
Sweets on Shelf: Cannabis Edibles Trends Report

 BRIGHTFIELD GROUP



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US Cannabis Consumer Insights:
Survey fielded quarterly. Responses are collected online from a census-balanced sample of 3,500 unique cannabis users age 21+ in the United States.

US Cannabis Distribution Trends:
Visualizes digital menu audits of thousands of dispensaries around the United States for a comprehensive view of products available on shelf, and social media data to uncover consumer reactions to product trends and launches.

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Introduction



The cannabis edibles market is expected to surpass \$10 billion in annual sales by 2025. It is one of the fastest growing product types, consistently capturing the third largest share-of-shelf of all cannabis product types. The maturing edibles category is starting to see some standardization. 100mg is the standard dosage in a single pack across state markets, and chocolate established itself as the most popular flavor of edible. Consumers can walk into a dispensary in any legal state and be met with a plethora of infused items to choose from.

62% of edibles on shelf come in 100mg packs



18% of edibles on shelf are chocolate flavored

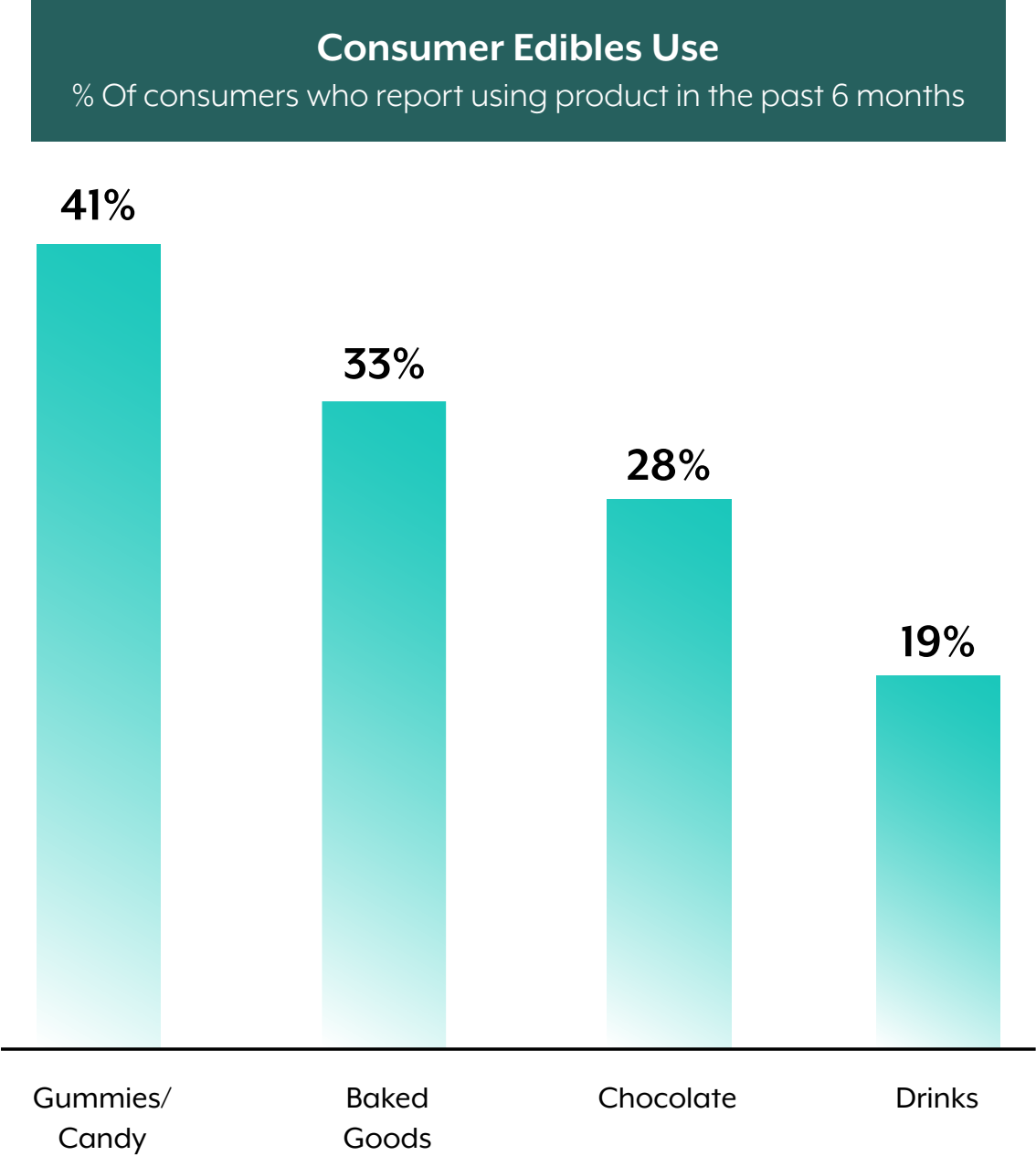
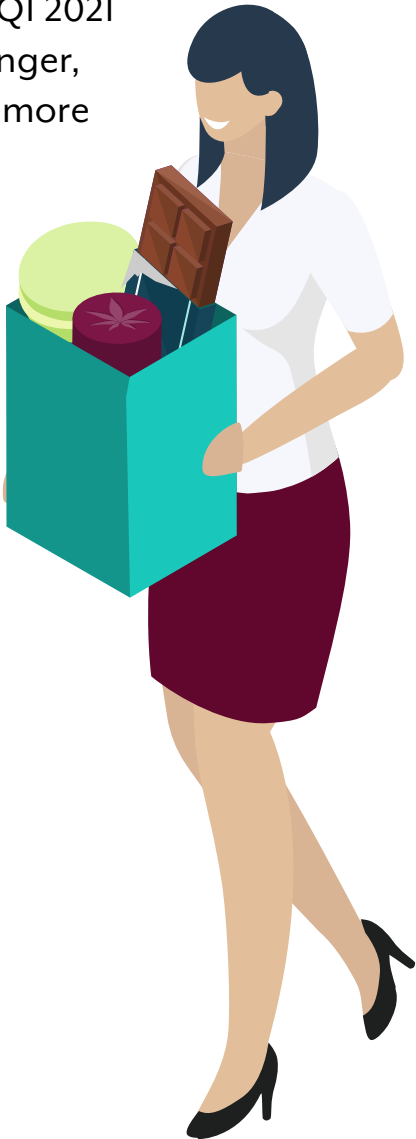


