

BC CANNABIS WHOLESAL

QUARTERLY

SALES

REPORT



**LIQUOR
DISTRIBUTION
BRANCH**

Q2 2023

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.

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

JUL | AUG | SEPT
2023 Q2

JUL | AUG | SEPT
2022 Q2

QUARTER YEAR-OVER-YEAR SUMMARY

	2023 Q2	2022 Q2
+40.9% WHOLESALE GRAMS	33,879,347 GRAMS	24,051,362 GRAMS
+24.3% WHOLESALE SALES	\$137,126,714	\$110,290,429
-11.7% PRICE ALL CANNABIS	\$4.05 PER GRAM	\$4.59 PER GRAM
-11.1% PRICE DRIED FLOWER	\$3.33 PER GRAM	\$3.75 PER GRAM
+8.4% RETAIL STORE GROWTH*	490 STORES	452 STORES

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

DRIED FLOWER PRICE PER GRAM BANDS

JUL	AUG	SEPT
2023 Q2		
JUL	AUG	SEPT
2022 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	273,466	215,929	26.6%	57,002	45,269	25.9%
	>\$5	143,217	322,465	-55.6%	23,162	46,007	-49.7%
3.5 GRAMS	\$3 - \$5	4,854,911	4,015,821	20.9%	1,143,688	903,770	26.5%
	>\$5	6,541,533	10,576,719	-38.2%	958,860	1,498,539	-36.0%
7 GRAMS	\$0 - \$3	365,745	0	-	122,724	0	-
	\$3 - \$5	3,574,609	3,074,680	16.3%	916,356	774,865	18.3%
	>\$5	894,000	774,349	15.5%	148,295	121,576	22.0%
14 GRAMS	\$0 - \$3	2,165,677	112,648	1,822.5%	793,968	38,290	1,973.6%
	\$3 - \$5	3,326,943	2,253,343	47.6%	836,486	673,036	24.3%
	>\$5	1,077,204	914,667	17.8%	182,868	163,324	12.0%
15 GRAMS	\$0 - \$3	5,912	77,282	-92.3%	1,980	30,780	-93.6%
	\$3 - \$5	48,823	699,187	-93.0%	14,190	205,560	-93.1%
	>\$5	0	19,958	-100.0%	0	3,900	-100.0%
28 GRAMS	\$0 - \$3	13,654,734	10,834,281	26.0%	5,879,860	4,287,724	37.1%
	\$3 - \$5	7,248,443	6,807,626	6.5%	2,193,548	2,103,780	4.3%
	>\$5	74,317	693,906	-89.3%	13,272	127,456	-89.6%
30 GRAMS	\$0 - \$3	247	28,766	-99.1%	120	32,550	-99.6%

