

BC CANNABIS WHOLESALE

**QUARTERLY
SALES
REPORT**



**LIQUOR
DISTRIBUTION
BRANCH**

Q2 2022

JUL | AUG | SEPT

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. Direct delivery sales are provided on pages 17, 18 and 19 of this report.

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 and 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 SEPT

2022 Q2

JUL AUG SEPT

2021 Q2

Quarter year-over-year summary

	2022 Q2	2021 Q2
+18.18% WHOLESALE GRAMS	25,797,065 GRAMS	21,829,432 GRAMS
+8.26% WHOLESALE SALES	\$110,290,429	\$101,872,233
-8.39% PRICE ALL CANNABIS	\$4.28 PER GRAM	\$4.67 PER GRAM
-5.03% PRICE DRIED FLOWER	\$3.75 PER GRAM	\$3.94 PER GRAM
+17.71% RETAIL STORE GROWTH*	452 STORES	384 STORES

* Includes private and public retail stores.

DRIED FLOWER PRICE PER GRAM BANDS

JUL AUG SEPT

2022 Q2

JUL AUG SEPT

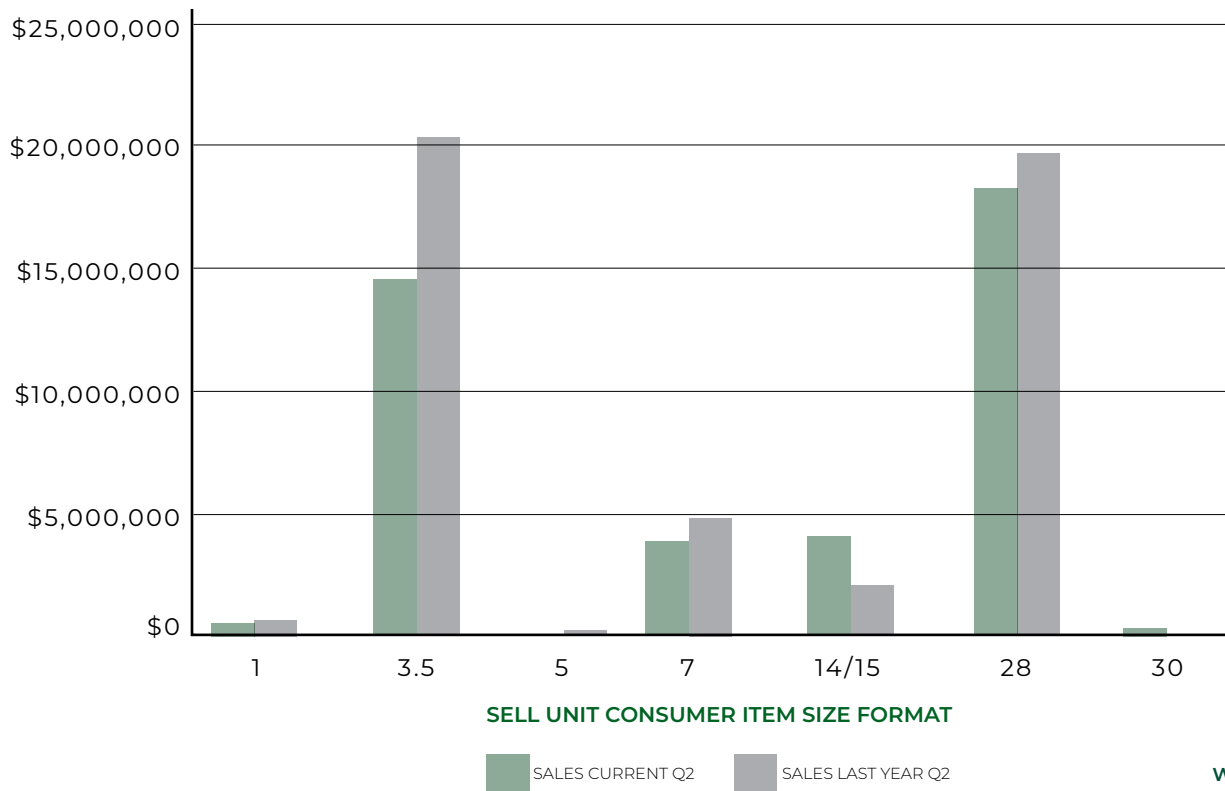
2021 Q2

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	215,929	153,901	40.3%	45,269	32,603	38.85%
	>\$5	322,465	516,988	-37.6%	46,007	78,666	-41.52%
3.5 GRAMS	\$0 - \$3	0	37,481	-100.0%	0	13,276	-100.00%
	\$3 - \$5	4,015,821	4,716,424	-14.9%	903,770	1,049,129	-13.86%
	>\$5	10,576,719	15,678,492	-32.5%	1,498,539	2,207,002	-32.10%
5 GRAMS	\$3 - \$5	0	19,063	-100.0%	0	5,385	-100.00%
7 GRAMS	\$3 - \$5	3,074,634	3,759,205	-18.2%	774,865	861,826	-10.09%
	>\$5	774,349	1,088,959	-28.9%	121,576	179,557	-32.29%
14 GRAMS	\$0 - \$3	112,648	32,828	243.2%	38,290	11,928	221.01%
	\$3 - \$5	2,253,343	525,181	329.1%	673,036	163,772	310.96%
	>\$5	914,667	146,205	525.6%	163,324	26,936	506.34%