Edibles Consumer Trends

The demographics of the edibles-curious dispensary-goer is different than other potential purchasers. Brightfield’s Q1 2021 survey found the US edibles purchaser tends to be younger, higher educated, slightly higher income. They are also more likely to have children and be a woman.

Looking at Brightfield Group’s cannabis personas, the edibles user is likely to fall in one of following persona groups:

- **Daily Pain Attacker** – Individuals that report using cannabis for pain and who use five or more days per week
- **Wake and Bake** – Consumers who use cannabis multiple times a day and who report using just after waking up
- **Stressed Out Millennial** – Millennials that report using cannabis for psychological reasons like anxiety, depression, and insomnia



Differentiating Edibles



Edibles companies are getting creative to differentiate themselves and appeal to these consumer groups. Eye-catching packaging and unique flavor combinations serve to attract consumers browsing dispensary menus or shelves. Dosing and ingestion technology is attracting those looking for a consistent edibles experience.

Atypical dosages appeal to heavy or light users. A heavy user may love to try a 200mg edible while an infrequent user would look for a 2-5mg per dose option. These atypical dosages also allow brands to spread across price points—a 90mg edible costing a few dollars less than the standard 100mg appeals to budget-conscious buyers.

Lastly, distinctive brand messaging is key to fostering loyalty beyond product attributes and features. As covered in Brightfield's report on The Next Chapter of US Cannabis, cannabis brands with all types of products will need to give consumers a reason to buy beyond the product's taste and effectiveness. Successful edibles brands provide consistent products, memorable branding, and focus on building long-term, emotional relationships with their customers.

