



Hemp-Derived THC Consumer Trends & Purchase Drivers

Based on Q1 2025 Data
May 2025



BRIGHTFIELD GROUP

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ABOUT US

The Brightfield Difference – Insights for Emerging Industries.

Since 2015, Brightfield Group has been providing research and insights to the cannabis community, but we're more than just data – we're a trusted partner that will help you create an actionable plan for the road ahead.

We provide a data-driven holistic view of products, customers, and the market landscape across emerging markets based on a combination of qualitative and quantitative sources including consumer surveys, online retail tracking and social listening.

By combining direct consumer feedback with social listening and machine learning, we deliver deep insights that empower our partners to make informed business decisions.



Hemp-Derived THC Studies

Background: Coverage of Hemp-Derived THC

With years of experience in analyzing consumer trends and behaviors, in the cannabis space, Brightfield Group has established itself as a trusted partner for companies navigating the complexities of the evolving industry. Brightfield Group has been tracking the rise of Hemp-derived THC in our General Population Study, Market Insights and the new dedicated Hemp-Derived THC consumer study to help clients understand this quickly evolving opportunity

Three Sources for Hemp-THC Insights



Hemp-Derived & CBD Market Insights

Market Sizing and Forecasting for Hemp-Derived THC by format provides insights on projected growth of the category overall accompanied by qualitative reporting, estimated brand shares of top 20 companies and share by hemp-derived cannabinoid (Delta-8, Delta-9, THCa, etc.)



General Population Wellness CPG Study

Brightfield's General Population Wellness study allows you to track incidence rates of hemp-derived THC usage across the US adult population and compared to other substances and products. Allows you to compare Hemp THC users to the gen pop and learn about these consumers' consumption patterns, lifestyle and behaviors.



Hemp-Derived Consumer & Brand Study

Dedicated study about Hemp-Derived consumers, including breakouts of CBD vs Hemp-Derived THC consumers. Allows you to see why consumers use Hemp-Derived THC, format usage, frequency of use, quality perceptions, and brand funnels for overall Hemp-THC, and beverages specifically.

Q1 2025 Sample Size
N=1,988



Explore more in the portal!
Dive deeper with your
interactive dashboard here.