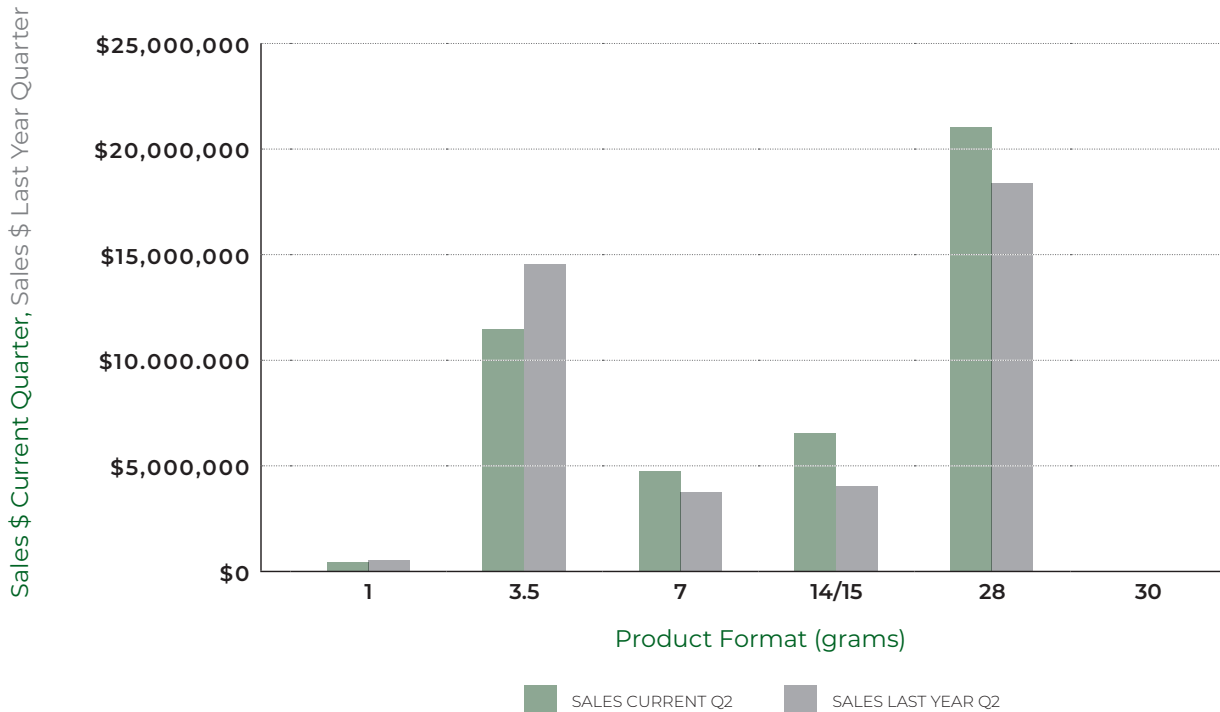
DRIED FLOWER SALES TREND BY FORMAT

JUL AUG SEPT
 2023 Q2

JUL AUG SEPT
 2022 Q2

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	416,683	538,394	-22.6%	80,164	91,276	-12.2%
3.5	11,396,444	14,592,540	-21.9%	2,102,548	2,402,309	-12.5%
7	4,834,354	3,848,982	25.6%	1,187,375	896,441	32.5%
14/15	6,624,559	4,077,084	62.5%	1,829,492	1,114,890	64.1%
28	20,977,494	18,335,813	14.4%	8,086,680	6,518,960	24.0%
30	247	28,766	-99.1%	120	32,550	-99.6%









FLOWER SALE TREND BY FORMAT



TOTAL SALES BY PRODUCT CATEGORY

JUL AUG SEPT
2023 Q2

JUL AUG SEPT
2022 Q2

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	2,664,577	1,900,917	40.2%	614,930	439,612	39.9%
 EDIBLES	7,360,664	6,277,008	17.3%	1,923,036	1,430,767	34.4%
 FLOWER	44,249,780	41,421,580	6.8%	1,269,932	1,218,109	4.3%
 INGESTIBLE EXTRACTS ¹	4,306,682	4,343,282	-0.8%	208,541	222,772	-6.4%
 INHALABLE EXTRACTS ²	46,120,036	29,232,507	57.8%	2,365,101	1,406,734	68.1%
 PRE-ROLL	31,663,959	26,505,340	19.5%	2,668,904	2,166,886	23.2%
 SEEDS	12,929	17,327	-25.4%	590	779	-24.3%
 TOPICALS	748,087	592,469	26.3%	32,702	25,408	28.7%

¹Contains ingestible extracts (such as a Jolts and Glitches) which were discontinued due to a change in Health Canada regulation.

²Includes infused pre-rolls.

