

BC CANNABIS WHOLESAL

QUARTERLY

SALES

REPORT



**LIQUOR
DISTRIBUTION
BRANCH**

Q4 2022/23

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)

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REPORT SUMMARY

JAN FEB MAR
2022 Q4
JAN FEB MAR
2021 Q4

QUARTER YEAR-OVER-YEAR SUMMARY

	2022 Q4	2021 Q4
+29.66% WHOLESALE GRAMS	27,873,086 GRAMS	21,497,080 GRAMS
+16.59% WHOLESALE SALES	\$119,696,932	\$102,667,855
-10.08% PRICE ALL CANNABIS	\$4.29 PER GRAM	\$4.78 PER GRAM
-8.63% PRICE DRIED FLOWER	\$3.50 PER GRAM	\$3.83 PER GRAM
+15.44% RETAIL STORE GROWTH*	486 STORES	421 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
 2022 Q4
 JAN FEB MAR
 2021 Q4

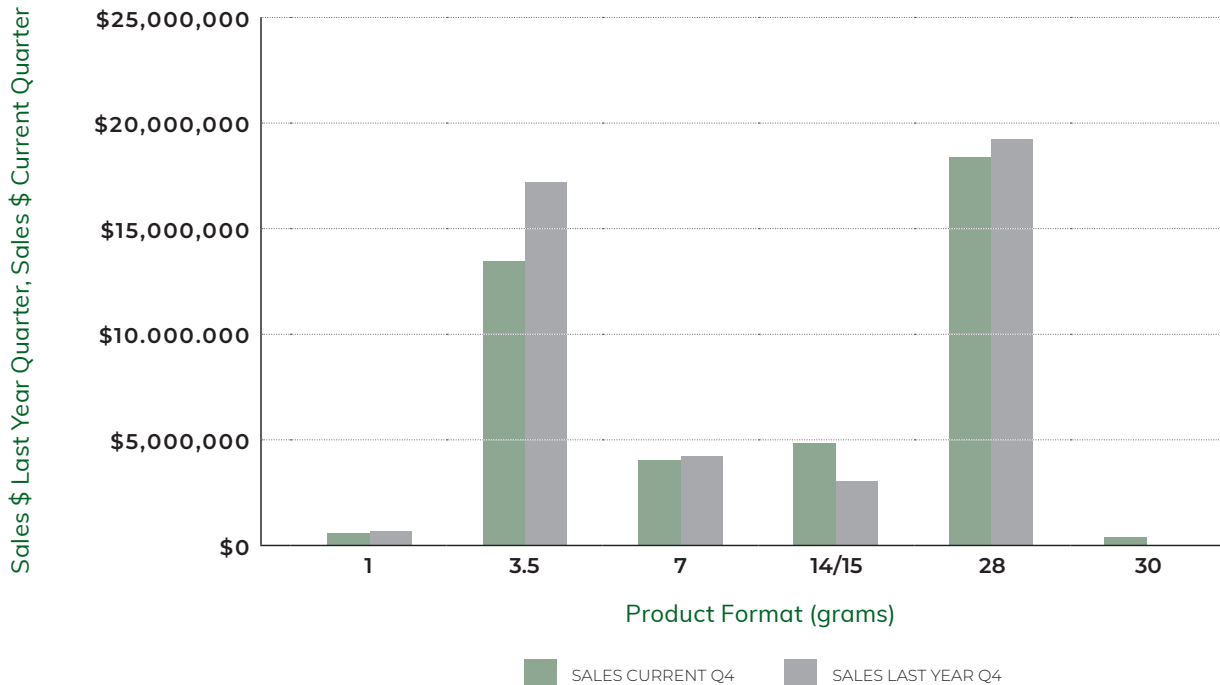
SELL UNIT CONSUMER ITEM SIZE FORMAT	PRICE PER GRAM BAND	SALES \$ CURRENT QUARTER	SALES \$ LAST YEAR'S QUARTER	SALES \$ YOY VARIANCE %	GRAMS CURRENT QUARTER	GRAMS LAST YEAR'S QUARTER	GRAMS YOY VARIANCE %
1 GRAM	\$3 - \$5	227,799	190,209	19.8%	47,713	39,875	19.7%
	>\$5	273,878	347,790	-21.3%	41,105	50,780	-19.1%
3.5 GRAMS	\$0 - \$3	15,043	0	100%	5,373	0	100%
	\$3 - \$5	4,491,727	3,579,520	25.5%	1,045,233	810,625	28.9%
	>\$5	8,863,898	13,598,297	-34.8%	1,272,282	1,932,882	-34.2%
7 GRAMS	\$0 - \$3	138,938	0	100%	49,903	0	100%
	\$3 - \$5	3,303,590	3,128,968	5.6%	847,476	742,693	14.1%
	>\$5	530,221	1,055,715	-49.8%	82,649	179,914	-54.1%
14 GRAMS	\$0 - \$3	779,227	0	100%	306,040	0	100%
	\$3 - \$5	2,635,916	1,372,149	92.1%	764,722	437,136	74.9%
	>\$5	1,020,526	679,871	50.1%	177,086	118,986	48.8%
15 GRAMS	\$0 - \$3	122,912	248,254	-50.5%	48,060	90,945	-47.2%
	\$3 - \$5	261,521	705,865	-63.0%	78,240	210,975	-62.9%
	>\$5	0	84,403	-100.0%	0	16,590	-100.0%
28 GRAMS	\$0 - \$3	12,366,082	11,888,827	4.0%	5,138,252	4,657,380	10.3%
	\$3 - \$5	5,596,046	6,966,369	-19.7%	1,689,464	2,182,348	-22.6%
	>\$5	435,967	367,086	18.8%	80,080	66,584	20.3%
30 GRAMS	\$0 - \$3	269,142	7,038	3,724.1%	138,720	9,000	1,441.3%

