

BC CANNABIS WHOLESALE

QUARTERLY

SALES

REPORT



**LIQUOR
DISTRIBUTION
BRANCH**

Q3 2023

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

OCT NOV DEC
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QUARTER YEAR-OVER-YEAR SUMMARY

	2023 Q3	2022 Q3
+33.0% WHOLESALE GRAMS	34,263,480 GRAMS	25,769,365 GRAMS
+20.5% WHOLESALE SALES	\$136,679,594	\$113,414,081
-9.4% PRICE ALL CANNABIS	\$3.99 PER GRAM	\$4.40 PER GRAM
-7.5% PRICE DRIED FLOWER	\$3.32 PER GRAM	\$3.58 PER GRAM
+6.4% RETAIL STORE GROWTH*	496 STORES	466 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
2023 Q3		
OCT	NOV	DEC
2022 Q3		

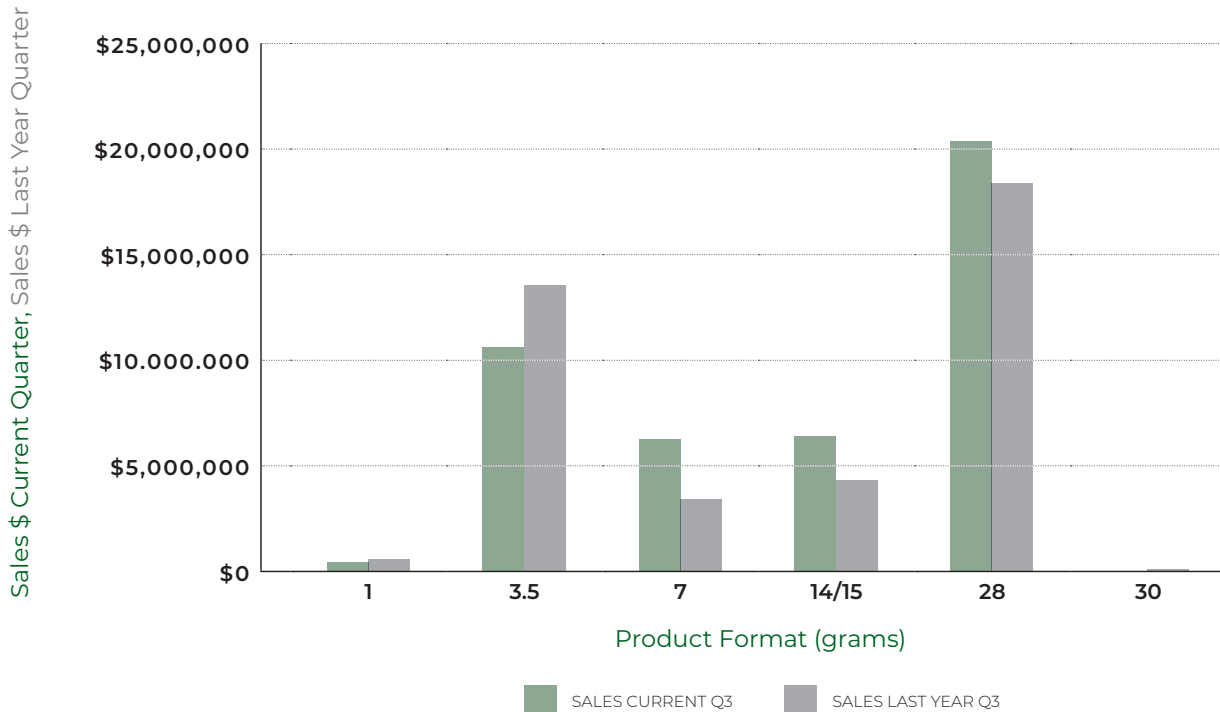
SELL UNIT CONSUMER ITEM SIZE FORMAT	PRICE PER GRAM BAND	SALES \$ CURRENT QUARTER	SALES \$ LAST YEAR'S QUARTER	SALES \$ YOY VARIANCE %	GRAMS CURRENT QUARTER	GRAMS LAST YEAR'S QUARTER	GRAMS YOY VARIANCE %
1 GRAM	\$3 - \$5	243,272	203,980	19.3%	50,343	42,763	17.7%
	>\$5	160,536	361,422	-55.6%	26,624	54,476	-51.1%
3.5 GRAMS	\$0 - \$3	0	19,920	-100.0%	0	6,972	-100.0%
	\$3 - \$5	5,060,820	4,584,367	10.4%	1,197,536	1,056,892	13.3%
	>\$5	5,497,100	8,886,386	-38.1%	797,426	1,266,920	-37.1%
7 GRAMS	\$0 - \$3	242,689	19,988	1,114.2%	90,937	7,231	1,157.6%
	\$3 - \$5	4,746,105	2,798,054	69.6%	1,209,243	730,835	65.5%
	>\$5	1,237,340	617,170	100.5%	205,198	99,582	106.1%
14 GRAMS	\$0 - \$3	1,865,397	229,880	711.5%	665,700	85,078	682.5%
	\$3 - \$5	3,661,271	2,792,499	31.1%	946,232	813,176	16.4%
	>\$5	783,245	721,454	8.6%	134,218	129,444	3.7%
15 GRAMS	\$0 - \$3	1,386	17,122	-91.9%	540	6,300	-91.4%
	\$3 - \$5	1,858	576,315	-99.7%	540	169,170	-99.7%
28 GRAMS	\$0 - \$3	13,515,417	10,824,561	24.9%	5,820,780	4,447,940	30.9%
	\$3 - \$5	6,817,205	6,817,909	0.0%	2,068,108	2,133,320	-3.1%
	>\$5	0	669,646	-100.0%	0	123,424	-100.0%
30 GRAMS	\$0 - \$3	0	76,291	-100.0%	0	45,990	-100.0%

