



ONTARIO CANNABIS MARKETPLACE: BY THE NUMBERS

(JAN. 1–DEC. 31, 2025)



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 Dec. 31, 2025, 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.

DISCLAIMER:

The data provided in this publication is for informational purposes only. The OCS shall be the sole owner of all intellectual property rights and all right, title and interest in this publication, *Ontario Cannabis Marketplace: By the Numbers* (Jan. 1–Dec. 31, 2025), and all data used in it, and no use of the same shall be made, nor may ideas obtained there be used except with written approval from the OCS. Without limiting the generality of the above, no party, other than the OCS, shall be permitted to modify, publish, transmit, participate in the transfer or sale, create derivative works, or in any way exploit or use this publication, *Ontario Cannabis Marketplace: By the Numbers* (Jan. 1–Dec. 31, 2025), or any and all data used in it, in whole or in part, without the prior written consent of the OCS. This publication is intended for general guidance and information purposes only. Under no circumstances is this publication intended to be considered any form of financial reporting or a recommendation to buy, sell or consume any of the products listed. The data provided is unaudited and has not been reconciled with official OCS data, and the OCS shall have no liability to any person resulting from the use of this publication.



AT A GLANCE

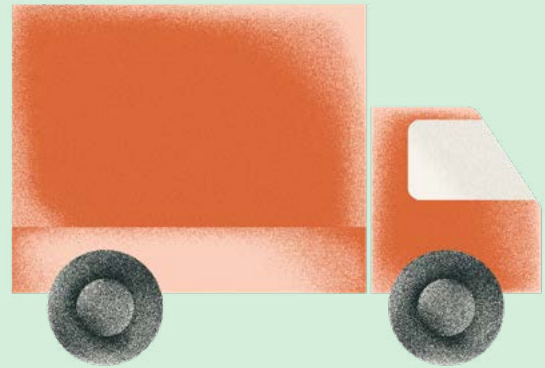
**IN 2025, AUTHORIZED
CANNABIS STORES
ACROSS ONTARIO
SOLD OVER 441
MILLION GRAMS OF
TESTED, TRACEABLE,
REGULATED
CANNABIS, TOTALLING
MORE THAN \$2.28 B
IN LEGAL SALES.**

AT A GLANCE



Total sales at
Authorized Cannabis Stores in Ontario

\$2,281,841,116



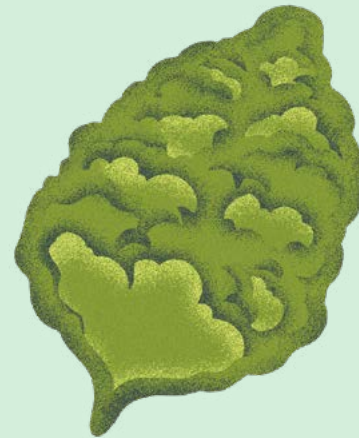
Total units shipped to
Authorized Cannabis Stores across Ontario

