

ONTARIO CANNABIS MARKETPLACE: BY THE NUMBERS

Jan. 1 – June 30, 2024





THE ONTARIO CANNABIS STORE (OCS) PUBLISHES **ONTARIO CANNABIS MARKETPLACE: BY THE NUMBERS** AS A RESOURCE FOR ALL ADULT ONTARIANS.

As Ontario's wholesaler and distributor of legal recreational cannabis, the OCS is mandated to provide a competitive alternative to the illegal market, champion a socially responsible cannabis industry and return its profits to the people of Ontario. The OCS is proud to share data aimed at informing adult Ontarians about the progress being made in the legal cannabis industry, supporting our vision to help enable Canada's largest and most vibrant cannabis marketplace.

The information contained in this publication demonstrates the span and scope of retail cannabis operations across Ontario and the growth in access to legal cannabis over time. This document is intended to provide an overview of key facts and figures for the period between Jan. 1 and June 30, 2024, as well as relevant year-over-year historical data.

Ontario Cannabis Marketplace: By the Numbers will evolve over future editions, and the OCS welcomes feedback to improve the value of this publication for adult Ontarians. Send comments and feedback to the OCS at inquiries@ocs.ca.

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Ce document est également publié en français. Il est disponible sur [OCS.ca](https://ocs.ca).

ONTARIO'S AUTHORIZED CANNABIS STORES SOLD OVER **21%** MORE CANNABIS BY VOLUME COMPARED TO THE SAME PERIOD A YEAR BEFORE, WORTH MORE THAN **\$1B** IN SALES.

Total sales at Authorized Cannabis Stores in Ontario

\$1,029,614,280

Number of active product SKUs in Ontario

4,746

Total units shipped to Authorized Cannabis Stores across Ontario

50,199,845

Average wholesale price per gram (dried flower)

\$3.84

Weighted average wholesale price per gram, without HST, includes dried flower and pre-rolls



Total number of Authorized Cannabis Stores in Ontario

1,721

↑ 3% YoY

Number of Authorized Cannabis Stores by region

West
546
↑ 12 STORES
(2%) YoY*

North
137
↑ 2 STORES
(2%) YoY

GTA
250
↑ 45 STORES
(22%) YoY

Toronto
388
↓ 11 STORES
(-3%) YoY

East
400
↑ 6 STORES
(2%) YoY

- North
- East
- West
- GTA
- Toronto



Store onboarding*

OPEN **123**

Number of Authorized Cannabis Stores onboarded from Jan. 1 to June 30, 2024
(-20% YoY)

Store offboarding*

CLOSED **80**

Number of Authorized Cannabis Stores offboarded from Jan. 1 to June 30, 2024
(-13% YoY)

*Glossary of terms on page 16

*Number of Authorized Cannabis Stores that have been onboarded to do business with the OCS. This number does not represent the number of net new bricks and mortar openings.

THE OCS DISTRIBUTION CENTRE SHIPPED 204,314,110 GRAMS OF CANNABIS TO AUTHORIZED CANNABIS STORES ACROSS ONTARIO FROM JAN. 1 TO JUNE 30, 2024. THAT'S AN INCREASE OF 18.5% YEAR-OVER-YEAR.

Total deliveries made to stores

34,063

(↑ 5% YoY)

