

US CANNABIS DISTRIBUTION TRENDS REPORT:

Flower/Pre-Rolls

September 2021



The simplest and most popular form of cannabis—flower and pre-rolls. In 2021, 56% of cannabis consumers reported using cannabis flower, with another 46% enjoying pre-rolls. Beyond winning over consumers, flower also takes the largest share of the US cannabis market. Cannabis flower products will bring in nearly \$12 billion USD in 2021 and well surpass that in 2022.

Cannabis flower and prerolls heavily rely on meeting consumer expectations. If a product markets itself as premium, the flower should not be overly dry or have small buds. Someone who buys an indica preroll and then is up all night with racing thoughts will probably move onto another brand.

With so many players in the space, providing consumers a consistent flower experience is key.

Our California and Colorado Brand Health study showed us that consumers see a high level of consistency in mature markers. As new markets come online, each will have its own path to high quality brands that deliver on consumer expectation.

Top Cannabis Flower/Pre-Roll Brands

By nationwide distribution in August 2021



Growing Products on Shelf

Products that grew from July to August 2021



Brite Labs
GMO Pre-Roll



FloraCal Farms
Lime Sorbet



Sticks
Gorilla Glue Pre-Roll

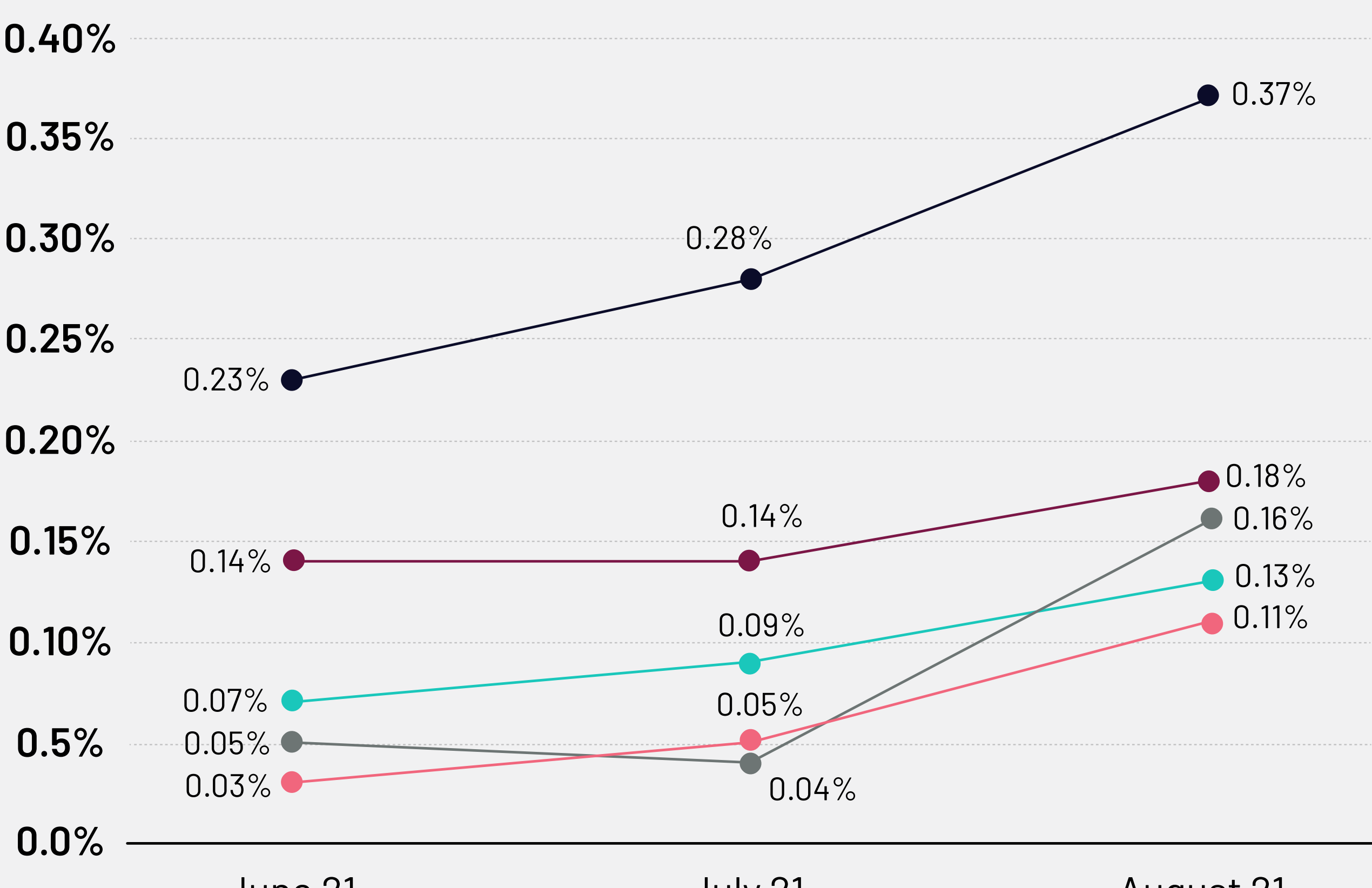


Monogram
No01 Flower Medium

Growing Cannabis/Pre-Roll Strains

% share of shelf from June to August 2021

- Face Off OG ● Green Dragon ● LA Kush
- Platinum Kush ● Lemon Cake



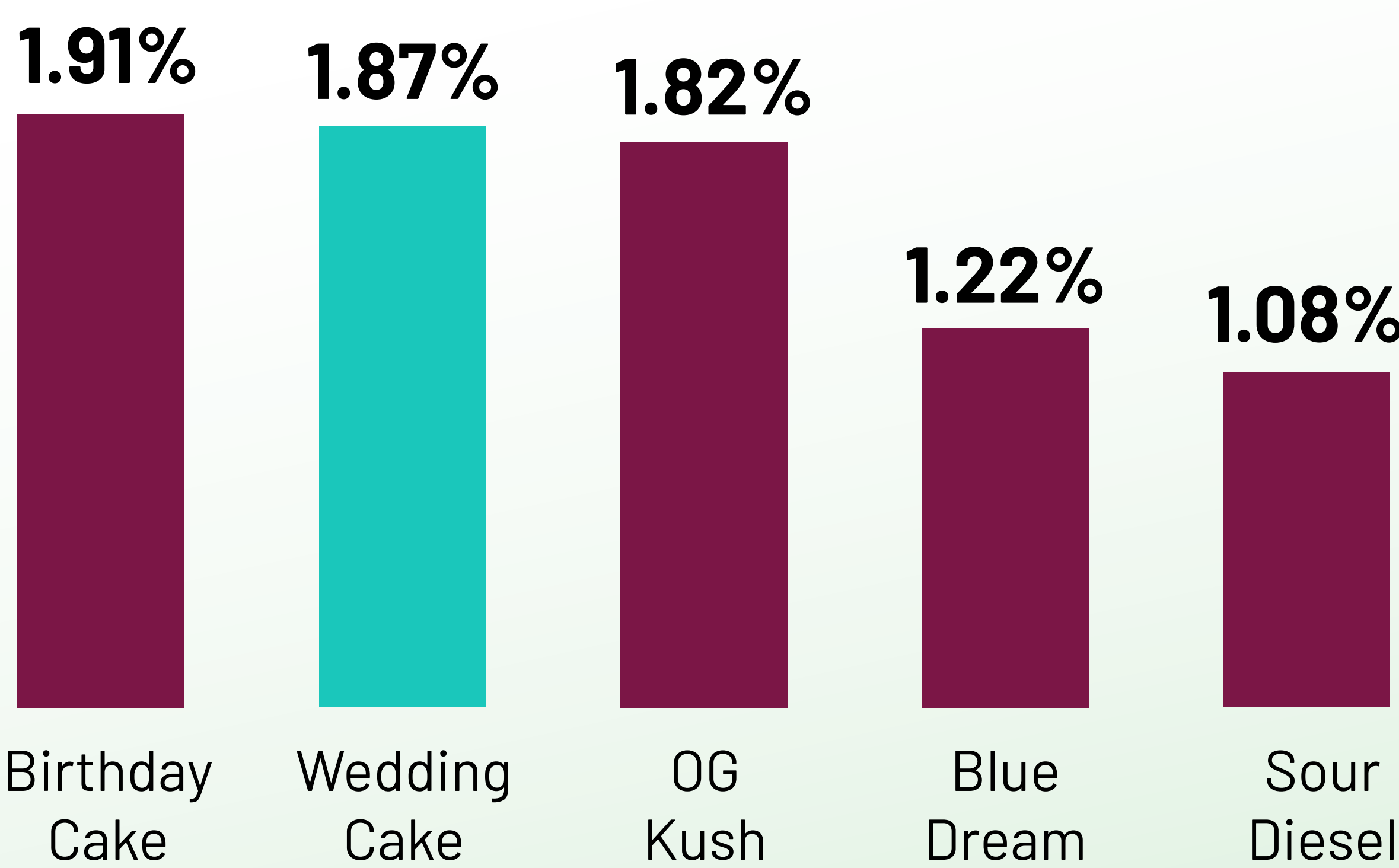
* For strains with over .1% distribution by August 2021



Three of the top five strains increasing in national share of dispensary shelves come from OG Kush—Face Off OG, Platinum Kush, and LA Kush. Lemon Cake is the only sativa on the list.

Top Cannabis/Pre-Roll Strains

% share of shelf nationwide in August 2021



BRIGHTFIELD GROUP