114,647,066



Number of active
product SKUs in Ontario

4,971



Average wholesale price per gram
(dried flower)*

\$3.75

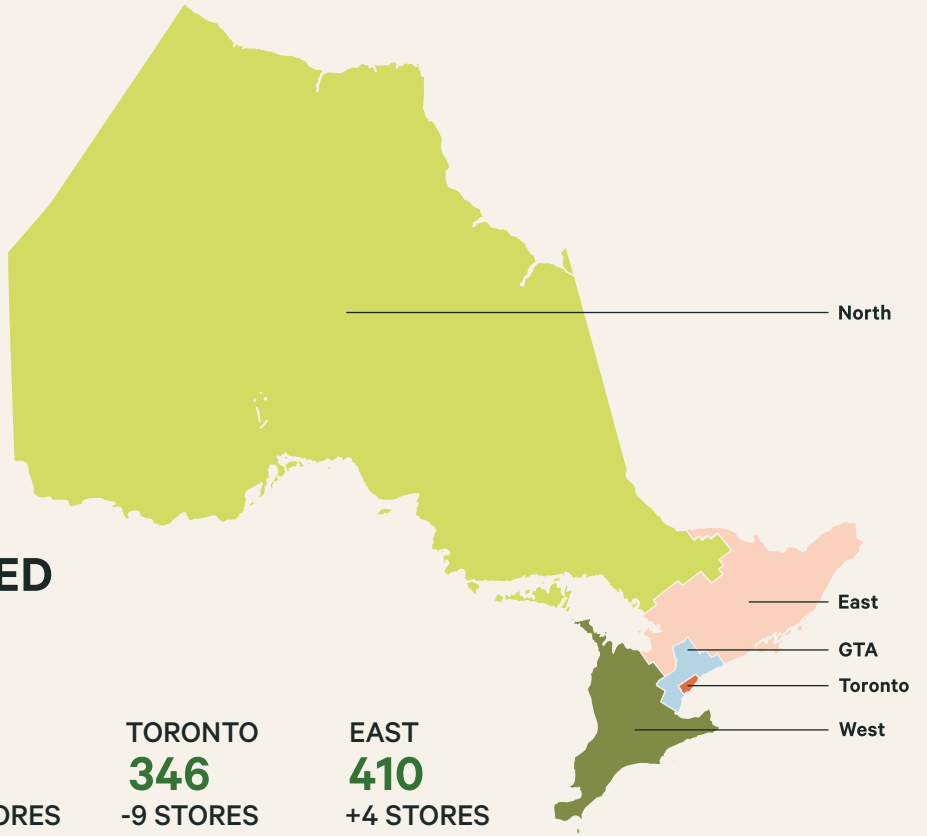
*Weighted average wholesale price per gram, without HST, includes dried flower and pre-rolls

CONSUMER ACCESS

TOTAL NUMBER OF AUTHORIZED CANNABIS STORES IN ONTARIO

1,780

+60 STORES
(3%) YoY*



NUMBER OF AUTHORIZED CANNABIS STORES BY REGION

WEST
582

+40 STORES
(7%) YoY

NORTH
163

+15 STORES
(10%) YoY

GTA
279

+10 STORES
(4%) YoY

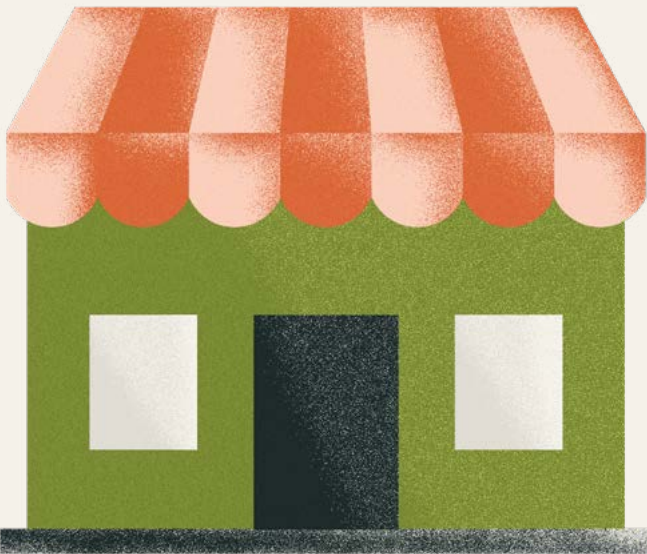
TORONTO
346

-9 STORES
(-3%) YoY

EAST
410

+4 STORES
(1%) YoY

MARKET DYNAMICS



STORE ONBOARDING AND OFFBOARDING

257

Number of Authorized Cannabis Stores onboarded**
(10%) YoY

134

Number of Authorized Cannabis Stores offboarded
(-37%) YoY

*Glossary of terms on page 14.

**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.

In total, the OCS Distribution Centre shipped **452,590,868 grams** of cannabis to Ontario's Authorized Cannabis Stores, an **increase of 6%** over last year.