DRIED FLOWER SALES TREND BY FORMAT

OCT NOV DEC
 2023 Q3
 OCT NOV DEC
 2022 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	403,808	565,402	-28.6%	76,967	97,239	-20.8%
3.5	10,557,921	13,490,672	-21.7%	1,994,962	2,330,783	-14.4%
7	6,226,134	3,435,213	81.2%	1,505,378	837,648	79.7%
14/15	6,313,157	4,337,270	45.6%	1,747,230	1,203,168	45.2%
28	20,332,623	18,312,115	11.0%	7,888,888	6,704,684	17.7%
30	0	76,291	-100.0%	0	45,990	-100.0%






FLOWER SALE TREND BY FORMAT



TOTAL SALES BY PRODUCT CATEGORY

OCT NOV DEC
2023 Q3

OCT NOV DEC
2022 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	2,284,278	1,884,370	21.2%	528,565	434,018	21.8%
 EDIBLES	7,677,737	6,458,137	18.9%	2,190,279	1,502,410	45.8%
 FLOWER	43,833,642	40,216,964	9.0%	1,258,112	1,208,932	4.1%
 INGESTIBLE EXTRACTS ¹	4,653,188	5,371,911	-13.4%	235,937	295,872	-20.3%
 INHALABLE EXTRACTS ²	47,854,009	34,064,634	40.5%	2,428,271	1,679,887	44.5%
 PRE-ROLL	29,509,765	24,625,619	19.8%	2,546,693	2,062,149	23.5%
 SEEDS	13,837	12,641	9.5%	873	586	49.0%
 TOPICALS	853,138	779,806	9.4%	46,254	40,358	14.6%