DRIED FLOWER SALES TREND BY FORMAT

JAN FEB MAR
 2022 Q4
 JAN FEB MAR
 2021 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	501,676	537,999	-6.8%	88,818	90,655	-2.0%
3.5	13,370,669	17,177,816	-22.2%	2,322,887	2,743,545	-15.3%
7	3,972,749	4,184,683	-5.1%	980,028	922,607	6.2%
14/15	4,820,103	3,090,542	56.0%	1,374,148	874,632	57.1%
28	18,398,094	19,222,283	-4.3%	6,907,796	6,906,592	0.0%
30	269,142	7,038	3,724.1%	138,720	9,000	1,441.3%

FLOWER SALE TREND BY FORMAT











TOTAL SALE BY PRODUCT CATEGORY

JAN FEB MAR
2022 Q4
 JAN FEB MAR
 2021 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	2,077,470	1,754,548	18.4%	471,580	398,816	18.2%
 EDIBLES	6,683,445	5,872,000	13.8%	1,549,682	1,300,218	19.2%
 FLOWER	41,332,433	44,220,361	-6.5%	1,241,387	1,314,247	-5.5%
 INGESTIBLE EXTRACTS	5,806,567	4,954,148	17.2%	327,748	249,048	31.6%
 INHALABLE EXTRACTS	37,688,364	23,455,278	60.7%	1,895,954	1,005,920	88.5%
 PRE-ROLL	25,374,696	21,693,352	17.0%	2,125,495	1,905,845	11.5%
 SEEDS	119,090	142,483	-16.4%	5,264	4,558	15.5%
 TOPICALS	614,867	575,685	6.8%	32,609	29,220	11.6%