15 GRAMS	\$0 - \$3	77,282	642,222	-88.0%	30,780	230,430	-86.64%
	\$3 - \$5	699,187	658,576	6.2%	205,560	192,450	6.81%
	>\$5	19,958	57,914	-65.5%	3,900	11,175	-65.10%
28 GRAMS	\$0 - \$3	10,834,281	10,971,688	-1.3%	4,287,724	4,350,724	-1.45%
	\$3 - \$5	6,807,626	8,804,061	-22.7%	2,103,780	2,704,492	-22.21%
	>\$5	693,906	0		127,456	0	
30 GRAMS	\$0 - \$3	28,766	0		32,550	0	

DRIED FLOWER SALES TREND BY FORMAT











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	538,394	670,889	-19.75%	91,276	111,269	-17.97%
3.5	14,592,540	20,432,397	-28.58%	2,402,309	3,269,406	-26.52%
5	0	19,063	-100.00%	0	5,385	-100.00%
7	3,848,982	4,848,164	-20.61%	896,441	1,041,383	-13.92%
14/15	4,077,084	2,062,926	97.64%	1,114,890	636,691	75.11%
28	18,335,813	19,775,749	-7.28%	6,518,960	7,055,216	-7.60%
30	28,766	0		32,550	0	



TOTAL SALES BY PRODUCT CATEGORY







JUL AUG SEPT
 2022 Q2
 JUL AUG SEPT
 2021 Q2

CATEGORY	SALES \$ CURRENT QUARTER	SALES \$ LAST YEAR'S QUARTER	SALES \$ YOY VARIANCE %	GRAMS CURRENT QUARTER	GRAMS LAST YEAR'S QUARTER	GRAMS YOY VARIANCE %
 BEVERAGES	1,900,917	1,781,378	6.71%	2,026,867	1,859,575	9.00%
 EDIBLES	6,277,008	4,953,067	26.73%	1,688,300	1,052,547	60.40%
 FLOWER	41,421,580	47,809,188	-13.36%	11,056,426	12,119,350	-8.77%
 INGESTIBLE EXTRACT	4,343,282	5,149,785	-15.66%	89,590	100,856	-11.17%
 INHALABLE EXTRACTS	29,232,507	18,040,141	62.04%	5,784,572	2,423,229	138.71%
 PRE-ROLL	26,505,340	23,383,767	13.35%	5,102,570	4,113,989	24.03%
 SEEDS	17,327	10,886	59.17%	3,895	1,964	98.32%
 TOPICALS	592,469	744,022	-20.37%	44,846	157,922	-71.60%