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

OCT NOV DEC
2023 Q3

OCT NOV DEC
2022 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 Drink	1,969,352	1,578,608	24.8%	460,236	363,520	26.6%
	Drink Mix	16,753	19,335	-13.4%	4,235	5,652	-25.1%
	Dry Tea and Coffee	29,561	13,015	127.1%	3,879	3,480	11.5%
	Non Carbonated Drink	268,612	271,805	-1.2%	60,215	61,030	-1.3%
	Other Beverages	0	1,606	-100.0%	0	336	-100.0%
 EDIBLES	Baked Goods	121,789	154,876	-21.4%	31,257	46,934	-33.4%
	Chews	6,840,571	5,553,341	23.2%	1,938,376	1,210,275	60.2%
	Chocolate	634,471	747,746	-15.1%	202,810	244,661	-17.1%
	Hard Candy	18,783	1,118	1,580.3%	4,308	324	1,229.6%
	Other Edibles	62,122	1,056	5,781.5%	13,528	216	6,163.0%
 FLOWER	Blend	59,114	46,098	28.2%	2,603	1,932	34.7%
	Hybrid	8,597,412	8,041,732	6.9%	267,559	256,540	4.3%
	Indica	21,780,231	20,835,602	4.5%	605,770	597,941	1.3%
	Sativa	12,976,544	11,293,533	14.9%	375,327	352,519	6.5%
	Variety Pack	420,342	0	-	6,853	0	-
 INGESTIBLE EXTRACTS	Capsule and Pills	2,193,714	1,724,021	27.2%	114,953	94,032	22.2%
	Oils and Tinctures	2,066,463	2,500,748	-17.4%	89,656	109,922	-18.4%
	Other Ingestibles ¹	393,011	1,147,142	-65.7%	31,328	91,918	-65.9%
 INHALABLE EXTRACTS	Cartridge	23,153,478	19,094,052	21.3%	969,980	787,999	23.1%
	Disposable Pens	2,011,395	1,012,944	98.6%	134,198	66,677	101.3%
	Dry Sift	45,989	28,825	59.5%	3,999	2,435	64.2%
	Hash	1,318,862	1,135,278	16.2%	68,207	56,390	21.0%
	Other Inhalables ²	18,369,471	10,019,511	83.3%	1,127,035	650,766	73.2%
	Resin and Rosin	1,365,823	888,907	53.7%	48,620	28,706	69.4%
	Shatter	1,357,238	1,473,383	-7.9%	62,716	65,976	-4.9%
	Vape Kits	170,029	175,785	-3.3%	11,048	11,422	-3.3%
	Wax	61,725	235,948	-73.8%	2,468	9,516	-74.1%
 PRE-ROLL	Blend	1,912,863	1,044,763	83.1%	195,939	87,378	124.2%
	Hybrid	4,386,084	3,106,991	41.2%	441,423	304,427	45.0%
	Indica	10,861,029	10,374,741	4.7%	929,077	866,506	7.2%
	Sativa	10,440,848	9,392,971	11.2%	892,702	766,945	16.4%
	Variety Pack	1,908,941	706,153	170.3%	87,552	36,893	137.3%
 SEEDS	Same Strain	12,112	12,641	-4.2%	813	586	38.7%
	Variety Pack	1,725	0	-	60	0	-
 TOPICALS	Balms	231,269	163,578	41.4%	11,324	7,424	52.5%
	Bath Products	333,396	221,429	50.6%	23,614	18,780	25.7%
	Creams and Lotions	270,153	368,495	-26.7%	10,386	13,057	-20.5%
	Massage Oils and Lubricants	4,131	0	-	342	0	-
	Other Topicals ³	14,188	26,303	-46.1%	588	1,097	-46.4%

¹Contains ingestible extracts, such as Jolts, Glitches, etc. Availability may be impacted by Health Canada regulations.

²Includes infused pre-rolls.

³Includes face masks and other topical oils.