SALES MIX BY PRODUCT CATEGORY

JAN FEB MAR
2022 Q4
JAN FEB MAR
2021 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	1,722,303	1,297,538	32.7%	391,039	299,351	30.6%
	Drink Mix	16,373	25,252	-35.2%	4,445	7,511	-40.8%
	Dry Tea and Coffee	16,227	58,929	-72.5%	4,045	6,603	-38.7%
	Non Carbonated Drink	322,451	348,193	-7.4%	72,027	80,197	-10.2%
	Other Beverages	115	24,636	-99.5%	24	5,154	-99.5%
 EDIBLES	Baked Goods	130,940	97,426	34.4%	38,348	24,480	56.7%
	Chews	5,967,375	5,087,601	17.3%	1,316,457	1,032,067	27.6%
	Chocolate	584,554	678,851	-13.9%	194,637	241,491	-19.4%
	Hard Candy	576	7,445	-92.3%	240	2,012	-88.1%
	Other Edibles	0	677	-100.0%	0	168	-100.0%
 FLOWER	Blend	67,849	0	100%	3,011	0	100%
	Hybrid	9,594,872	8,321,370	15.3%	319,106	256,430	24.4%
	Indica	20,676,758	24,176,098	-14.5%	590,014	682,310	-13.5%
	Sativa	10,992,953	11,722,893	-6.2%	329,256	375,507	-12.3%
 INGESTIBLE EXTRACTS	Capsule and Pills	1,836,611	1,637,855	12.1%	105,321	97,177	8.4%
	Oils and Tinctures	2,327,427	2,867,269	-18.8%	99,868	119,364	-16.3%
	Other Ingestibles	1,642,530	449,025	265.8%	122,559	32,507	277.0%
 INHALABLE EXTRACTS	Cartridge	20,386,624	15,360,607	32.7%	841,474	626,386	34.3%
	Disposable Pens	1,253,679	585,961	114.0%	83,904	46,406	80.8%
	Dry Sift	38,686	42,634	-9.3%	3,269	3,554	-8.0%
	Hash	1,084,962	863,571	25.6%	54,172	43,865	23.5%
	Other Inhalables*	12,200,198	4,197,255	190.7%	798,590	200,576	298.1%
	Resin and Rosin	997,558	859,929	16.0%	32,680	26,538	23.1%
	Shatter	1,382,574	1,521,168	-9.1%	63,061	58,058	8.6%
	Vape Kits	204,856	0	100%	13,311	0	100%
	Wax	139,228	24,169	476.1%	5,493	539	919.1%
 PRE-ROLL	Blend	799,043	740,166	8.0%	47,575	27,535	72.8%
	Hybrid	3,570,085	4,729,773	-24.5%	332,720	509,858	-34.7%
	Indica	10,392,995	8,862,234	17.3%	885,444	740,843	19.5%
	Sativa	9,559,103	7,252,045	31.8%	818,195	623,274	31.3%
	Variety Pack	1,053,469	109,134	865.3%	41,561	4,335	858.7%
 SEEDS	Same Strain	119,090	142,483	-16.4%	5,264	4,558	15.5%
 TOPICALS	Balms	149,129	107,166	39.2%	6,832	4,705	45.2%
	Bath Products	133,993	111,422	20.3%	12,382	11,839	4.6%
	Creams and Lotions	290,289	322,903	-10.1%	11,020	11,189	-1.5%
	Massage Oils and Lubricants	24,919	0	100%	1,686	0	100%
	Other Topicals	16,537	34,195	-51.6%	689	1,487	-53.7%

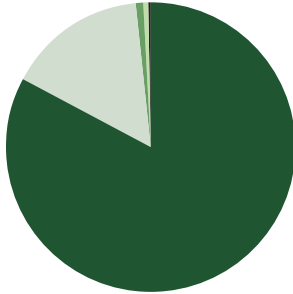
*Includes infused pre-rolls.

SALES MIX BY PRODUCT CATEGORY



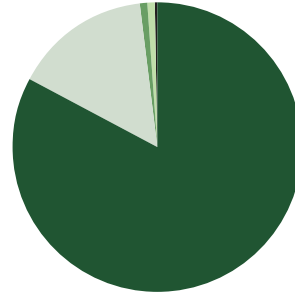
BEVERAGES

SALES \$ MIX PERCENTAGE



82.9%	Carbonated Drink
15.5%	Non Carbonated Drink
0.8%	Drink Mix
0.8%	Dry Tea and Coffee
0.0%	Other Beverages

SELL UNITS MIX PERCENTAGE

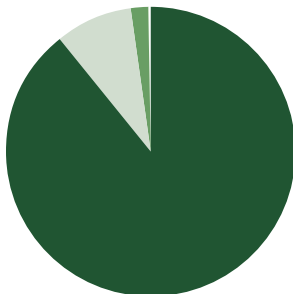


82.9%	Carbonated Drink
15.3%	Non Carbonated Drink
0.9%	Drink Mix
0.9%	Dry Tea and Coffee
0.0%	Other Beverages