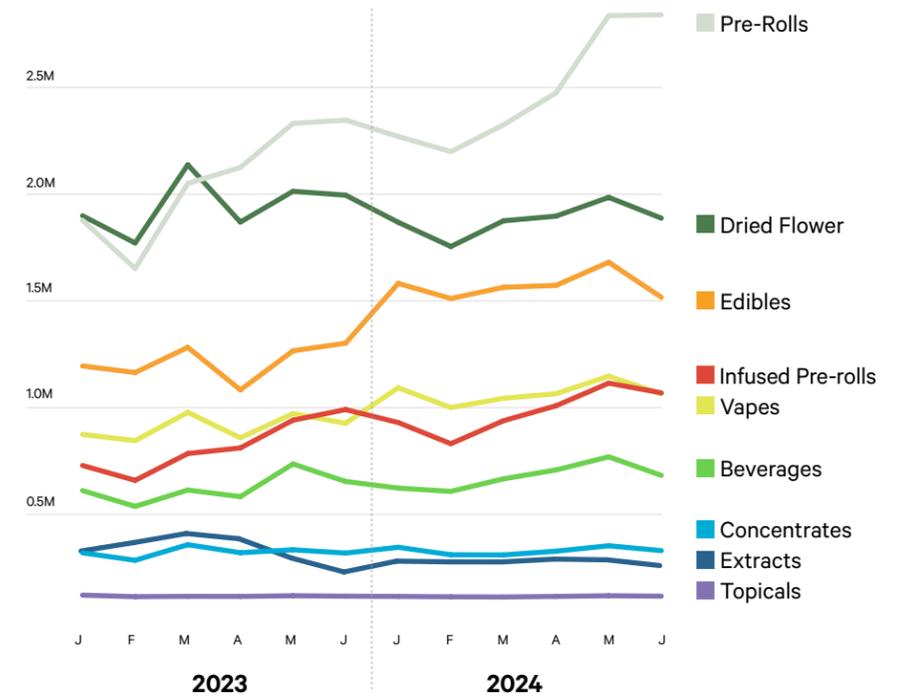
Average deliveries made to stores per week

1,301

Average deliveries made to stores daily

187

Units distributed to stores per month



*Infused Pre-Rolls added as a new distinct product category for this report

Units shipped to stores across Ontario

50,199,845

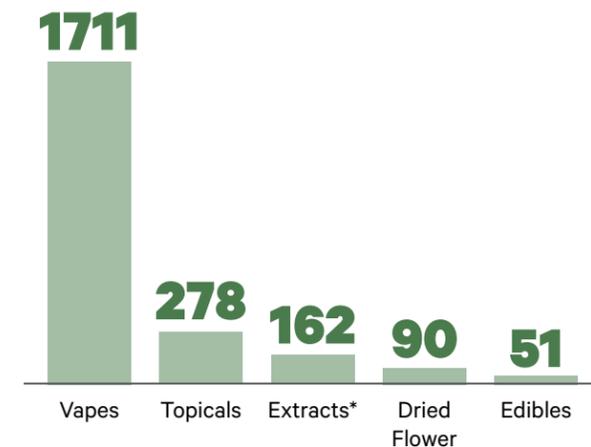
(↑ 44,080,008 units YoY)

