

BC CANNABIS WHOLESALE

QUARTERLY

SALES

REPORT



**LIQUOR
DISTRIBUTION
BRANCH**

FY2024 Q1

APR | MAY | JUN

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

APR MAY JUN

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QUARTER YEAR-OVER-YEAR SUMMARY

	2024 Q1	2023 Q1
+18.8% WHOLESALE GRAMS	36,418,336 GRAMS	30,654,980 GRAMS
+10.6% WHOLESALE SALES	\$140,504,318	\$127,052,701
-6.9% PRICE ALL CANNABIS	\$3.86 PER GRAM	\$4.14 PER GRAM
-6.3% PRICE DRIED FLOWER	\$3.19 PER GRAM	\$3.40 PER GRAM
+3.7% RETAIL STORE GROWTH*	505 STORES	487 STORES

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

DRIED FLOWER PRICE PER GRAM BANDS

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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	229,917	221,410	3.8%	47,142	46,100	2.3%
	>\$5	178,696	197,728	-9.6%	29,602	30,702	-3.6%
3.5 GRAMS	\$0 - \$3	1,894	0	-	760	0	-
	\$3 - \$5	4,748,913	4,386,847	8.3%	1,118,681	1,014,993	10.2%
	>\$5	4,164,245	7,779,567	-46.5%	635,667	1,141,221	-44.3%
7 GRAMS	\$0 - \$3	119,294	286,787	-58.4%	42,665	97,447	-56.2%
	\$3 - \$5	4,756,705	3,205,637	48.4%	1,241,016	808,143	53.6%
	>\$5	2,115,812	557,195	279.7%	357,721	93,961	280.7%
14 GRAMS	\$0 - \$3	2,005,502	1,307,381	53.4%	739,746	497,882	48.6%
	\$3 - \$5	3,565,027	2,667,271	33.7%	943,306	718,172	31.3%
	>\$5	388,739	841,340	-53.8%	69,090	139,636	-50.5%
15 GRAMS	\$0 - \$3	0	105,973	-100.0%	0	35,490	-100.0%
	\$3 - \$5	0	127,477	-100.0%	0	37,050	-100.0%
28 GRAMS	\$0 - \$3	14,516,414	13,559,226	7.1%	6,337,408	5,681,844	11.5%
	\$3 - \$5	7,155,366	6,165,279	16.1%	2,232,608	1,815,856	23.0%
	>\$5	0	200,524	-100.0%	0	36,036	-100.0%
30 GRAMS	\$0 - \$3	0	177,959	-100.0%	0	91,890	-100.0%