Top Edibles Brands by Share of Shelf
June 2021



Candy Distribution Trends

Growing Candies on Shelf
SKUs that grew in distribution May to June 2021



Smokiez Edibles
Jamberry Gummiez



MKX Oil Co Gummies
Ganja Grape



Kanha Green
Apple Nano 20:1



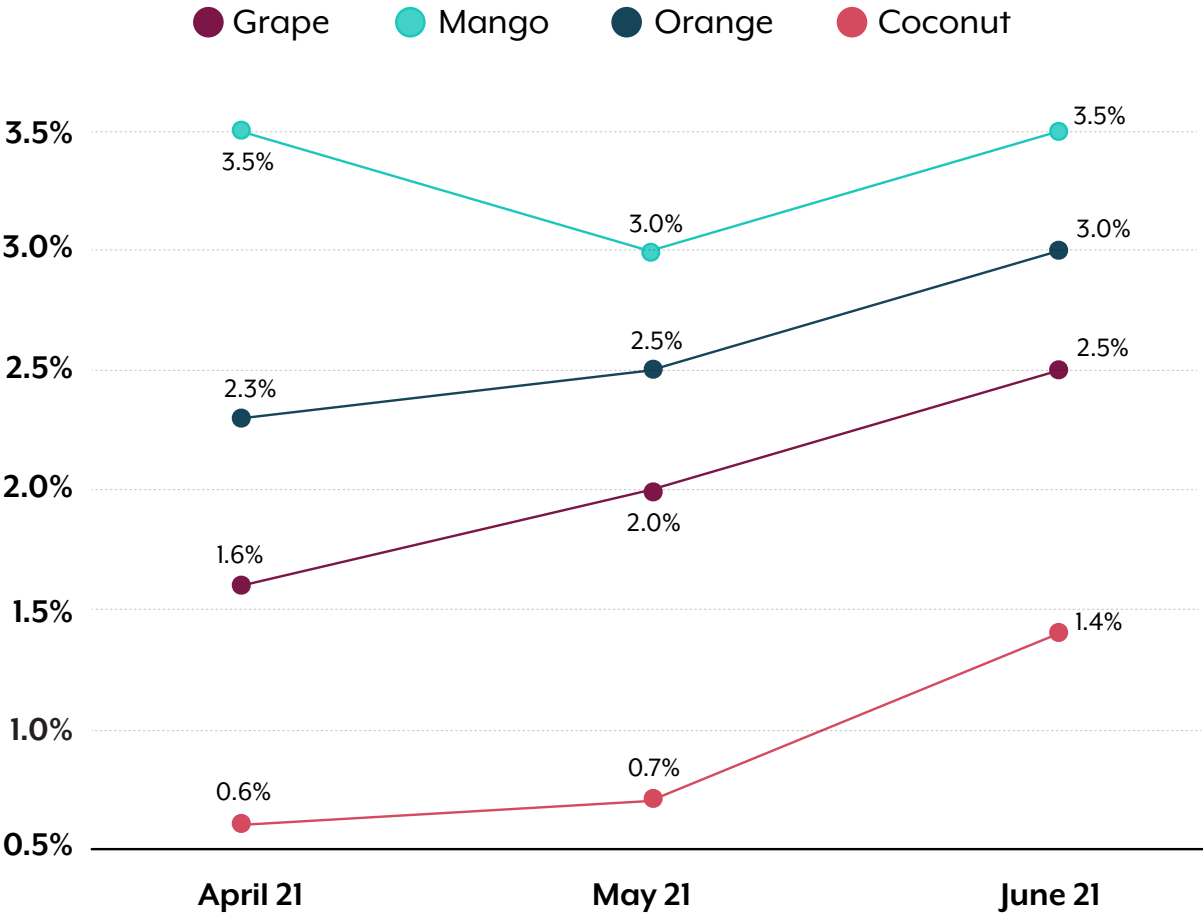
Kushy Punch Sativa
Strawberry Gummy



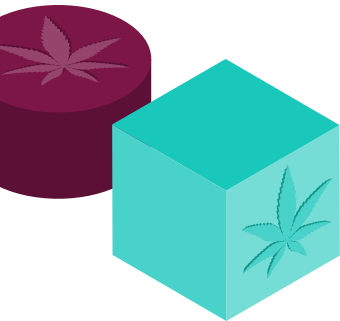
Dixie 1:1 Mixed
Berry Mints

Cannabis Candy Flavors Over Time

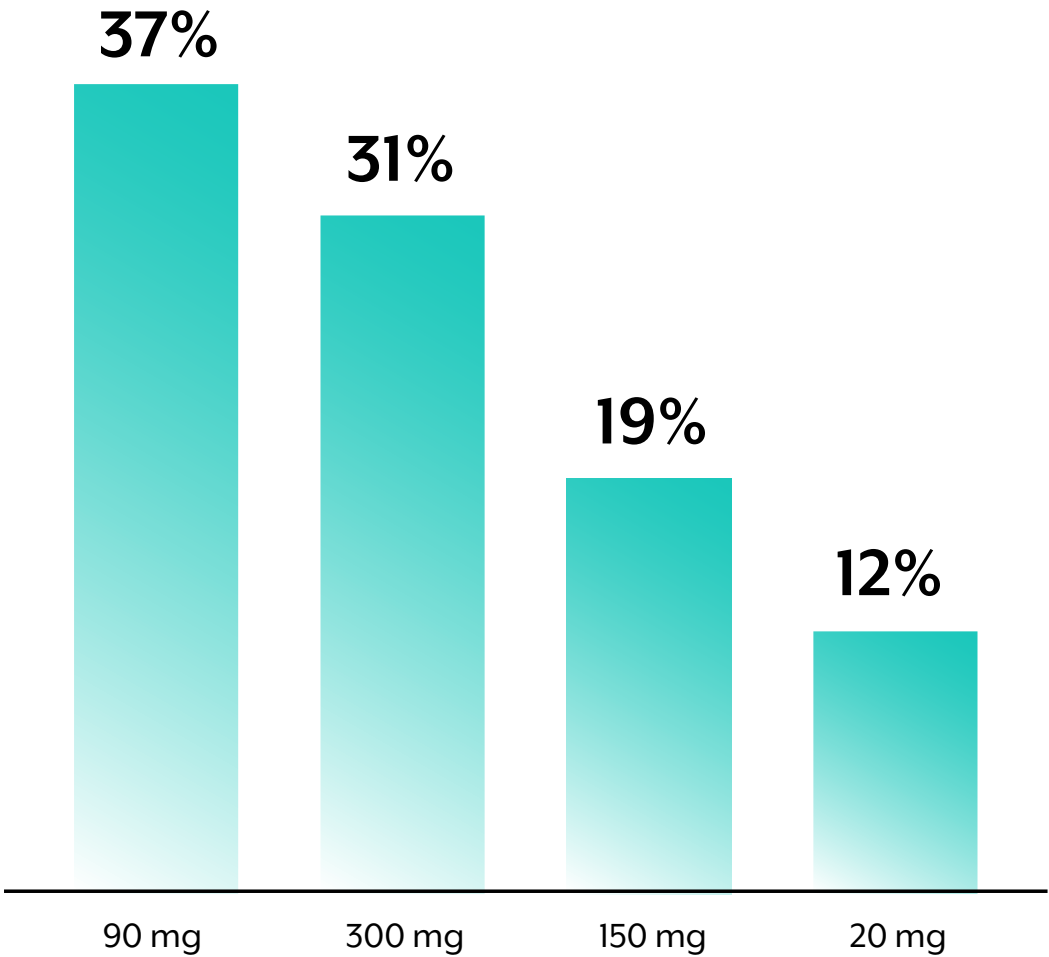
% Share of shelf April to June 2021



Just like other food categories, seasonal candy flavors make their way onto dispensary shelves. Coconut flavored candies more than doubled in distribution from April to June. Citrus flavors also increased their share—orange has the largest distribution, but clementine and tangerine also grew from April to June.

