

BC CANNABIS WHOLESALE

**QUARTERLY
SALES
REPORT**



**LIQUOR
DISTRIBUTION
BRANCH**

Q3 2022

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. Direct delivery sales are provided on pages 14 – 17 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, 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

2022 Q3

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2021 Q3

Quarter year-over-year summary

	2022 Q3	2021 Q3
<p>+29.9% WHOLESALE GRAMS</p>	<p>25,735,744 GRAMS</p>	<p>19,809,654 GRAMS</p>
<p>+13.1% WHOLESALE SALES</p>	<p>\$113,414,081</p>	<p>\$100,279,921</p>
<p>-12.9% PRICE ALL CANNABIS</p>	<p>\$4.41 PER GRAM</p>	<p>\$5.06 PER GRAM</p>
<p>-11.5% PRICE DRIED FLOWER</p>	<p>\$3.58 PER GRAM</p>	<p>\$4.05 PER GRAM</p>
<p>+14.7% RETAIL STORE GROWTH*</p>	<p>468 STORES</p>	<p>408 STORES</p>

* 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

2022 Q3

OCT NOV DEC

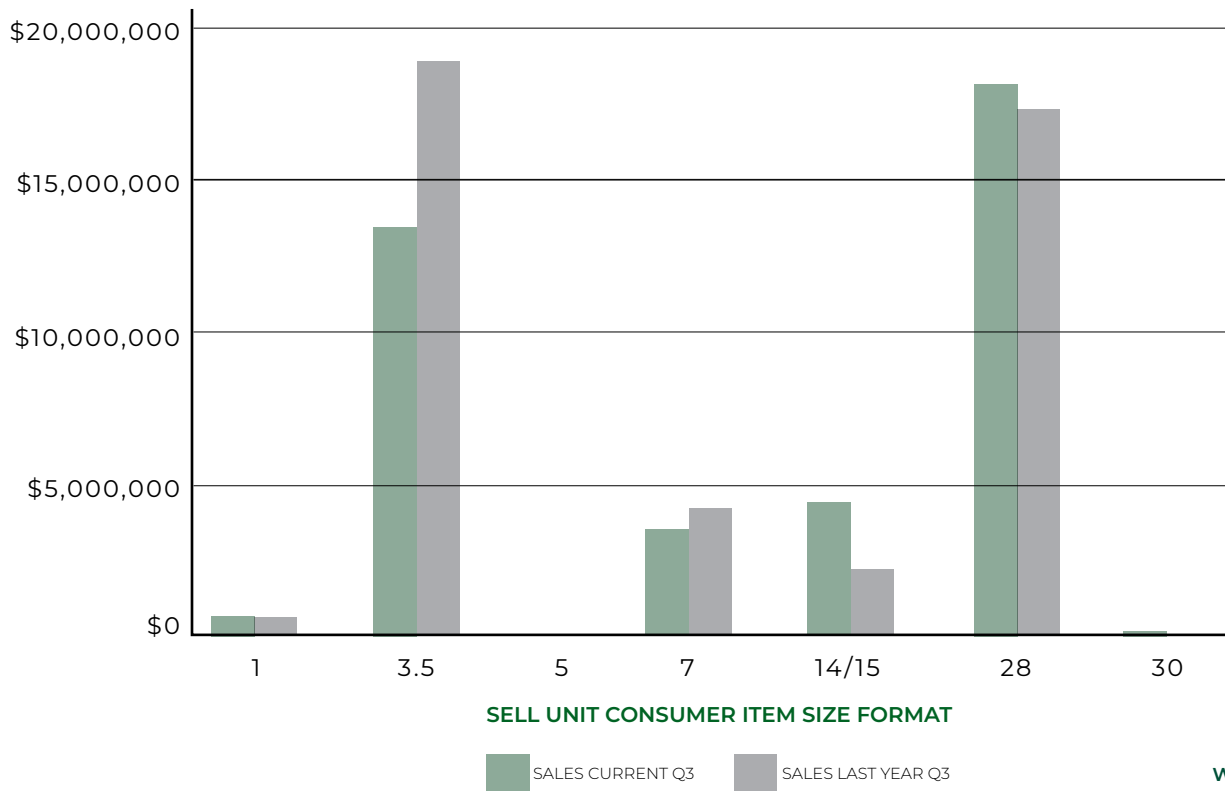
2021 Q3

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	203,980	74,101	175.3%	42,763	15,695	172.5%
	>\$5	361,422	450,585	-19.8%	54,476	63,787	-14.6%
3.5 GRAMS	\$0 - \$3	19,920	221	8,921.7%	6,972	81	8,560.9%
	\$3 - \$5	4,584,367	4,280,157	7.1%	1,056,892	946,215	11.7%
	>\$5	8,886,386	14,731,856	-39.7%	1,266,920	2,065,956	-38.7%
7 GRAMS	\$0 - \$3	19,988	0	n/a	7,231	0	n/a
	\$3 - \$5	2,798,054	3,158,968	-11.4%	730,835	731,276	-0.1%
	>\$5	617,170	1,003,720	-38.5%	99,582	172,368	-42.2%
14 GRAMS	\$0 - \$3	229,880	0	n/a	85,078	0	n/a
	\$3 - \$5	2,792,499	817,625	241.5%	813,176	257,642	215.6%
	>\$5	721,454	350,466	105.9%	129,444	64,568	100.5%
15 GRAMS	\$0 - \$3	17,122	391,789	-95.6%	6,300	141,825	-95.6%
	\$3 - \$5	576,315	750,003	-23.2%	169,170	220,860	-23.4%
28 GRAMS	\$0 - \$3	10,824,561	9,307,524	16.3%	4,447,940	3,577,476	24.3%
	\$3 - \$5	6,817,909	7,506,833	-9.2%	2,133,320	2,344,916	-9.0%
	>\$5	669,646	570,912	17.3%	123,424	105,168	17.4%
30 GRAMS	\$0 - \$3	76,291	0	n/a	45,990	0	n/a

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	565,402	524,686	7.8%	97,239	79,482	22.3%
3.5	13,490,672	19,012,234	-29.0%	2,330,783	3,012,289	-22.6%
7	3,435,213	4,162,688	-17.5%	837,648	903,644	-7.3%
14/15	4,337,270	2,309,883	87.8%	1,203,168	684,895	75.7%
28	18,312,115	17,385,269	5.3%	6,704,684	6,027,560	11.2%
30	76,291	0	n/a	45,990	0	n/a



TOTAL SALES BY PRODUCT CATEGORY

OCT NOV DEC

2022 Q3

OCT NOV DEC

2021 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	1,884,370	1,606,572	17.3%	434,018	375,299	15.6%
 EDIBLES	6,458,137	5,637,340	14.6%	1,502,410	1,239,200	21.2%
 FLOWER	40,216,964	43,394,742	-7.3%	1,208,932	1,331,691	-9.2%
 INGESTIBLE EXTRACTS	5,371,911	4,985,557	7.7%	295,872	237,608	24.5%
 INHALABLE EXTRACTS	34,064,634	20,164,900	68.9%	1,679,887	818,999	105.1%
 PRE-ROLL	24,625,619	23,684,995	4.0%	2,062,149	2,048,942	0.6%
 SEEDS	12,641	8,343	51.5%	586	330	77.5%
 TOPICALS	779,806	797,471	-2.2%	40,358	37,789	6.8%