SALES MIX BY PRODUCT CATEGORY

2022 Q2

2021 Q2

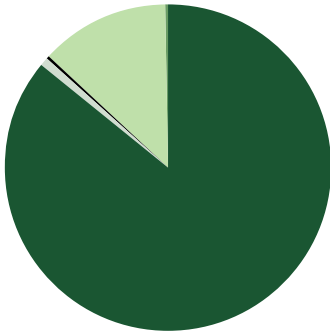
PRODUCT	SUB CATEGORY	SALES \$ CURRENT QUARTER	SALES \$ LAST YEAR'S QUARTER	SALES \$ YOY VARIANCE %	GRAMS CURRENT QUARTER	GRAMS LAST YEAR'S QUARTER	GRAMS YOY VARIANCE %
 BEVERAGES	Carbonated Drink	1,632,725	1,189,627	37.2%	1,801,277	1,386,277	29.94%
	Drink Mix	19,063	30,660	-37.8%	6,999	3,190	119.44%
	Dry Tea and Coffee	5,109	59,083	-91.4%	284	3,196	-91.10%
	Non Carbonated Drink	241,013	502,008	-52.0%	215,117	466,912	-53.93%
	Other Beverages	3,007	0		3,189	0	
 EDIBLES	Baked Goods	74,487	93,090	-20.0%	31,937	48,107	-33.61%
	Chews	5,579,857	4,178,150	33.5%	1,486,214	794,658	87.03%
	Chocolate	579,409	640,200	-9.5%	159,208	204,329	-22.08%
	Hard Candy	1,201	13,428	-91.1%	104	1,463	-92.86%
	Other Edibles	42,054	28,198	49.1%	10,836	3,991	171.54%
 FLOWER	Blend	54,973	72,818	-24.5%	16,128	20,685	-22.03%
	Hybrid	8,411,376	8,165,504	3.0%	2,140,480	1,811,926	18.13%
	Indica	20,999,035	24,791,203	-15.3%	5,845,073	6,502,318	-10.11%
	Sativa	11,956,196	14,779,664	-19.1%	3,054,746	3,784,422	-19.28%
 INGESTIBLE EXTRACT	Capsules and Pills	1,630,835	1,730,197	-5.7%	13,669	19,132	-28.56%
	Oils and Tinctures	2,274,759	3,212,496	-29.2%	40,516	63,967	-36.66%
	Other Ingestible	437,689	207,092	111.3%	35,405	17,757	99.38%
 INHALABLE EXTRACTS	Cartridge	17,785,606	14,297,009	24.4%	2,802,614	1,778,375	57.59%
	Disposable Pens	991,757	295,921	235.1%	102,292	29,274	249.42%
	Dry Sift	26,993	41,702	-35.3%	16,124	16,984	-5.06%
	Hash	890,378	737,816	20.7%	336,099	262,140	28.21%
	Other Inhalable	7,456,298	1,127,795	561.1%	2,206,939	131,206	1,582.04%
	Resin and Rosin	558,874	470,867	18.7%	74,492	58,204	27.98%
	Shatter	1,091,106	976,116	11.8%	183,428	135,044	35.83%
	Vape Kits	200,162	-272	n/a	26,012	-42	n/a
	Wax	231,333	93,189	148.2%	36,572	12,044	203.65%
 PRE-ROLL	Blend	174,859	74,994	133.2%	35,569	12,230	190.83%
	Hybrid	4,883,782	7,317,280	-33.3%	898,332	1,377,426	-34.78%
	Indica	10,658,423	7,990,793	33.4%	2,049,176	1,282,200	59.82%
	Sativa	10,588,324	7,767,869	36.3%	2,080,273	1,414,164	47.10%
	Variety Pack	199,951	232,830	-14.1%	39,221	27,969	40.23%
SEEDS	Same Strain	17,327	10,886	59.2%	3,895	1,964	98.32%
 TOPICALS	Balms	8,254	29,700	-72.2%	974	1,594	-38.92%
	Bath Products	66,797	100,243	-33.4%	19,603	127,435	-84.62%
	Creams and Lotions	330,874	499,954	-33.8%	10,337	20,240	-48.93%
	Massage Oils & Lubricants	0	20,790	-100.0%	0	382	-100.00%
	Other Topicals	186,544	93,335	99.9%	13,932	8,270	68.47%

SALES MIX BY PRODUCT CATEGORY



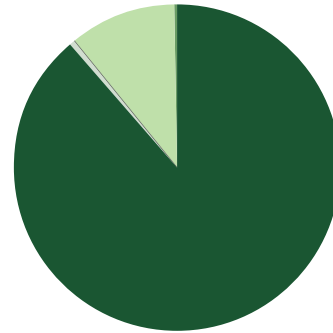
BEVERAGES

SALES \$ MIX PERCENTAGE



- 85.89% Carbonated Drink
- 1.00% Drink Mix
- 0.27% Dry Tea and Coffee
- 12.68% Non Carbonated Drink
- 0.16% Other Beverages

GRAMS MIX PERCENTAGE

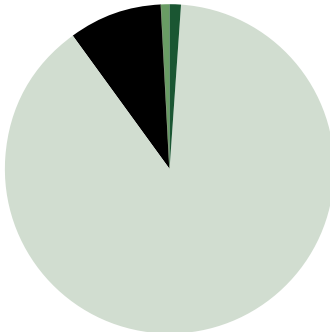


- 88.87% Carbonated Drink
- 0.35% Drink Mix
- 0.01% Dry Tea and Coffee
- 10.61% Non Carbonated Drink
- 0.16% Other Beverages