Units shipped to stores, by region



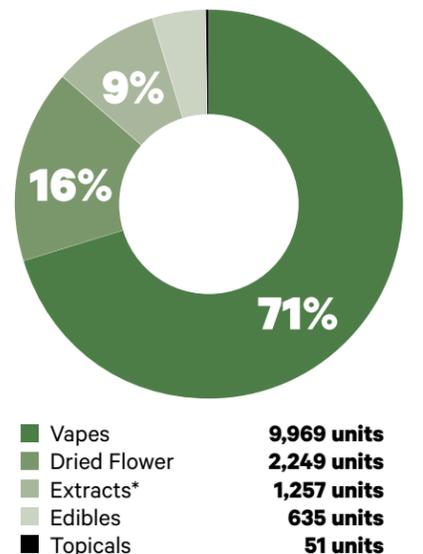
PRODUCT QUALITY ASSURANCE

Complaints-per-million-units (CPMU) by category



*Includes infused pre-rolls

Number of complaints by category



Total active product SKUs as of June 30, 2024

4,746

That's **↑19%** more than the same time last year

Number of SKUs added and dropped

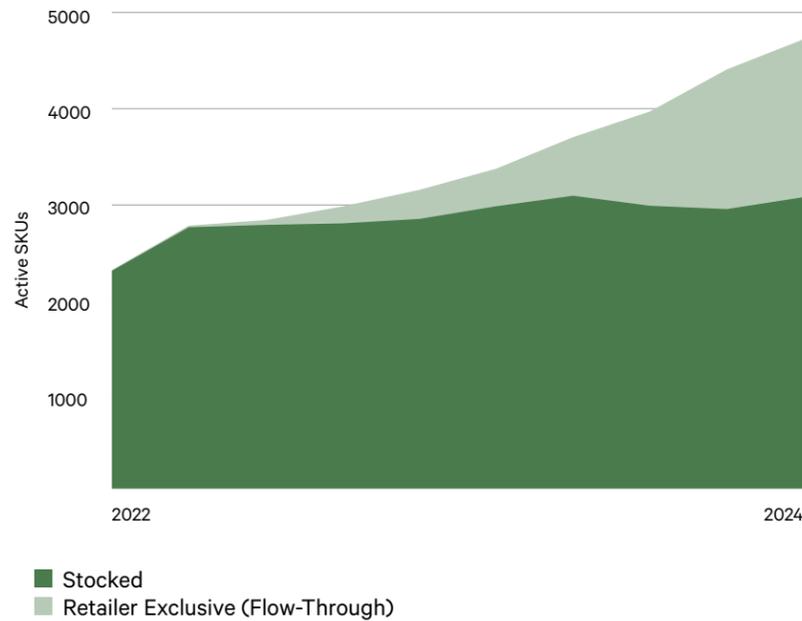
↑1,816

New SKUs added

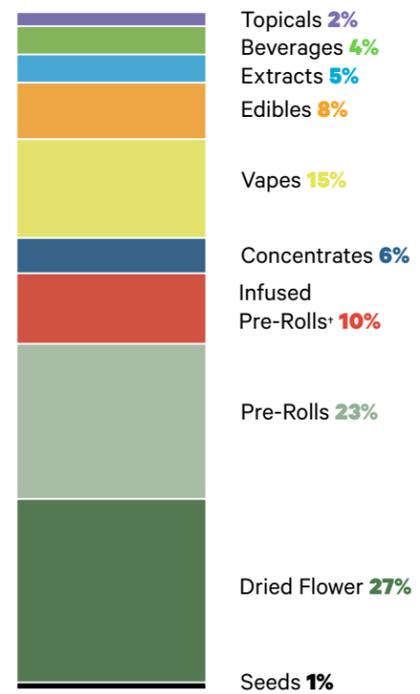
↓1,053

SKUs dropped*

Number of active SKUs added



Active SKUs per category**



*Most SKUs are dropped at the request of Licensed Producers as part of their internal SKU rationalization processes

**Values rounded to the nearest whole number. Excludes accessories.
*Infused Pre-Rolls added as a new distinct product category for this report



RETAIL SALES

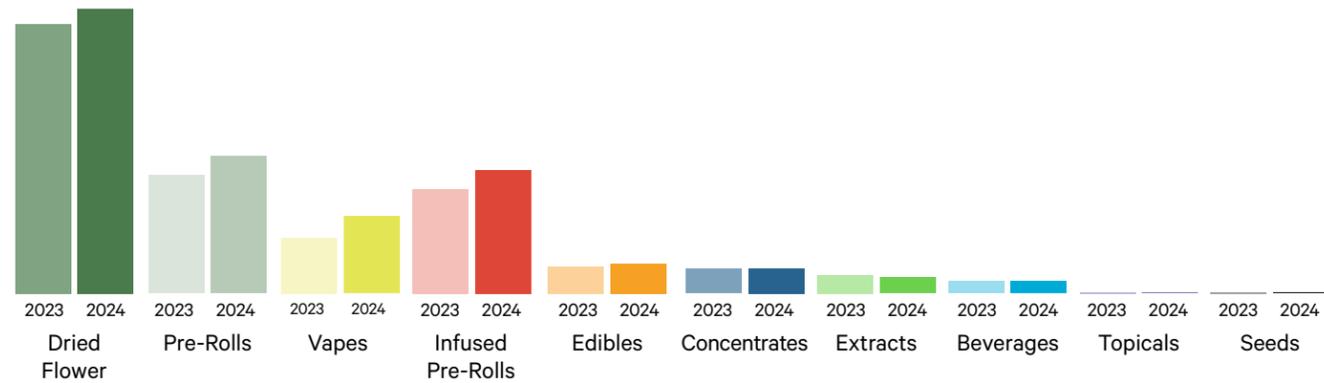
Total grams of cannabis sold
190,527,442 g
↑21%