SALES MIX BY PRODUCT CATEGORY

2022 Q3

2021 Q3

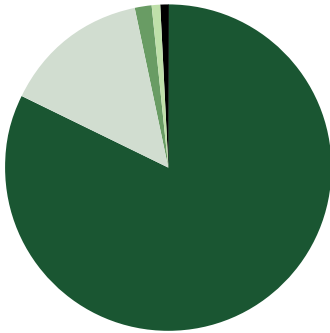
PRODUCT	SUB CATEGORY	SALES \$ CURRENT QUARTER	SALES \$ LAST YEAR'S QUARTER	SALES \$ YOY VARIANCE %	SELL UNITS CURRENT QUARTER	SELL UNITS LAST YEAR'S QUARTER	SELL UNITS YOY VARIANCE %
 BEVERAGES	Carbonated Drink	1,550,709	1,081,878	43.3%	356,621	267,148	33.5%
	Drink Mix	19,335	21,497	-10.1%	5,652	5,702	-0.9%
	Dry Tea and Coffee	13,015	104,735	-87.6%	3,480	11,412	-69.5%
	Non Carbonated Drink	271,805	397,922	-31.7%	61,030	90,924	-32.9%
	Other Beverages	29,505	540	5,362.5%	7,235	113	6,302.7%
 EDIBLES	Baked Goods	154,876	114,908	34.8%	46,934	30,888	51.9%
	Chews	5,553,341	4,733,489	17.3%	1,210,275	929,922	30.1%
	Chocolate	747,746	762,785	-2.0%	244,661	271,611	-9.9%
	Hard Candy	1,118	12,616	-91.1%	324	3,419	-90.5%
	Other Edibles	1,056	13,541	-92.2%	216	3,360	-93.6%
 FLOWER	Blend	46,098	21,614	113.3%	1,932	1,080	78.9%
	Hybrid	8,112,058	8,082,181	0.4%	260,393	261,539	-0.4%
	Indica	20,918,850	23,698,282	-11.7%	594,088	690,843	-14.0%
	Sativa	11,139,958	11,592,664	-3.9%	352,519	378,229	-6.8%
 INGESTIBLE EXTRACTS	Capsules and Pills	1,724,021	1,630,009	5.8%	94,032	92,584	1.6%
	Oils and Tinctures	2,500,748	3,075,236	-18.7%	109,922	127,377	-13.7%
	Other Ingestible Extracts	1,147,142	280,312	309.2%	91,918	17,647	420.9%
 INHALABLE EXTRACTS	Cartridge	19,094,052	14,945,451	27.8%	787,999	598,459	31.7%
	Disposable Pens	1,012,944	339,855	198.1%	66,677	30,891	115.8%
	Dry Sift	28,825	43,394	-33.6%	2,435	3,221	-24.4%
	Hash	1,135,278	828,672	37.0%	56,390	40,630	38.8%
	Other Inhalable Extracts	9,990,061	1,607,607	521.4%	650,766	59,817	987.9%
	Resin and Rosin	888,907	809,313	9.8%	28,706	24,630	16.5%
	Shatter	1,473,383	1,535,799	-4.1%	65,976	59,739	10.4%
	Vape Kits	175,785	0	n/a	11,422	0	n/a
	Wax	235,948	54,809	330.5%	9,516	1,612	490.3%
 PRE-ROLL	Blend	218,493	36,777	494.1%	13,266	2,399	453.0%
	Hybrid	3,987,752	6,824,696	-41.6%	330,621	610,152	-45.8%
	Indica	10,282,733	9,269,342	10.9%	887,775	784,779	13.1%
	Sativa	9,591,441	7,367,239	30.2%	803,950	642,137	25.2%
	Variety Pack	545,201	186,942	191.6%	26,537	9,475	180.1%
 SEEDS	Same Strain	12,641	8,343	51.5%	586	330	77.6%
 TOPICALS	Balms	20,031	27,408	-26.9%	1,155	1,923	-39.9%
	Bath Products	221,429	177,241	24.9%	18,780	15,055	24.7%
	Creams and Lotions	338,967	477,591	-29.0%	11,863	15,736	-24.6%
	Massage Oils & Lubricants	0	587	-100.0%	0	41	-100.0%
	Other Topicals	199,378	114,644	73.9%	8,560	5,034	70.0%

SALES MIX BY PRODUCT CATEGORY



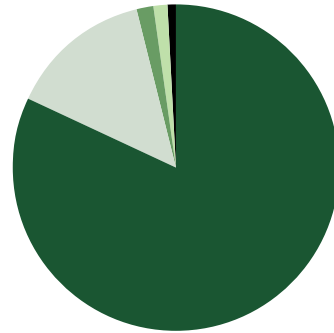
BEVERAGES

SALES \$ MIX PERCENTAGE



- 82.3% Carbonated Drink
- 14.4% Non Carbonated Drink
- 1.6% Other Beverages
- 1.0% Drink Mix
- 0.7% Dry Tea and Coffee