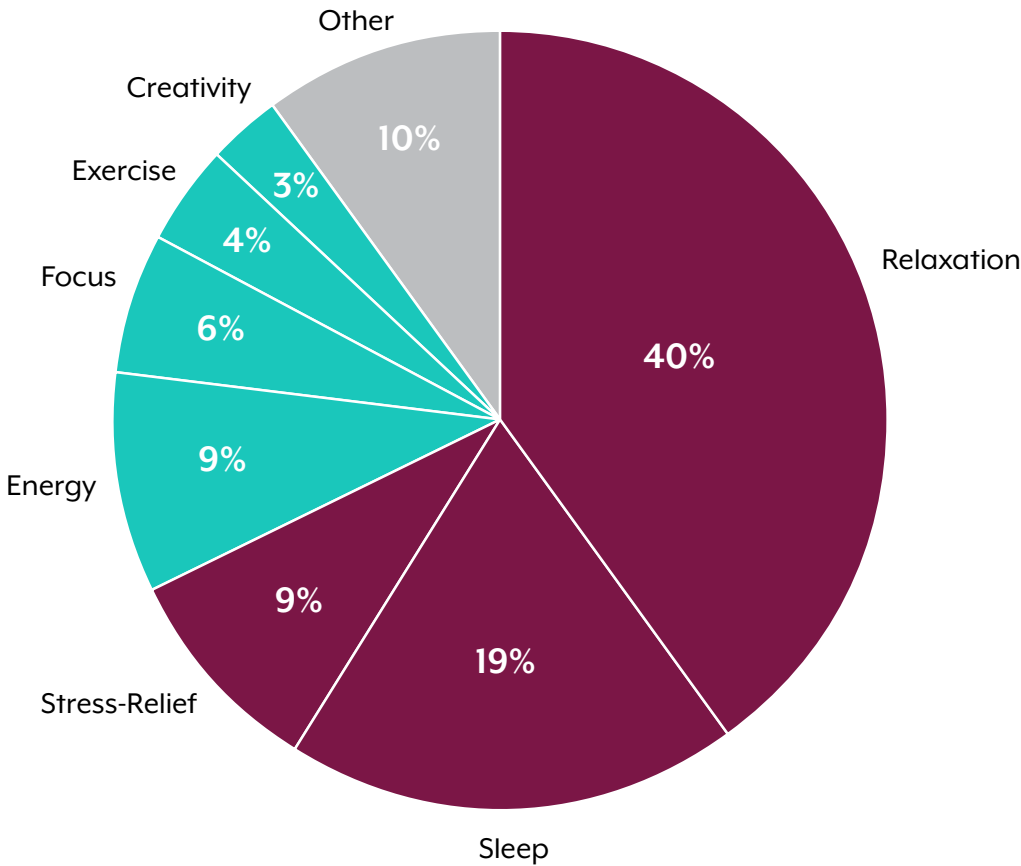


Growing Cannabis Candy Dosages
% May to June 2021 Growth



While 100mg pack sizes are the most common with 47% share of cannabis candy shelf, options beyond the standard continue to grow.

Cannabis Candy Positionings
% Share of shelf in June 2021



Cannabis candies have two types of positionings: to **unwind** or to **activate**. Products to unwind are most common—relaxation, sleep, and stress-relief make up 68% of candy positionings on shelf. 22% of candy products are positioned to activate energy, focus, exercise, or creativity.