YoY increase, compared to 157,495,201 g sold over the same period last year

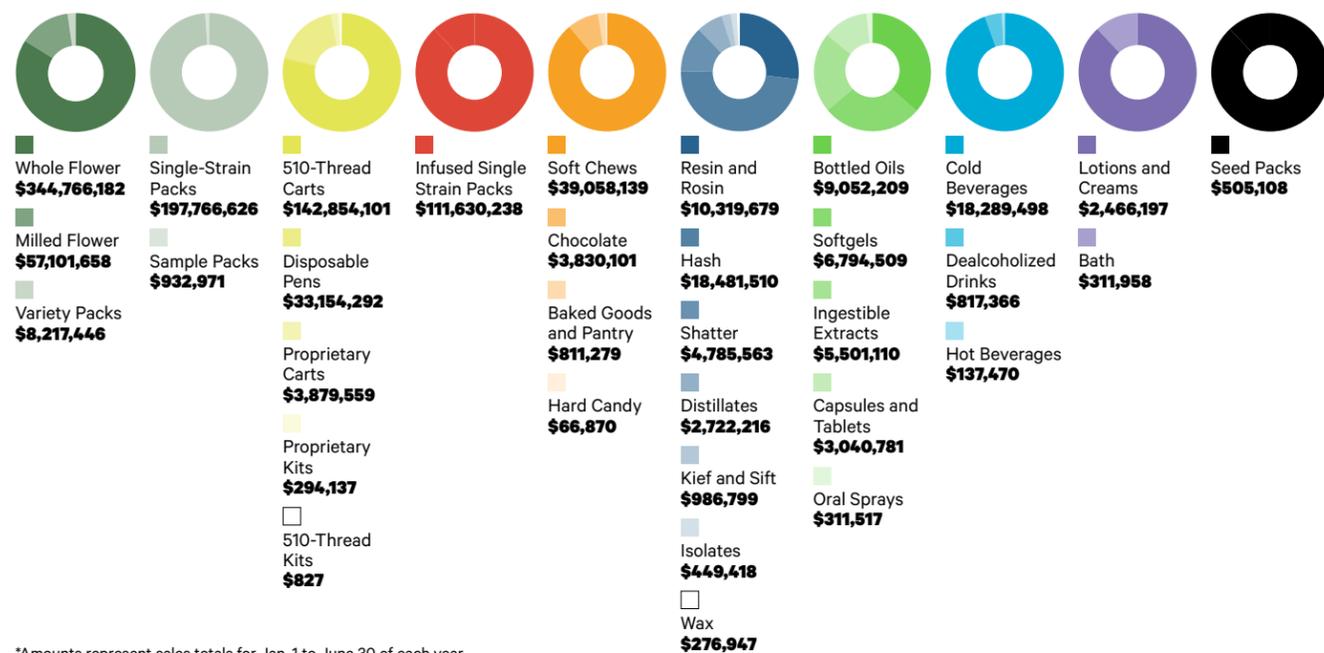
Total value of legal cannabis sales
\$1,029,614,280
↑11.8%