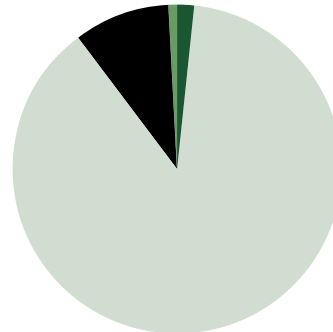
EDIBLES

SALES \$ MIX PERCENTAGE



- 1.19% Baked Goods
- 88.89% Chews
- 9.23% Chocolate
- 0.02% Hard Candy
- 0.67% Other Edibles

GRAMS MIX PERCENTAGE



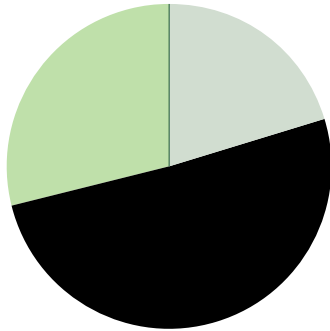
- 1.89% Baked Goods
- 88.03% Chews
- 9.43% Chocolate
- 0.01% Hard Candy
- 0.64% Other Edibles

SALES MIX BY PRODUCT CATEGORY



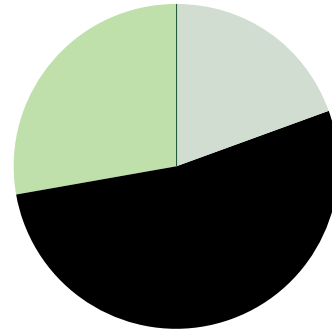
FLOWER

SALES \$ MIX PERCENTAGE



- 0.13% Blend
- 20.31% Hybrid
- 50.70% Indica
- 28.86% Sativa

GRAMS MIX PERCENTAGE

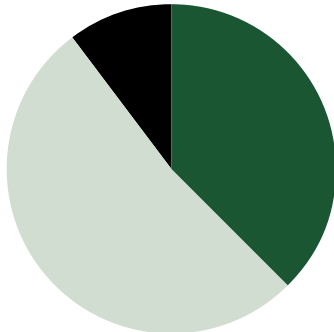


- 0.15% Blend
- 19.36% Hybrid
- 52.87% Indica
- 27.63% Sativa



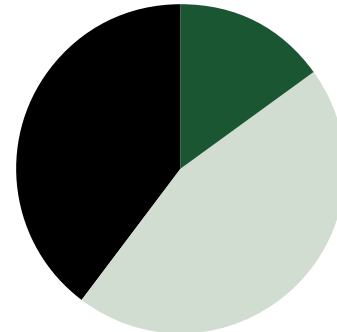
INGESTIBLE EXTRACTS

SALES \$ MIX PERCENTAGE



- 37.55% Capsules and Pills
- 52.37% Oils and Tinctures
- 10.08% Other Ingestible Extracts

GRAMS MIX PERCENTAGE



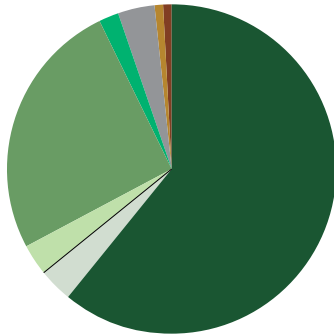
- 15.26% Capsules and Pills
- 45.22% Oils and Tinctures
- 39.52% Other Ingestible Extracts

SALES MIX BY PRODUCT CATEGORY



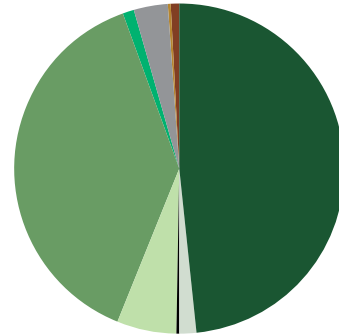
INHALABLE EXTRACTS

SALES \$ MIX PERCENTAGE



- 60.84%** Cartridge
- 3.39%** Disposable Pens
- 0.09%** Dry Sift
- 3.05%** Hash
- 25.51%** Other Inhalable Extracts
- 1.91%** Resin and Rosin
- 3.73%** Shatter
- 0.68%** Vape Kits
- 0.79%** Wax

GRAMS MIX PERCENTAGE



- 48.45%** Cartridge
- 1.77%** Disposable Pens
- 0.28%** Dry Sift
- 5.81%** Hash
- 38.15%** Other Inhalable Extracts
- 1.29%** Resin and Rosin
- 3.17%** Shatter
- 0.45%** Vape Kits
- 0.63%** Wax