UNITS SHIPPED TO STORES ACROSS ONTARIO

114,647,066

(9%) YoY

UNITS SHIPPED TO STORES

BY REGION

WEST

33,573,689

(9%) YoY

TORONTO

23,799,723

(5%) YoY

NORTH

9,505,445

(11%) YoY

EAST

27,049,664

(8%) YoY

GTA

20,718,545

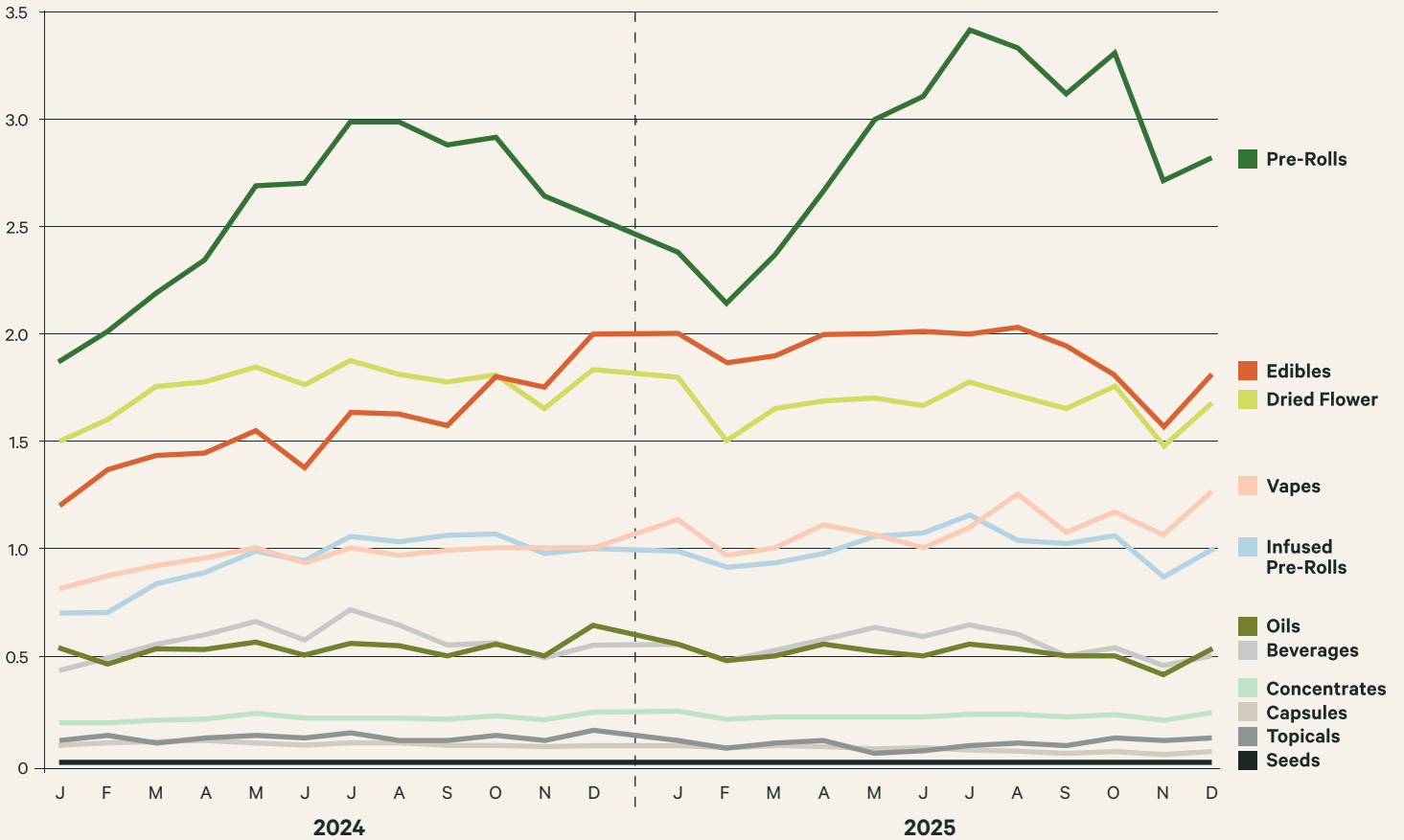
(13%) YoY