Category Background & Growth

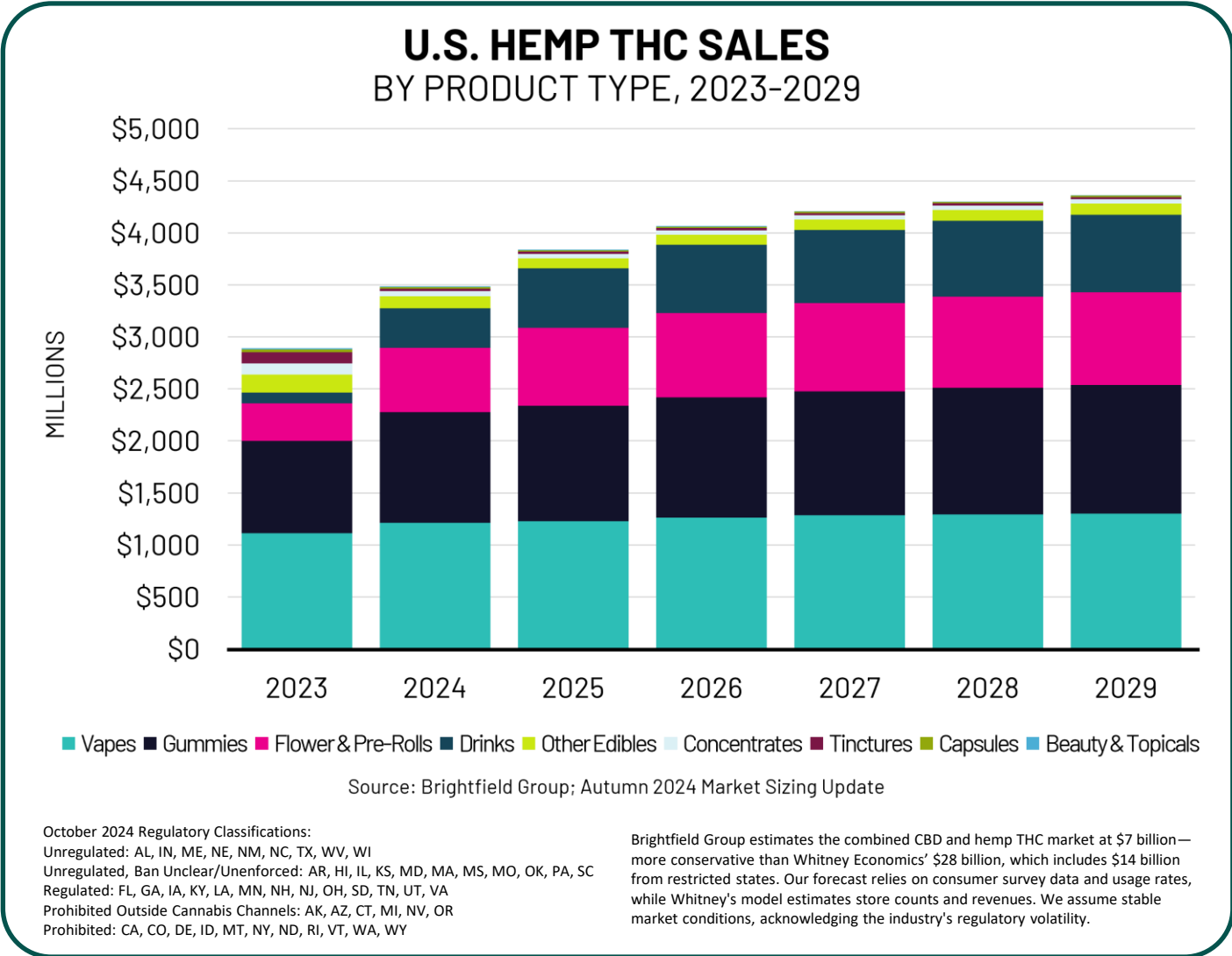


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Hemp THC Legal Overview & Market Projections

The 2018 Farm Bill **legalized hemp-derived products containing no more than 0.3% Delta-9 THC by dry weight**, unintentionally paving the way for intoxicating edibles and beverages. Cannabinoids like Delta-8, THCA, and HHC remain federally legal due to regulatory gaps, as they aren’t explicitly restricted under current federal law. Although the Farm Bill is intended to be renewed every five years, Congress has twice extended the 2018 version, with the next deadline set for September 30, 2025. In the meantime, regulation falls to the states. Recent actions include [Alabama’s](#) new dosage limits and a ban on smokable hemp, while [Ohio](#) is considering similar restrictions. Though [Florida’s](#) efforts recently stalled, the [Texas House](#) passed heavy restrictions in late May and will make it before the Senate.

According to Brightfield Group’s Autumn 2024 forecast, the U.S. hemp-derived psychoactive cannabinoid market is **projected to reach \$3.8 billion in 2025**—up from just \$200 million in 2020—and grow to \$4.4 billion by 2029 (CAGR: 4.6%). Continued expansion into mainstream retail outlets, limited cannabis accessibility driving consumers towards hemp, and sub-marijuana pricing are expected to be key drivers of category growth.



Awareness and usage of hemp-derived cannabinoids remain elevated in 2025 after seeing notable growth in 2024

14% of general population U.S. adults surveyed in Q1 2025 reported using some type of hemp-derived THC product, a similar incidence rate to calcium and fish oil supplements and a bit below herbal tea (16.0%).

Cannabinoid Awareness

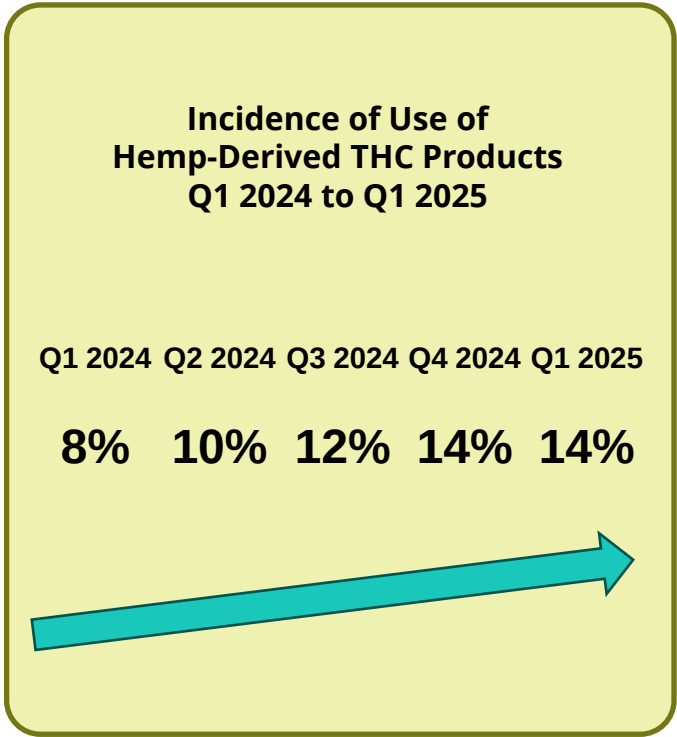
Q1 2023 Q2 2023 Q3 2023 Q4 2023 Q1 2024 Q2 2024 Q3 2024 Q4 2024 Q1 2025