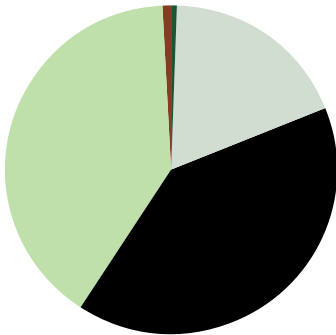


SALES MIX BY PRODUCT CATEGORY



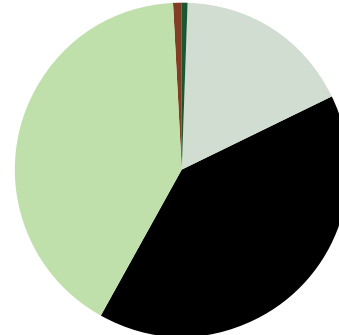
PRE-ROLL

SALES \$ MIX PERCENTAGE



- 0.66% Blend
- 18.43% Hybrid
- 40.21% Indica
- 39.95% Sativa
- 0.75% Variety Pack

GRAMS MIX PERCENTAGE

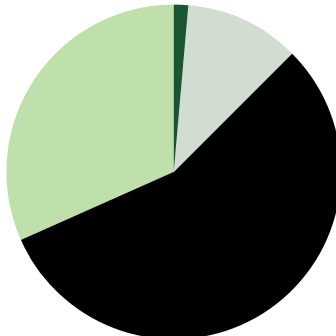


- 0.70% Blend
- 17.61% Hybrid
- 40.16% Indica
- 40.77% Sativa
- 0.77% Variety Pack



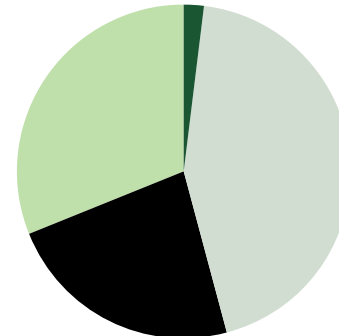
TOPICALS

SALES \$ MIX PERCENTAGE



- 1.39% Balms
- 11.27% Bath Products
- 55.85% Creams and Lotions
- 31.49% Other Topicals

GRAMS MIX PERCENTAGE



- 2.17% Balms
- 43.71% Bath Products
- 23.05% Creams and Lotions
- 31.07% Other Topicals