YoY increase, compared to \$921,021,041 sold over the same period last year

Retail sales by category*



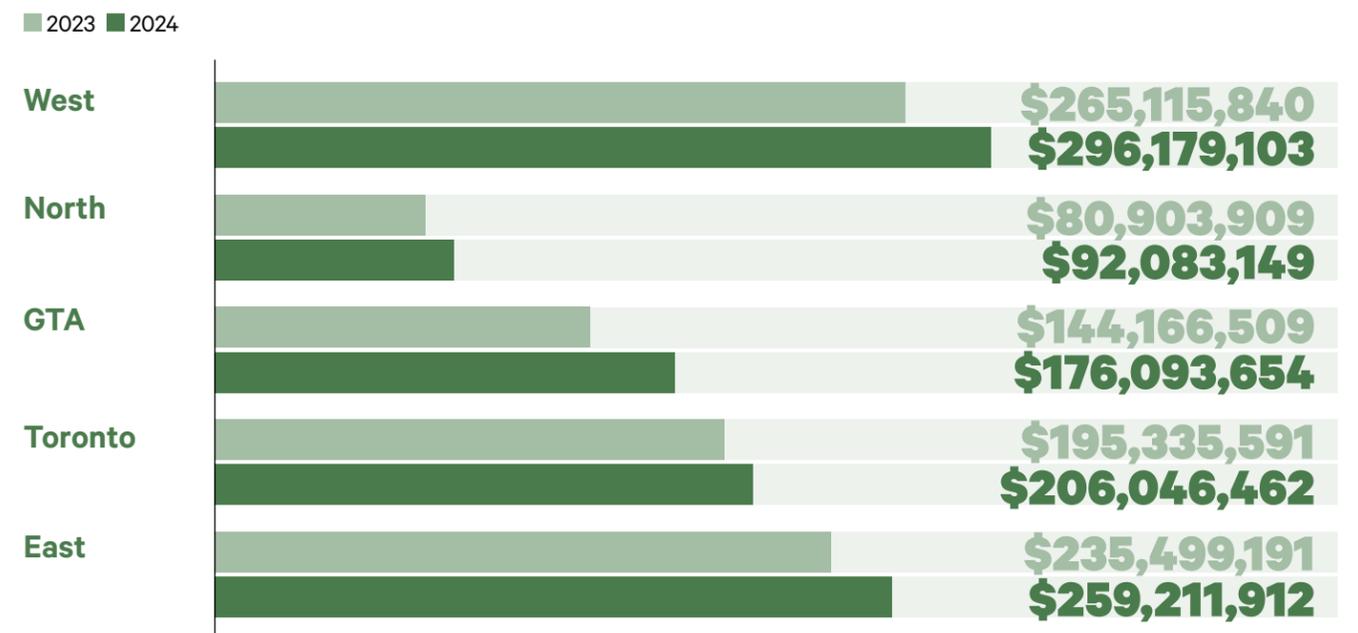
Retail sales by subcategory*



*Amounts represent sales totals for Jan. 1 to June 30 of each year



Retail sales by region*



*Amounts represent sales totals for Jan. 1 to June 30 of each year

ON AVERAGE, THE WHOLESALE PRICE PER GRAM OF DRIED FLOWER* IS \$3.84 IN ONTARIO.

Wholesale price per gram (dried flower), by format

	2023	2024	YoY
Pre-Rolls	\$5.18	\$4.63	↓ 11%
3.5 Grams	\$5.55	\$5.24	↓ 6%
7 Grams	\$3.40	\$3.56	↑ 5%
14 Grams	\$4.01	\$3.66	↓ 9%
28 Grams	\$2.91	\$2.82	↓ 3%

The OCS establishes wholesale prices for cannabis sold to Authorized Cannabis Stores. The assortment of available SKUs in different price tiers can lead to varying prices per gram, by format. These wholesale prices also inform end-consumer pricing on OCS.ca. In Ontario, Authorized Cannabis Stores set their own pricing. As a result, prices may vary among different types of products, store to store.

*Weighted average wholesale price per gram, without HST, includes dried flower and pre-rolls

TOP FIVE BRANDS PER CATEGORY BY UNITS SOLD

Dried Flower					
Pre-Rolls					
Infused Pre-Rolls					
Vapes					
Concentrates					
Edibles					
Beverages					
Oils					
Capsules					
Topicals					
Seeds					

*Updated to include most recent data

GLOSSARY

Active SKUs

Products available for sale through the OCS Catalogue, either through Stocked or Flow-Through fulfillment.

Alcohol and Gaming Commission of Ontario (AGCO)

The Alcohol and Gaming Commission of Ontario (AGCO) licenses eligible retail store operators and regulates the sale of cannabis through Authorized Cannabis Stores in Ontario. It sets operational standards for licensed retail store operators to adhere to the *Cannabis Licence Act, 2018* and its Regulations. These standards are outlined in the AGCO's Cannabis Retail Regulation Guide.