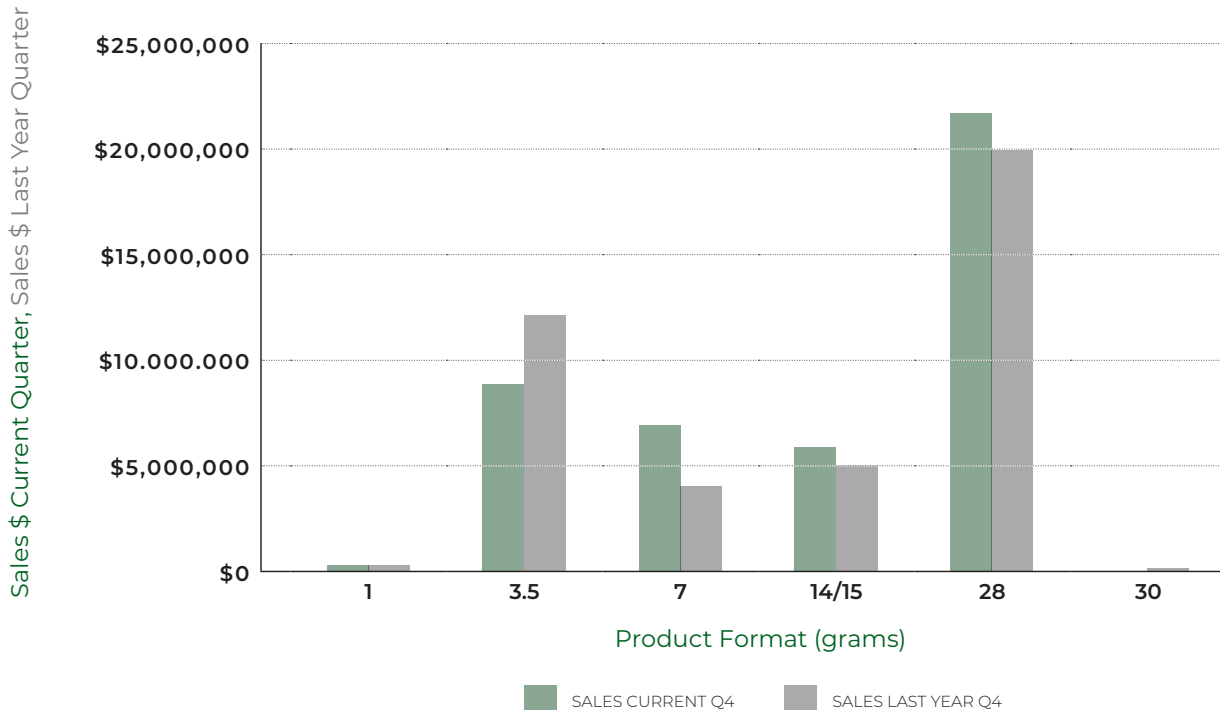
DRIED FLOWER SALES TREND BY FORMAT

APR MAY JUN
 FY2024 Q1

APR MAY JUN
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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	408,613	419,138	-2.5%	76,744	76,802	-0.1%
3.5	8,915,053	12,166,414	-26.7%	1,755,107	2,156,252	-18.6%
7	6,991,811	4,049,619	72.7%	1,641,402	999,551	64.2%
14/15	5,959,268	5,049,443	18.0%	1,752,142	1,428,230	22.7%
28	21,671,780	19,925,029	8.8%	8,570,016	7,533,736	13.8%
30	0	177,959	-100.0%	0	91,890	-100.0%


FLOWER SALE TREND BY FORMAT



TOTAL SALES BY PRODUCT CATEGORY

APR MAY JUN
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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	3,177,166	2,414,124	31.6%	720,053	551,331	30.6%
 EDIBLES	7,247,445	6,088,600	19.0%	2,205,006	1,484,847	48.5%
 FLOWER	43,946,524	41,787,601	5.2%	1,243,914	1,209,463	2.8%
 INGESTIBLE EXTRACTS ¹	4,330,297	5,247,802	-17.5%	222,232	328,795	-32.4%
 INHALABLE EXTRACTS ²	49,652,255	42,054,402	18.1%	2,566,742	2,148,577	19.5%
 PRE-ROLL	31,436,572	28,697,672	9.5%	2,749,363	2,398,626	14.6%
 SEEDS	94,598	89,578	5.6%	4,460	3,998	11.6%
 TOPICALS	619,461	672,923	-7.9%	26,633	31,509	-15.5%




