ABOUT THIS PUBLICATION

The Ontario Cannabis Store (OCS) publishes A Year in Review (April 1, 2020 – March 31, 2021) as a resource for the entire legal cannabis industry in Ontario. This document is intended to provide historical key facts and figures for the period between April 1, 2020 and March 31, 2021.

This publication marks the second annual data report by the OCS following A Quarterly Review (October 1 – December 31, 2020). This publication will evolve over time, and feedback is welcome to help improve its value. Comments and feedback on this report can be submitted to inquiries@OCS.ca.

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Letter from David Lobo, Interim President and CEO

I am pleased to share with you our A Year In Review insights publication, covering the Ontario cannabis marketplace from April 1, 2020 to March 31, 2021.

OVERCOMING COVID-19

While our legal marketplace has a great distance to go to fulfill our mandate of bringing in legacy consumers, the progress made in 2020–21 deserves celebration. In the last year, our industry demonstrated resolve as it continued to grow despite the challenges presented by a global pandemic. While all retail businesses in Canada faced the devastating impact of COVID-19, the Ontario legal cannabis industry showed significant resiliency given it was only in its second full year of operation. Most prominently, our network of legal retail stores had to overcome lockdown measures that forced them to shut their doors for in-store sales for more than half the year, relying exclusively on newly launched curbside pick-up and delivery platforms to service their customers. These same important public health measures and stay-at-home orders also tempered demand – minimizing social and tourism activity across our province. And while legal retailers did their part to help our province fight this devastating virus, persistent illegal operators continued to fight for the attention of consumers. Notwithstanding these challenges, Ontario’s legal marketplace consistently grew its rate of market capture and percentage of national sales. This was primarily driven by increases in retail points of access, advances in product innovation and quality, and gradual acceptance among consumers around shopping legal.

REORIENTING OPERATIONS AROUND CONSUMERS

A notable observation of the past year has been the progress made across legal cannabis producers, retailers, and even the OCS, in reorienting our business activities toward clearer consumer-focused operating strategies. At the heart of this shift has been a step forward in what consumers care most about – products. Product pricing on OCS.ca and retail stores became more competitive in 2020–21, and on average prices are almost a dollar per gram lower than prices found through illegal online sellers. Quality and freshness, particularly in dried flower, consistently improved with a more mature supply chain and improved logistics.
infrastructure. Most rewardingly, legal dried products have started to shed the negative reputation they once garnered as being dry and stale. A growth of craft cannabis producers also successfully emerged in the market, encouraging the rest of the industry to build brands based on fresh products and farm-to-consumer artisanal practices.

RISE IN CONSUMER ACCESS

Most central to the growth of the Ontario cannabis marketplace in 2020-21 has been the rapid expansion of our retail store network. At the time of this publication, Ontario was home to the most stores in Canada, with over 800 stores across all regions of the province, up from 53 in April 2020 when Ontario’s open market retail framework began. The average distance to a store for residents in Ontario is now below 6.5 kilometres, down from almost 20 kilometres less than a year ago. Behind these numbers are hundreds of retail operators who all faced hurdles around leasing, building out stores and getting doors open during a pandemic. Despite construction delays, challenges in accessing capital and recruiting employees virtually, many new retailers opened their stores during this time.

CANNABIS 2.0 PRODUCT INNOVATION

In 2020-21 the emergence of Cannabis 2.0 product categories (extracts, edibles and topicals) resulted in significant infusion of capital investment into legal cannabis manufacturing. The output of this has been a wave of new legal Cannabis 2.0 products that have launched into market in Ontario, and consumers have provided a wealth of feedback for producers on how to improve the products in these new legal categories. With each quarter that passes, improved data on shopper habits and consumer preferences are propelling CPG-oriented (consumer packaged goods) cannabis producers toward the ultimate goal of offering products that not only rival, but surpass, the illegal market in all consumer desired attributes. Feedback from consumers through our legal supply chain has further underscored the competitive global advantage Canadian producers and retailers have when maximizing the learnings available to them from our domestic marketplace.

LOOKING AHEAD

With or without continued COVID-19 challenges, the immediate future of the legal cannabis marketplace is likely to continue to shift and adjust. Ontario’s open market is expected to grow in the months ahead, with 1,000 retail stores expected to open their doors by September 2021. Unfortunately, this rapid growth will likely result in some retailers being faced with increased competition and a crowded marketplace, which could result in some closures and market right-sizing. Other retail stores may choose to participate in mergers and acquisitions to increase their size and scale, and presumably drive down their operating costs. However, at the core, all retailers will be challenged to further drive a relentless focus on targeted consumer segments and differentiating themselves from others.

For cannabis producers, additional consolidation activity is expected as the number of participants and licensed cultivation capacity continues to far exceed the size of domestic demand. Some producers will continue to face the harsh challenge of adjusting their business to accurately capture the right share of the addressable market in Canada. Additional craft and micro-cultivators and processors are expected to come to market in waves, creating a healthier level of competition to meet consumer demand, particularly in product categories with deep legacy roots. Product innovation and the pipeline of new products is also expected to radically shift as producers leverage greater consumer insights and feedback, put more focus into targeted assortments, and adopt more stringent CPG and traditional retail standards into their operations.

Regardless of how our new marketplace continues to unfold, cannabis producers, retailers, and the OCS must remain focused on maintaining a culture of innovation centred on delighting legacy consumers with compelling legal offerings. As the flash and attention of legalization of cannabis wears off, a stronger commitment to continuous improvement is critical to establishing a sustainable industry. In the months ahead, many Ontarians emerging from COVID-19 lockdowns will enter a new legal retail store in their community for the very first time. These shopping experiences and attention to consumer feedback hold the secret to success for the industry for years to come. If we stay on the right course, this new legal cannabis industry will most certainly establish itself as an important engine that helps drive Ontario toward economic recovery in the months and years ahead.

David Lobo, Interim President and CEO, Ontario Cannabis Store

A Year in Review (April 1, 2020 – March 31, 2021)
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Ontario recreational cannabis market share by source: illegal vs. legal

<table>
<thead>
<tr>
<th>Source</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
<th>Q3 2020</th>
<th>Q4 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Illegal</td>
<td>25.1%</td>
<td>36.2%</td>
<td>43.1%</td>
<td>55.9%</td>
</tr>
<tr>
<td>Legal</td>
<td></td>
<td></td>
<td></td>
<td>44.1%</td>
</tr>
</tbody>
</table>

As a result of continued growth in retail store openings, Ontario’s legal share of the recreational market nearly doubled from 20% during the 2019 – 2020 fiscal year to 37.6% in this past fiscal year. This last quarter, Ontario’s legal share of the recreational market increased by 1% point compared to Q3, reaching 44%.

Note: Ontario legal market share has been calculated based on data from Statistics Canada. The time period of reporting has been adjusted to reflect OCS fiscal periods compared to the calendar year used by Statistics Canada.

Total grams sold

- **99,100,000 g**
  - Retail Stores: 81,500,000 g
  - OCS.ca: 17,600,000 g

Number of retail stores

- 572

Total sales in Ontario

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail Stores</td>
<td>$707,600,000</td>
</tr>
<tr>
<td>OCS.ca</td>
<td>$132,400,000</td>
</tr>
</tbody>
</table>

$840,100,000

Note: All figures are unaudited and include both cannabis products and accessories. Sales exclude taxes (HST).

Unique and new items listed

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1, 2020</td>
<td>907</td>
</tr>
<tr>
<td>Q2, 2020</td>
<td>1,115</td>
</tr>
<tr>
<td>Q3, 2020</td>
<td>1,362</td>
</tr>
<tr>
<td>Q4, 2020</td>
<td>1,386</td>
</tr>
</tbody>
</table>

The number of unique items available for sale on OCS.ca is growing consistently and has increased by 34.5% since the end of Q1; with 920 new SKUs in the last fiscal year. Unique items listed include active SKUs that were in-stock and excludes accessories.