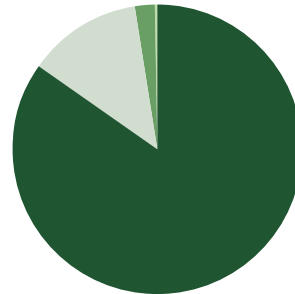
EDIBLES

SALES \$ MIX PERCENTAGE



89.3%	Chews
8.7%	Chocolate
2.9%	Baked Goods
0.0%	Hard Candy

SELL UNITS MIX PERCENTAGE



85.0%	Chews
12.6%	Chocolate
2.5%	Baked Goods
0.0%	Hard Candy

SALES MIX BY PRODUCT CATEGORY



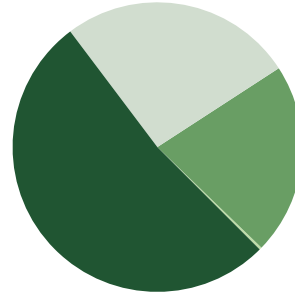
FLOWER

SALES \$ MIX PERCENTAGE



50.0%	Indica
26.6%	Sativa
23.2%	Hybrid
0.2%	Blend

GRAMS MIX PERCENTAGE

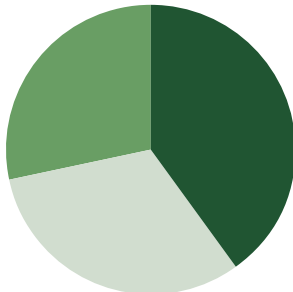


52.2%	Indica
26.4%	Sativa
21.2%	Hybrid
0.2%	Blend



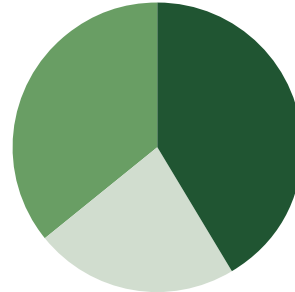
INGESTIBLE EXTRACTS

SALES \$ MIX PERCENTAGE



40.1%	Oils and Tinctures
31.6%	Capsule and Pills
28.3%	Other Ingestible Extracts

SELL UNITS MIX PERCENTAGE



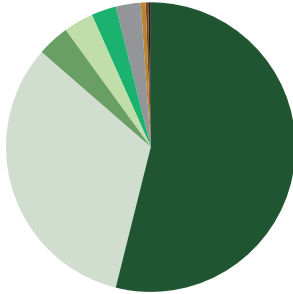
37.4%	Other Ingestible Extracts
32.1%	Capsule and Pills
30.5%	Oils and Tinctures

SALES MIX BY PRODUCT CATEGORY



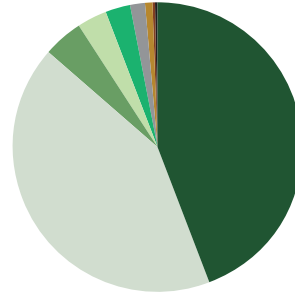
INHALABLE EXTRACTS

SALES \$ MIX PERCENTAGE



54.1%	Cartridge
32.4%	Other Inhalable Extracts*
3.7%	Shatter
3.3%	Disposable Pens
2.9%	Hash
2.6%	Resin and Rosin
0.5%	Vape Kits
0.4%	Wax
0.1%	Dry Sift

SELL UNITS MIX PERCENTAGE



44.4%	Cartridge
42.1%	Other Inhalable Extracts*
4.4%	Disposable Pens
3.3%	Shatter
2.9%	Hash
1.7%	Resin and Rosin
0.7%	Vape Kits
0.3%	Wax
0.2%	Dry Sift



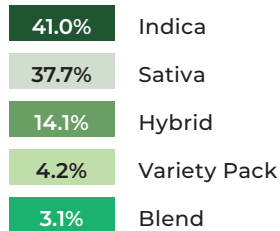
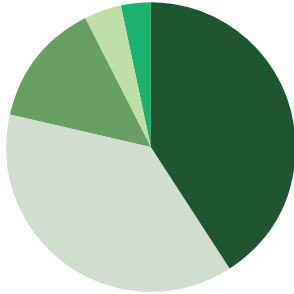
*Includes infused pre-rolls.