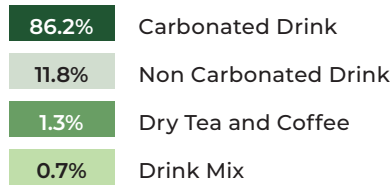
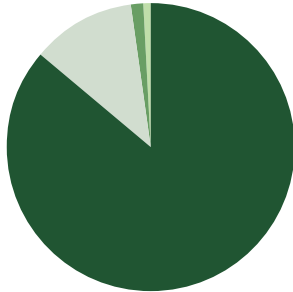
SALES MIX BY PRODUCT CATEGORY

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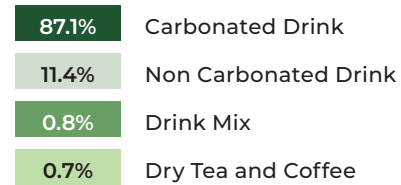
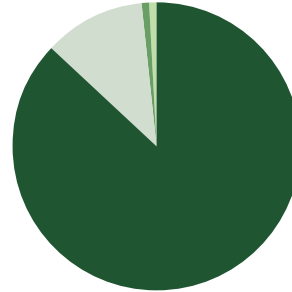


BEVERAGES

SALES \$ MIX PERCENTAGE

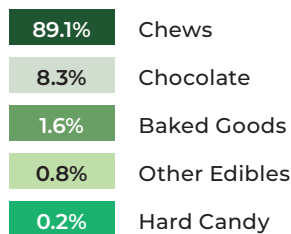
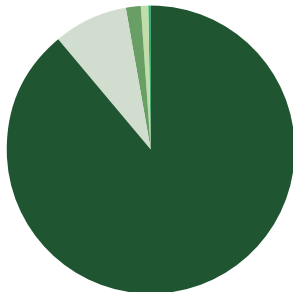


SELL UNITS MIX PERCENTAGE

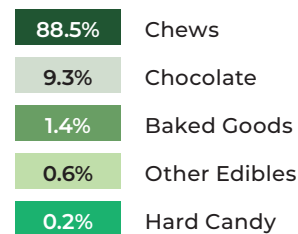
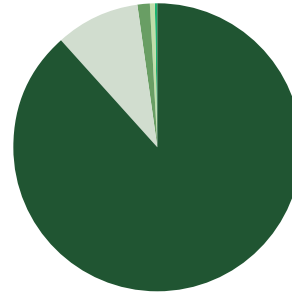


EDIBLES

SALES \$ MIX PERCENTAGE



SELL UNITS MIX PERCENTAGE



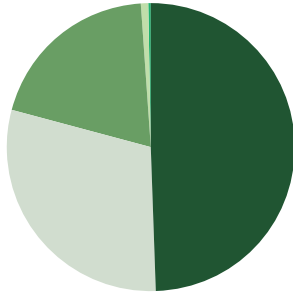
SALES MIX BY PRODUCT CATEGORY

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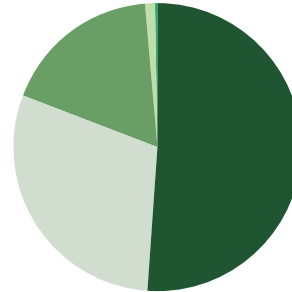
FLOWER

SALES \$ MIX PERCENTAGE



- 49.7% Indica
- 29.6% Sativa
- 19.6% Hybrid
- 1.0% Variety Pack
- 0.1% Blend

GRAMS MIX PERCENTAGE

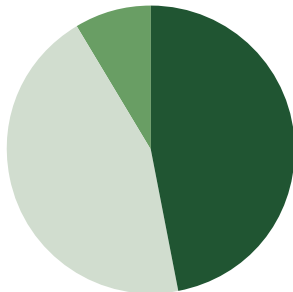


- 51.2% Indica
- 29.9% Sativa
- 17.7% Hybrid
- 1.1% Variety Pack
- 0.1% Blend



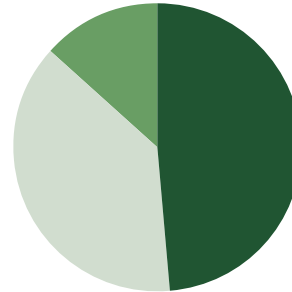
INGESTIBLE EXTRACTS

SALES \$ MIX PERCENTAGE



- 47.1% Capsule and Pills
- 44.4% Oils and Tinctures
- 8.4% Other Ingestible Extracts