Ontario share of national recreational sales

- April 1, 2020, to March 31, 2021

Despite extended COVID-19 lockdown measures which prohibited in-store sales, Ontario grew its national recreational sales among all provinces and territories to 29%, an increase of 4% points compared to 2019 – 2020.

Source: Statistics Canada. Table 20-10-0008-01 Retail trade sales by province and territory
Cumulative monthly retail cannabis sales across all provinces and territories

Source: Statistics Canada. Table 20-10-0008-01 Retail trade sales by province and territory (x 1,000)

Note: The time period of reporting used by Statistics Canada is based on a calendar year.

Source: Statistics Canada. Table 20-10-0008-01 Retail trade sales by province and territory (x 1,000)
In the second full fiscal year of commercial operations, 99,100,000 grams of legal recreational cannabis valued at approximately $840,100,000 were sold in Ontario, an increase in volume of 182% over last year. Physical stores made up of 84% of sales in the province representing 81,500,000 grams versus the online channel’s sales of 17,600,000 grams. This year dried flower continued to lead product categories, with over 59% of sales, followed by vapes and pre-rolls, at 16% and 12% respectively, with edibles making up 4% of all sales.

The entire duration of the fourth quarter, Ontario was under a state of emergency and provincial emergency measures temporarily limited retailers’ operations to curbside pick-up and delivery, with many stores unable to consistently open for in-person sales. Despite these challenges presented by COVID-19, cannabis sales grew aligned with the number of brick-and-mortar stores across the province. Progress was made in taking market share away from the illegal market with legal sales representing nearly 44% of all cannabis sold in Ontario, a slight increase from 43%.

As new product categories continued to grow, the categories that experienced the most amount of revenue growth included milled flower, resin and rosin, and lotions and creams. Vapes captured over 16% of total sales, an increase of 795% in sales from last fiscal. 74% of these sales were attributed to 510 cartridges while disposable vape pens continued to see a steady decline each quarter. Soft chews dominated the edibles category as chocolate, baked goods and hard edibles declined in sales.

Consumer preference continues to lean towards products with higher THC levels (above 20%) with customers in stores buying high THC products 344 times faster than low-THC products. CBD-dominant products were the second-fastest selling category, 138 times faster than the slowest selling products. On OCS.ca the sales velocity of high-THC and CBD-dominant products were sold at an extremely close rate with only a 4-point difference.
Total sales and grams sold by product categories

<table>
<thead>
<tr>
<th>Product Categories</th>
<th>OCS.ca</th>
<th>Retail Stores</th>
<th>% of Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dried Flower</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Milled Flower</td>
<td>$1,501,000</td>
<td>$6,178,000</td>
<td>59%</td>
</tr>
<tr>
<td>Whole Flower</td>
<td>$68,826,000</td>
<td>$411,397,000</td>
<td></td>
</tr>
<tr>
<td>Vapes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>510 Thread Vape Cartridges</td>
<td>$14,561,000</td>
<td>$81,804,000</td>
<td>16%</td>
</tr>
<tr>
<td>Disposable Vape Pens</td>
<td>$4,247,000</td>
<td>$14,594,000</td>
<td></td>
</tr>
<tr>
<td>Proprietary Systems Vape Cartridges</td>
<td>$1,741,000</td>
<td>$4,800,000</td>
<td></td>
</tr>
<tr>
<td>510 Thread Vape Kits</td>
<td>$1,691,000</td>
<td>$5,984,000</td>
<td></td>
</tr>
<tr>
<td>Pre-Rolled</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single Strain Packs</td>
<td>$6,935,000</td>
<td>$89,920,000</td>
<td>12%</td>
</tr>
<tr>
<td>Edibles</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hard Edibles</td>
<td>$141,000</td>
<td>$349,000</td>
<td>4%</td>
</tr>
<tr>
<td>Baked Goods</td>
<td>$201,000</td>
<td>$630,000</td>
<td></td>
</tr>
<tr>
<td>Chocolate</td>
<td>$3,094,000</td>
<td>$9,864,000</td>
<td></td>
</tr>
<tr>
<td>Soft Chews</td>
<td>$3,385,000</td>
<td>$18,158,000</td>
<td></td>
</tr>
<tr>
<td>Oils</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bottled Oils</td>
<td>$8,632,000</td>
<td>$18,494,000</td>
<td>4%</td>
</tr>
<tr>
<td>Oral Sprays</td>
<td>$2,027,000</td>
<td>$2,437,000</td>
<td></td>
</tr>
<tr>
<td>Beverages</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cold Beverages</td>
<td>$1,620,000</td>
<td>$8,712,000</td>
<td>2%</td>
</tr>
<tr>
<td>Dealcoholized Drinks</td>
<td>$75,000</td>
<td>$496,000</td>
<td></td>
</tr>
<tr>
<td>Hot Beverages</td>
<td>$601,000</td>
<td>$1,305,000</td>
<td></td>
</tr>
<tr>
<td>Capsules</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Softgels</td>
<td>$4,747,000</td>
<td>$8,266,000</td>
<td>2%</td>
</tr>
<tr>
<td>Concentrates</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shatter</td>
<td>$227,000</td>
<td>$2,160,000</td>
<td>2%</td>
</tr>
<tr>
<td>Wax</td>
<td>$83,000</td>
<td>$626,000</td>
<td></td>
</tr>
<tr>
<td>Hash</td>
<td>$1,504,000</td>
<td>$6,523,000</td>
<td></td>
</tr>
<tr>
<td>Distillates</td>
<td>$48,000</td>
<td>$125,000</td>
<td></td>
</tr>
<tr>
<td>Resin and Rosin</td>
<td>$575,000</td>
<td>$4,041,000</td>
<td></td>
</tr>
<tr>
<td>Kief and Sift</td>
<td>$499,000</td>
<td>$1,172,000</td>
<td></td>
</tr>
<tr>
<td>Topicals</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lotions and Creams</td>
<td>$1,005,000</td>
<td>$3,100,000</td>
<td>1%</td>
</tr>
<tr>
<td>Bath</td>
<td>$75,000</td>
<td>$344,000</td>
<td></td>
</tr>
<tr>
<td>Seeds</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seed Packs</td>
<td>$471,000</td>
<td>$453,000</td>
<td>&lt;1%</td>
</tr>
</tbody>
</table>

Note: Average prices are weighted by sales and exclude taxes. % of sales do not total 100% due to rounding. Dried flower equivalency (DFE) conversion can be found here.

Sales velocity by THC %

Sales velocity references units per day for OCS.ca and units sold per day per average store for retail.