SELL UNITS MIX PERCENTAGE

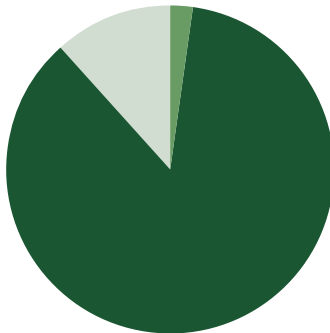


- 82.2% Carbonated Drink
- 14.1% Non Carbonated Drink
- 1.7% Other Beverages
- 1.3% Drink Mix
- 0.8% Dry Tea and Coffee



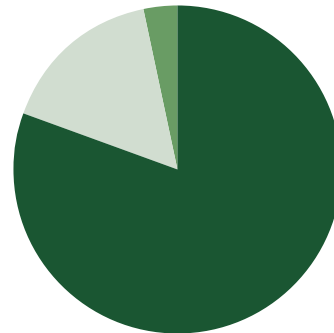
EDIBLES

SALES \$ MIX PERCENTAGE



- 86.0% Chews
- 11.6% Chocolate
- 2.4% Baked Goods

SELL UNITS MIX PERCENTAGE



- 80.6% Chews
- 16.3% Chocolate
- 3.1% Baked Goods

SALES MIX BY PRODUCT CATEGORY



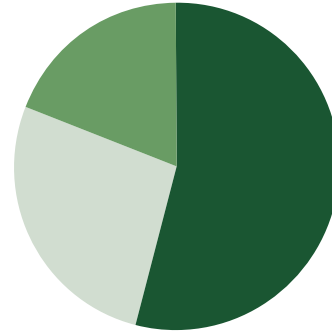
FLOWER

SALES \$ MIX PERCENTAGE



- 52.0% Indica
- 27.7% Sativa
- 20.2% Hybrid

GRAMS MIX PERCENTAGE

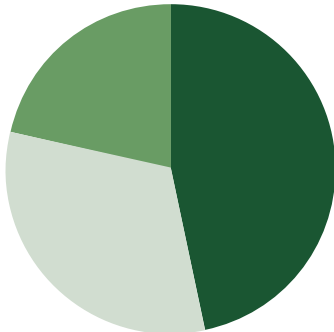


- 54.0% Indica
- 26.9% Sativa
- 18.9% Hybrid



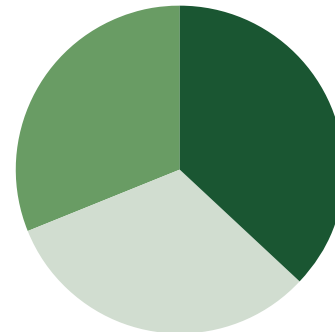
INGESTIBLE EXTRACTS

SALES \$ MIX PERCENTAGE



- 46.6% Oils and Tinctures
- 32.1% Capsules and Pills
- 21.4% Other Ingestible Extracts

SELL UNITS MIX PERCENTAGE



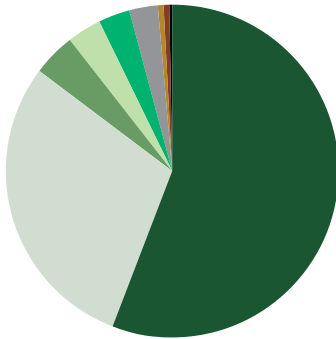
- 37.2% Oils and Tinctures
- 31.8% Capsules and Pills
- 31.1% Other Ingestible Extracts

SALES MIX BY PRODUCT CATEGORY



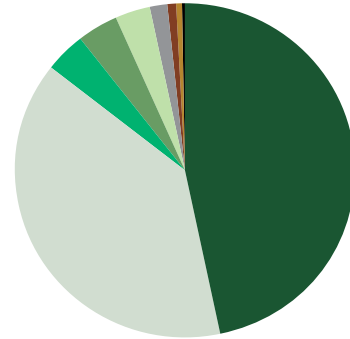
INHALABLE EXTRACTS

SALES \$ MIX PERCENTAGE



56.1%	Cartridge
29.3%	Other Inhalable Extracts
4.3%	Shatter
3.3%	Hash
3.0%	Disposable Pens
2.7%	Resin and Rosin
0.7%	Wax
0.5%	Vape Kits
0.1%	Dry Sift