SALES MIX BY PRODUCT CATEGORY

JUL AUG SEPT
 2023 Q2

JUL AUG SEPT
 2022 Q2

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	2,263,194	1,632,725	38.6%	525,334	378,313	38.9%
	Drink Mix	8,680	19,063	-54.5%	2,388	5,580	-57.2%
	Dry Tea and Coffee	27,561	5,109	439.4%	4,253	564	654.1%
	Non Carbonated Drink	365,142	241,013	51.5%	82,955	54,526	52.1%
	Other Beverages	0	3,007	-100.0%	0	629	-100.0%
 EDIBLES	Baked Goods	101,723	74,487	36.6%	27,965	20,460	36.7%
	Chews	6,817,476	5,579,857	22.2%	1,749,390	1,191,697	46.8%
	Chocolate	427,386	579,409	-26.2%	142,717	209,662	-31.9%
	Hard Candy	0	1,201	-100.0%	0	348	-100.0%
	Other Edibles	14,079	42,054	-66.5%	2,964	8,600	-65.5%
 FLOWER	Blend	69,875	54,973	27.1%	3,131	2,304	35.9%
	Hybrid	9,089,937	8,471,987	7.3%	278,369	257,816	8.0%
	Indica	20,890,380	20,950,774	-0.3%	573,816	576,279	-0.4%
	Sativa	14,052,391	11,943,846	17.7%	411,987	381,710	7.9%
	Variety Pack	147,198	0	-	2,629	0	-
 INGESTIBLE EXTRACTS	Capsule and Pills	2,108,072	1,630,835	29.3%	113,552	91,053	24.7%
	Oils and Tinctures	2,079,842	2,274,759	-8.6%	89,338	97,213	-8.1%
	Other Ingestibles ¹	118,767	437,689	-72.9%	5,651	34,506	-83.6%
 INHALABLE EXTRACTS	Cartridge	22,353,994	17,785,606	25.7%	930,448	734,094	26.7%
	Disposable Pens	1,970,145	991,757	98.7%	135,316	61,239	121.0%
	Dry Sift	36,605	26,993	35.6%	3,183	2,283	39.4%
	Hash	1,219,646	890,378	37.0%	63,423	45,471	39.5%
	Other Inhalables ²	17,720,902	7,456,298	137.7%	1,115,882	476,774	134.0%
	Resin and Rosin	1,253,434	558,874	124.3%	41,775	18,596	124.6%
	Shatter	1,314,469	1,091,106	20.5%	60,414	46,128	31.0%
	Vape Kits	185,265	200,162	-7.4%	12,038	13,006	-7.4%
	Wax	65,576	231,333	-71.7%	2,622	9,143	-71.3%
 PRE-ROLL	Blend	1,268,597	856,160	48.2%	90,112	29,754	202.9%
	Hybrid	4,823,114	3,837,251	25.7%	446,217	354,019	26.0%
	Indica	11,856,506	10,954,158	8.2%	993,206	901,988	10.1%
	Sativa	12,587,655	10,473,837	20.2%	1,092,890	864,000	26.5%
	Variety Pack	1,128,088	383,935	193.8%	46,479	17,125	171.4%
 SEEDS	Same Strain	12,929	17,327	-25.4%	590	779	-24.3%
 TOPICALS	Balms	272,278	154,920	75.8%	10,858	6,901	57.3%
	Bath Products	89,354	66,797	33.8%	7,124	5,930	20.1%
	Creams and Lotions	374,746	344,129	8.9%	14,058	11,455	22.7%
	Massage Oils and Lubricants	5,340	0	-	398	0	-
	Other Topicals ³	6,370	26,624	-76.1%	264	1,122	-76.5%

¹Contains ingestible extracts (such as a Jolts and Glitches) which were discontinued due to a change in Health Canada regulation.

²Includes infused pre-rolls.

³Includes face masks and other topical oils.