<table>
<thead>
<tr>
<th>THC %</th>
<th>OCS.ca</th>
<th>Retail Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;20%</td>
<td>119x</td>
<td>115x</td>
</tr>
<tr>
<td>17% - 20%</td>
<td>21x</td>
<td>138x</td>
</tr>
<tr>
<td>12% - 16.99%</td>
<td>31x</td>
<td>115x</td>
</tr>
<tr>
<td>7% - 11.99%</td>
<td>4x</td>
<td>115x</td>
</tr>
<tr>
<td>2% - 6.99%</td>
<td>5x</td>
<td>115x</td>
</tr>
<tr>
<td>0% - 1.99%</td>
<td>1x</td>
<td>1x</td>
</tr>
<tr>
<td>1% - 1.99%</td>
<td>1x</td>
<td>1x</td>
</tr>
</tbody>
</table>
Sales for new product categories January 1, 2021 – March 31, 2021

Sales proportion by quarter, size and channel for dried flower

Note: In an effort to drive consistency for consumers, OCS continues to encourage producers to transition towards standardized size variants of 1g, 3.5g, 7g, 14g, and 28g.
Sales proportion by quarter, type and channel for vapes

Sales proportion by quarter, type, and channel for edibles and beverages
### Top five brands per category based on sales January 1, 2021 - March 31, 2021

#### OCS.ca

<table>
<thead>
<tr>
<th>Category</th>
<th>Brand</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beverages</td>
<td>Tweed</td>
<td>26%</td>
</tr>
<tr>
<td></td>
<td>Everie</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>Houseplant</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>Haven St.</td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td>The Green</td>
<td>6%</td>
</tr>
<tr>
<td></td>
<td>Organic Dutchman</td>
<td></td>
</tr>
<tr>
<td>Concentrates</td>
<td>Original Stash</td>
<td>26%</td>
</tr>
<tr>
<td></td>
<td>Canna Farms</td>
<td>18%</td>
</tr>
<tr>
<td></td>
<td>JWC</td>
<td>15%</td>
</tr>
<tr>
<td></td>
<td>48North</td>
<td>14%</td>
</tr>
<tr>
<td></td>
<td>Hiway</td>
<td>5%</td>
</tr>
<tr>
<td>Edibles</td>
<td>Bhang</td>
<td>21%</td>
</tr>
<tr>
<td></td>
<td>Foray</td>
<td>20%</td>
</tr>
<tr>
<td></td>
<td>Aurora Drift</td>
<td>13%</td>
</tr>
<tr>
<td></td>
<td>Chowie Wowie</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>Wana</td>
<td>7%</td>
</tr>
<tr>
<td>Pre-Rolls</td>
<td>Redecan</td>
<td>23%</td>
</tr>
<tr>
<td></td>
<td>Good Supply</td>
<td>18%</td>
</tr>
<tr>
<td></td>
<td>Solei</td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td>Tantalus Labs</td>
<td>6%</td>
</tr>
<tr>
<td></td>
<td>Re-up</td>
<td>5%</td>
</tr>
<tr>
<td>Topicals</td>
<td>Tidal</td>
<td>30%</td>
</tr>
<tr>
<td></td>
<td>48North</td>
<td>26%</td>
</tr>
<tr>
<td></td>
<td>LivRelief</td>
<td>19%</td>
</tr>
<tr>
<td></td>
<td>Eve &amp; Co.</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td>Latitude by 48North</td>
<td>5%</td>
</tr>
<tr>
<td>Capsules</td>
<td>Tweed</td>
<td>34%</td>
</tr>
<tr>
<td></td>
<td>Redecan</td>
<td>29%</td>
</tr>
<tr>
<td></td>
<td>Aurora</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>Indiva</td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>Daily Special</td>
<td>6%</td>
</tr>
<tr>
<td>Dried Flower</td>
<td>Pure Sunfarms</td>
<td>15%</td>
</tr>
<tr>
<td></td>
<td>Redecan</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>Good Supply</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td>Daily Special</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td>Edison Cannabis Co.</td>
<td>6%</td>
</tr>
<tr>
<td>Oils</td>
<td>Solei</td>
<td>31%</td>
</tr>
<tr>
<td></td>
<td>Redecan</td>
<td>27%</td>
</tr>
<tr>
<td></td>
<td>Symbol</td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>Tweed</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td>Twd</td>
<td>4%</td>
</tr>
<tr>
<td>Seeds</td>
<td>34 Street Seed Co.</td>
<td>57%</td>
</tr>
<tr>
<td></td>
<td>Tweed</td>
<td>22%</td>
</tr>
<tr>
<td></td>
<td>Pure Sunfarms</td>
<td>14%</td>
</tr>
<tr>
<td></td>
<td>Pristine</td>
<td>7%</td>
</tr>
<tr>
<td>Vapes</td>
<td>Redecan</td>
<td>16%</td>
</tr>
<tr>
<td></td>
<td>Good Supply</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>Solei</td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td>Foray</td>
<td>8%</td>
</tr>
<tr>
<td></td>
<td>Kolab Project</td>
<td>6%</td>
</tr>
<tr>
<td>Topicals</td>
<td>48North</td>
<td>27%</td>
</tr>
<tr>
<td></td>
<td>Tidal</td>
<td>26%</td>
</tr>
<tr>
<td></td>
<td>LivRelief</td>
<td>19%</td>
</tr>
<tr>
<td></td>
<td>Eve &amp; Co.</td>
<td>18%</td>
</tr>
<tr>
<td></td>
<td>Latitude by 48North</td>
<td>5%</td>
</tr>
</tbody>
</table>

#### Retail Stores

<table>
<thead>
<tr>
<th>Category</th>
<th>Brand</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beverages</td>
<td>Tweed</td>
<td>15%</td>
</tr>
<tr>
<td></td>
<td>Houseplant</td>
<td>15%</td>
</tr>
<tr>
<td></td>
<td>Deep Space</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td>Everie</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>XMG</td>
<td>8%</td>
</tr>
<tr>
<td>Concentrates</td>
<td>Original Stash</td>
<td>21%</td>
</tr>
<tr>
<td></td>
<td>48North</td>
<td>17%</td>
</tr>
<tr>
<td></td>
<td>Canna Farms</td>
<td>14%</td>
</tr>
<tr>
<td></td>
<td>San Rafael '71</td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td>Blendcraft</td>
<td>8%</td>
</tr>
<tr>
<td>Edibles</td>
<td>Bhang</td>
<td>19%</td>
</tr>
<tr>
<td></td>
<td>Wana</td>
<td>17%</td>
</tr>
<tr>
<td></td>
<td>Aurora Drift</td>
<td>13%</td>
</tr>
<tr>
<td></td>
<td>Affirma</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td>Foray</td>
<td>9%</td>
</tr>
<tr>
<td>Pre-Rolls</td>
<td>Good Supply</td>
<td>17%</td>
</tr>
<tr>
<td></td>
<td>Redecan</td>
<td>17%</td>
</tr>
<tr>
<td></td>
<td>RIFF</td>
<td>13%</td>
</tr>
<tr>
<td></td>
<td>Solei</td>
<td>8%</td>
</tr>
<tr>
<td></td>
<td>Trailblazer</td>
<td>6%</td>
</tr>
<tr>
<td>Oils</td>
<td>Redecan</td>
<td>46%</td>
</tr>
<tr>
<td></td>
<td>Solei</td>
<td>21%</td>
</tr>
<tr>
<td></td>
<td>Pure Sunfarms</td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>Symbol</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td>MediPharm Labs</td>
<td>4%</td>
</tr>
<tr>
<td>Seeds</td>
<td>34 Street Seed Co.</td>
<td>61%</td>
</tr>
<tr>
<td></td>
<td>Tweed</td>
<td>16%</td>
</tr>
<tr>
<td></td>
<td>Pure Sunfarms</td>
<td>15%</td>
</tr>
<tr>
<td></td>
<td>Pristine</td>
<td>8%</td>
</tr>
<tr>
<td>Vapes</td>
<td>Redecan</td>
<td>18%</td>
</tr>
<tr>
<td></td>
<td>Good Supply</td>
<td>17%</td>
</tr>
<tr>
<td></td>
<td>Daily Special</td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>Back Forty</td>
<td>6%</td>
</tr>
<tr>
<td></td>
<td>Foray</td>
<td>5%</td>
</tr>
</tbody>
</table>

For a list of top twenty brands please see Appendix A. Note: Sales market share by category indicated is for the fiscal year and may differ from point in time snapshots were available to Licensed Producers through the OCS Data Program before the year fully closed.
This past year, the average price per gram for dried flower in the legal market continued to show progress with OCS.ca decreasing to $6.17 per gram and retail stores reducing to $8.87 per gram by the end of the fourth quarter. Prices found on the illegal market through analysis of online sellers increased by $1.83 per gram to $9.59. This may be reflective of various factors including the increased availability of premium quality large format dried flower products available on illegal sites as well as the removal of illegal sites. In the legal market, value-priced, bulk offerings at 14, 15 and 28 grams gave consumers access to quality cannabis at competitive pricing and grew from 12 to 84 SKUs this past year. The gap for premium quality, large format dried flower will begin to close in the months ahead as demand for these products emerge.

