRAM	<b>\$5.24</b> PER GRAM
<b>5.7%</b> PRICE DRIED FLOWER	<b>\$4.42</b> PER GRAM	<b>\$4.18</b> PER GRAM

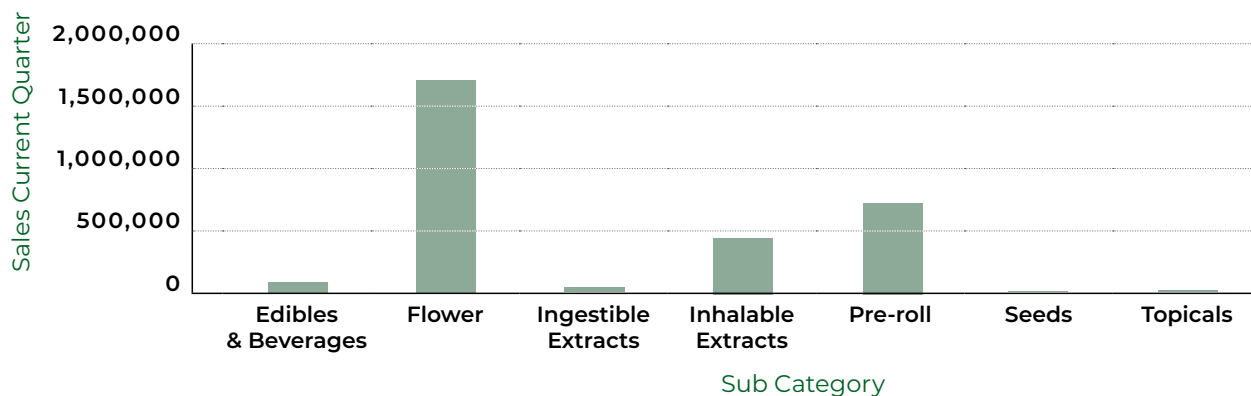
\*Sales reported during the quarter as sold.

# DIRECT DELIVERY SUB CATEGORY SALES\*

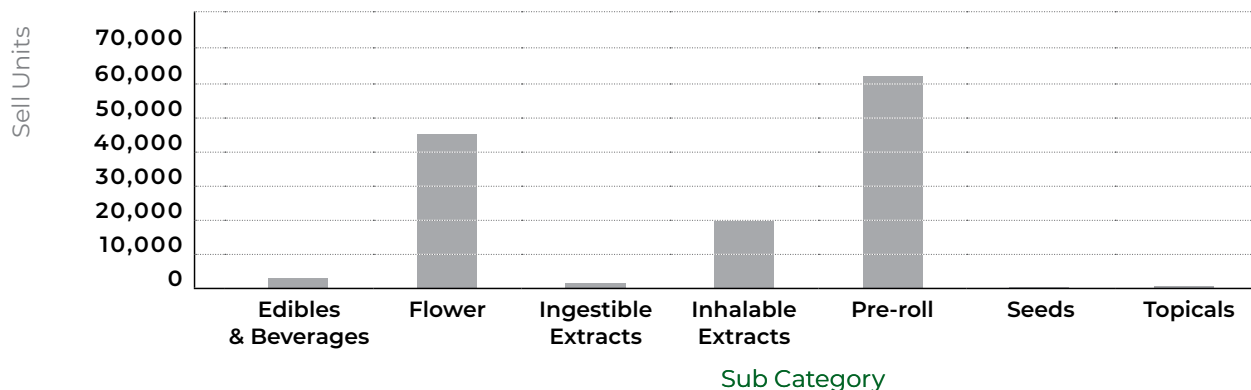
JAN FEB MAR  
 FY2023 Q4  
 JAN FEB MAR  
 FY2022 Q4

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	29,465	15,498	90.1%	2,705	1,424	90.0%
Flower	1,715,020	1,390,861	23.3%	45,143	30,169	49.6%
Ingestible Extracts	21,650	5,898	267.1%	1,804	262	588.5%
Inhalable Extracts	450,134	699,374	-35.6%	19,369	21,290	-9.0%
Plants	0	2,812	-100.0%	0	102	-100.0%
Pre-roll	749,115	341,964	119.1%	61,104	26,804	128.0%
Seeds	534	771	-30.8%	21	30	-30.0%
Topicals	12,859	2,589	396.8%	479	132	262.9%

## SALES CURRENT QUARTER












## SELL UNITS CURRENT QUARTER



\*Sales reported during the quarter as sold.

# DIRECT DELIVERY SALES MIX BY PRODUCT CATEGORY\*

JAN FEB MAR  
FY2023 Q4  
JAN FEB MAR  
FY2022 Q4

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	Drink Mix	549	2,737	-79.9%	40	170	-76.5%
	Non Carbonated Drink	204	0	-	72	0	-
 EDIBLES	Baked Goods	58	0	-	24	0	-
	Chews	20,390	2,168	840.3%	1,684	780	115.9%
	Other Edibles	8,264	10,592	-22.0%	885	474	86.7%
 FLOWER	Blend	11,199	0	-	557	0	-
	Hybrid	311,366	296,500	5.0%	8,828	7,581	16.5%
	Indica	951,166	640,140	48.6%	24,162	16,062	50.4%
	Sativa	433,195	448,012	-3.3%	11,509	6,388	80.2%
	Variety Pack	8,094	6,209	30.4%	87	138	-37.0%
 INGESTIBLE EXTRACTS	Capsule and Pills	468	0	-	12	0	-
	Oils and Tinctures	5,716	1,843	210.1%	342	72	375.0%
	Other Ingestibles <sup>1</sup>	15,466	4,055	281.4%	1,450	190	663.2%
 INHALABLE EXTRACTS	Cartridge	119,087	132,023	-9.8%	5,516	4,592	20.1%
	Disposable Pens	159,776	126,112	26.7%	5,736	4,504	27.4%
	Dry Sift	0	773	-100.0%	0	60	-100.0%
	Hash	6,746	14,581	-53.7%	410	804	-49.0%
	Other Inhalables <sup>2</sup>	71,258	72,957	-2.3%	4,032	3,344	20.6%
	Resin and Rosin	58,104	313,520	-81.5%	1,961	6,246	-68.6%
	Shatter	35,163	39,407	-10.8%	1,714	1,740	-1.5%
 PLANTS	Plants Same Strain	0	2,412	-100.0%	0	90	-100.0%
	Plants Variety Pack	0	400	-100.0%	0	12	-100.0%
 PRE-ROLL	Blend	28,962	0	-	2,555	0	-
	Hybrid	136,913	78,302	74.9%	10,870	7,119	52.7%
	Indica	353,769	153,189	130.9%	28,647	12,342	132.1%
	Sativa	212,691	67,078	217.1%	17,780	5,435	227.1%
	Variety Pack	16,780	43,395	-61.3%	1,252	1,908	-34.4%
 SEEDS	Same Strain	534	771	-30.8%	21	30	-30.0%
 TOPICALS	Bath Products	0	374	-100.0%	0	30	-100.0%
	Creams and Lotions	7,372	2,215	232.8%	305	102	199.0%
	Massage Oils and Lubricants	3,711	0	-	106	0	-
	Other Topicals <sup>3</sup>	1,776	0	-	68	0	-

<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.

<sup>3</sup>Includes face masks and other topical oils.





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