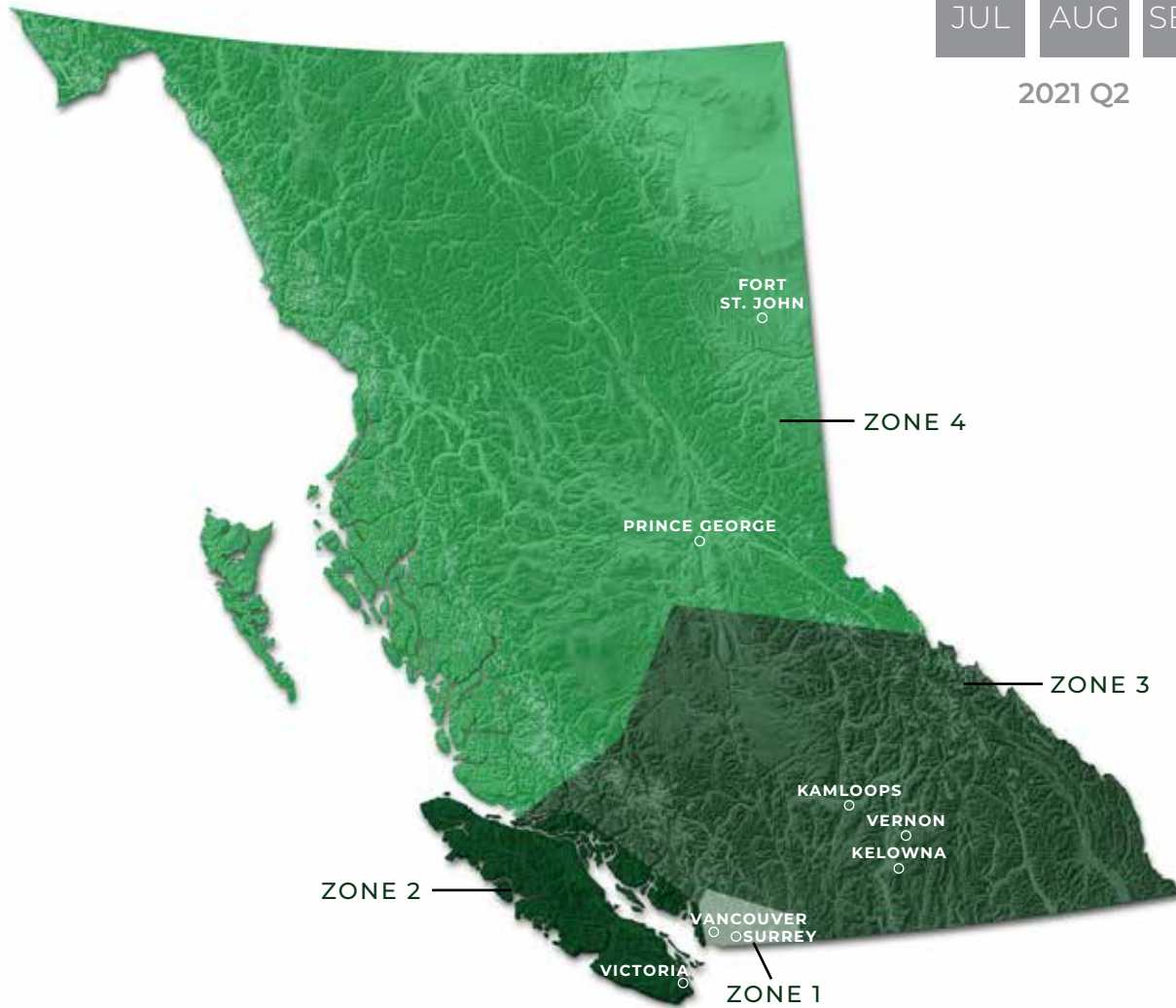
GROWING ACCESS POINTS

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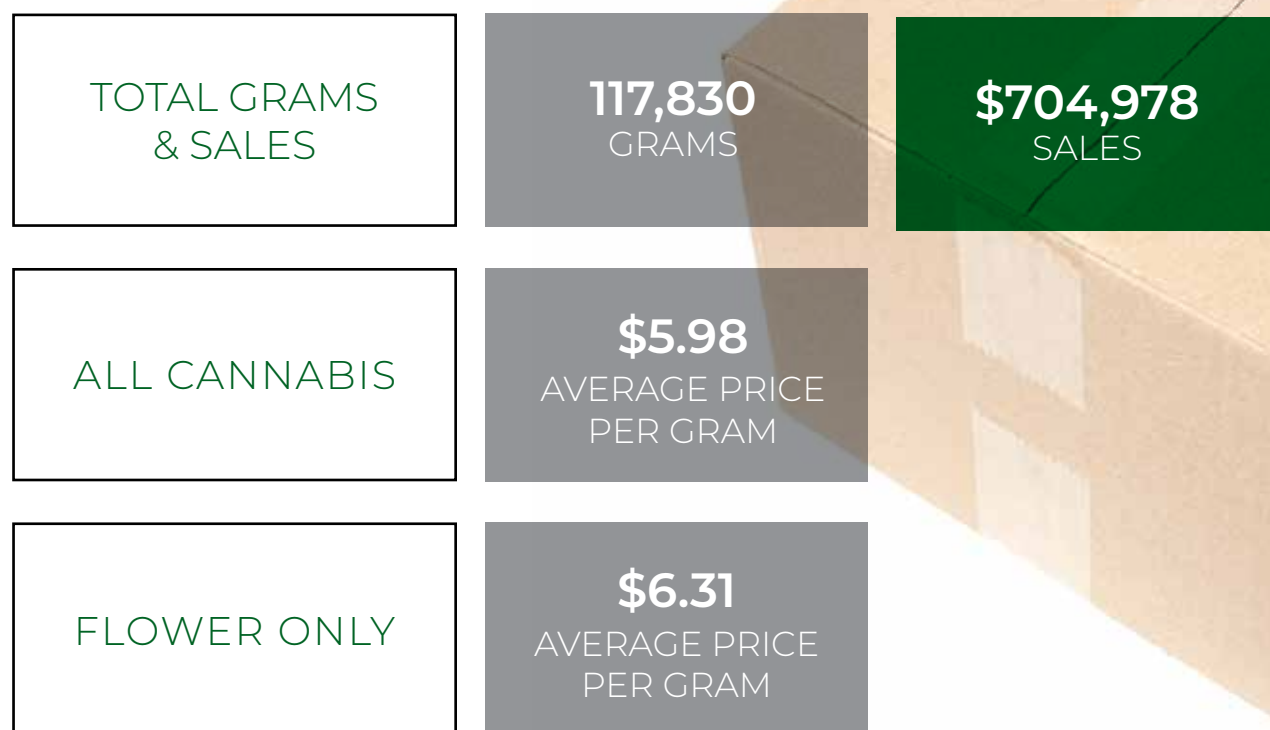