There is a clear split between consumers who purchase through OCS.ca versus those who purchase at retail stores for dried flower. On OCS.ca, products priced between $3 and $6.50 per gram, sold 3 times faster than those at the higher end of the scale between $20.50 and $24 per gram. In retail stores products in the top end were sold at a slightly higher sales velocity of 1.7 than value products at 1.3. Various factors could influence this trend, including consumer education offered by budtenders, different characteristics of online shoppers or customers supporting local businesses. This suggests that consumers shopping through OCS.ca are more price sensitive.

Pricing of product categories are continuing to decline, while newer subcategories are fluctuating. Vape cartridges, capsules, beverages, pre-rolls, edibles, and hash are a few of the subcategories that have shown a decline in pricing compared to last quarter. Customers are shifting from being price-conscious to finding a balance between price and quality, which is informing a broader product catalogue.
A Year in Review (April 1, 2020 – March 31, 2021)

Illegal market price per gram for dried flower

OCS.ca and retail store are weighted by sales and include taxes. Illegal market prices are unweighted and sourced through mail-order-marijuana sites.

Note: Change in illegal pricing may be reflective of various factors including the removal of illegal sites and an increased availability of premium quality large format dried flower products available on illegal sites.

Average price per gram across cannabis subcategories on OCS.ca

<table>
<thead>
<tr>
<th></th>
<th>Oct 1 – Dec 31, 2020</th>
<th>Jan 1 – March 31, 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baked Goods</td>
<td>$5.26/g (DFE)</td>
<td>$5.26/g (DFE)</td>
</tr>
<tr>
<td>Bath &amp; Shower</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Beverages</td>
<td>$1.93/g (DFE)</td>
<td>$1.82/g (DFE)</td>
</tr>
<tr>
<td>Capsules</td>
<td>$35.13/g (DFE)</td>
<td>$27.09/g (DFE)</td>
</tr>
<tr>
<td>Cartridges</td>
<td>$20.51/g (DFE)</td>
<td>$18.32/g (DFE)</td>
</tr>
<tr>
<td>Chocolates</td>
<td>$5.66/g (DFE)</td>
<td>$5.33/g (DFE)</td>
</tr>
<tr>
<td>Confectionery</td>
<td>$10.83/g (DFE)</td>
<td>$9.67/g (DFE)</td>
</tr>
<tr>
<td>Creams and Lotions</td>
<td>$60.08/g (DFE)</td>
<td>$61.02/g (DFE)</td>
</tr>
<tr>
<td>Dried Flower</td>
<td>$6.24/g (DFE)</td>
<td>$6.17/g (DFE)</td>
</tr>
<tr>
<td>Hash</td>
<td>$6.15/g (DFE)</td>
<td>$4.93/g (DFE)</td>
</tr>
<tr>
<td>Kief and Sift</td>
<td>$6.14/g (DFE)</td>
<td>$6.41/g (DFE)</td>
</tr>
<tr>
<td>Oils</td>
<td>$20.49/g (DFE)</td>
<td>$74.36/g (DFE)</td>
</tr>
<tr>
<td>Pre-Rolls</td>
<td>$9.02/g (DFE)</td>
<td>$8.87/g (DFE)</td>
</tr>
<tr>
<td>Resin and Rosin</td>
<td>$16.18/g (DFE)</td>
<td>$17.22/g (DFE)</td>
</tr>
<tr>
<td>Shatter</td>
<td>$22.42/g (DFE)</td>
<td>$15.73/g (DFE)</td>
</tr>
<tr>
<td>Seeds</td>
<td>$11.94/seed</td>
<td>$12.20/seed</td>
</tr>
<tr>
<td>Wax</td>
<td>$15.69/g (DFE)</td>
<td>$14.74/g (DFE)</td>
</tr>
</tbody>
</table>

Average prices are weighted by sales and include taxes. Dried flower equivalency (DFE) conversion can be found here. Note: Oils were formally changed to the extract category by Health Canada resulting in an increase when calculating DFE.

Sales velocity by price bucket for dried flower

<table>
<thead>
<tr>
<th></th>
<th>OCS.ca</th>
<th>Retail Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.0x</td>
<td>$3 – 6.50</td>
<td>1.3x</td>
</tr>
<tr>
<td>1.5x</td>
<td>$6.50 – 10</td>
<td>1.7x</td>
</tr>
<tr>
<td>0.8x</td>
<td>$10 – 13.50</td>
<td>1.3x</td>
</tr>
<tr>
<td>0.9x</td>
<td>$13.50 – 17</td>
<td>1.1x</td>
</tr>
<tr>
<td>1.1x</td>
<td>$17 – 20.50</td>
<td>1.0x</td>
</tr>
<tr>
<td>1.0x</td>
<td>$20.50 – 24</td>
<td>1.7x</td>
</tr>
</tbody>
</table>

Sales velocity references units sold per day for OCS.ca and units sold per day per average store for retail.
GROWING ACCESS POINTS

For the entire duration of the fourth quarter, Ontario continued to be challenged with the growing number of COVID-19 cases resulting in the implementation of public health measures that impacted retailers’ ability to open. Despite the restrictions, Ontario was operating a total of 572 stores this fiscal year in 122 communities. Comparatively, Ontario opened 53 stores in 27 communities by the end of the last fiscal year.

Western Ontario doubled the number of retail stores operating this quarter from 94 to operating 188 stores and leads total regional sales. Eastern Ontario follows with 123 stores and only a 2% difference in revenue. While the market continues to consistently see a concentration of stores in Toronto each quarter, progress is being made in decreasing the average distance for consumers to a retail store. Since the first quarter, this number has dropped from 19 to 6.5 kilometres indicating that smaller and unserved communities across Ontario are gaining access to legal cannabis.

Express 3-day delivery now services 78% of adults in Ontario, an increase of 111% since the end of the last fiscal year. OCS has limited barriers to purchase as a result of expanded delivery options as only 3% of visitors report shipping fees being too high and 8% who believe delivery takes too long.
Grams and sale sold by region

<table>
<thead>
<tr>
<th>Region</th>
<th>Grams Sold</th>
<th>Sales ($USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>East</td>
<td>26,200,000</td>
<td>$213,100,000</td>
</tr>
<tr>
<td>GTA</td>
<td>16,000,000</td>
<td>$141,800,000</td>
</tr>
<tr>
<td>North</td>
<td>10,700,000</td>
<td>$87,300,000</td>
</tr>
<tr>
<td>Toronto</td>
<td>20,600,000</td>
<td>$178,200,000</td>
</tr>
<tr>
<td>West</td>
<td>25,600,000</td>
<td>$219,700,000</td>
</tr>
</tbody>
</table>

Average distance for consumers to a retail store

The average distance to a store decreased by 3 kilometres, with the number of stores increasing by 76.5% compared to last quarter. This demonstrates smaller and unserved communities opening more authorized retail stores.