SALES MIX BY PRODUCT CATEGORY

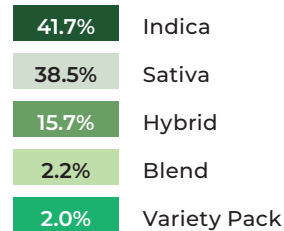
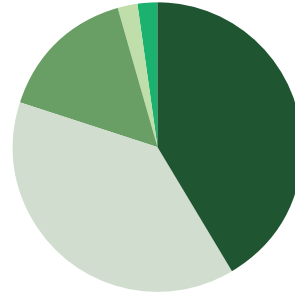


PRE-ROLL

SALES \$ MIX PERCENTAGE

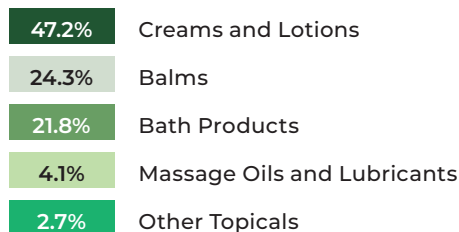
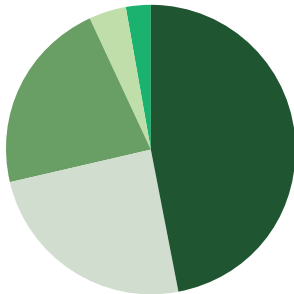


GRAMS MIX PERCENTAGE

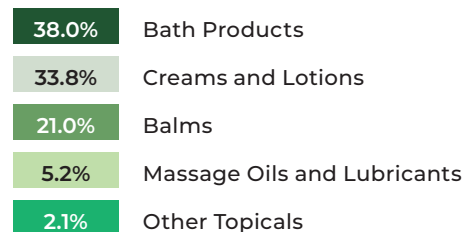
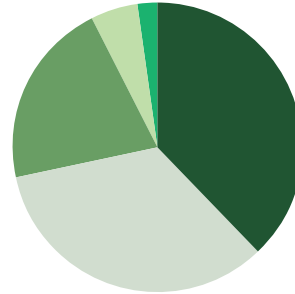