CBD	52.0%	54.0%	52.0%	54.7%	53.8%	54.4%	57.2%	53.6%	58.6%
Delta-8 THC	20.9%	18.7%	19.1%	20.3%	18.5%	20.9%	23.4%	25.6%	16.8%
Delta-9 THC (hemp-derived)	-	16.7%	17.5%	17.4%	16.3%	19.3%	23.0%	23.5%	25.3%

Incidence of Cannabinoid Use P6M

Q1 2023 Q2 2023 Q3 2023 Q4 2023 Q1 2024 Q2 2024 Q3 2024 Q4 2024 Q1 2025

Cannabis	22.2%	23.2%	22.5%	22.2%	20.2%	18.4%	25.2%	26.9%	27.0%
CBD	19.1%	18.4%	14.9%	15.1%	12.7%	12.4%	14.9%	13.6%	13.8%
Delta-8 THC	6.0%	5.0%	5.5%	5.5%	4.3%	4.3%	5.1%	5.7%	5.6%
Delta-9 THC (hemp-derived)	-	5.9%	3.3%	4.1%	3.1%	3.3%	5.5%	5.0%	5.4%

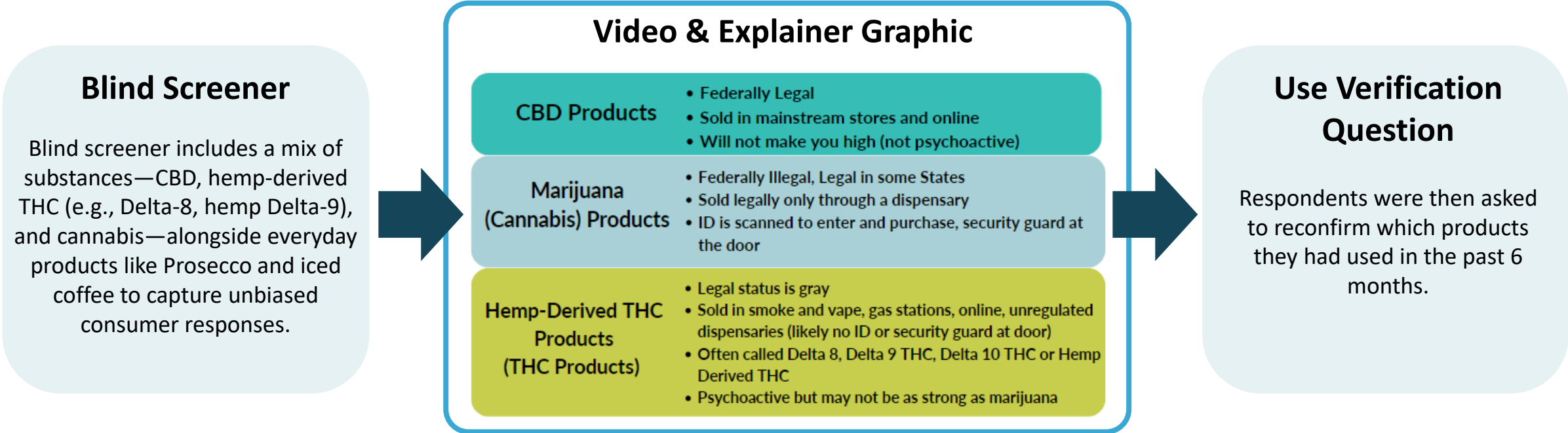


Consumer confusion lingers surrounding the differences between cannabinoid product categories

After capturing initial unaided responses on cannabinoid awareness and usage, respondents were shown an educational video and summary page explaining the differences between CBD, marijuana, and hemp-derived THC products. They were then asked to reassess their past six-month usage based on this information. This methodology is also utilized in our general population Wellness Survey.

In Q1 2025, 65% of consumers who identified as hemp-derived THC users after viewing the video and explainer graphic had not reported using it prior to receiving clarifying information. Drops in reported usage of both cannabis and CBD suggest some conflation with both categories.