SHIPPING ZONE*	SALES \$ CURRENT QUARTER	SALES \$ LAST YEAR'S QUARTER	SALES \$ YOY VARIANCE %	GRAMS CURRENT QUARTER	GRAMS LAST YEAR'S QUARTER	GRAMS YOY VARIANCE %	STORE COUNT CURRENT QUARTER	STORE COUNT LAST YEAR'S QUARTER
1	43,605,333	37,198,280	17.2%	9,696,553	7,450,918	30%	113	84
2	25,031,307	24,362,249	2.7%	5,897,143	5,292,798	11%	123	103
3	25,822,731	25,336,864	1.9%	6,235,886	5,647,432	10%	160	149
4	15,640,007	14,706,750	6.3%	3,922,327	3,384,018	16%	59	51

*Nominal postal codes with unassigned shipping zones

DIRECT DELIVERY SALES SUMMARY*

CURRENT QUARTER

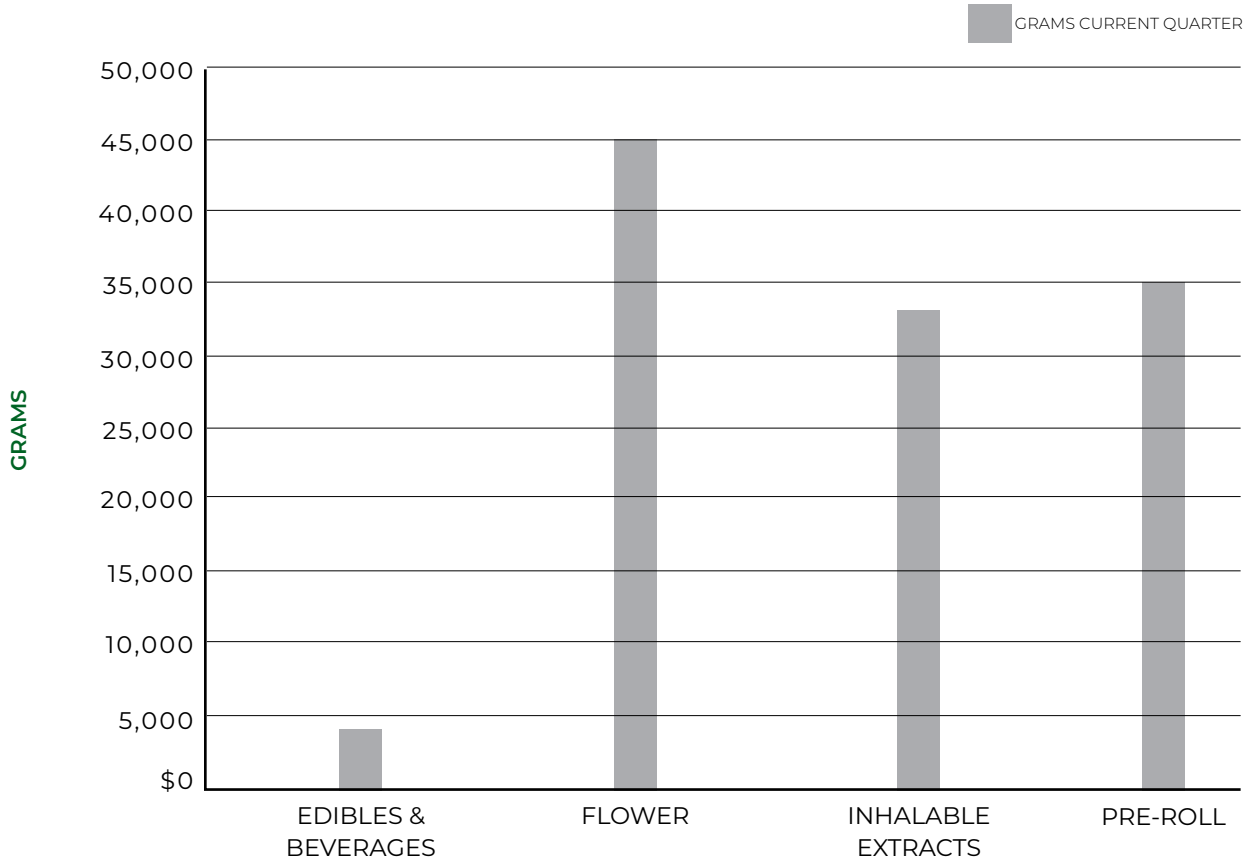
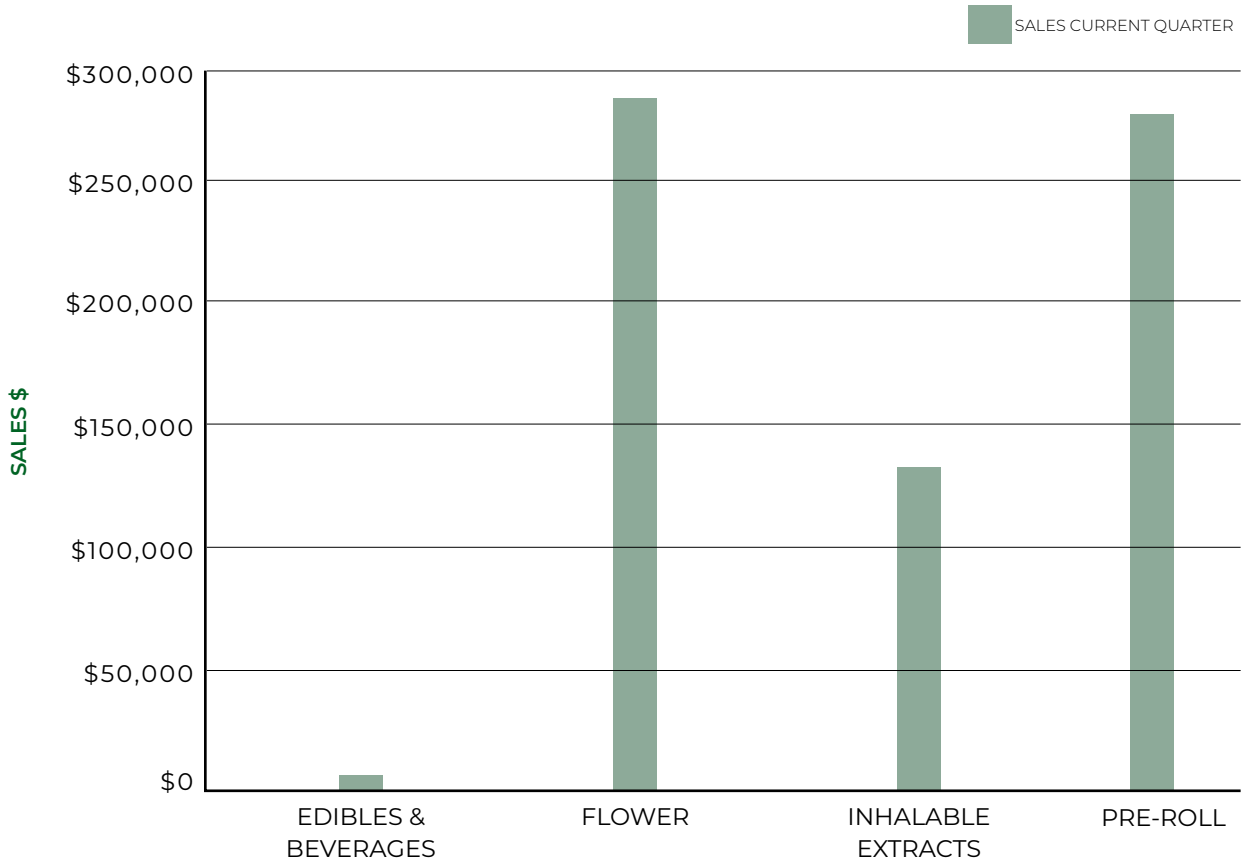