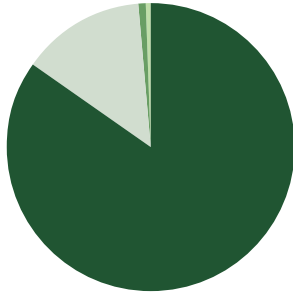
SALES MIX BY PRODUCT CATEGORY

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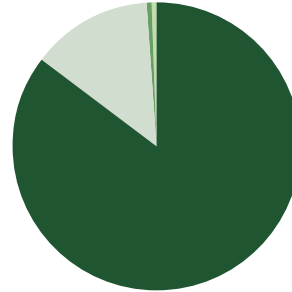
BEVERAGES

SALES \$ MIX PERCENTAGE



84.9%	Carbonated Drink
13.7%	Non Carbonated Drink
1.0%	Dry Tea and Coffee
0.3%	Drink Mix

SELL UNITS MIX PERCENTAGE

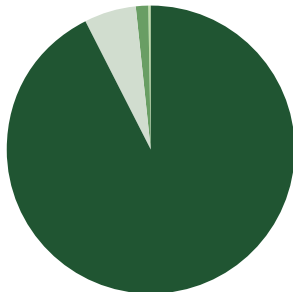


85.4%	Carbonated Drink
13.5%	Non Carbonated Drink
0.7%	Dry Tea and Coffee
0.4%	Drink Mix



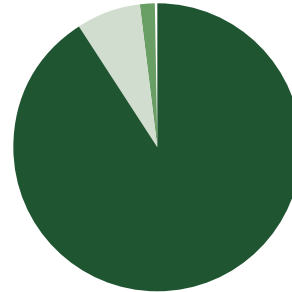
EDIBLES

SALES \$ MIX PERCENTAGE



92.6%	Chews
5.8%	Chocolate
1.4%	Baked Goods
0.2%	Other Edibles

SELL UNITS MIX PERCENTAGE



91.0%	Chews
7.4%	Chocolate
1.5%	Baked Goods
0.2%	Other Edibles

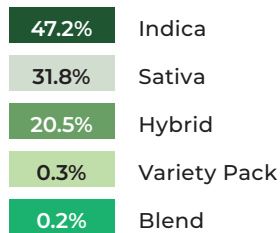
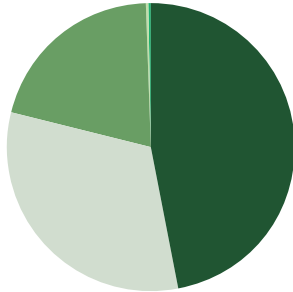
SALES MIX BY PRODUCT CATEGORY

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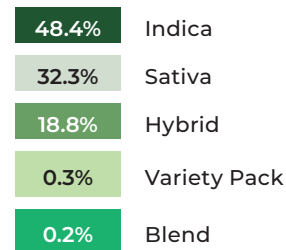
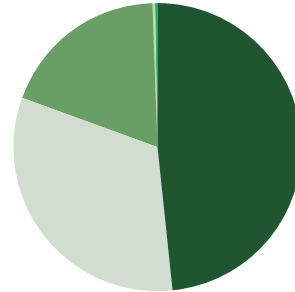


FLOWER

SALES \$ MIX PERCENTAGE

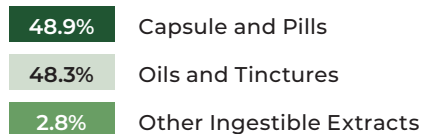
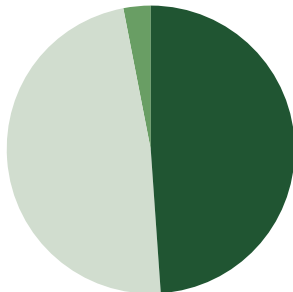


GRAMS MIX PERCENTAGE

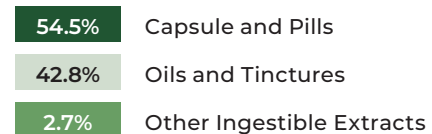
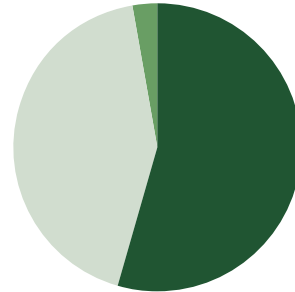