	Usage BEFORE Info Video	Usage AFTER Info Video	
Hemp THC	65%	100%	+35 pts
Cannabis	89%	81%	-8 pts
CBD	70%	66%	-4 pts

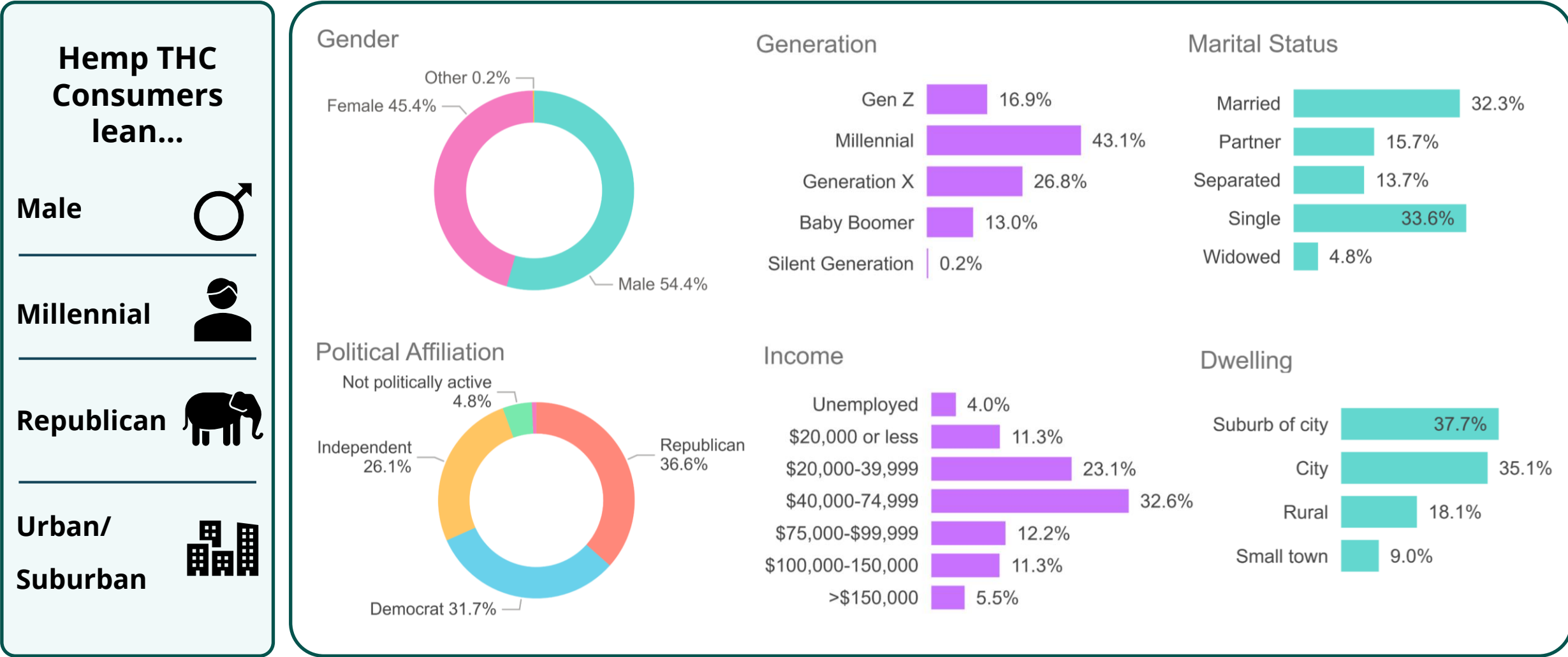


Consumer Overview & Behaviors