TOPICALS

SALES \$ MIX PERCENTAGE



SELL UNITS MIX PERCENTAGE



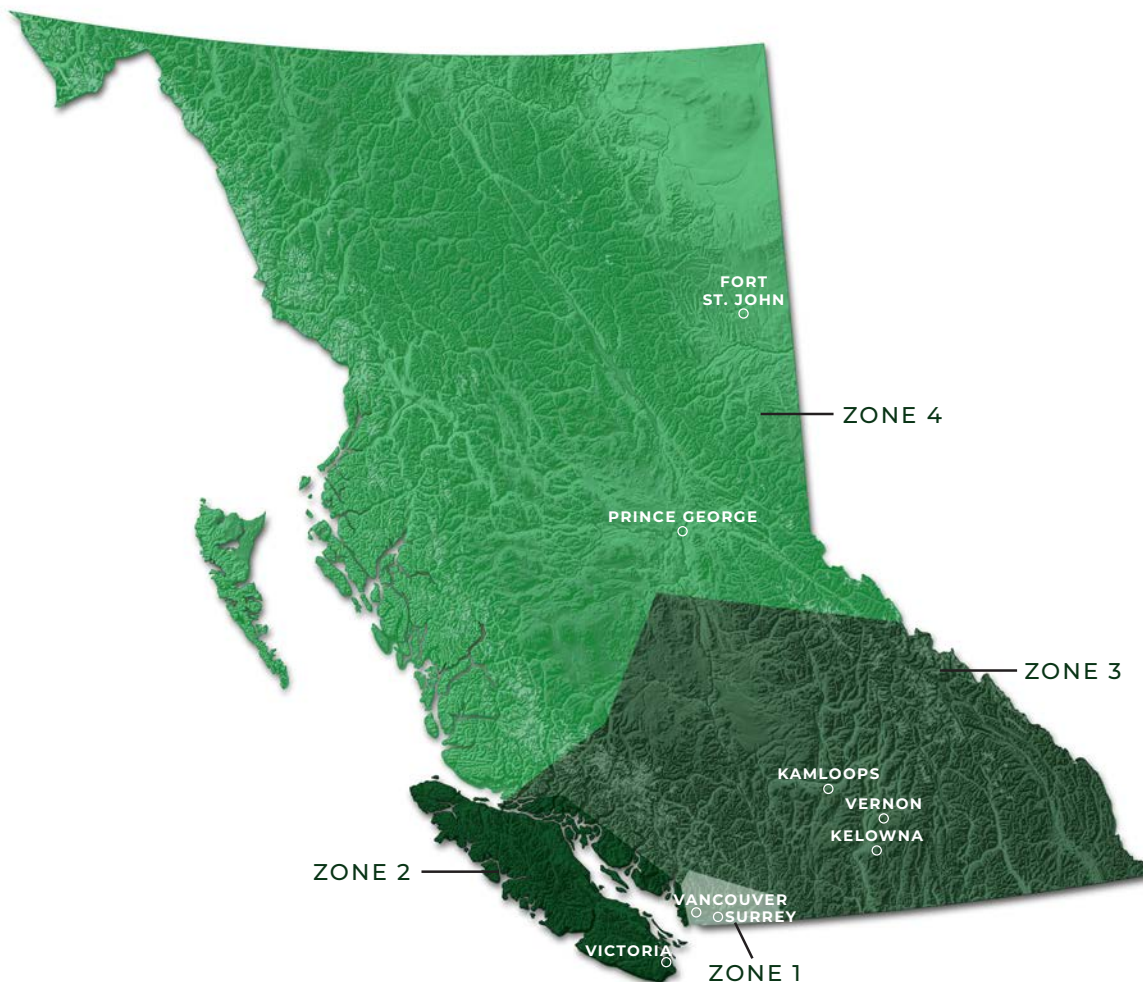
GROWING ACCESS POINTS

JAN FEB MAR

2022 Q4

JAN FEB MAR

2021 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	50,137,920	39,779,682	26.0%	3,411,227	2,582,553	32.0%	133	99
2	26,540,914	24,321,266	9.1%	1,701,794	1,477,007	15.0%	124	115
3	26,191,578	23,393,667	12.0%	1,638,510	1,375,528	19.0%	168	151
4	16,679,198	14,952,666	11.5%	886,690	756,993	17.0%	63	56

DIRECT DELIVERY SALES SUMMARY*

CURRENT QUARTER

TOTAL GRAMS
& SALES

469,421
GRAMS

\$2,459,766
SALES

ALL CANNABIS

\$5.24
AVERAGE PRICE
PER GRAM

FLOWER ONLY

\$4.19
AVERAGE PRICE
PER GRAM

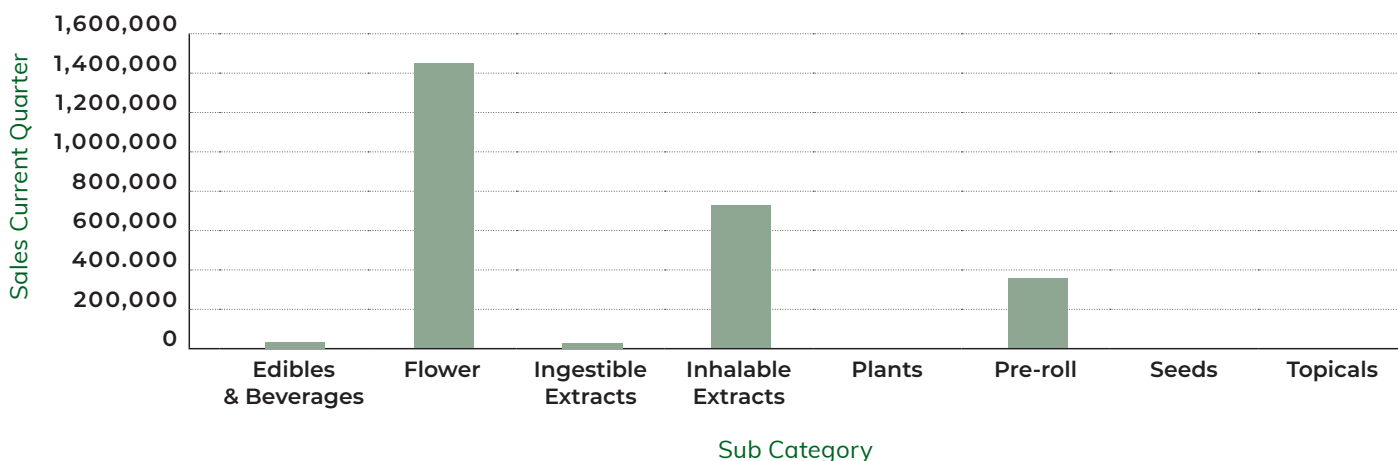


*Sales reported during the quarter as sold.