WHOLESALE DISTRIBUTION

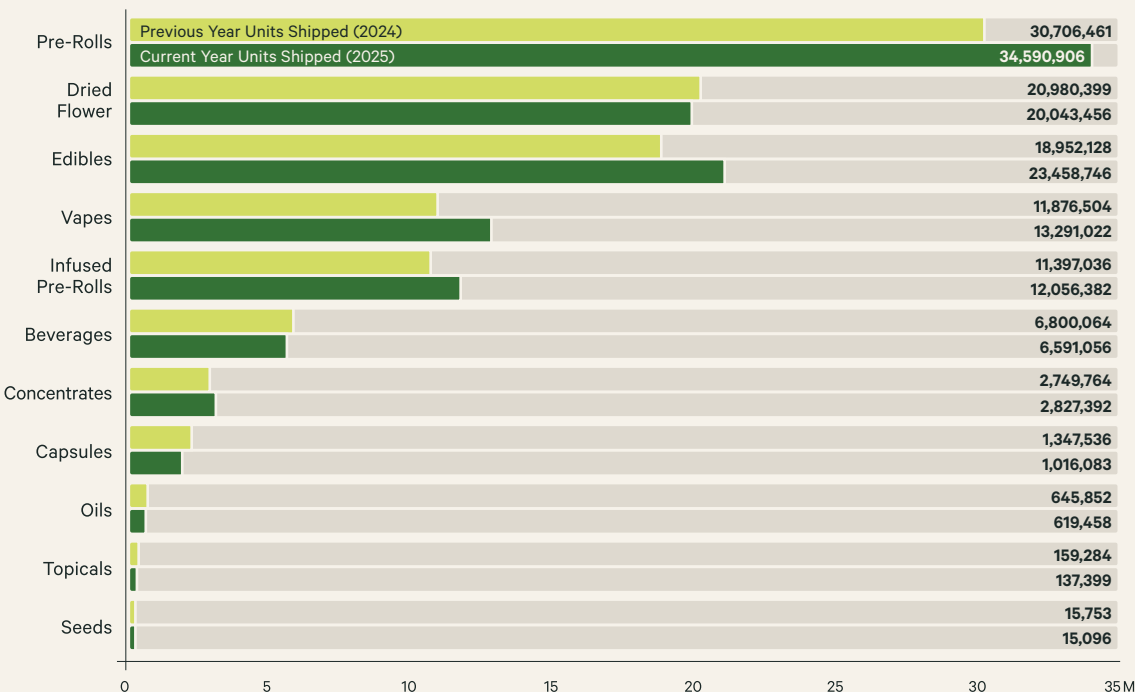
UNITS DISTRIBUTED TO STORES PER MONTH

MILLION UNITS PER MONTH



TOTAL UNITS DISTRIBUTED TO STORES

BY CATEGORY



Total deliveries made to stores

75,818

(7%) YoY

Average deliveries made to stores per week

1,454