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

APR MAY JUN
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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	2,834,072	2,044,812	38.6%	645,830	473,674	36.3%
	Drink Mix	1,945	6,427	-69.7%	636	1,691	-62.4%
	Dry Tea and Coffee	21,101	43,758	-51.8%	2,484	5,817	-57.3%
	Non Carbonated Drink	320,047	319,126	0.3%	71,103	70,149	1.4%
 EDIBLES	Baked Goods	85,087	126,475	-32.7%	20,287	37,101	-45.3%
	Chews	6,645,095	5,503,653	20.7%	2,022,628	1,295,145	56.2%
	Chocolate	495,844	458,472	8.2%	157,553	152,601	3.2%
	Hard Candy	5,930	0	-	1,692	0	-
	Other Edibles	15,488	0	-	2,846	0	-
 FLOWER	Blend	0	93,040	-100.0%	0	4,140	-100.0%
	Hybrid	5,676,227	7,991,882	-29.0%	185,081	259,137	-28.6%
	Indica	24,431,784	20,759,052	17.7%	654,475	579,044	13.0%
	Sativa	13,243,661	12,943,628	2.3%	395,337	367,142	7.7%
	Variety Pack	594,853	0	-	9,021	0	-
 INGESTIBLE EXTRACTS	Capsule and Pills	2,118,791	1,820,027	16.4%	111,354	103,240	7.9%
	Oils and Tinctures	1,764,743	2,146,388	-17.8%	74,464	93,078	-20.0%
	Other Ingestibles ¹	446,763	1,281,386	-65.1%	36,414	132,477	-72.5%
 INHALABLE EXTRACTS	Cartridge	22,648,503	20,691,011	9.5%	966,704	856,602	12.9%
	Disposable Pens	3,400,520	1,486,394	128.8%	175,763	103,747	69.4%
	Dry Sift	53,326	36,553	45.9%	4,637	3,178	45.9%
	Hash	1,168,627	1,194,081	-2.1%	62,198	59,815	4.0%
	Infused Pre-roll	18,599,951	14,673,170	26.8%	1,197,754	960,810	24.7%
	Other Inhalables ²	1,122,699	1,515,076	-25.9%	50,795	57,834	-12.2%
	Resin and Rosin	1,378,198	933,483	47.6%	47,681	31,600	50.9%
	Shatter	1,200,174	1,290,183	-7.0%	57,702	59,757	-3.4%
	Vape Kits	80,257	234,451	-65.8%	3,508	15,234	-77.0%
 PRE-ROLL	Blend	1,857,673	1,303,867	42.5%	188,566	137,679	37.0%
	Hybrid	3,462,239	3,780,922	-8.4%	326,742	321,109	1.8%
	Indica	12,532,147	11,238,976	11.5%	1,098,473	948,472	15.8%
	Sativa	11,683,608	11,308,493	3.3%	1,057,671	946,437	11.8%
	Variety Pack	1,900,906	1,065,413	78.4%	77,911	44,929	73.4%
 SEEDS	Same Strain	54,920	65,571	-16.2%	2,662	3,163	-15.8%
	Variety Pack	39,678	24,006	65.3%	1,798	835	115.3%
 TOPICALS	Balms	273,037	154,548	76.7%	9,706	6,955	39.6%
	Bath Products	93,617	116,508	-19.6%	6,964	9,454	-26.3%
	Creams and Lotions	221,775	387,740	-42.8%	8,487	14,331	-40.8%
	Massage Oils and Lubricants	3,310	6,917	-52.1%	274	468	-41.5%
	Other Topicals ³	27,722	7,209	284.5%	1,202	301	299.3%

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

²Includes diamonds, wax, crumble, etc.

³Includes face masks, other topical oils/sprays, etc.

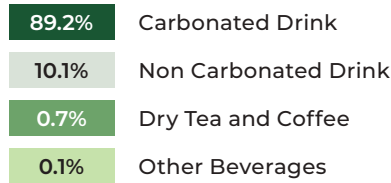
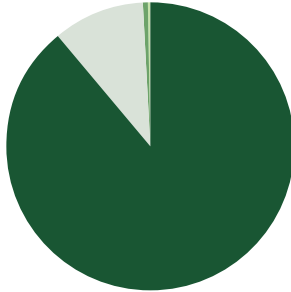
SALES MIX BY PRODUCT CATEGORY

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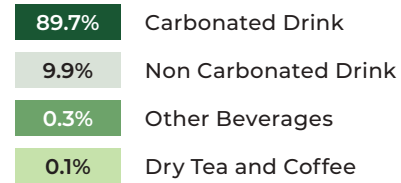
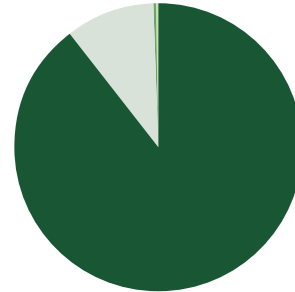