SELL UNITS MIX PERCENTAGE



- 48.7% Capsule and Pills
- 38.0% Oils and Tinctures
- 13.3% Other Ingestible Extracts

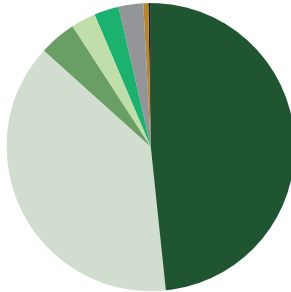
SALES MIX BY PRODUCT CATEGORY

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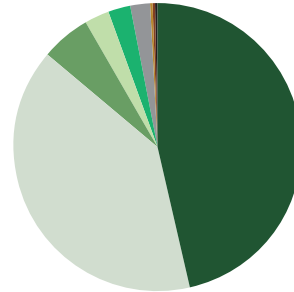
INHALABLE EXTRACTS

SALES \$ MIX PERCENTAGE



- 48.4%** Cartridge
- 38.4%** Other Inhalable Extracts*
- 4.2%** Disposable Pens
- 2.9%** Resin and Rosin
- 2.8%** Shatter
- 2.8%** Hash
- 0.4%** Vape Kits
- 0.1%** Wax
- 0.1%** Dry Sift

SELL UNITS MIX PERCENTAGE



- 46.4%** Other Inhalable Extracts*
- 39.9%** Cartridge
- 5.5%** Disposable Pens
- 2.8%** Hash
- 2.6%** Shatter
- 2.0%** Resin and Rosin
- 0.5%** Vape Kits
- 0.2%** Dry Sift
- 0.1%** Wax



*Includes infused pre-rolls.

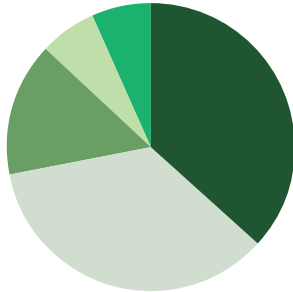
SALES MIX BY PRODUCT CATEGORY

OCT NOV DEC
 2023 Q3
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 2022 Q3



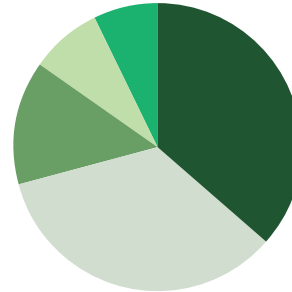
PRE-ROLL

SALES \$ MIX PERCENTAGE



- 36.8%** Indica
- 35.4%** Sativa
- 14.9%** Hybrid
- 6.5%** Blend
- 6.5%** Variety Pack

GRAMS MIX PERCENTAGE

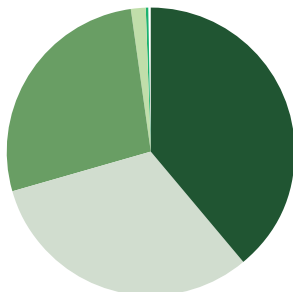


- 36.6%** Indica
- 34.3%** Sativa
- 14.0%** Hybrid
- 8.0%** Blend
- 7.0%** Variety Pack



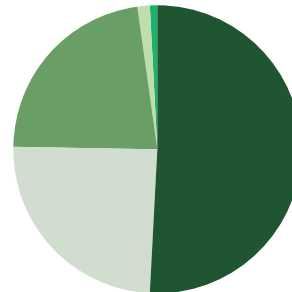
TOPICALS

SALES \$ MIX PERCENTAGE



- 39.1%** Bath Products
- 31.7%** Creams and Lotions
- 27.1%** Balms
- 1.7%** Other Topicals*
- 0.5%** Massage Oils and Lubricants