INGESTIBLE EXTRACTS

SALES \$ MIX PERCENTAGE



SELL UNITS MIX PERCENTAGE



SALES MIX BY PRODUCT CATEGORY

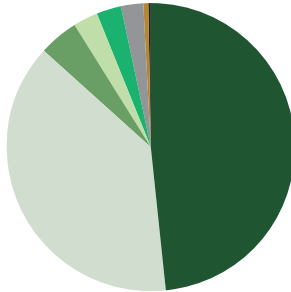
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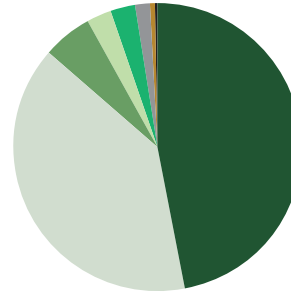
INHALABLE EXTRACTS

SALES \$ MIX PERCENTAGE



48.5%	Cartridge
38.4%	Other Inhalable Extracts*
4.3%	Disposable Pens
2.9%	Shatter
2.7%	Resin and Rosin
2.6%	Hash
0.4%	Vape Kits
0.1%	Wax
0.1%	Dry Sift

SELL UNITS MIX PERCENTAGE



47.2%	Other Inhalable Extracts*
39.3%	Cartridge
5.7%	Disposable Pens
2.7%	Hash
2.6%	Shatter
1.8%	Resin and Rosin
0.5%	Vape Kits
0.1%	Wax
0.1%	Dry Sift



*Includes infused pre-rolls.

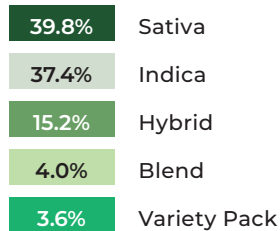
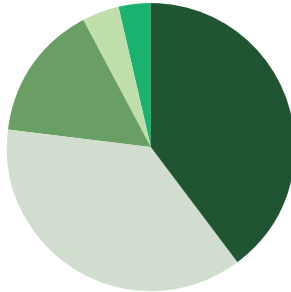
SALES MIX BY PRODUCT CATEGORY

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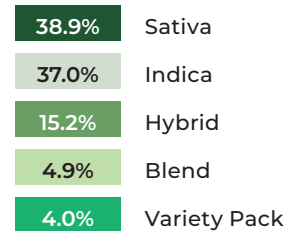
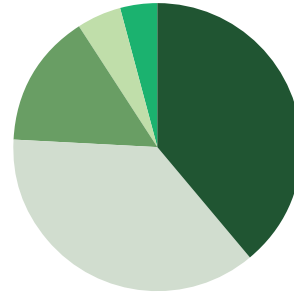


PRE-ROLL

SALES \$ MIX PERCENTAGE

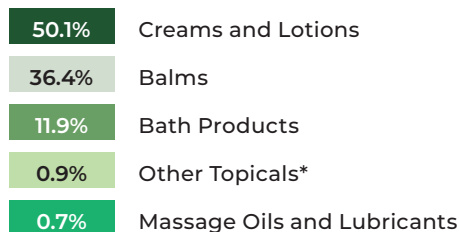
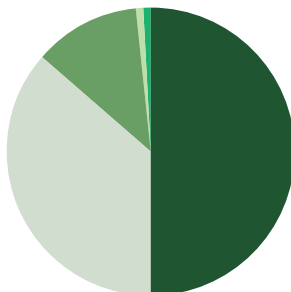