BEVERAGES

SALES \$ MIX PERCENTAGE

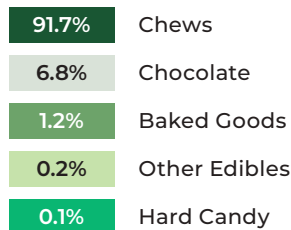
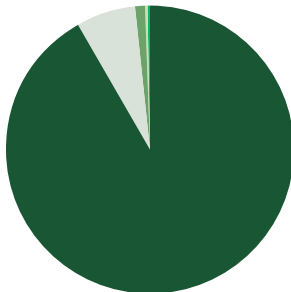


SELL UNITS MIX PERCENTAGE

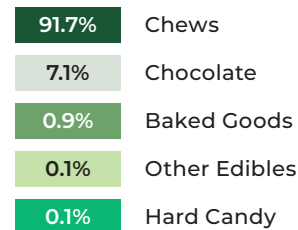
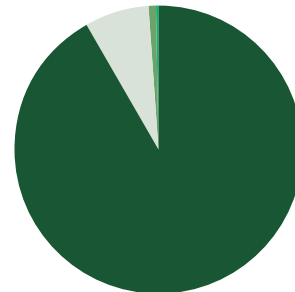


EDIBLES

SALES \$ MIX PERCENTAGE



SELL UNITS MIX PERCENTAGE



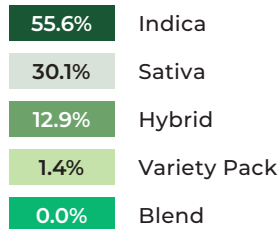
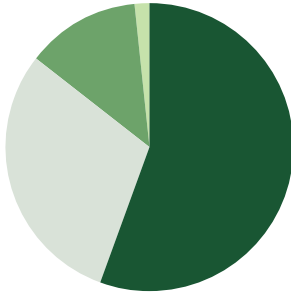
SALES MIX BY PRODUCT CATEGORY

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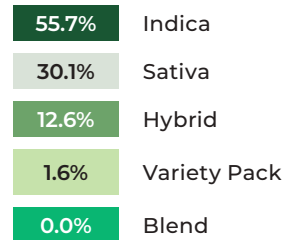
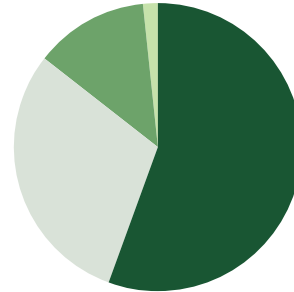


FLOWER

SALES \$ MIX PERCENTAGE

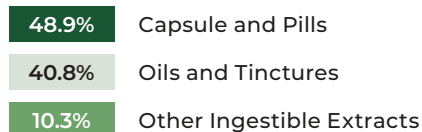
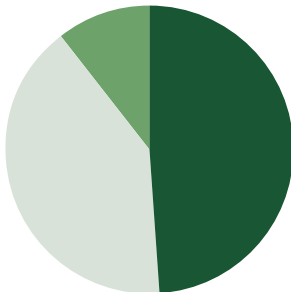


GRAMS MIX PERCENTAGE

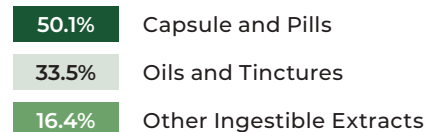
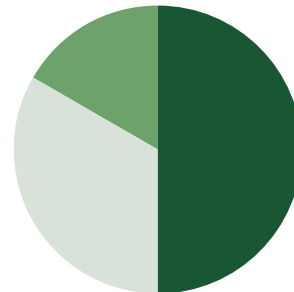


INGESTIBLE EXTRACTS

SALES \$ MIX PERCENTAGE



SELL UNITS MIX PERCENTAGE



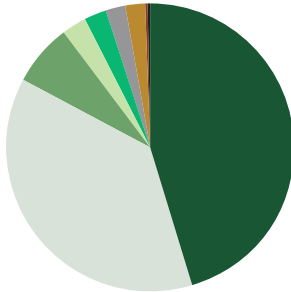
SALES MIX BY PRODUCT CATEGORY

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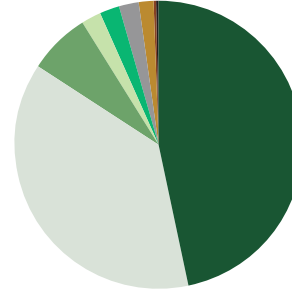
INHALABLE EXTRACTS