SELL UNITS MIX PERCENTAGE



46.9%	Cartridge
38.7%	Other Inhalable Extracts
4.0%	Disposable Pens
3.9%	Shatter
3.4%	Hash
1.7%	Resin and Rosin
0.7%	Vape Kits
0.6%	Wax
0.1%	Dry Sift

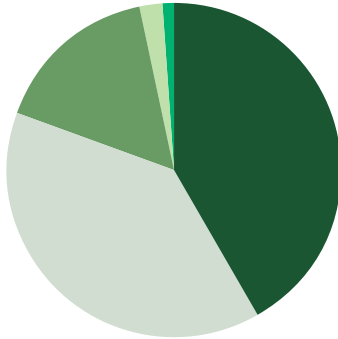


SALES MIX BY PRODUCT CATEGORY



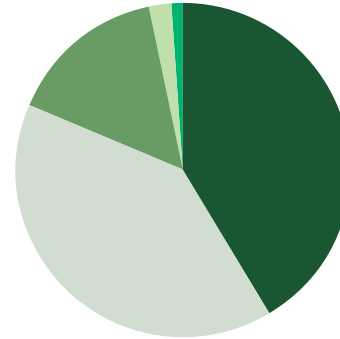
PRE-ROLL

SALES \$ MIX PERCENTAGE



- 41.8% Indica
- 38.9% Sativa
- 16.2% Hybrid
- 2.2% Variety Pack
- 0.9% Blend

GRAMS MIX PERCENTAGE

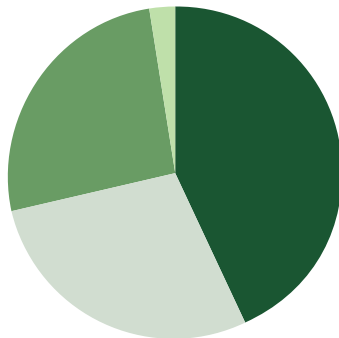


- 41.4% Indica
- 40.1% Sativa
- 15.3% Hybrid
- 2.2% Variety Pack
- 1.0% Blend



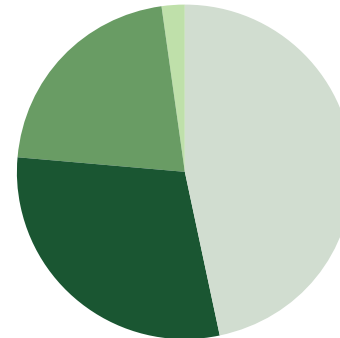
TOPICALS

SALES \$ MIX PERCENTAGE



- 43.5% Creams and Lotions
- 28.4% Bath Products
- 25.6% Other Topicals
- 2.6% Balms

SELL UNITS MIX PERCENTAGE



- 46.5% Bath Products
- 29.4% Creams and Lotions
- 21.2% Other Topicals
- 2.9% Balms