SELL UNITS MIX PERCENTAGE

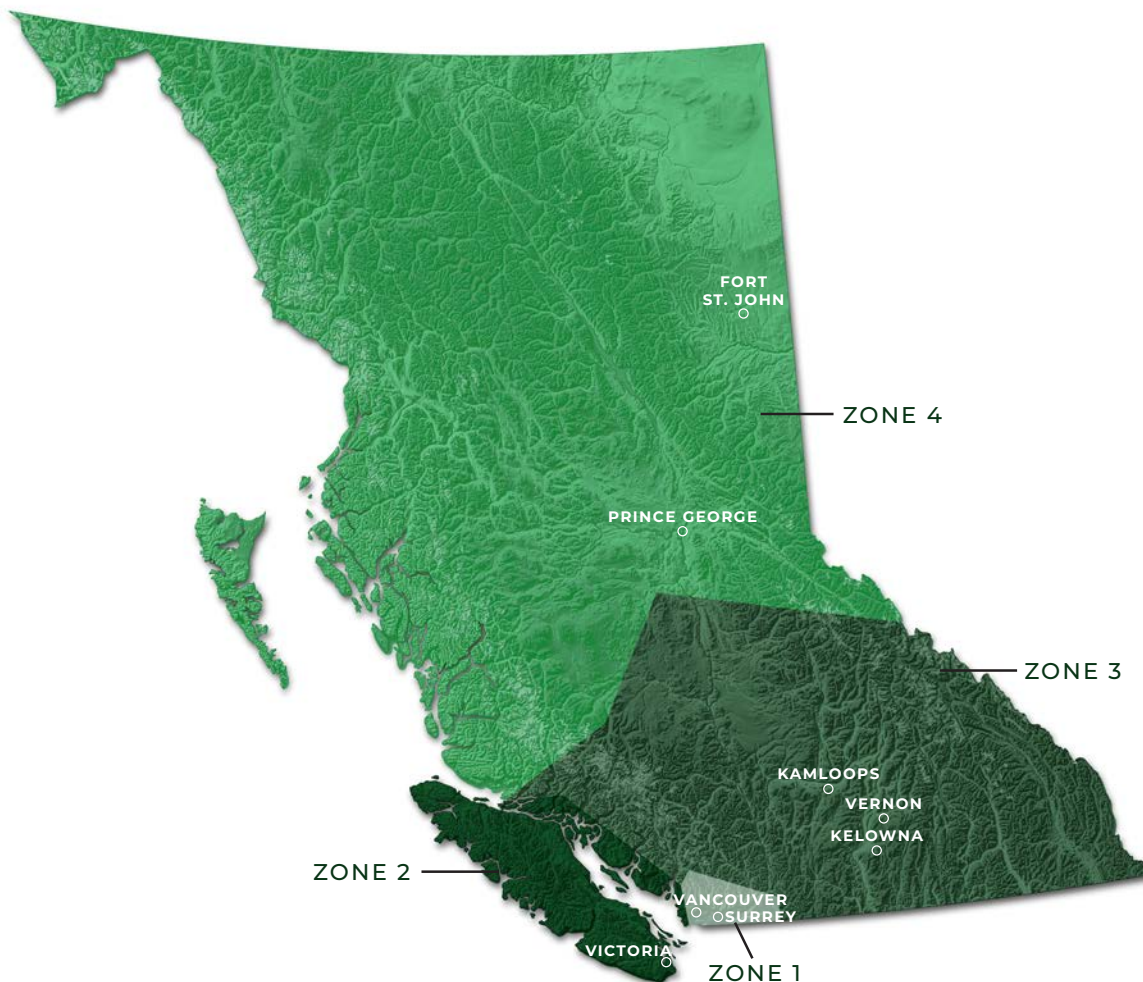


- 51.1%** Bath Products
- 24.5%** Balms
- 22.5%** Creams and Lotions
- 1.3%** Other Topicals*
- 0.7%** Massage Oils and Lubricants

*Includes face masks and other topical oils.