SALES \$ MIX PERCENTAGE



- 45.6%** Cartridge
- 37.5%** Infused Pre-roll
- 6.8%** Disposable Pens
- 2.8%** Resin and Rosin
- 2.4%** Shatter
- 2.4%** Hash
- 2.3%** Other Inhalable Extracts*
- 0.2%** Vape Kits
- 0.1%** Dry Sift

SELL UNITS MIX PERCENTAGE



- 46.7%** Infused Pre-roll
- 37.7%** Cartridge
- 6.8%** Disposable Pens
- 2.4%** Hash
- 2.2%** Shatter
- 2.0%** Other Inhalable Extracts*
- 1.9%** Resin and Rosin
- 0.2%** Dry Sift
- 0.1%** Dry Sift



*Includes infused pre-rolls.

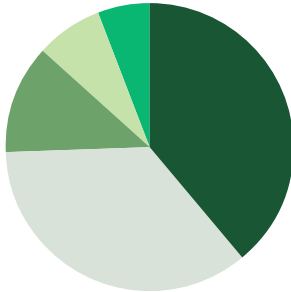
SALES MIX BY PRODUCT CATEGORY

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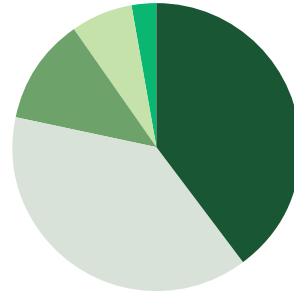
PRE-ROLL

SALES \$ MIX PERCENTAGE



- 39.9%** Indica
- 37.2%** Sativa
- 11.0%** Hybrid
- 6.0%** Variety Pack
- 5.9%** Blend

GRAMS MIX PERCENTAGE

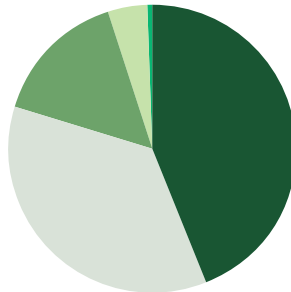


- 40.0%** Indica
- 38.5%** Sativa
- 11.9%** Hybrid
- 6.9%** Blend
- 2.8%** Variety Pack



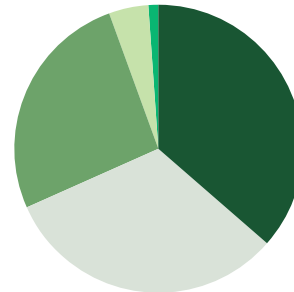
TOPICALS

SALES \$ MIX PERCENTAGE



- 44.1%** Balms
- 35.8%** Creams and Lotions
- 15.1%** Bath Products
- 4.5%** Other Topicals*
- 0.5%** Massage Oils and Lubricants