Authorized Cannabis Store

In Ontario, consumers can legally purchase cannabis in person only from AGCO-Authorized Cannabis Stores. Authorized Cannabis Stores have bricks-and-mortar locations and can offer online ordering for delivery or in-store pickup. Authorized Cannabis Stores can be identified by the black and white Provincial Retail Seal located outside the store entrance.

Cannabis legalization

The *Cannabis Act* is a federal law that came into force Oct. 17, 2018, legalizing access to recreational cannabis in Canada. The law governs the production, distribution, sale and possession of cannabis across Canada and protects public health and safety.

Complaints-per-million-units (CPMU)

CPMU offers a standardized way for OCS to evaluate and track complaints received for a particular product or SKU, relative to the number of units sold during a defined period.

GTA

The Greater Toronto Area region, or GTA region, refers to the following census divisions, but does not include the Toronto census division: Durham, York, Peel and Halton.

Legal purchase channels

In Canada, provinces and territories are responsible for setting their own rules around how cannabis can be sold and where stores may be located, among other regulations. In Ontario, legal recreational cannabis is available for purchase only by adults 19 years of age or older and only through Authorized Cannabis Stores licensed by the AGCO, and online at OCS.ca. Adult consumers can look for the Provincial Retail Seal to easily identify a legal retailer's storefront.

Licensed Producer

A Licensed Producer is an organization licensed by Health Canada to perform activities with cannabis that include cultivation, processing, research and development, and selling cannabis for medical and non-medical purposes. Health Canada maintains a full list of [Canadian Licensed Producers](#).

By law, the OCS only purchases cannabis from Licensed Producers authorized by Health Canada to sell cannabis for the legal recreational market.

OCS.ca

The Province's online e-commerce platform, which delivers legal cannabis products to consumers aged 19 and older in every corner of Ontario. Beyond operating as a retail site, OCS.ca prioritizes public education through initiatives like [Cannabis Made Clear](#), which helps new and experienced consumers learn more about recreational cannabis and responsible use.

OCS Distribution Centre

The OCS's 220,000-square-foot warehouse facility operated by Domain Logistics in Guelph, Ont. It operates 24 hours a day, seven days a week, and delivers to every corner of the province.

Offboarded stores

Locations where the licensed owner has ceased doing business and has worked with the OCS to settle and

close their account. The location may still be in business under a new owner with a separate OCS account.

Onboarded stores

Retail Store Authorization (RSA) holders who have engaged the OCS and completed the onboarding process to become an OCS customer for a specific location. This includes locations that have not yet opened, and accounts created for new owners of existing locations.

Ontario Cannabis Store (OCS)

The Ontario Cannabis Store (OCS) is a Crown agency solely owned by the Province of Ontario that operates the largest legal and centralized wholesale cannabis organization in the world. It provides Ontario adults aged 19 and older with safe access to tested and traceable recreational cannabis products. The OCS is mandated to provide a competitive alternative to the illegal market, champion a [socially responsible](#) cannabis industry and return its profits to the people of Ontario. The OCS's mission is to enable a vibrant cannabis marketplace through great customer experiences, rooted in selection, service and quality.

Price per gram (dried flower)

Represents the average wholesale price per gram of dried flower sold by the OCS to Authorized Cannabis Stores in Ontario. This price does not represent the average retail price for dried flower; Authorized Cannabis Stores can set product prices at their own discretion.

Product category

Refers to the type of cannabis product (for example, dried flower, vapes and edibles).

Product subcategory

Refers to a specific product type within a product category (for example, whole flower and milled flower are subcategories of dried flower).



Provincial Retail Seal

Authorized Cannabis Stores in Ontario must display a Provincial Retail Seal in a place that is visible from the exterior of the public entrance. The seal must be at least 17 cm wide and 20 cm long. This helps consumers easily identify a legal retailer's storefront. The Provincial Retail Seal must also appear on Authorized Cannabis Stores' retail websites.

Region

Five geographical areas categorized by location, which together make up the province of Ontario: East region, GTA region, North region, Toronto region and West region.