GROWING ACCESS POINTS

OCT NOV DEC
 2023 Q3
 OCT NOV DEC
 2022 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	58,326,864	45,941,207	27.0%	4,232,336	3,083,085	37.3%	142	121
2	29,919,156	26,091,396	14.7%	2,030,581	1,677,066	21.1%	123	125
3	29,385,712	25,280,033	16.2%	1,903,188	1,584,273	20.1%	168	165
4	18,882,098	15,932,320	18.5%	1,056,009	866,568	21.9%	66	58

*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
2023 Q3
OCT NOV DEC
2022 Q3

QUARTER YEAR-OVER-YEAR SUMMARY

	2023 Q3	2022 Q3
+94.0% WHOLESALE GRAMS	702,478 GRAMS	362,180 GRAMS
+23.0% WHOLESALE SALES	\$3,167,456	\$2,575,585
-36.6% PRICE ALL CANNABIS	\$4.51 PER GRAM	\$7.11 PER GRAM
-39.1% PRICE DRIED FLOWER	\$3.93 PER GRAM	\$6.45 PER GRAM

*Sales reported during the quarter as sold.

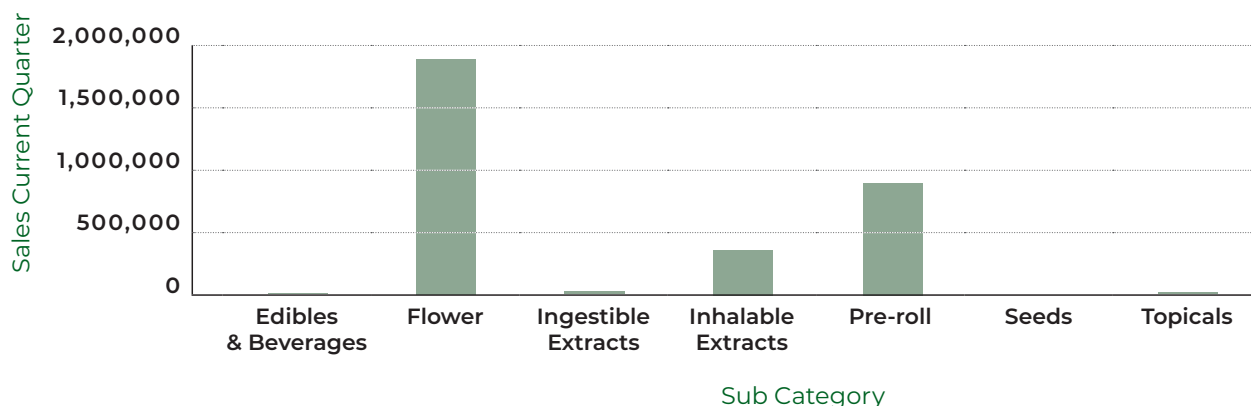
DIRECT DELIVERY SUB CATEGORY SALES*

OCT NOV DEC
 2023 Q3

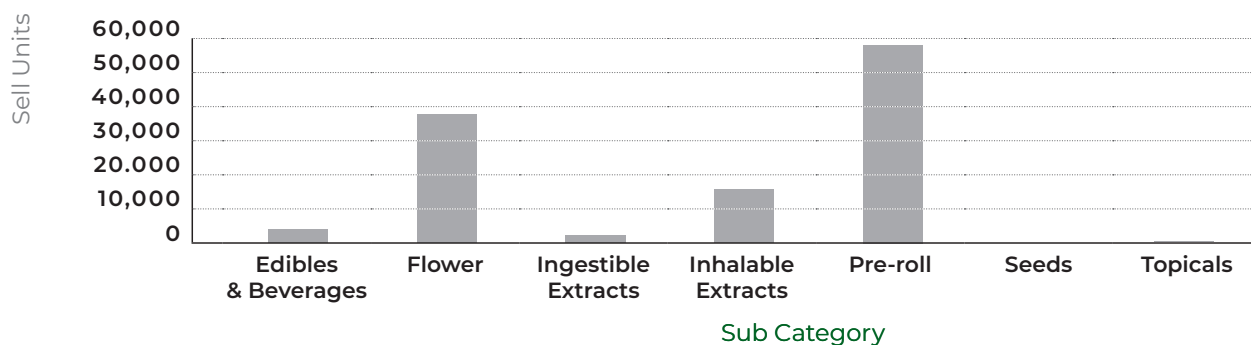
OCT NOV DEC
 2022 Q3

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	16,169	12,945	24.9%	3,439	1,210	184.2%
Flower	1,863,265	1,254,754	48.5%	37,852	38,796	-2.4%
Ingestible Extracts	24,502	8,773	179.3%	2,214	340	551.2%
Inhalable Extracts	358,054	348,970	2.6%	15,637	11,778	32.8%
Pre-roll	896,215	945,003	-5.2%	57,987	74,069	-21.7%
Seeds	761	0	-	30	0	-
Topicals	8,489	5,140	65.2%	288	216	33.3%

SALES CURRENT QUARTER










SELL UNITS CURRENT QUARTER



*Sales reported during the quarter as sold.

DIRECT DELIVERY SALES MIX BY PRODUCT CATEGORY*

OCT	NOV	DEC
2023 Q3		
OCT	NOV	DEC
2022 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 Drink	706	11,753	-94.0%	184	730	-74.8%
	Drink Mix	270	667	-59.6%	96	240	-60.0%