SELL UNITS MIX PERCENTAGE

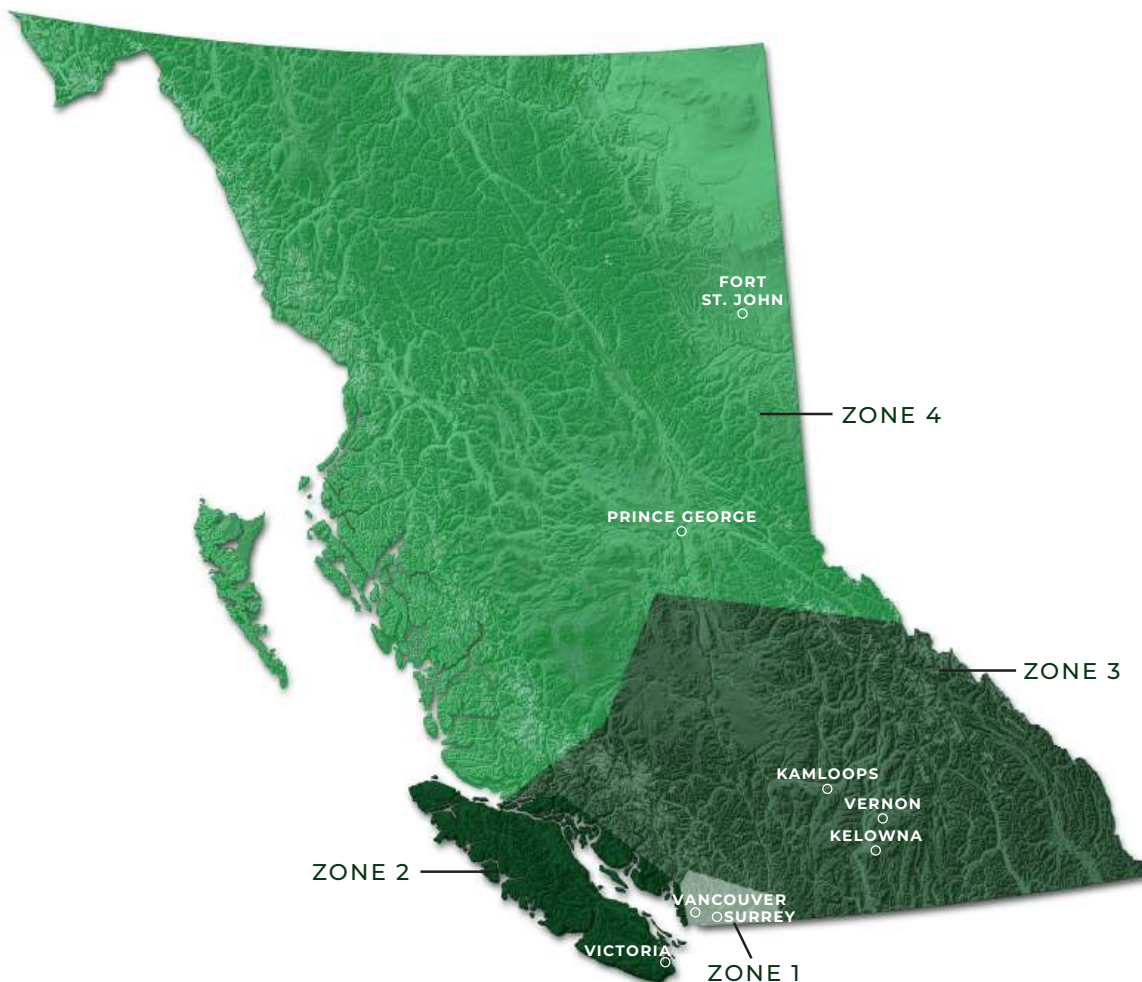


- 36.4%** Balms
- 31.9%** Creams and Lotions
- 26.1%** Bath Products
- 4.5%** Other Topicals*
- 1.0%** Massage Oils and Lubricants

*Includes face masks and other topical oils.

GROWING ACCESS POINTS

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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	59,515,480	53,127,437	12.0%	4,423,053	3,644,261	21.4%	149	139
2	31,527,056	28,383,469	11.1%	2,195,250	1,822,165	20.5%	130	124
3	30,402,865	28,087,402	8.2%	2,035,342	1,760,346	15.6%	163	165
4	18,893,427	17,287,223	9.3%	1,071,462	917,985	16.7%	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*

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FY2023 Q1

QUARTER YEAR-OVER-YEAR SUMMARY

	2024 Q1	2023 Q1
-20.8% WHOLESALE GRAMS	617,359 GRAMS	779,774 GRAMS
-18.9% WHOLESALE SALES	\$2,971,136	\$ 3,665,299
+2.4% PRICE ALL CANNABIS	\$4.81 PER GRAM	\$4.70 PER GRAM
+3.3% PRICE DRIED FLOWER	\$4.15 PER GRAM	\$4.02 PER GRAM

*Sales reported during the quarter as sold.