Growing number of retail stores

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Number of Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1, 2020</td>
<td>110</td>
</tr>
<tr>
<td>Q2, 2020</td>
<td>183</td>
</tr>
<tr>
<td>Q3, 2020</td>
<td>324</td>
</tr>
<tr>
<td>Q4, 2020</td>
<td>572</td>
</tr>
</tbody>
</table>

Top ten retailers by store count As of March 31, 2021

1. **Tokyo Smoke** 27 stores
2. **Fire & Flower** 26 stores
3. **Sessions Cannabis** 25 stores
4. **Spiritleaf** 25 stores
5. **ShinyBud Cannabis Co.** 16 stores
6. **High Tide** 14 stores
7. **One Plant** 13 stores
8. **Dutch Love** 12 stores
9. **Cannabis Supply Company** 8 stores
10. **The Hunny Pot Cannabis Co.** 7 stores

Note: Sales figures include cannabis products and accessories. Taxes (HST) are excluded.
Number of stores by region and municipality

<table>
<thead>
<tr>
<th>Region</th>
<th>Number of Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td>East</td>
<td>123</td>
</tr>
<tr>
<td>GTA</td>
<td>51</td>
</tr>
<tr>
<td>North</td>
<td>31</td>
</tr>
<tr>
<td>Toronto</td>
<td>179</td>
</tr>
<tr>
<td>West</td>
<td>188</td>
</tr>
</tbody>
</table>

- Acton: 1
- Ajax: 1
- Alliston: 2
- Amherstburg: 2
- Ancaster: 1
- Angus: 1
- Arnprior: 1
- Aurora: 4
- Bancroft: 1
- Barrie: 10
- Barry's Bay: 1
- Beamsville: 1
- Binbrook: 1
- Blenheim: 2
- Blind River: 1
- Bobcaygeon: 1
- Bowmanville: 1
- Bracebridge: 1
- Bradford: 2
- Brampton: 10
- Brantford: 6
- Bridgenorth: 1
- Brockville: 2
- Burlington: 13
- Caledonia: 1
- Cambridge: 10
- Carleton Place: 1
- Chatham: 5
- Cobourg: 1
- Collingwood: 2
- Cornwall: 4
- Crystal Beach: 1
- Deep River: 1
- Dryden: 1
- Dundas: 2
- Dunnville: 1
- Elliot Lake: 1
- Embrun: 1
- Essex: 1
- Fort Erie: 2
- Fort Frances: 1
- Gananoque: 1
- Georgetown: 2
- Gloucester: 1
- Grand Bend: 1
- Gravenhurst: 1
- Guelph: 7
- Haliburton: 1
- Hamilton: 27
- Hanover: 1
- Harrow: 1
- Hawkesville: 1
- Huntsville: 5
- Innisfil: 1
- Kanata: 4
- Kapuskasing: 1
- Kenora: 2
- Kingston: 6
- Kitchener: 8
- Lakeshore: 1
- Leamington: 1
- Lindsay: 1
- Listowel: 1
- London: 21
- Midland: 2
- Milton: 4
- Nepean: 6
- Newcastle: 2
- Niagara Falls: 7
- North Bay: 5
- Northbrook: 1
- Orangeville: 3
- Orillia: 5
- Orleans: 4
- Oshawa: 9
- Ottawa: 21
- Owen Sound: 3
- Pembroke: 6
- Perth: 1
- Petawawa: 2
- Peterborough: 5
- Petrolia: 1
- Picton: 2
- Port Colborne: 2
- Port Elgin: 1
- Port Perry: 1
- Prescott: 1
- Rama: 1
- Red Lake: 1
- Renfrew: 2
- Richmond: 1
- Rockland: 3
- Sarnia: 5
- Sauble Beach: 1
- Sault Ste. Marie: 5
- Scotland: 1
- Shelburne: 1
- Simcoe: 2
- Smiths Falls: 1
- Southampton: 1
- Springwater: 1
- St Catharines: 9
- St Thomas: 2
- Stittsville: 1
- Stoney Creek: 5
- Stouffville: 1
- Stratford: 3
- Strathroy: 1
- Sudbury: 4
- Thunder Bay: 7
- Timmins: 2
- Toronto: 179
- Trenton: 1
- Uxbridge: 1
- Vanier: 1
- Wallaceburg: 1
- Waterdown: 2
- Waterloo: 6
- Welland: 4
- Whitchurch-Stouffville: 1
- Windsor: 18
- Woodstock: 4

A Year in Review (April 1, 2020 – March 31, 2021)
Growing Access Points

Conversion rate on OCS.ca
January 1, 2021 – March 31, 2021

Q4, 2020 10%
Q1, 2020 9.2% | Q2, 2020 9.1% | Q3, 2020 9.2%

Conversion rate is an important metric by which e-commerce businesses measure consumer demand on their platforms. For every 100 customers on OCS.ca, 10 made a transaction.

Population served by express shipping

Q4, 2020 78%
Q1, 2020 64% | Q2, 2020 74% | Q3, 2020 78%

OCS.ca delivery was augmented by retailers offering delivery services while Ontario was under a state of emergency. The OCS continues to expand express delivery to additional communities across Ontario to provide consumers direct-to-door delivery within one to three business days.

Growth of new vs. returning visitors

New Visitors
Returning Visitors

Q1, 2020 3,400,000
Q2, 2020 2,000,000
Q3, 2020 1,700,000
Q4, 2020 1,500,000

Number of visitors

A Year in Review (April 1, 2020 – March 31, 2021)
Attributes most important to customers on OCS.ca January 1, 2021 – March 31, 2021

- Quality, potency, and price are the top three attributes that customers are looking for while purchasing cannabis. During this last fiscal year, 12% of customers reported issues with quality of cannabis. Dryness, stems, and underweight product are the main quality related concerns.
- New customers find product information to be more important compared to returning customers who value price as more important.

Source: OCS.ca survey by Emplifi

Barriers to purchasing on OCS.ca January 1, 2021 – March 31, 2021

- Stock issues decreased by 5% points compared to the previous year whereas assortment issues decreased by 10% points.
- Additionally, visitors reported a slight decrease in information related issues. These issues are mainly driven by visitors who want to learn more about extracts.
- Three barriers to purchasing on OCS.ca included: price not decreasing to correlate with higher quantities (bulk pricing), customer can find cheaper products elsewhere, and poor-quality products.
- These top three barriers are mainly driven by those shopping for dried flower and extracts.

Source: OCS.ca survey by Emplifi
Through the course of the year the number of stores in Ontario rapidly increased with a total of 572 authorized retailer stores by the end of the fourth quarter. As the retail network expanded, OCS’s distribution centre scaled operationally with over 4,800 wholesale orders in the fourth quarter. Order-to-ship lead time was 2.45 days, slightly faster than the first quarter with only 110 stores in operation. As greater automation is built out, the distribution centre will continue to support and improve the rapid growth of the retail network in Ontario.
Order-to-ship lead time for wholesale customers

2.45 days

Note: Average since January 1 – March 31, 2021

Top ten SKUs by units sold

<table>
<thead>
<tr>
<th>SKU</th>
<th>Name</th>
<th>Units Sold</th>
</tr>
</thead>
<tbody>
<tr>
<td>343,000</td>
<td>Bhang THC MILK CHOCOLATE BAR</td>
<td>330028, 1x10g</td>
</tr>
<tr>
<td>254,000</td>
<td>Pure Sunfarms PINK KUSH</td>
<td>101557, 3.5g</td>
</tr>
<tr>
<td>230,000</td>
<td>Good Supply ROYAL HIGHNESS PRE-ROLL</td>
<td>100991, 1x1g</td>
</tr>
<tr>
<td>229,000</td>
<td>Redecan REDEES WAPPA PRE-ROLL</td>
<td>101487, 10x0.35g</td>
</tr>
<tr>
<td>211,000</td>
<td>Redecan REDEES COLD CREEK KUSH PRE-ROLL</td>
<td>101483, 10x0.35g</td>
</tr>
<tr>
<td>207,000</td>
<td>Bhang THC DARK CHOCOLATE BAR</td>
<td>330029, 1x10g</td>
</tr>
<tr>
<td>203,000</td>
<td>Good Supply ROYAL HIGHNESS</td>
<td>100990, 3.5g</td>
</tr>
<tr>
<td>199,000</td>
<td>Good Supply JEAN GUY PRE-ROLL</td>
<td>100074, 1x1g</td>
</tr>
<tr>
<td>193,000</td>
<td>Redecan WAPPA</td>
<td>100225, 3.5g</td>
</tr>
<tr>
<td>168,000</td>
<td>Deep Space DEEP SPACE</td>
<td>320025, 1x222ml</td>
</tr>
</tbody>
</table>