GRAMS MIX PERCENTAGE

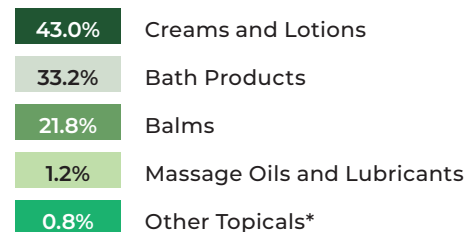
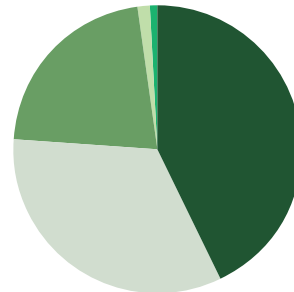


TOPICALS

SALES \$ MIX PERCENTAGE



SELL UNITS MIX PERCENTAGE

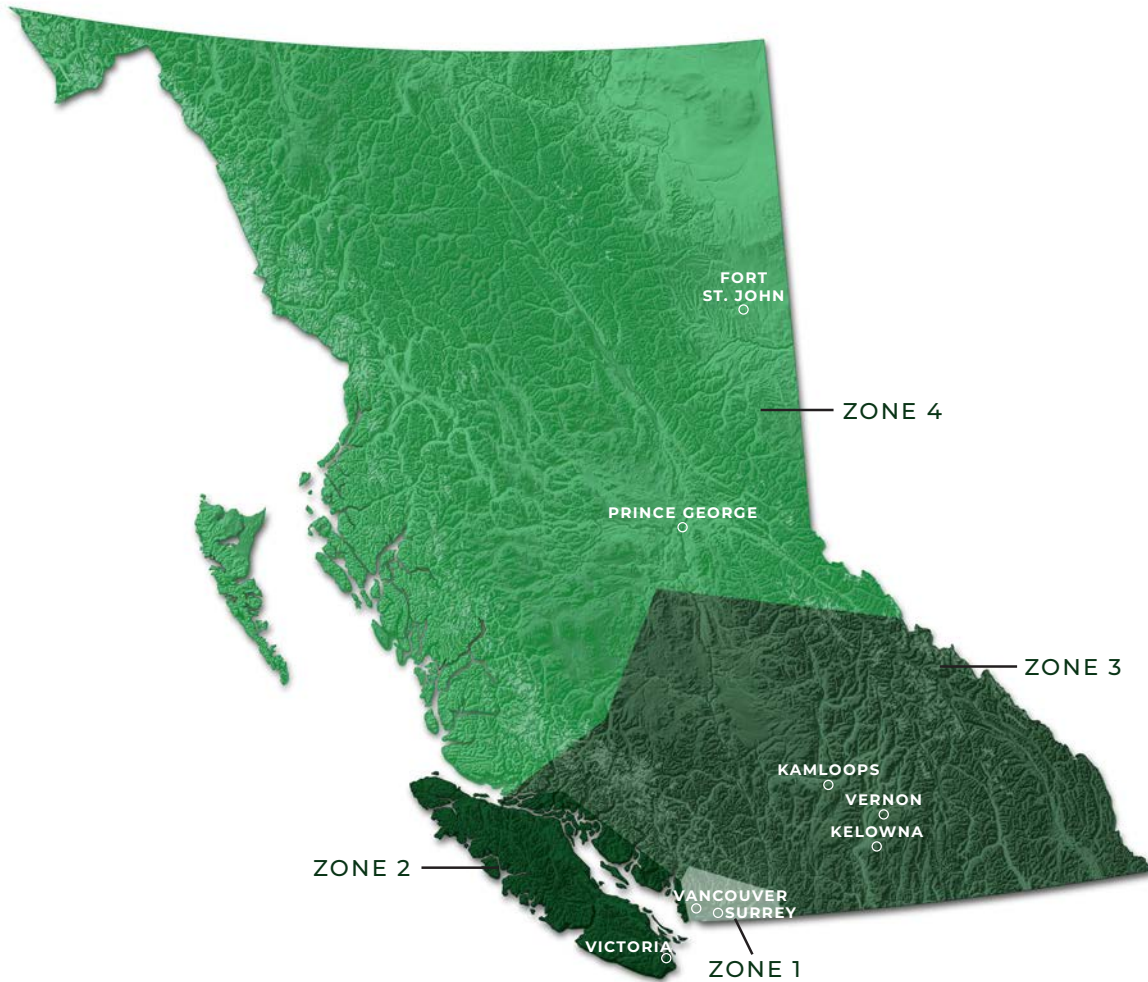


*Includes face masks and other topical oils.