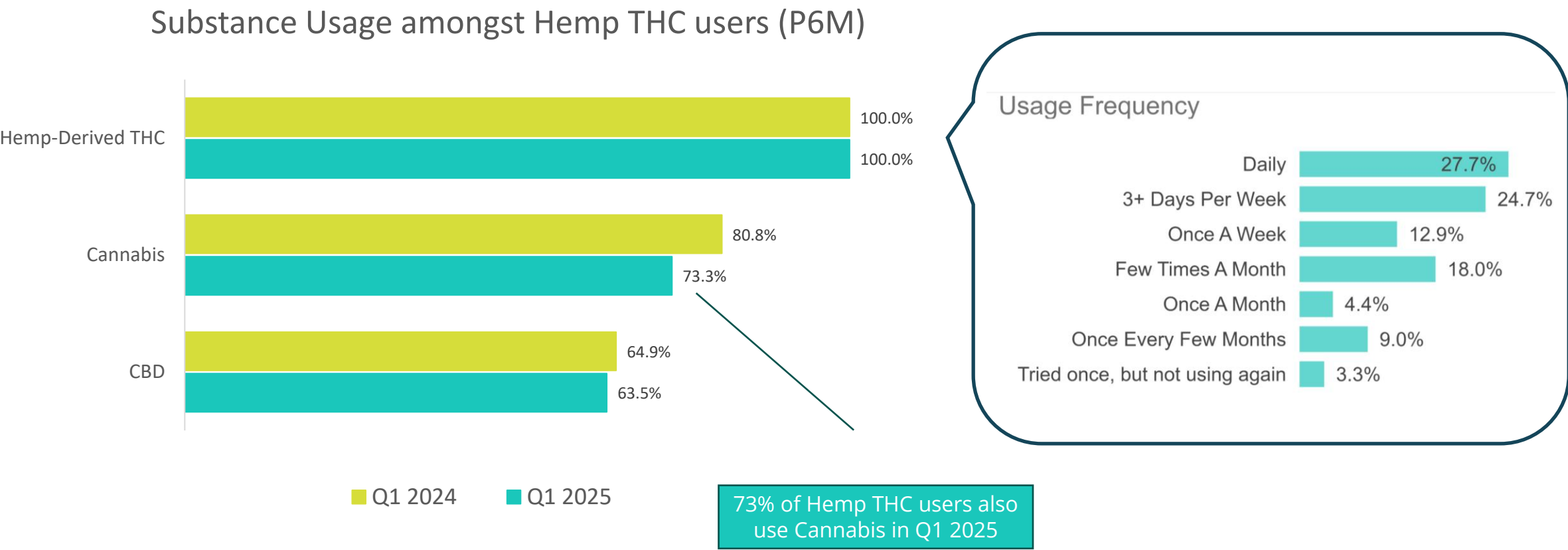


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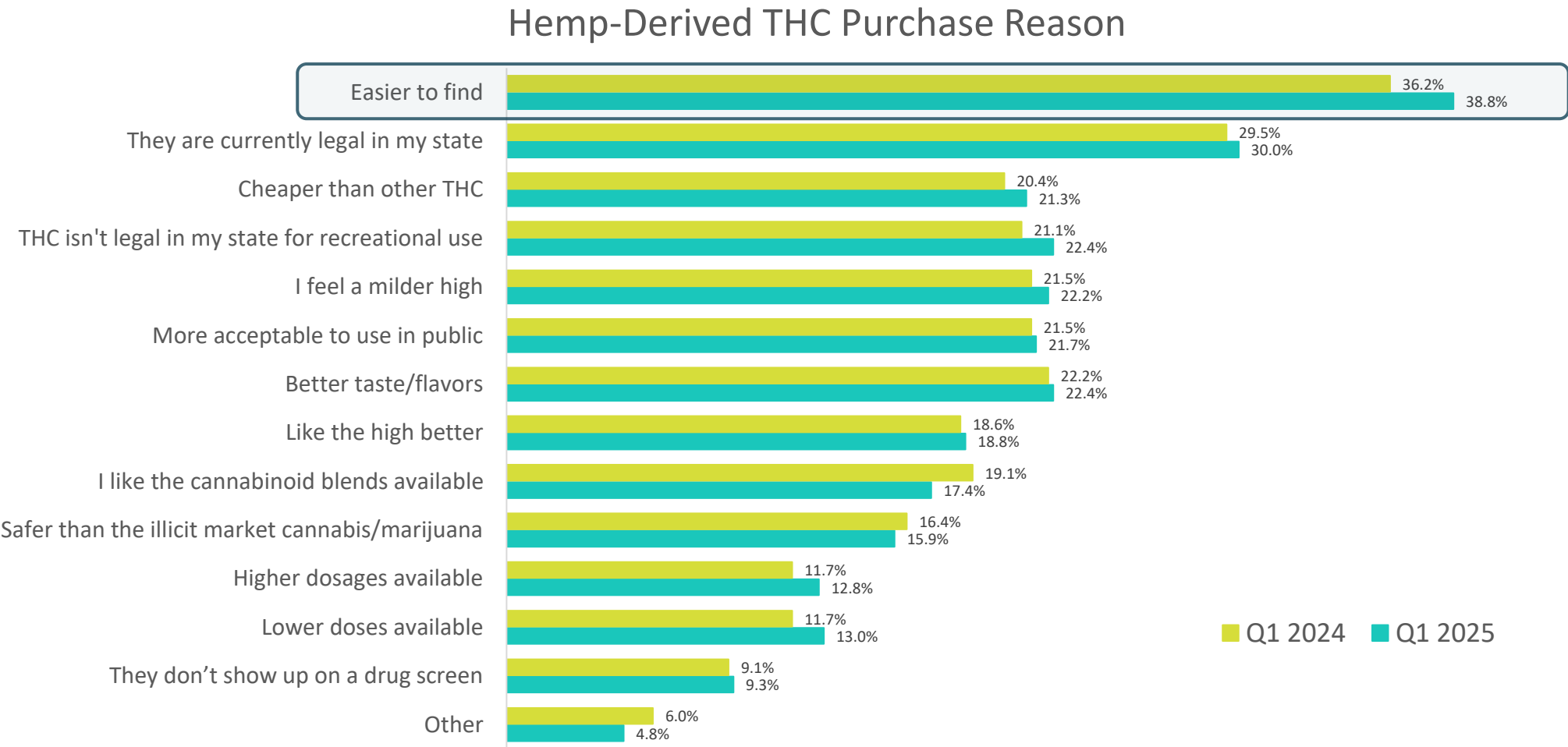
Who is buying hemp-derived THC products?