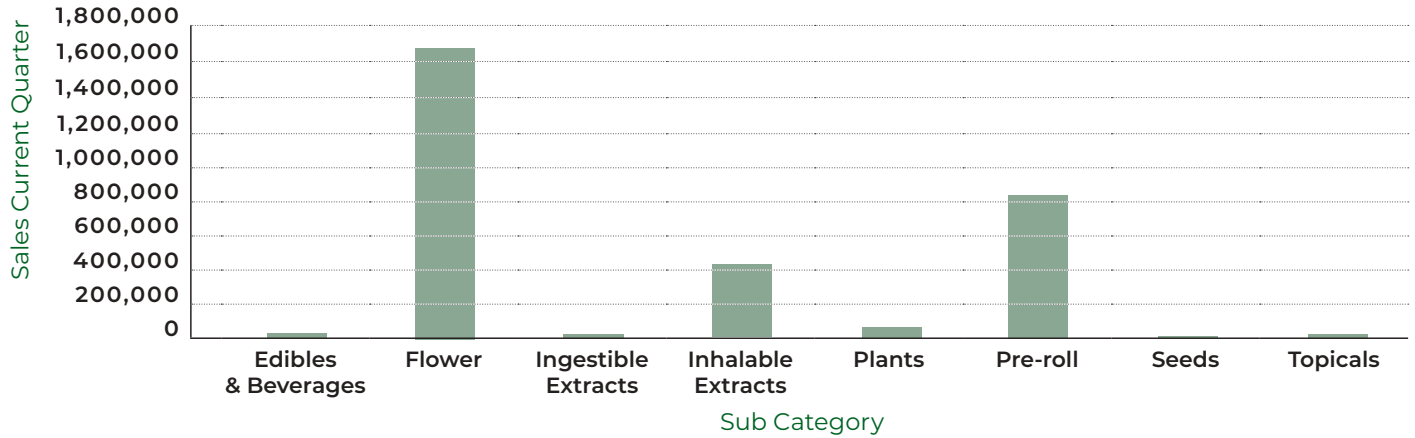
DIRECT DELIVERY SUB CATEGORY SALES*

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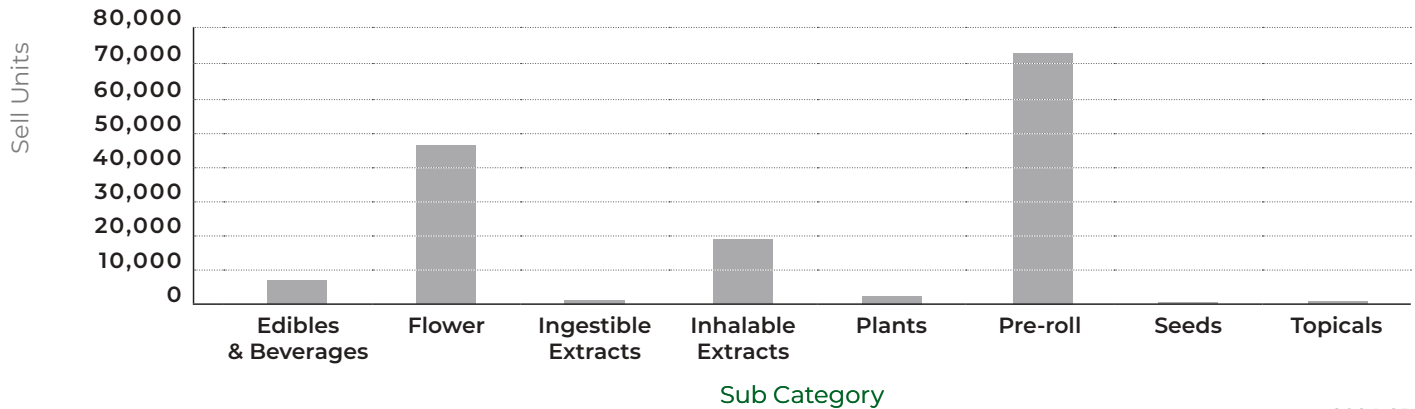
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SUB CATEGORY	SALES \$ CURRENT QUARTER	SALES \$ LAST YEAR'S QUARTER	SALES \$ YOY VARIANCE %	SELL UNITS CURRENT QUARTER	SELL UNITS LAST YEAR'S QUARTER	SELL UNITS YOY VARIANCE %
Edibles & Beverages	37,320	19,265	93.7%	7,004	5,209	34.5%
Flower	1,620,351	2,296,458	-29.4%	46,136	50,426	-8.5%
Ingestible Extracts	20,134	12,774	57.6%	1,137	757	50.2%
Inhalable Extracts	413,209	477,604	-13.5%	18,970	17,768	6.8%
Plants	59,491	58,597	1.5%	2,537	2,342	8.3%
Pre-roll	794,294	793,483	0.1%	72,980	63,105	15.6%
Seeds	1,162	1,554	-25.2%	53	54	-1.9%
Topicals	25,176	5,566	352.3%	963	249	286.7%