GROWING ACCESS POINTS

JUL AUG SEPT
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JUL AUG SEPT
 2022 Q2



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	56,717,734	43,605,333	30.1%	4,019,281	2,900,918	38.6%	140	113
2	30,059,343	25,031,307	20.1%	2,007,422	1,589,537	26.3%	121	123
3	31,065,348	25,898,749	19.9%	1,998,556	1,597,419	25.1%	168	161
4	19,131,604	15,563,989	22.9%	1,046,459	809,045	29.3%	64	58

DIRECT DELIVERY SALES SUMMARY*

JUL AUG SEPT
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CURRENT QUARTER

TOTAL GRAMS & SALES	821,718 GRAMS	\$3,777,539 SALES
ALL CANNABIS	\$4.60 AVERAGE PRICE PER GRAM	
FLOWER ONLY	\$4.00 AVERAGE PRICE PER GRAM	



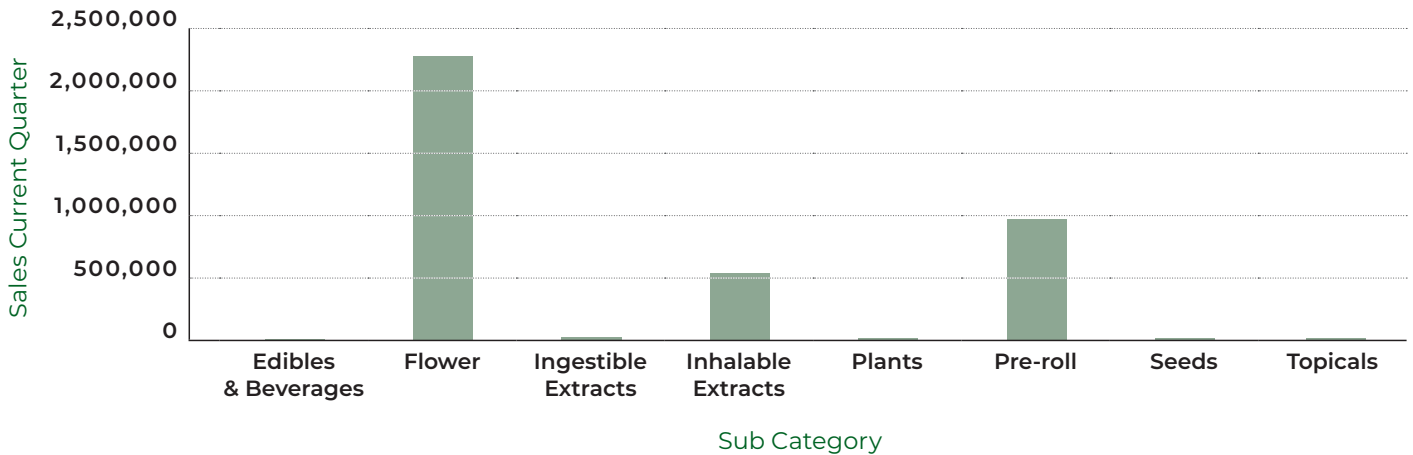
*Sales reported during the quarter as sold.