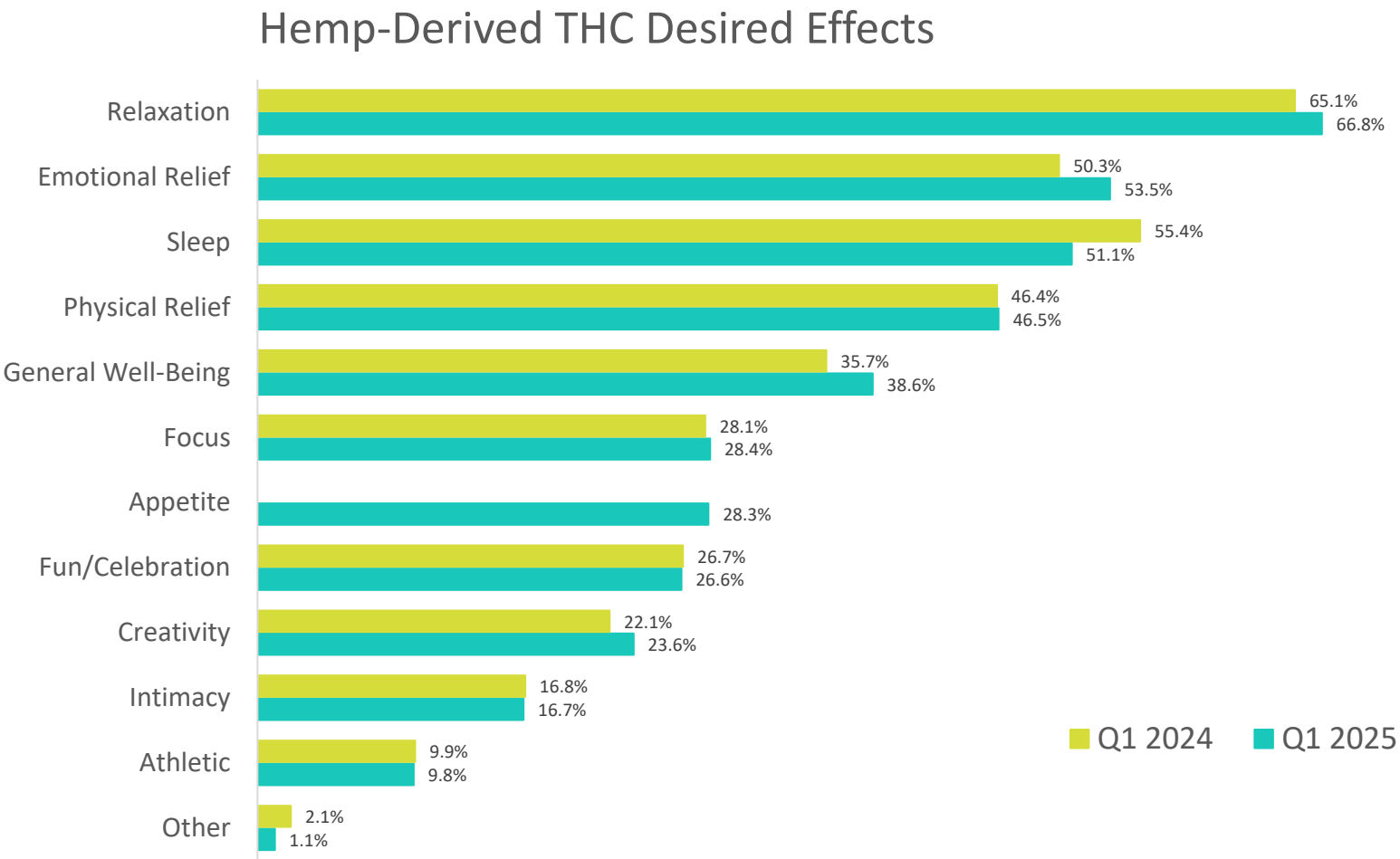
Most consumers utilize some other cannabinoid alongside hemp THC, and typically use hemp-derived products at least once weekly