Baked Goods Distribution Trends

Growing Baked Goods on Shelf
SKUs that grew in distribution May to June 2021



Heavenly Sweet
Rocky Road Treat



Big Pete's Treats
Birthday Cake Cookies



Dutch Girl Caramel
Stroopwafel

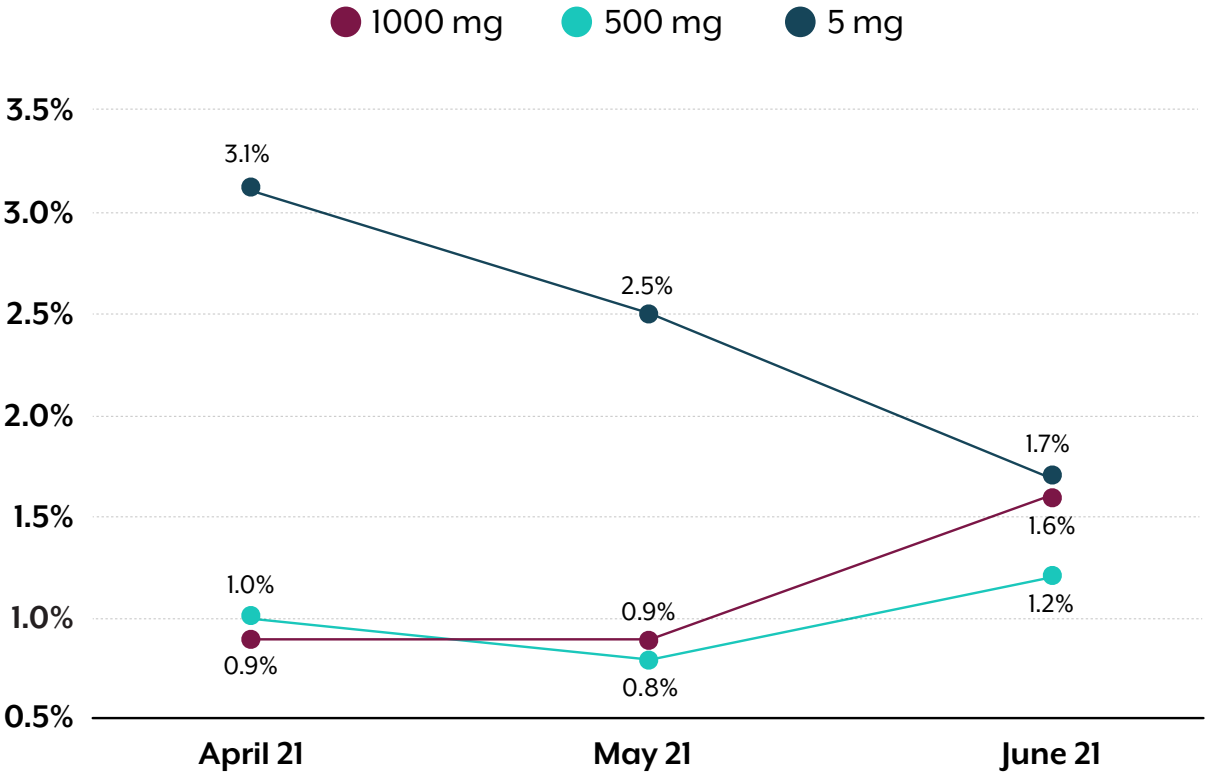


Utopia Cannabis
Chocolate Macaroons

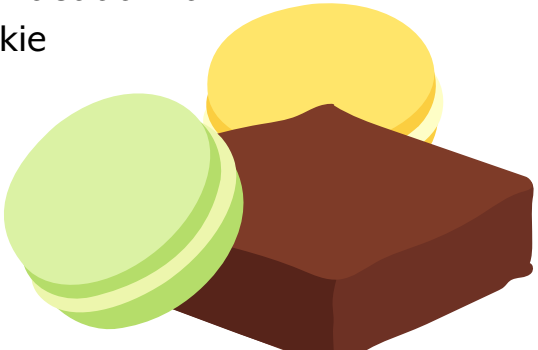


The Original Pot Company
White Chocolate Macadamia
Nut Cookie

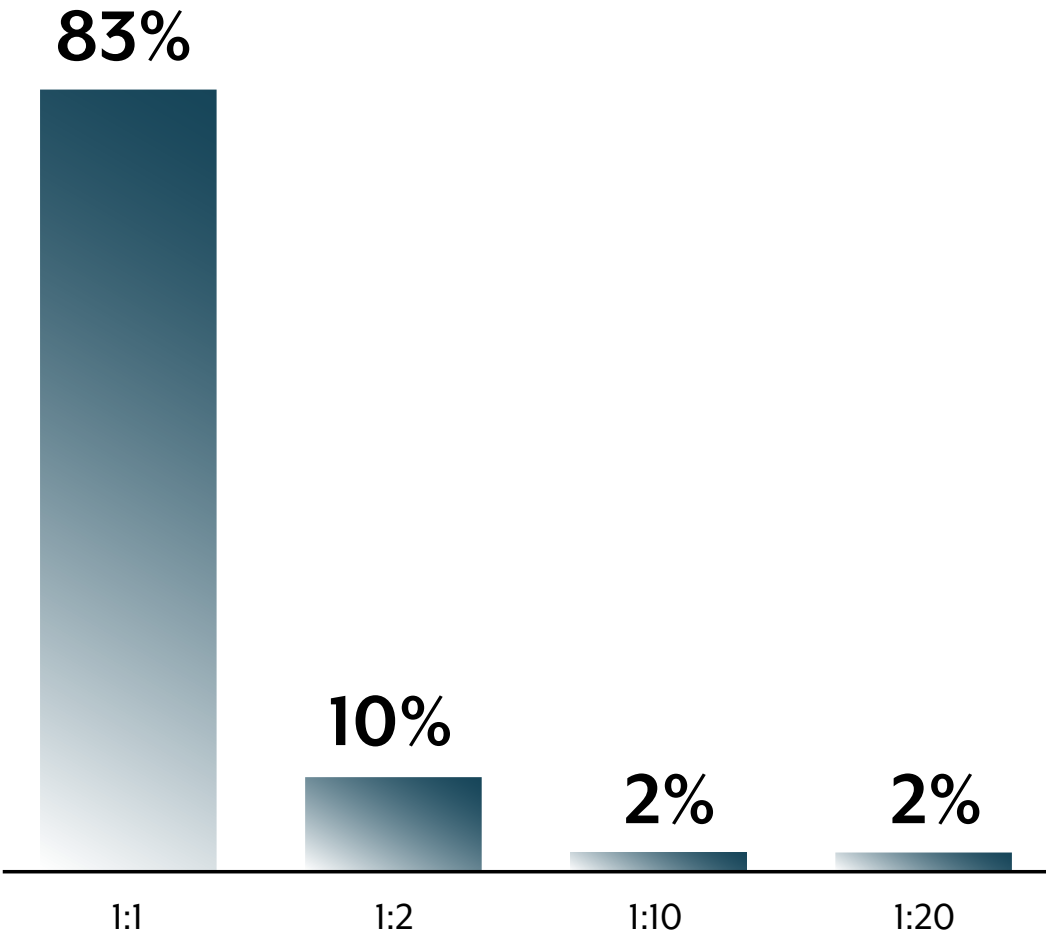
Growing Baked Goods Dosages
% Share of shelf April to June 2021



Large pack sizes increased in June while smaller sizes—like 5mg, 90mg, and 30mg—lost share of shelf.