SALES CURRENT QUARTER



SELL UNITS CURRENT QUARTER











*Sales reported during the quarter as sold.

DIRECT DELIVERY SALES MIX BY PRODUCT CATEGORY*

APR MAY JUN
FY2024 Q1

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FY2023 Q1

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	6,801	0	-	1,092	0	-
	Drink Mix	160	4,694	-96.59%	20	1,114	-98.20%
	Non Carbonated Drink	951	135	604.98%	336	48	600.00%
 EDIBLES	Baked Goods	0	457	-100.00%	0	228	-100.00%
	Chews	21,641	1,535	1,310.26%	4,611	552	735.33%
	Chocolate	291	6,514	-95.54%	108	2,108	-94.88%
	Hard Candy	0	1,452	-100.00%	0	528	-100.00%
	Other Edibles	7,476	4,478	66.94%	837	631	32.65%
 FLOWER	Blend	5,469	0	-	320	0	-
	Hybrid	342,305	361,916	-5.42%	11,200	9,466	18.32%
	Indica	883,733	1,165,413	-24.17%	25,262	26,188	-3.54%
	Sativa	361,129	763,190	-52.68%	8,971	14,640	-38.72%
	Variety Pack	27,715	5,939	366.69%	383	132	190.15%
 INGESTIBLE EXTRACTS	Capsule and Pills	8,541	0	-	367	0	-
	Oils and Tinctures	6,641	9,484	-29.98%	331	588	-43.71%
	Other Ingestibles ¹	4,952	3,290	50.53%	439	169	159.76%
 INHALABLE EXTRACTS	Cartridge	111,711	104,119	7.29%	5,290	3,479	52.06%
	Disposable Pens	60,811	101,995	-40.38%	2,365	4,408	-46.35%
	Hash	12,041	34,380	-64.98%	632	1,978	-68.05%
	Infused Pre-roll	64,163	24,718	159.59%	4,889	1,560	213.40%
	Other Inhalables ²	22,311	19,358	15.26%	986	938	5.12%
	Resin and Rosin	118,135	161,771	-26.97%	3,527	4,013	-12.11%
	Shatter	24,035	31,263	-23.12%	1,281	1,392	-7.97%
 PLANTS	Plants Same Strain	42,068	58,597	-28.21%	1,527	2,342	-34.80%
	Plants Variety Pack	17,423	0	-	1,010	0	-
 PRE-ROLL	Blend	32,673	8,975	264.06%	1,984	579	242.66%
	Hybrid	112,131	71,087	57.74%	12,030	6,360	89.15%
	Indica	407,343	489,151	-16.72%	39,343	36,270	8.47%
	Sativa	184,184	213,543	-13.75%	16,163	19,260	-16.08%
	Variety Pack	57,962	10,727	440.34%	3,460	636	444.03%
 SEEDS	Same Strain	1,162	1,554	-25.25%	53	54	-1.85%
 TOPICALS	Balms	0	1,793	-100.00%	0	60	-100.00%
	Bath Products	0	75	-100.00%	0	6	-100.00%
	Creams and Lotions	11,384	3,698	207.82%	489	183	167.21%
	Massage Oils and Lubricants	5,497	0	-	157	0	-
	Other Topicals ³	8,296	0	-	317	0	-

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

²Includes diamonds, wax, crumble, etc.

³Includes face masks, other topical oils/sprays, etc.



**LIQUOR
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FY2024 Q1
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