Selling classes of products January 1, 2021 – March 31, 2021

- Ultra fast sellers: 58.8% of SKUs, 17% of sales
- Fast sellers: 52.5% of SKUs, 26.7% of sales
- Slow sellers: 9.5% of SKUs, 7.2% of sales
- Ultra slow sellers: 20% of SKUs, 7.2% of sales
- New launch: 9.5% of SKUs, 7.2% of sales
- Re-launch: 1.6% of SKUs, 0.4% of sales

During the last quarter of the year, 3.3% of SKUs were classified as fast-selling products representing close to 20% of sales. Fewer SKUs were able to achieve high rate of sale per store as the store network and market grew. Note: SKU classes are based on the unit rate of sale for a SKU per store per week. Sales include Wholesale and excludes accessories.

Average SKU count per wholesale order

- Q1, 2020: 72
- Q2, 2020: 92 (*Revised data)
- Q3, 2020: 65
- Q4, 2020: 76

Unique SKUs ordered by month

- April 2019: 340
- May 2019: 330
- June 2019: 360
- July 2019: 320
- Aug 2019: 360
- Sept 2019: 340
- Oct 2019: 390
- Nov 2019: 440
- Dec 2019: 540
- Jan 2020: 550
- Feb 2020: 980
- Mar 2020: 1,035
- Apr 2020: 1,063
- May 2020: 1,097
- June 2020: 1,138
- July 2020: 1,174
- Aug 2020: 1,194
- Sept 2020: 1,187
- Oct 2020: 1,157
- Nov 2020: 1,145
- Dec 2020: 1,145
- Jan 2021: 1,187
- Feb 2021: 1,157
- Mar 2021: 1,145

A Year in Review (April 1, 2020 – March 31, 2021)
QUALITY ASSURANCE

The OCS Quality Assurance team ensures products introduced to the market follow Health Canada’s guidelines for packaging and labelling, and conducts analysis based on returns and consumer complaints. Every product can be traced to where it has been legally produced.

The addition of 920 new SKUs, with the second-highest number being in the vape product category, requires a regulatory review for every product launch or labelling update. Vapes represented 72% of all product quality complaints received and demonstrate an opportunity for improvement. Feedback for all quality complaints is shared directly with Licensed Producers and only includes details specifically about product issues – dryness, weight, or packaging.

This past year 102 quality vendor audits were performed, a necessary step in the QA process that improves operational practices to drive consistent customer experiences with every product.
Regulatory reviews completed

1,370

Every product launch or labelling update is considered a regulatory review.

Total product quality complaints received

12,873

Vapes 9,359

Product quality complaints include dryness, weight, and packaging issues. Feedback is shared and resolved with Licensed Producers. 72% of total product quality complaints received were vape related.

Percent of returns by channel

<table>
<thead>
<tr>
<th>Channel</th>
<th>OCS.ca</th>
<th>Retail Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td>Returns</td>
<td>0.15%</td>
<td>0.2%</td>
</tr>
</tbody>
</table>

Note: Includes product returns (not undelivered or shipping refunds) based on sales.

Number of quality vendor audits performed

102

13 ON-SITE

78 REMOTE

11 CATEGORY EXPANSION REVIEWS

Product quality recalls

<table>
<thead>
<tr>
<th>No.</th>
<th>Date</th>
<th>Licensed Producer</th>
<th>Recall Issue</th>
<th>Product Category</th>
<th>Product Name</th>
<th>Product Lot(s)</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>January 2021</td>
<td>Hexo Operations Inc.</td>
<td>Product Safety (Mechanical Defect)</td>
<td>Vapes - All-in-One Disposable vape pens</td>
<td>Hexo Blue Dream All-in-One Disposable Pen</td>
<td>All product lots that was distributed in Ontario</td>
<td>0.25g</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Hexo Trainwreck All-in-One Disposable Pen</td>
<td></td>
<td>0.25g</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Hexo Durban All-in-One Disposable Pen</td>
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<tr>
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<td>TerrAscend Canada</td>
<td>Product Quality (Mould)</td>
<td>Edibles - Soft Chews</td>
<td>Haven St. Rise. No.570 (Wild Berry THC Infused Soft Chew)</td>
<td>All product lots that was distributed in Ontario</td>
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<td>Haven St. Drift No. 470 (Sour Watermelon THC Infused Soft Chew)</td>
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<tr>
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<td>February 2021</td>
<td>We Grow BC Ltd.</td>
<td>Labelling and Packaging</td>
<td>Pre-rolls</td>
<td>QWEST Pineapple Cake</td>
<td>MC328A. 01A</td>
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<td>4</td>
<td>February 2021</td>
<td>Aurora Cannabis Enterprises</td>
<td>Labelling and Packaging</td>
<td>Extracts - Live Resin</td>
<td>San Rafael ’71 OG Chemdawg</td>
<td>11040210000377</td>
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<td>5</td>
<td>March 2021</td>
<td>Mediwanna</td>
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<td>Pre-rolls</td>
<td>ELIOS Pink Lemonade</td>
<td>PR5ZCUM</td>
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</tr>
</tbody>
</table>

Note: Includes Health Canada reported recalls.
### Top twenty brands on OCS.ca

#### Beverages
- **Tweed** 26%
- **Everie** 12%
- **Houseplant** 12%
- **Haven St. Premium Cannabis** 9%
- **The Green Organic Dutchman** 6%
- **Quatreau** 5%
- **Deep Space** 5%
- **Mollo** 4%
- **Little Victory** 4%
- **Ripple by The Green Organic Dutchman** 3%

#### Capsules
- **Tweed** 34%
- **Redecan** 29%
- **Aurora** 10%
- **Indiva** 7%
- **Daily Special** 6%
- **Solei** 5%
- **Vertical** 4%
- **Dosecann** 2%
- **San Rafael ’71** 1%
- **Emprise Canada** 1%
- **Kin Slips** 1%
- **Being** 0%
- **LBS** 0%
- **Mood Ring** 0%
- **DNA Genetics** 0%

#### Dried Flower
- **Pure Sunfarms** 15%
- **Redecan** 12%
- **Good Supply** 11%
- **Daily Special** 11%
- **Edison Cannabis Co** 6%
- **Hedo** 5%
- **Tweed** 4%
- **RIFF** 3%
- **Namaste** 3%
- **Tweed** 3%
- **San Rafael’71** 3%
- **Color Cannabis** 3%
- **Solei** 3%
- **Original Stash** 3%
- **Tweed** 2%
- **3ACRES** 2%
- **BINGO** 2%
- **Spinach** 2%
- **Tweed28** 2%
- **Tweed** 2%
- **Blissco** 2%
- **Verse Originals** 2%
- **Kiwi Cannabis** 2%