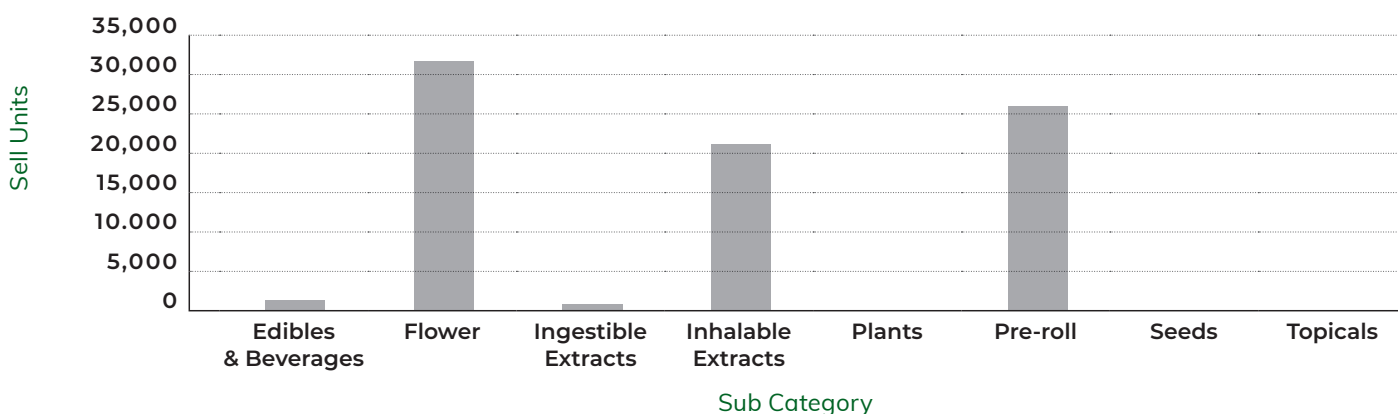
DIRECT DELIVERY SUB CATEGORY SALES*

SUB CATEGORY	SALES \$ CURRENT QUARTER	SELL UNITS CURRENT QUARTER
Edibles & Beverages	15,498	1,424
Flower	1,400,452	31,249
Ingestible Extracts	5,898	262
Inhalable Extracts	699,374	21,290
Plants	2,812	102
Pre-roll	332,373	25,724
Seeds	771	30
Topicals	2,589	132

SALES CURRENT QUARTER








SELL UNITS CURRENT QUARTER



*Sales reported during the quarter as sold.

DIRECT DELIVERY SALES

MIX BY PRODUCT CATEGORY*





CATEGORY	SUB CATEGORY	SALES \$ CURRENT QUARTER	SELL UNITS CURRENT QUARTER
 BEVERAGES	Drink Mix	2,737	170
 EDIBLES	Chews	2,168	780
	Other Edibles	10,592	474
 FLOWER	Hybrid	299,006	7,665
	Indica	647,224	17,058
	Sativa	448,012	6,388
	Variety Pack	6,209	138
 INGESTIBLE EXTRACTS	Oils and Tinctures	1,843	72
	Other Ingestible Extracts	4,055	190
 INHALABLE EXTRACTS	Cartridge	132,023	4,592
	Disposable Pens	126,112	4,504
	Dry Sift	773	60
	Hash	14,581	804
	Other Inhalable Extracts ¹	72,957	3,344
	Resin and Rosin	313,520	6,246
	Shatter	39,407	1,740

*Sales reported during the quarter as sold.

¹Includes infused pre-rolls.

DIRECT DELIVERY SALES

MIX BY PRODUCT CATEGORY*

CATEGORY	SUB CATEGORY	SALES \$ CURRENT QUARTER	SELL UNITS CURRENT QUARTER
 PLANTS	Same Strain	2,412	90
	Variety Pack	400	12
 PRE-ROLL	Hybrid	78,302	7,119
	Indica	143,599	11,262
	Sativa	67,078	5,435
	Variety Pack	43,395	1,908
 SEEDS	Same Strain	771	30
 TOPICALS	Bath Products	374	30
	Creams and Lotions	421	24
	Other Topicals	1,794	78

*Sales reported during the quarter as sold.



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