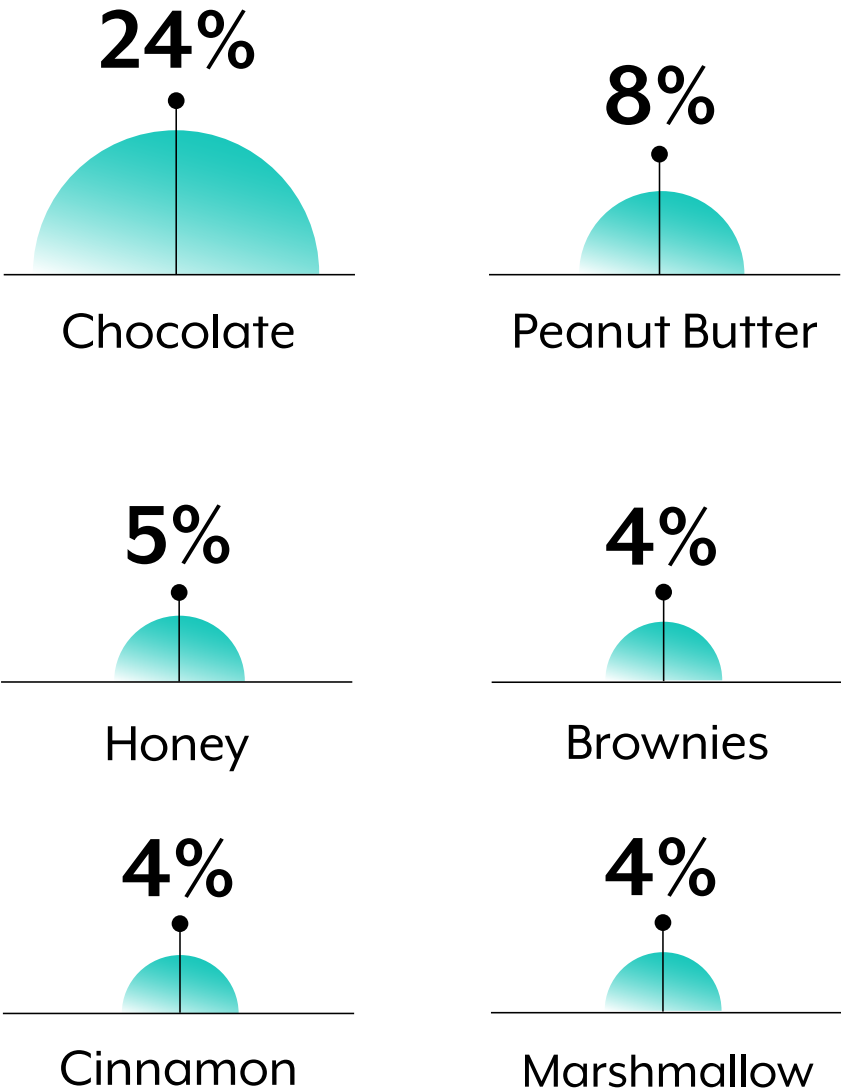


Top Baked Goods Ratios
June 2021 % share of shelf



Cannabis baked goods have the least diversity in THC:CBD ratio. Nearly all products (93%) are 1:1 or 1:2.