Convenience/ease of access relative to cannabis continues to be the primary purchase driver; interest in blends declined slightly year-over-year



Relaxation also held its position as the top desired product effect, though sleep fell behind emotional relief in the battle for second place



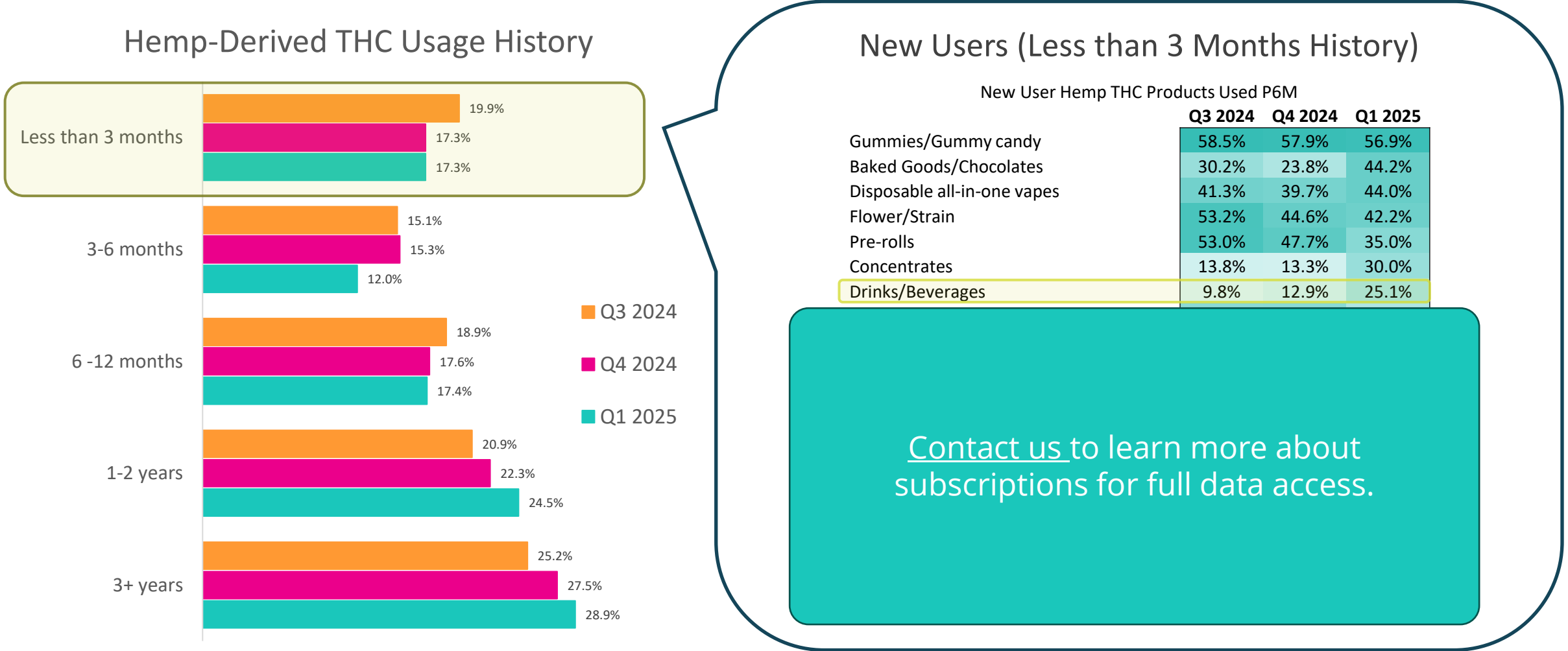
Though gummies still lead, drinks saw a massive jump in reported usage in Q1 2024, coinciding with a decline in pre-roll usage