#### Edibles
- **Bhang** 21%
- **Foray** 20%
- **Aurora Drift** 13%
- **Chowie Wowie** 12%
- **Wana** 7%
- **San Rafael’71** 7%
- **Affirma** 5%
- **Legend - Powered by Indiva** 5%
- **Goodship** 3%
- **Tweed** 2%
- **Edison Bytes** 2%

#### Oils
- **Solei** 31%
- **Redecan** 27%
- **Symbi** 7%
- **Tweed** 4%
- **Tweed** 4%
- **Five Founders** 3%
- **Dosecann** 3%
- **Pure Sunfarms** 3%
- **CANACA** 3%
- **Northern Harvest** 3%
- **MediPharm Labs** 3%
- **COVE** 2%
- **Sugar Leaf** 2%
- **Vertical** 1%
- **Blissed** 1%
- **Veryvell** 1%
- **Blissco** 1%
- **Verse Originals** 1%
- **RIFF** 1%
- **Kiwi Cannabis** 1%

#### Pre-Rolled
- **Redecan** 23%
- **Good Supply** 18%
- **Solei** 17%
- **Tantalus Labs** 15%
- **Re-up** 10%
- **RIFF** 9%
- **Edison Cannabis Co** 8%
- **Aurora** 8%
- **Tweed** 7%
- **JWC** 6%
- **Tweed** 6%
- **JWC** 5%
- **Trailblazer** 5%
- **Hiway** 5%
- **Pure Sunfarms** 5%
- **Aurora Drift** 5%
- **Tweed** 4%
- **Trailblazer** 4%
- **Palmetto** 4%

#### Seeds
- **34 Street Seed Co.** 57%
- **Tweed** 22%
- **Pure Sunfarms** 14%
- **Pristine** 7%

#### Topicals
- **Tidal** 30%
- **48North** 26%
- **LivRelief** 19%
- **Eve & Co.** 11%
- **Latitude by 48North** 5%
- **Solei** 4%
- **Axea** 3%
- **Apothecary Labs** 1%
- **Proofy** 0%

#### Vapes
- **Redecan** 16%
- **Good Supply** 10%
- **Solei** 9%
- **Foray** 8%
- **Kolab Project** 6%
- **CANACA** 6%
- **Hexo** 6%
- **FIGR** 5%
- **Sundial** 5%
- **Daily Special** 4%
- **Back Forty** 3%
- **dosist** 3%
- **San Rafael’71** 3%
- **Wayfarer** 3%
- **Verse Originals** 3%
- **Aurora Drift** 3%
- **Pure Sunfarms** 2%
- **Tweed** 2%
- **Trailblazer** 2%
- **Palmetto** 2%
### Top twenty brands in retail stores

#### Beverages

<table>
<thead>
<tr>
<th>Brand</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tweed</td>
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</tr>
<tr>
<td>Houseplant</td>
<td>15%</td>
</tr>
<tr>
<td>Deep Space</td>
<td>11%</td>
</tr>
<tr>
<td>Everie</td>
<td>10%</td>
</tr>
<tr>
<td>XMG</td>
<td>8%</td>
</tr>
<tr>
<td>Little Victory</td>
<td>6%</td>
</tr>
<tr>
<td>Quatreau</td>
<td>5%</td>
</tr>
<tr>
<td>House of Terpenes</td>
<td>5%</td>
</tr>
<tr>
<td>Mollo</td>
<td>5%</td>
</tr>
<tr>
<td>Haven St. Premium Cotton</td>
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</tr>
<tr>
<td>The Green Organic Dutchman</td>
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<tr>
<td>Ripple by The Green Organic Dutchman</td>
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</tr>
<tr>
<td>Aurora Drift</td>
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</tr>
<tr>
<td>Summit</td>
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<tr>
<td>Basecamp</td>
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<tr>
<td>Veryvell</td>
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</tr>
<tr>
<td>THC BioMed</td>
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<td>Edison Re:Mix</td>
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#### Capsules

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<tr>
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<tr>
<td>Daily Special</td>
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</tr>
<tr>
<td>Aurora</td>
<td>4%</td>
</tr>
<tr>
<td>Soli</td>
<td>3%</td>
</tr>
<tr>
<td>Indiva</td>
<td>2%</td>
</tr>
<tr>
<td>Kinslips</td>
<td>2%</td>
</tr>
<tr>
<td>Vertical</td>
<td>1%</td>
</tr>
<tr>
<td>Being</td>
<td>1%</td>
</tr>
<tr>
<td>Dosecann</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>San Rafael ‘71</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Mood Ring</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>DNA Genetics</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>LBS</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Emprise Canada</td>
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<tr>
<td>AltaVie</td>
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<td>Houseplant</td>
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#### Dried Flower

<table>
<thead>
<tr>
<th>Brand</th>
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<tbody>
<tr>
<td>Pure Sunfarms</td>
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<tr>
<td>Redecan</td>
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</tr>
<tr>
<td>Good Supply</td>
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</tr>
<tr>
<td>Daily Special</td>
<td>7%</td>
</tr>
<tr>
<td>Edison Cannabis Co</td>
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</tr>
<tr>
<td>RIFF</td>
<td>5%</td>
</tr>
<tr>
<td>TWD.</td>
<td>5%</td>
</tr>
<tr>
<td>Color Cannabis</td>
<td>5%</td>
</tr>
<tr>
<td>7ACRES</td>
<td>5%</td>
</tr>
<tr>
<td>Namaste</td>
<td>4%</td>
</tr>
<tr>
<td>Haven St. Premium Cannabis</td>
<td>4%</td>
</tr>
<tr>
<td>Spinach</td>
<td>3%</td>
</tr>
<tr>
<td>Tweed</td>
<td>3%</td>
</tr>
<tr>
<td>DNA Genetics</td>
<td>3%</td>
</tr>
<tr>
<td>Soli</td>
<td>3%</td>
</tr>
<tr>
<td>San Rafael ‘71</td>
<td>2%</td>
</tr>
<tr>
<td>Broken Coast</td>
<td>2%</td>
</tr>
<tr>
<td>LBS</td>
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</tr>
<tr>
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</tr>
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#### Edibles

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</tr>
<tr>
<td>Chowie Wowie</td>
<td>8%</td>
</tr>
<tr>
<td>Legend - Powered by Indiva</td>
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</tr>
<tr>
<td>Tweed</td>
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<tr>
<td>Ave Valley</td>
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<tr>
<td>Edison Bytes</td>
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<td>Kolab Project</td>
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#### Concentrates

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#### Oils

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<tr>
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<tr>
<td>DOVE</td>
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#### Pre-Rolled

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<td>RIFF</td>
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<tr>
<td>Solei</td>
<td>8%</td>
</tr>
<tr>
<td>Trailblazer</td>
<td>6%</td>
</tr>
<tr>
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<td>5%</td>
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<td>Broken Coast</td>
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<td>48North</td>
<td>3%</td>
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<tr>
<td>Tantalus Labs</td>
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</tr>
<tr>
<td>Spinach</td>
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<tr>
<td>Ace Valley</td>
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<tr>
<td>Tweed</td>
<td>3%</td>
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<tr>
<td>TWD.</td>
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<tr>
<td>Citizen Stash</td>
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#### Seeds

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<tr>
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<td>16%</td>
</tr>
<tr>
<td>Pure Sunfarms</td>
<td>15%</td>
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<tr>
<td>Pristine</td>
<td>8%</td>
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#### Topicals

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<tr>
<td>Tidal</td>
<td>26%</td>
</tr>
<tr>
<td>LivRelief</td>
<td>19%</td>
</tr>
<tr>
<td>Eve &amp; Co.</td>
<td>18%</td>
</tr>
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<tr>
<td>Solei</td>
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</tr>
<tr>
<td>Apothecary Labs</td>
<td>1%</td>
</tr>
<tr>
<td>Axea</td>
<td>1%</td>
</tr>
<tr>
<td>Proofly</td>
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#### Vapes