Top Baked Goods Flavors
June 2021 % share of shelf



Chocolates Distribution Trends

Growing Chocolates on Shelf

SKUs that grew in distribution May to June 2021



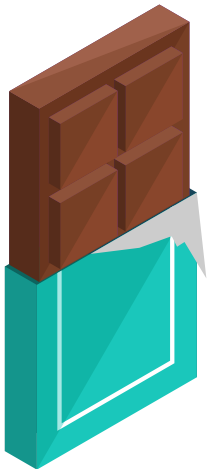
Défoncé Mint
Chocolate Bar



Chill Chocolate Dream
4:1 Mood Bar for Sleep



Chill Cappuccino Crunch
Milk Chocolate



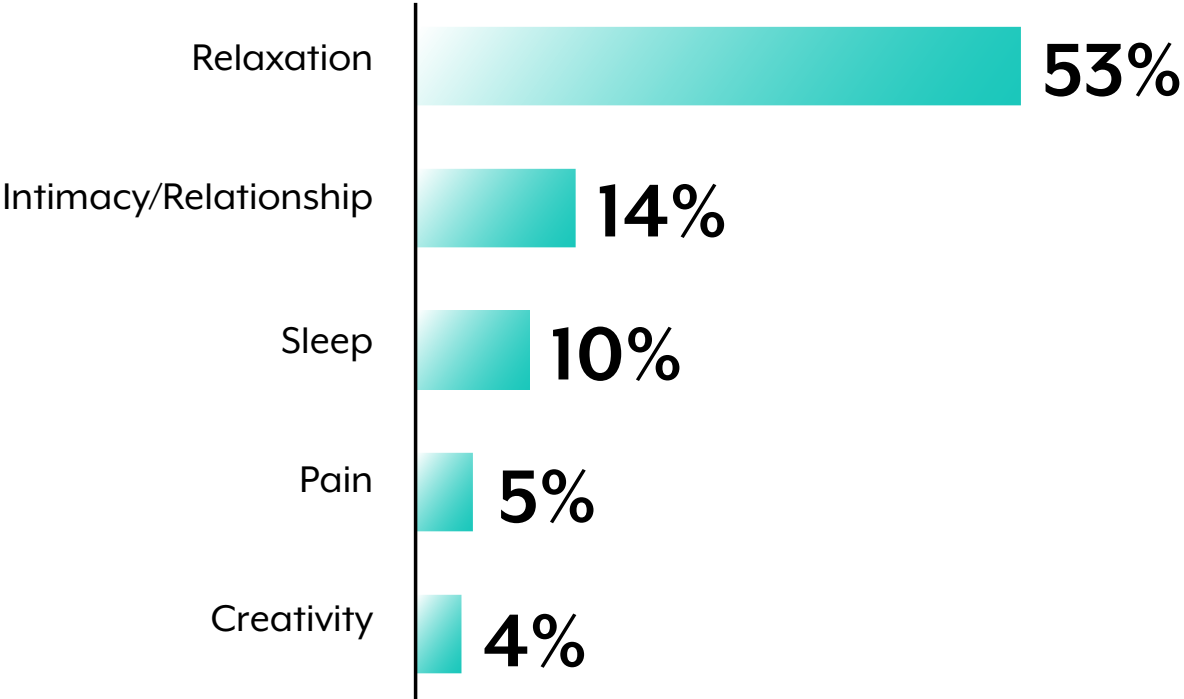
Satori Blueberries in
Dark Chocolate



Emerald Sky Peanut
Butter Cups Hybrid

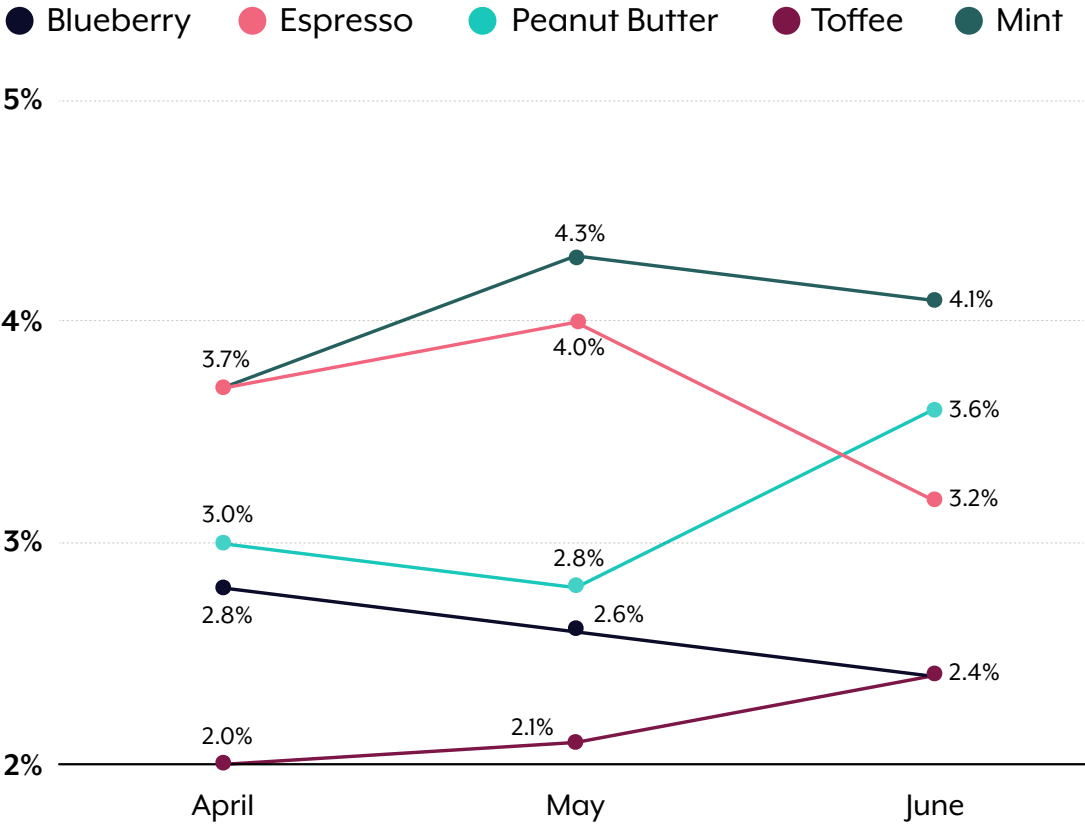
Top Chocolate Positionings

June 2021 % share of shelf



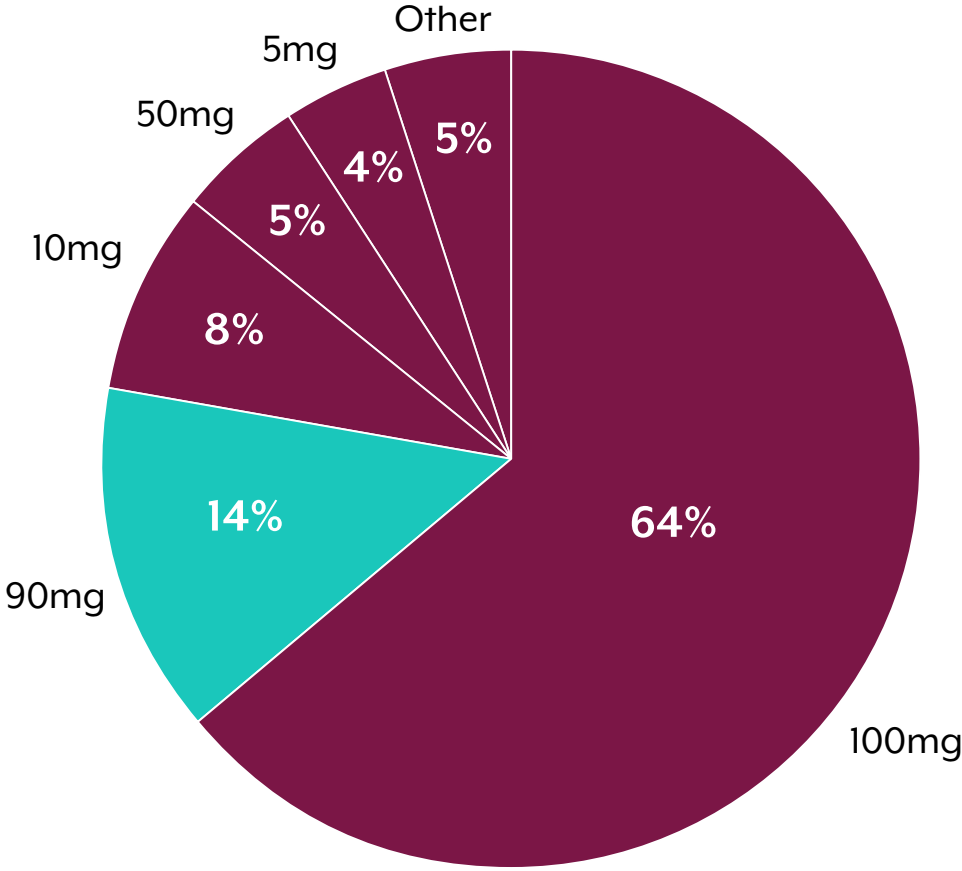
Chocolates are a universal symbol of romance. THC chocolates are the most romantic product type with intimacy/relationship as a top positioning.