Average deliveries made to stores daily

208

LEGAL PRODUCT ASSORTMENT

TOTAL ACTIVE PRODUCT SKUS

AS OF DEC. 31, 2025

4,971

NUMBER OF SKUS ADDED AND DROPPED

2,583

New SKUs added

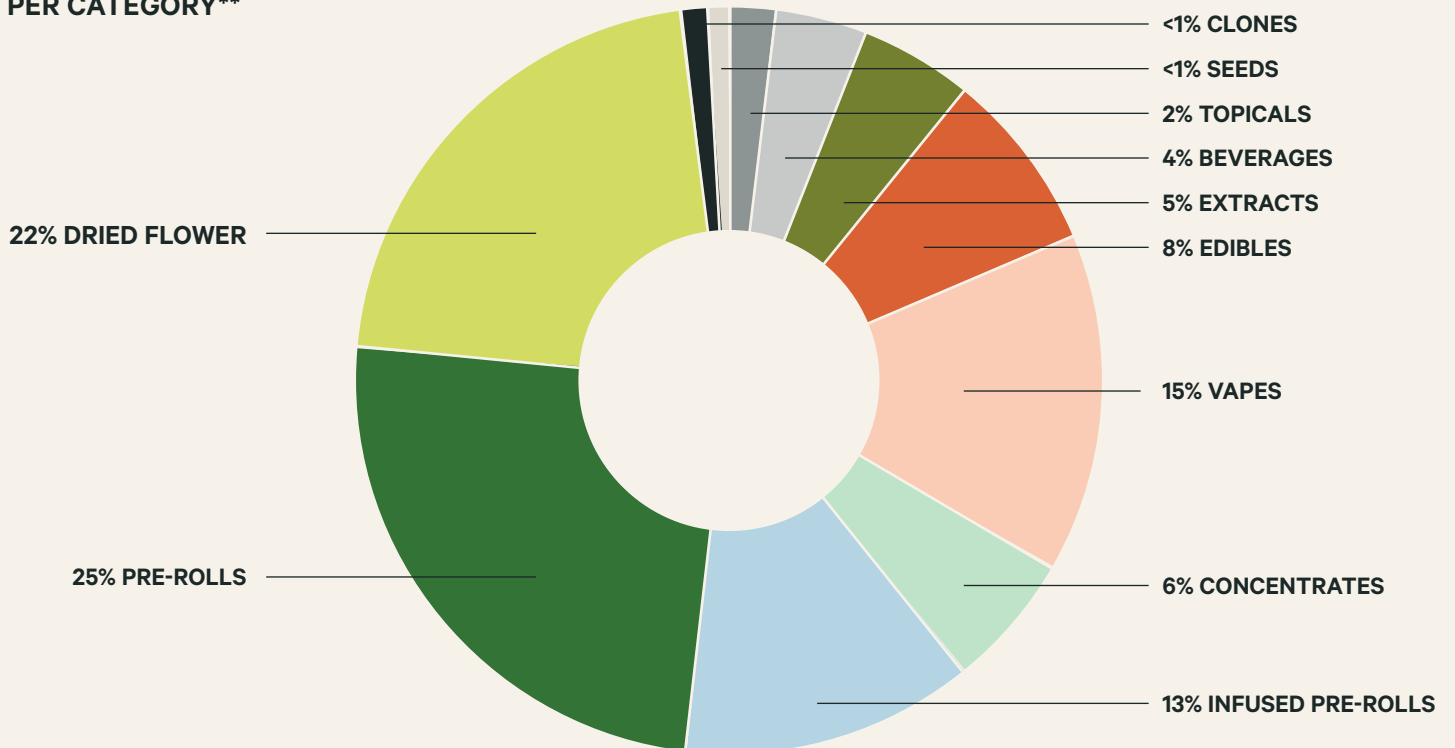
2,806

SKUs dropped*



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.