<table>
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</tr>
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<tr>
<td>Daily Special</td>
<td>7%</td>
</tr>
<tr>
<td>Back Forty</td>
<td>6%</td>
</tr>
<tr>
<td>Foray</td>
<td>5%</td>
</tr>
<tr>
<td>Kolab Project</td>
<td>5%</td>
</tr>
<tr>
<td>CANACA</td>
<td>4%</td>
</tr>
<tr>
<td>Pure Sunfarms</td>
<td>4%</td>
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<tr>
<td>Solei</td>
<td>4%</td>
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<tr>
<td>Hexo</td>
<td>4%</td>
</tr>
<tr>
<td>Ace Valley</td>
<td>3%</td>
</tr>
<tr>
<td>San Rafael ‘71</td>
<td>2%</td>
</tr>
<tr>
<td>Sundial</td>
<td>3%</td>
</tr>
<tr>
<td>Trailblazer</td>
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<td>RIFF</td>
<td>2%</td>
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<td>MARLEY NATURAL</td>
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<td>1%</td>
</tr>
<tr>
<td>Spinach</td>
<td>1%</td>
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<tr>
<td>Verse Originals</td>
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</table>
### Top ten stores by retail sales

**January 1, 2021 – March 31, 2021**

#### GTA

<table>
<thead>
<tr>
<th>Rank</th>
<th>Store Name</th>
<th>Location</th>
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<tbody>
<tr>
<td>1</td>
<td>Calyx and Trichomes</td>
<td>Kingston</td>
</tr>
<tr>
<td>2</td>
<td>One Plant</td>
<td>Barrie</td>
</tr>
<tr>
<td>3</td>
<td>Stash and Co.</td>
<td>Ottawa</td>
</tr>
<tr>
<td>4</td>
<td>One Plant</td>
<td>Nepean</td>
</tr>
<tr>
<td>5</td>
<td>Dutch Love</td>
<td>Bradford</td>
</tr>
<tr>
<td>6</td>
<td>One Plant</td>
<td>Orleans</td>
</tr>
<tr>
<td>7</td>
<td>Fire &amp; Flower (York St.)</td>
<td>Orleans</td>
</tr>
<tr>
<td>8</td>
<td>Growers Retail</td>
<td>Peterborough</td>
</tr>
<tr>
<td>9</td>
<td>The Oz Store</td>
<td>Orleans</td>
</tr>
<tr>
<td>10</td>
<td>Dutch Love (Clarence St.)</td>
<td>Ottawa</td>
</tr>
</tbody>
</table>

#### TORONTO

<table>
<thead>
<tr>
<th>Rank</th>
<th>Store Name</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MaryJane's Cannabis</td>
<td>Etobicoke</td>
</tr>
<tr>
<td>2</td>
<td>Shiny Bud Inc</td>
<td>North York</td>
</tr>
<tr>
<td>3</td>
<td>Canvas Retail Inc. (Danforth)</td>
<td>Toronto</td>
</tr>
<tr>
<td>4</td>
<td>Tokyo Smoke (333 Yonge)</td>
<td>Toronto</td>
</tr>
<tr>
<td>5</td>
<td>Lakeview Cannabis</td>
<td>Etobicoke</td>
</tr>
<tr>
<td>6</td>
<td>Spiritleaf (2389 Bloor)</td>
<td>Toronto</td>
</tr>
<tr>
<td>7</td>
<td>Budders Cannabis</td>
<td>Toronto</td>
</tr>
<tr>
<td>8</td>
<td>Your Local Cannabis</td>
<td>Scarborough</td>
</tr>
<tr>
<td>9</td>
<td>Spiritleaf</td>
<td>North York</td>
</tr>
<tr>
<td>10</td>
<td>Pufftastic Cannabis</td>
<td>Scarborough</td>
</tr>
</tbody>
</table>

#### NORTH

<table>
<thead>
<tr>
<th>Rank</th>
<th>Store Name</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>High Life</td>
<td>Sudbury</td>
</tr>
<tr>
<td>2</td>
<td>Kana Leaf</td>
<td>North Bay</td>
</tr>
<tr>
<td>3</td>
<td>Sessions Cannabis</td>
<td>Timmins</td>
</tr>
<tr>
<td>4</td>
<td>Tokyo Smoke</td>
<td>Thunder Bay</td>
</tr>
<tr>
<td>5</td>
<td>Cheerful Charlie's</td>
<td>North Bay</td>
</tr>
<tr>
<td>6</td>
<td>J. Supply Co.</td>
<td>Thunder Bay</td>
</tr>
<tr>
<td>7</td>
<td>Canna Cabana</td>
<td>Sudbury</td>
</tr>
<tr>
<td>8</td>
<td>Dutch Love</td>
<td>Timmins</td>
</tr>
<tr>
<td>9</td>
<td>Happy Life</td>
<td>Sudbury</td>
</tr>
<tr>
<td>10</td>
<td>Hello Cannabis</td>
<td>Sault Ste. Marie</td>
</tr>
</tbody>
</table>

#### EAST

<table>
<thead>
<tr>
<th>Rank</th>
<th>Store Name</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Calyx and Trichomes</td>
<td>Kingston</td>
</tr>
<tr>
<td>2</td>
<td>One Plant</td>
<td>Barrie</td>
</tr>
<tr>
<td>3</td>
<td>Stash and Co.</td>
<td>Ottawa</td>
</tr>
<tr>
<td>4</td>
<td>One Plant</td>
<td>Nepean</td>
</tr>
<tr>
<td>5</td>
<td>Dutch Love</td>
<td>Bradford</td>
</tr>
<tr>
<td>6</td>
<td>One Plant</td>
<td>Orleans</td>
</tr>
<tr>
<td>7</td>
<td>Fire &amp; Flower (York St.)</td>
<td>Orleans</td>
</tr>
<tr>
<td>8</td>
<td>Growers Retail</td>
<td>Peterborough</td>
</tr>
<tr>
<td>9</td>
<td>The Oz Store</td>
<td>Orleans</td>
</tr>
<tr>
<td>10</td>
<td>Dutch Love (Clarence St.)</td>
<td>Orleans</td>
</tr>
</tbody>
</table>

#### WEST

<table>
<thead>
<tr>
<th>Rank</th>
<th>Store Name</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Tweed</td>
<td>London</td>
</tr>
<tr>
<td>2</td>
<td>The Niagara Herbalist</td>
<td>St. Catharines</td>
</tr>
<tr>
<td>3</td>
<td>Meta Cannabis Co</td>
<td>Kitchener</td>
</tr>
<tr>
<td>4</td>
<td>Spiritleaf</td>
<td>Guelph</td>
</tr>
<tr>
<td>5</td>
<td>Canna Cabana</td>
<td>Waterloo</td>
</tr>
<tr>
<td>6</td>
<td>Canna Cabana</td>
<td>Hamilton</td>
</tr>
<tr>
<td>7</td>
<td>Crossroads Cannabis</td>
<td>Woodstock</td>
</tr>
<tr>
<td>8</td>
<td>Tokyo Smoke</td>
<td>Cambridge</td>
</tr>
<tr>
<td>9</td>
<td>Tokyo Smoke</td>
<td>London</td>
</tr>
<tr>
<td>10</td>
<td>Cabbage Brothers</td>
<td>Dundas</td>
</tr>
</tbody>
</table>

**Correction:** A previous version of this report misidentified the top retail store by sales in Toronto as MaryJane's Cannabis, North York. This has been updated to MaryJane's Cannabis, Etobicoke.