Growing Baked Goods Dosages
% Share of shelf April to June 2021



Plain chocolate flavored THC chocolate is the most common, with 54% share of shelf. These five flavors—blueberry, espresso, mint, peanut butter, and toffee—are commonly paired with chocolate for delicious flavor combinations. As edibles technology have improved, THC chocolates taste better than ever.

Cannabis Chocolate Flavors
% Share of shelf April to June 2021



Among all edibles, 90mg doses are uniquely popular in cannabis chocolates. Only 6% of baked goods and 1% of candies are dosed at 90mg.

Distribution Trends

The most comprehensive view of what's next in cannabis

See what's moving

Understanding products on shelf helps your team identify emerging trends before they crest.

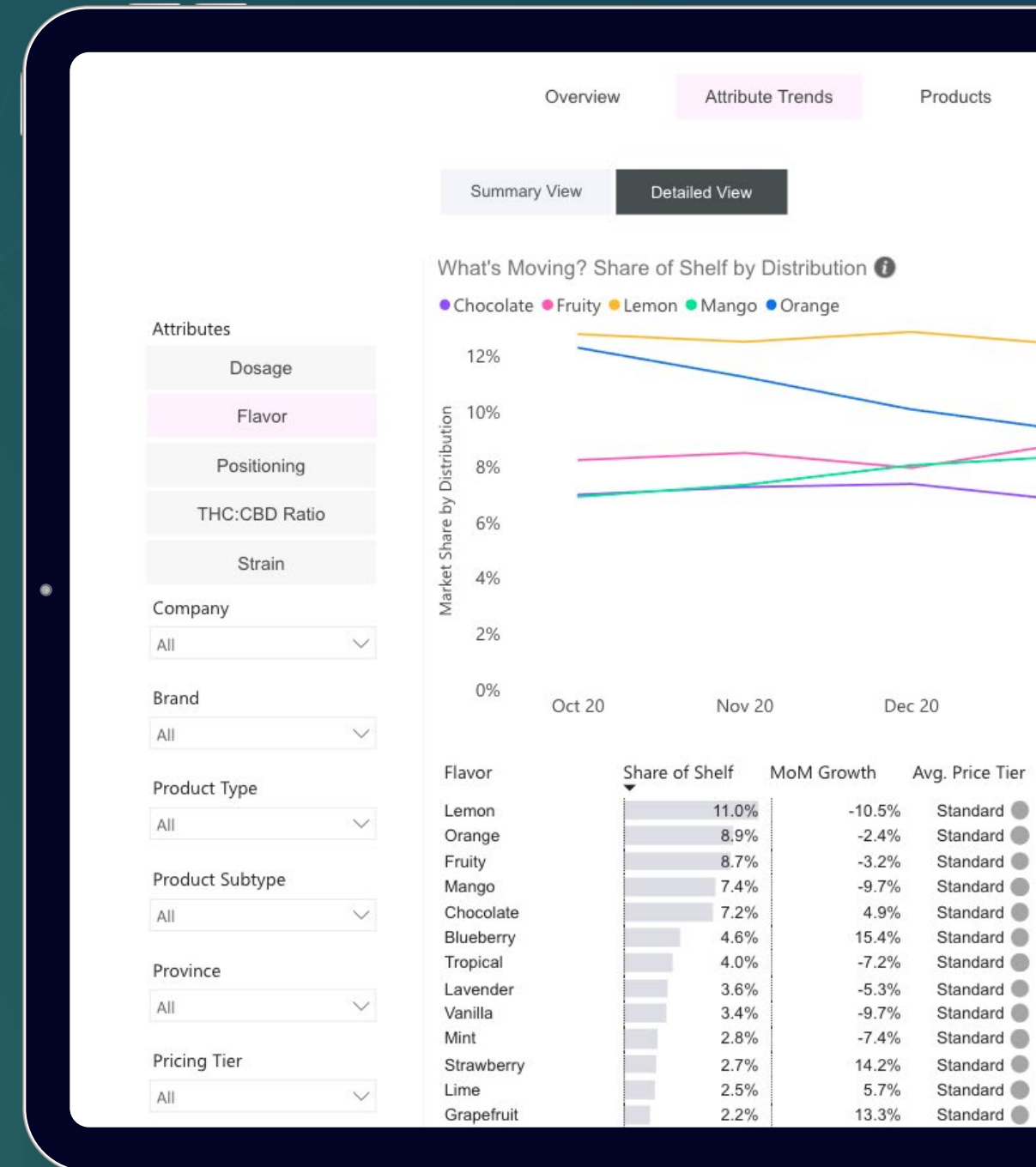
Build a data-driven innovation pipeline

Ensure your product development is backed by robust data.

Position the perfect product

Identify opportunities in the market with SKU and brand-level data. Available for US and Canada markets.

Learn more at brightfieldgroup.com



Brightfield Group is the leading research firm for emerging categories including CBD, Cannabis, and Wellness. By integrating multi-source data with AI and research expertise into our cross-comparable data lake, we uncover robust insights as new markets develop. We have helped Marketing, Innovation, and Insights leaders drive customer-centric strategies on their next big idea since 2015.

See what we can do for you at brightfieldgroup.com.



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