RETAIL SALES



TOTAL SALES

Total grams of cannabis sold

441,069,676 g

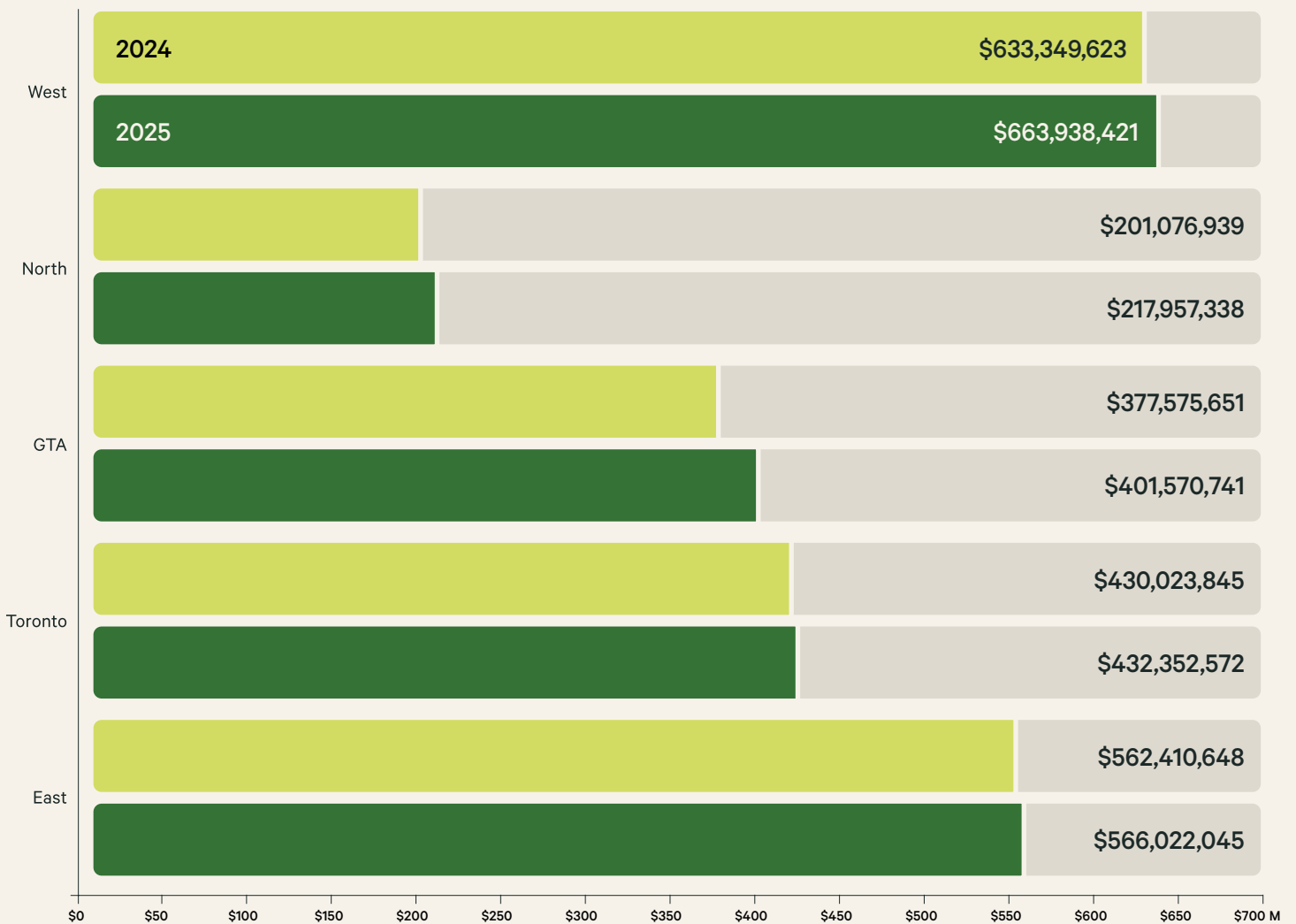
(5.6%) YoY

Total value of legal cannabis sales

\$2,281,841,116

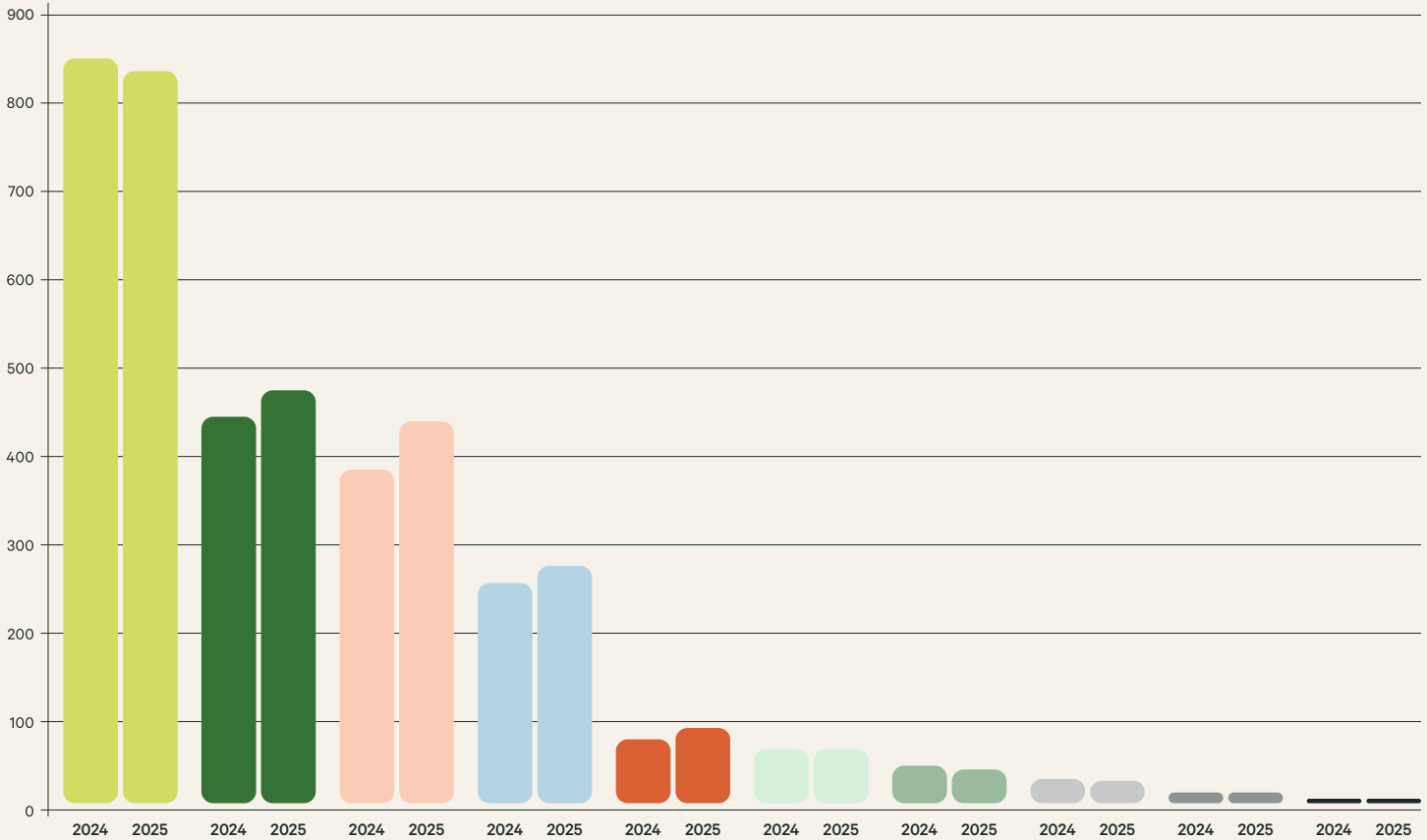
(3.5%) YoY

RETAIL SALES BY REGION



RETAIL SALES

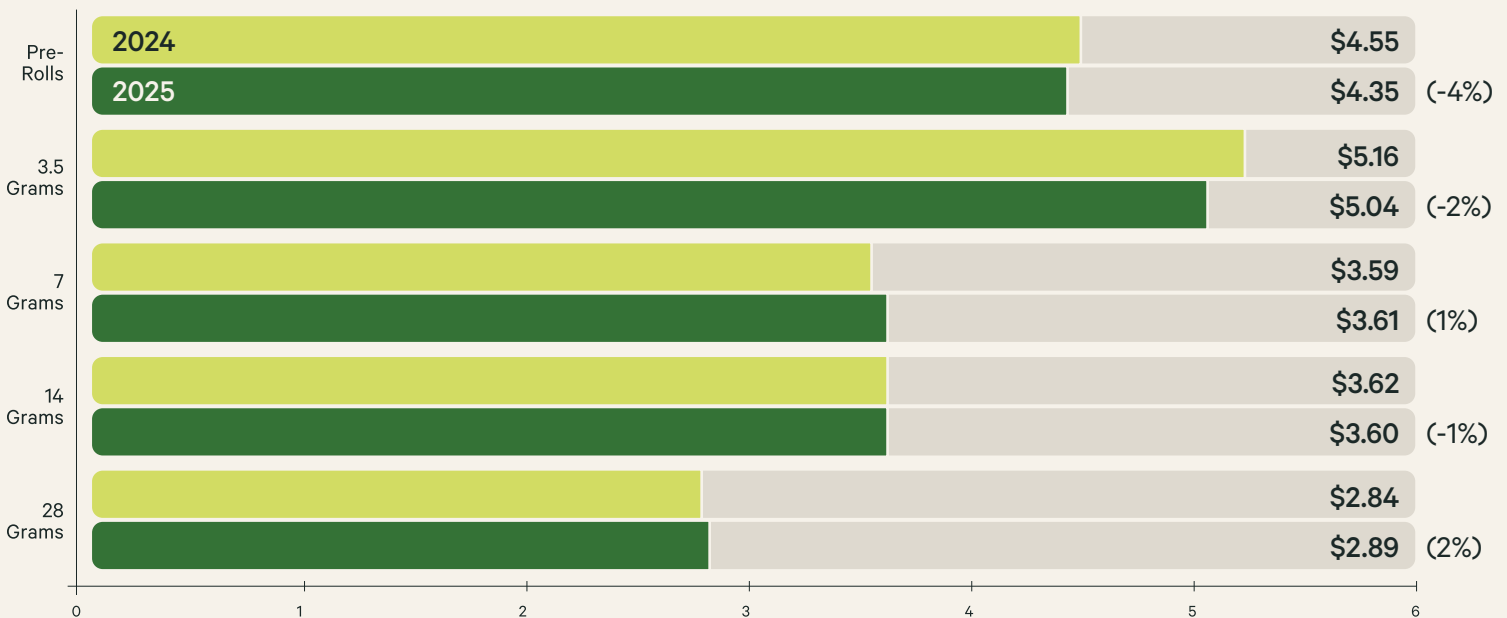
RETAIL SALES BY CATEGORY \$ MILLION



DRIED FLOWER	PRE-ROLLS	VAPES	INFUSED PRE-ROLLS	EDIBLES	CONCENTRATES	EXTRACTS	BEVERAGES	TOPICALS	SEEDS
Whole Flower \$701,308,216 Milled Flower \$125,931,628 Variety Packs \$12,092,381	Single-Strain Packs \$476,392,920 Sample Packs \$3,048,320	510-Thread Carts \$296,241,396 Disposable Pens \$135,510,896 Proprietary Carts \$1,438,466 Proprietary Kits \$98,106 510-Thread Kits \$210	Infused Single-Strain Packs \$261,909,341 Infused Sample Packs \$12,581,518	Soft Chews \$84,773,498 Chocolate \$6,233,592 Baked Goods and Pantry \$807,591 Hard Edibles \$225,536	Hash \$37,991,598 Resin and Rosin \$19,358,197 Shatter \$8,662,074 Distillates \$4,380,677 Kief and Sift \$3,027,813 Isolates \$1,872,985 Wax \$597,144	Bottled Oils \$17,307,952 Softgels \$13,721,970 Capsules and Tablets \$11,223,058 Ingestible Extracts \$1,355,414 Oral Sprays \$534,373	Cold Beverages \$36,928,537 Hot Beverages \$53,463	Lotions and Creams \$5,166,625 Bath and Shower \$566,323	Seed Packs \$497,049 Clones \$1,616

On average, the wholesale price per gram of dried flower* is *\$3.75 in Ontario.*

**WHOLESALE PRICE PER GRAM (DRIED FLOWER)
BY FORMAT**