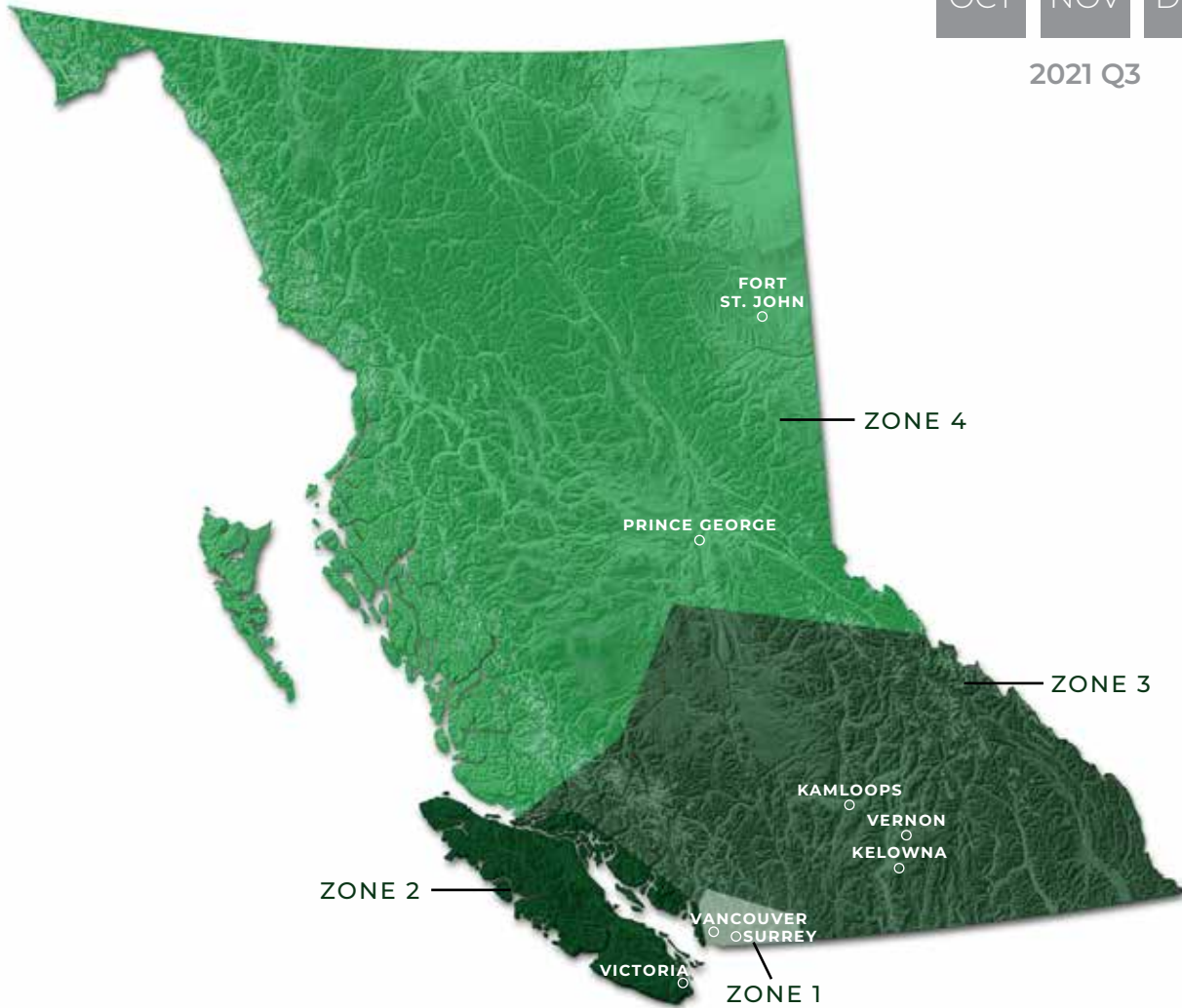
GROWING ACCESS POINTS

OCT NOV DEC

2022 Q3

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2021 Q3



SHIPPING ZONE*	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	45,941,207	39,134,947	17.4%	3,083,085	2,536,818	21.5%	121	93
2	26,091,396	23,633,992	10.4%	1,677,066	1,453,852	15.4%	125	111
3	25,195,731	22,983,745	9.6%	1,578,997	1,346,217	17.3%	164	152
4	16,016,622	14,261,069	12.3%	871,844	733,878	18.8%	59	55