DIRECT DELIVERY SUB CATEGORY SALES*

SUB CATEGORY	SALES CURRENT QUARTER	GRAMS CURRENT QUARTER
Edibles & Beverages	6,657	4,160
Flower	285,633	45,234
Inhalable Extracts	133,448	32,904
Pre-roll	279,240	35,532





*Sales reported during the quarter as sold.

DIRECT DELIVERY SUB CATEGORY SALES*



*Sales reported during the quarter as sold.

DIRECT DELIVERY SALES MIX BY PRODUCT CATEGORY*

PRODUCT	SUB CATEGORY	SALES \$ CURRENT QUARTER	GRAMS CURRENT QUARTER
BEVERAGES 	DRINK MIX	677	791
EDIBLES 	CHOCOLATE	3,430	2,053
	HARD CANDY	512	61
	OTHER EDIBLES	2,039	1,255
FLOWER 	HYBRID	43,607	5,250
	INDICA	139,079	25,914
	SATIVA	102,947	14,070
INHALABLE EXTRACTS 	CARTRIDGE	3,565	624
	DRY SIFT	1,391	432
	HASH	3,564	1,392
	OTHER INHALABLE EXTRACTS	64,597	23,712
	RESIN AND ROSIN	60,331	6,744
PRE-ROLL 	HYBRID	31,326	3,528
	INDICA	102,453	15,660
	SATIVA	145,462	16,344

*Sales reported during the quarter as sold.