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 among different formats. These

wholesale prices also inform end-consumer pricing on [OCS.ca](https://www.ocs.ca). In Ontario, Authorized Cannabis Stores set their own pricing. As a result, prices may vary among different types of products from store to store.

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

TOP FIVE BRANDS PER CATEGORY

BY UNITS SOLD

DRIED FLOWER



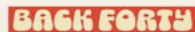
PRE-ROLLS



INFUSED PRE-ROLLS



VAPES



CONCENTRATES



EDIBLES



BEVERAGES



OILS



CAPSULES



TOPICALS



SEEDS



GENERAL TERMS

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. The AGCO maintains a map of all [licensed retail stores](#) in Ontario.

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 Cannabis Retail Seal that must be displayed outside the store entrance.

Cannabis Retail Seal: Authorized Cannabis Stores in Ontario must display the Cannabis 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 Cannabis Retail Seal must also appear on Authorized Cannabis Stores' retail websites.

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

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

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. It is illegal to purchase cannabis from non-licensed sources. Adult consumers can look for the Cannabis 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 purchases cannabis only 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 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.

GLOSSARY

price per gram (dried flower): Represents the average wholesale price per gram of dried flower (including pre-rolls) 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.

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.

SKU: A SKU, or stock-keeping unit, represents one product (in this case, a legal cannabis product) and is the unit of measure in which stock is managed.

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

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.

PRODUCT TYPE

beverage: 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.

concentrate: 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 distillate, 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.

edible: 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 candies, chocolate and baked goods.

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

topical: 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.

vape: 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 Dec. 31, 2025. 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 AND SUBCATEGORY:

AGCO Authorized Retail reporting

REGIONAL SALES TRENDS:

Total sales (\$) by region (year-over-year)

AGCO Authorized Retail reporting

Total volume sold by region (year-over-year)

AGCO Authorized Retail reporting

ALL OTHER DATA POINTS:

Multiple internal sources