*Nominal postal codes with unassigned shipping zones

DIRECT DELIVERY SALES SUMMARY*

CURRENT QUARTER

TOTAL GRAMS
 & SALES

362,180
 GRAMS

\$2,575,858
 SALES

ALL CANNABIS

\$7.11
 AVERAGE PRICE
 PER GRAM

FLOWER ONLY

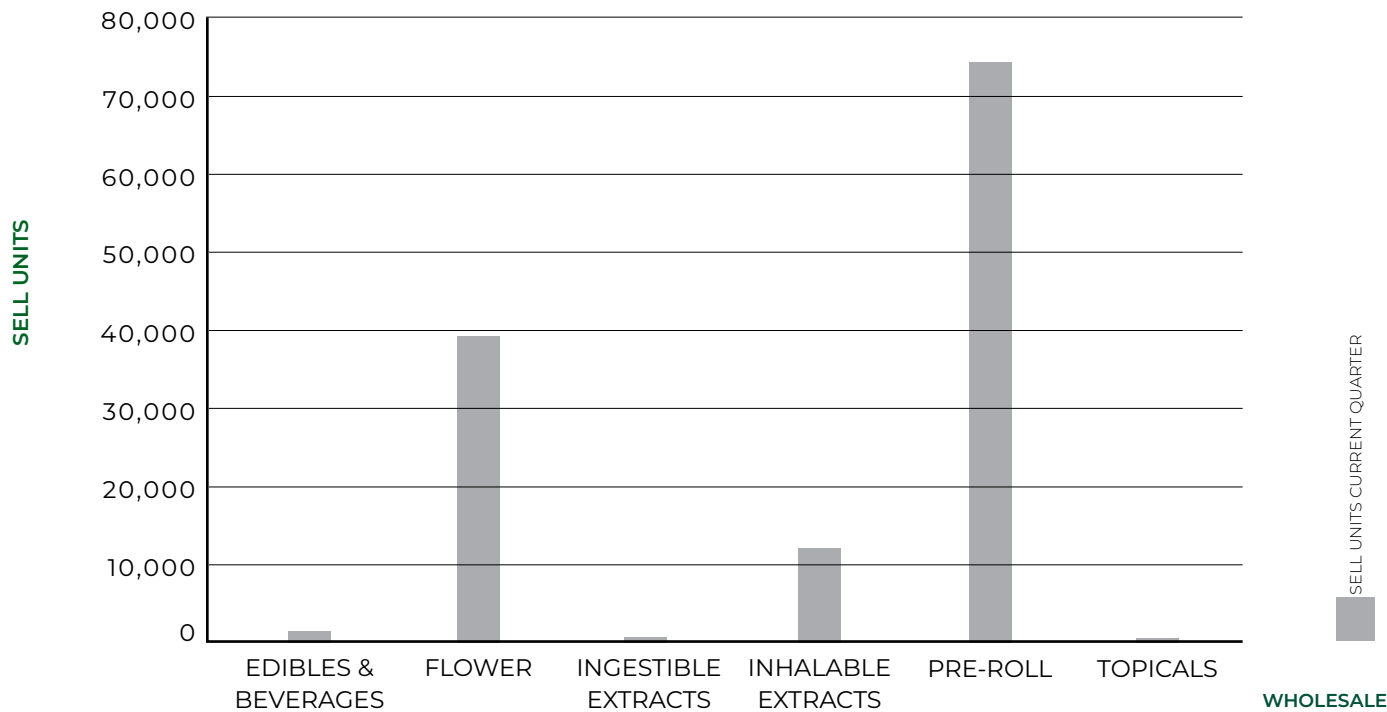
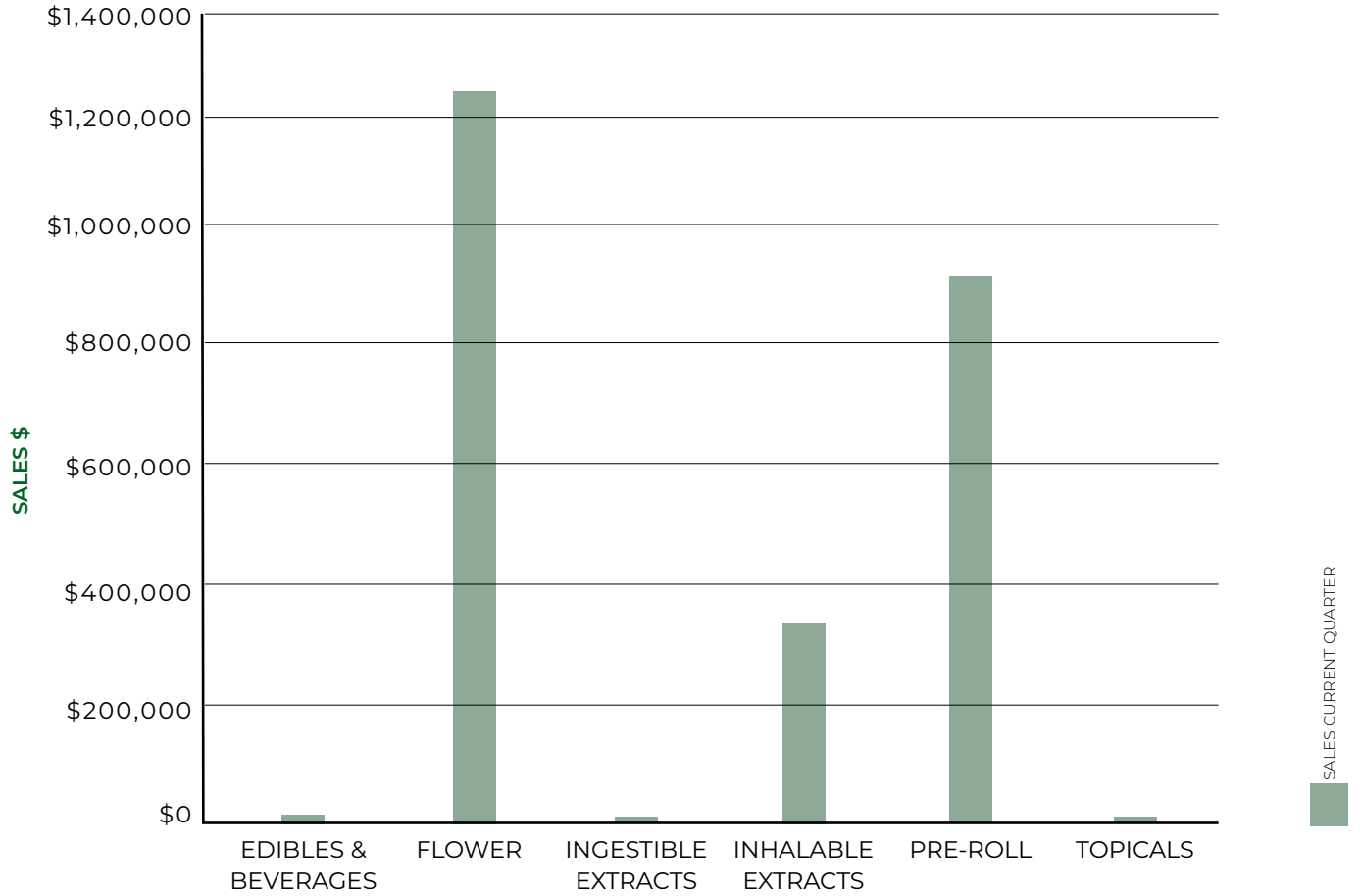
\$6.46
 AVERAGE PRICE
 PER GRAM