Each region is composed of various census divisions as outlined by Statistics Canada. For example, West region includes the following census divisions: Dufferin, Wellington, Hamilton, Niagara, Haldimand-Norfolk, Brant, Waterloo, Perth, Oxford, Elgin, Chatham-Kent, Essex, Lambton, Middlesex, Huron, Bruce, Grey and Manitoulin.

Retailer Exclusive (Flow-Through)

Flow-Through refers to an OCS distribution model in which Authorized Cannabis Stores can order products from an expanded catalogue of items that are not stored in the OCS Distribution Centre. These items ship from the Licensed Producer to the OCS Distribution Centre, where they are packaged and shipped to the retailer. Flow-Through products are retailer exclusive and not available for purchase on OCS.ca.

Stocked

Stocked is an OCS designation for products that are physically stored and held in inventory at the OCS Distribution Centre prior to sale. Items designated as Stocked are made available for sale to Authorized Cannabis Stores through the OCS Business to Business (B2B) Portal and to Ontario adults through OCS.ca.

Stock-keeping unit (SKU)

A stock-keeping unit (SKU) represents one product (in

GLOSSARY

this case, a legal cannabis product) and is the unit of measure in which stock is managed.

Units

Refers to individual cannabis products of a defined format available for sale. This information indicates how much of a particular product or SKU is held in inventory, its rate of sale and more.

Wholesale price

The amount paid to the OCS (the seller) by an Authorized Cannabis Store (the purchaser) for goods rendered.

Year-over-year (YoY)

A defined period of time that is used to compare sequential results from one year to the next.

Beverages

Available in a wide variety of formats, cannabis-infused beverages include ready-to-drink sodas, lemonades and other flavoured beverages, tea bags and hot chocolate.

Concentrates

Concentrates are potent forms of cannabis available in a variety of solid and liquid formats. They are made by separating active ingredients such as cannabinoids, terpenes and flavonoids from plant material, such as buds, leaves and stems. Examples include distillates, hash, kief, shatter and wax.

Dried flower

Dried flower is cannabis plant matter that has been cured and dried, and is ready to smoke or vaporize. Examples include whole flower and milled flower.

Edibles

Edibles are products containing cannabis that are intended to be ingested, meaning they are consumed in the same manner as food. Products include soft and hard candy, chocolate and baked goods.

Extracts

Cannabis extracts are made by separating (extracting) the active ingredients in cannabis using solvents. After extraction, they may also be combined with a carrier oil to prepare the extracts for ingestion. Examples include products such as capsules, bottled oils, softgels and oral sprays.

Pre-rolls

Pre-rolls are pre-rolled joints that have been assembled and rolled by a Licensed Producer for purchase in a ready-to-consume format.

Infused pre-rolls

Infused pre-rolls are pre-rolled joints that have been infused with a cannabis concentrate.

Topicals

Topicals refer to products such as lotions and oils that have been infused with cannabis extracts and are meant to be applied to the external body surface, which includes hair, skin and nails.

Vapes

A vape is a device used for vaping cannabis. This battery-powered accessory can be purchased as an all-in-one disposable product or as a cartridge that fits with a rechargeable battery. Inside disposable vapes and vape cartridges is the cannabis consumed through vaping, in the form of a liquid cannabis product, such as distillate, full-spectrum extract or live resin.

METHODOLOGY

This publication is a compendium of insights from the legal cannabis industry within Ontario from Jan. 1 to June 30, 2024. Data gathered from various sources provides insights related to legal cannabis access, breadth of assortment, volume and sales information, consumer research and more to provide the public with a holistic view of the health of Ontario's legal cannabis sector.

Sources

Sales by category/subcategory (dried flower, pre-rolls, edibles/ beverages, concentrates, vapes, oils/ingestible, topicals)

Source: AGCO Authorized Retail reporting

Regional Sales Trends: Total sales (\$) by region (year-over-year)

Source: AGCO Authorized Retail reporting

Regional Sales Trends: Total volume sold by region (year-over-year)

Source: AGCO Authorized Retail reporting

All other data points:

Multiple internal sources



OCS.ca