DIRECT DELIVERY SUB CATEGORY SALES*

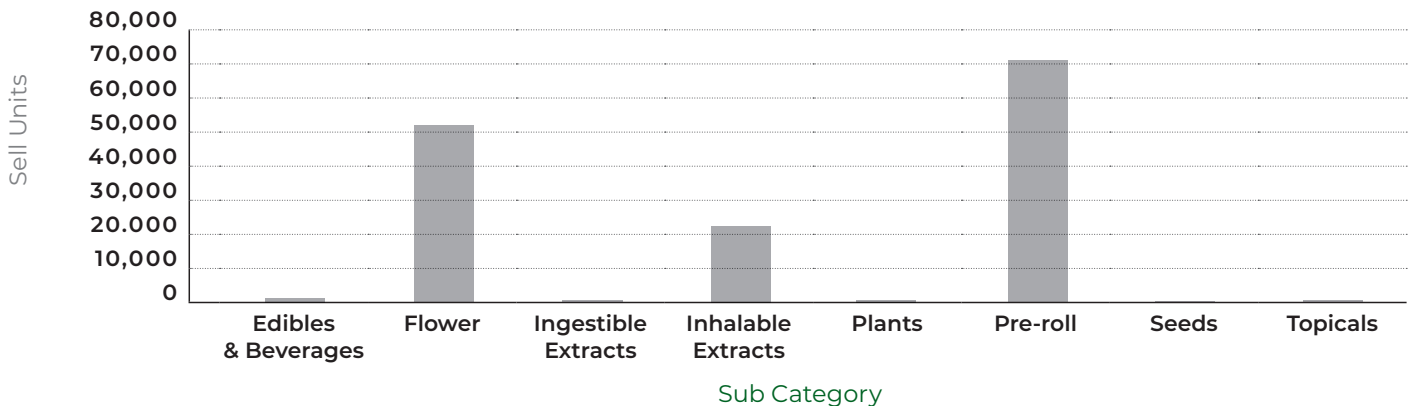
JUL AUG SEPT
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SUB CATEGORY	SALES \$ CURRENT QUARTER	SELL UNITS CURRENT QUARTER
Edibles & Beverages	3,806	1,244
Flower	2,259,307	51,714
Ingestible Extracts	12,923	748
Inhalable Extracts	516,322	22,236
Plants	5,741	236
Pre-roll	968,026	70,413
Seeds	3,618	150
Topicals	7,797	311

SALES CURRENT QUARTER



SELL UNITS CURRENT QUARTER



*Sales reported during the quarter as sold.

DIRECT DELIVERY SALES MIX BY PRODUCT CATEGORY*

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	CATEGORY	SUB CATEGORY	SALES \$ CURRENT QUARTER	SELL UNITS CURRENT QUARTER
	BEVERAGES	Drink Mix	322	20
	EDIBLES	Chews	3,294	1,212
		Chocolate	0	0
		Hard Candy	0	0
		Other Edibles	190	12
	FLOWER	Blend	11,821	312
		Hybrid	380,822	10,198
		Indica	1,171,807	26,485
		Sativa	694,857	14,719
	INGESTIBLE EXTRACTS	Oils and Tinctures	11,424	666
		Other Ingestibles	1,499	82
	INHALABLE EXTRACTS	Cartridge	142,233	5,098
		Disposable Pens	106,070	4,984
		Dry Sift	2,164	168
		Hash	29,580	1,443
		Other Inhalables ¹	97,081	5,769
		Resin and Rosin	100,860	3,118
		Shatter	38,334	1,656
	PLANTS	Same Strain	5,741	236
	PRE-ROLL	Blend	21,022	1,950
		Hybrid	150,975	11,644
		Indica	577,769	40,939
		Sativa	199,207	15,027
		Variety Pack	19,053	853
	SEEDS	Same Strain	3,618	150
	TOPICALS	Balms	717	24
		Bath Products	299	24
		Creams and Lotions	6,669	261
		Other Topicals	113	2

*Sales reported during the quarter as sold.

¹Includes infused pre-rolls.



**LIQUOR
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