DIRECT DELIVERY SUB CATEGORY SALES*

SUB CATEGORY	SALES \$ CURRENT QUARTER	SELL UNITS CURRENT QUARTER
Edibles & Beverages	12,945	1,210
Flower	1,258,692	39,084
Ingestible Extracts	8,773	340
Inhalable Extracts	348,970	11,778
Pre-roll	941,065	73,781
Topicals	5,140	216






*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	SELL UNITS CURRENT QUARTER
BEVERAGES 	DRINK MIX	11,753	730
	NON CARBONATED DRINKS	667	240
EDIBLES 	BAKED GOODS	424	204
	CHEWS	100	36
FLOWER 	HYBRID	566,721	17,750
	INDICA	424,228	14,248
	SATIVA	267,743	7,086
INGESTIBLE EXTRACTS 	CAPSULES AND PILLS	3,959	72
	OILS AND TINCTURES	1,063	84
	OTHER INGESTIBLE EXTRACTS	3,751	184
INHALABLE EXTRACTS 	CARTRIDGE	92,964	3,232
	DISPOSABLE PENS	128,352	4,584
	DRY SIFT	155	12
	HASH	1,058	-12
	OTHER INHALABLE EXTRACTS	25,581	188
	RESIN AND ROSIN	44,444	1,260
	SHATTER	56,416	2,514

*Sales reported during the quarter as sold.

DIRECT DELIVERY SALES MIX BY PRODUCT CATEGORY*

PRODUCT	SUB CATEGORY	SALES \$ CURRENT QUARTER	SELL UNITS CURRENT QUARTER
PRE-ROLL 	BLEND	9,043	960
	HYBRID	179,980	16,428
	INDICA	688,953	54,504
	SATIVA	11,560	-451
	VARIETY PACK	51,529	2,340
TOPICALS 	BALMS	1,434	48
	BATH PRODUCTS	898	42
	CREAMS AND LOTIONS	1,566	72
	OTHER TOPICALS	1,242	54

*Sales reported during the quarter as sold.