 EDIBLES	Baked Goods	274	424	-35.4%	132	204	-35.3%
	Chews	11,266	100	11,156.6%	1,836	36	5,000.0%
	Chocolate	2,874	0	-	930	0	-
	Hard Candy	264	0	-	96	0	-
	Other Edibles	516	0	-	165	0	-
 FLOWER	Blend	5,515	0	-	187	0	-
	Hybrid	287,847	578,477	-50.2%	7,752	17,750	-56.3%
	Indica	1,021,316	407,167	150.8%	19,991	13,960	43.2%
	Sativa	548,587	269,111	103.9%	9,922	7,086	40.0%
 INGESTIBLE EXTRACTS	Capsule and Pills	0	3,959	-100.0%	0	72	-100.0%
	Oils and Tinctures	4,451	1,290	244.9%	324	96	237.5%
	Other Ingestibles ¹	20,052	3,523	469.1%	1,890	172	998.8%
 INHALABLE EXTRACTS	Cartridge	93,591	92,964	0.7%	3,758	3,232	16.3%
	Disposable Pens	81,319	128,352	-36.6%	2,952	4,584	-35.6%
	Dry Sift	1,236	155	700.0%	96	12	700.0%
	Hash	14,027	1,058	1,225.3%	783	-12	-6,625.0%
	Other Inhalables ²	106,686	25,893	312.0%	5,615	188	2,886.7%
	Resin and Rosin	30,031	44,132	-32.0%	953	1,260	-24.4%
	Shatter	31,164	56,416	-44.8%	1,480	2,514	-41.1%
 PRE-ROLL	Blend	22,296	0	-	2,160	0	-
	Hybrid	94,232	187,819	-49.8%	7,390	16,080	-54.0%
	Indica	531,828	687,260	-22.6%	34,363	54,792	-37.3%
	Sativa	166,894	18,395	807.3%	13,688	341	3914.1%
	Variety Pack	80,966	51,529	57.1%	386	2,856	-86.5%
SEEDS	Same Strain	761	0	-	30	0	-
 TOPICALS	Balms	2,151	1,434	50.0%	72	48	50.0%
	Bath Products	1,347	898	50.1%	48	42	14.3%
	Creams and Lotions	4,146	2,808	47.7%	153	126	21.4%
	Other Topicals ³	844	0	-	15	0	-

¹Contains ingestible extracts, such as Jolts, Glitches, etc. Availability may be impacted by Health Canada regulations.

²Includes infused pre-rolls.

³Includes face masks and other topical oils.



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