Hemp THC Products Used P6M

	Q1 2024	Q3 2024	Q4 2024	Q1 2025
Gummies/Gummy candy				59.1%
Disposable all-in-one vapes				45.3%
Flower/Strain				41.8%
Baked Goods/Chocolates				41.4%
Pre-rolls				35.2%
Concentrates (e.g., resin, crumble, shatter, wax, budder)				31.2%
Pre-filled vape cartridges				27.4%
Drinks/Beverages (including powders, drop and syrups)				24.8%
Capsules/Pills				16.8%
Other edibles				12.0%
Tinctures				8.9%
Topicals				8.2%
Mints/Lozenges/Sublingual Strips				7.5%

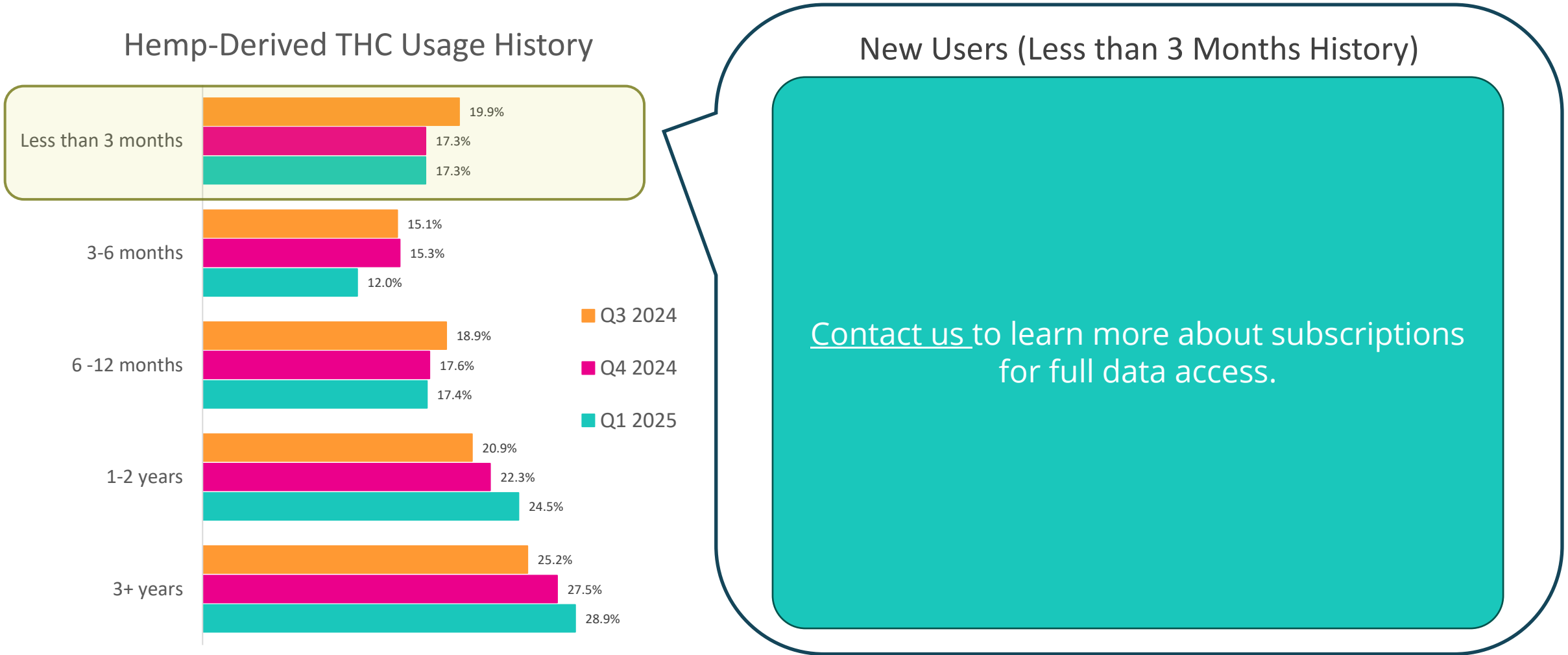
Contact us to learn more about subscriptions for full data access.

While new users coming in has been steady, they are less likely to be using THC and have been increasingly gravitating towards drinks



Q: How long ago did you first use hemp-derived THC?
Q: Which of the following hemp-derived THC products have you used in the past 6 months? Choose all that apply.
Q: Which of the following describes how you've brought these Hemp-derived products into your life?

New Users (started in past 3 months) are typically trying products that they see on store shelves, especially in Q1 2025



Consumers who are new to THC overall (licensed and hemp-derived) rely more heavily on family/friend recommendations, and they are often older and more likely to be female

Product Introduction



[Contact us](#) to learn more about subscriptions for full data access.

Darker Bar = Not Using Cannabis Before Hemp THC
Lighter Bar = All Hemp THC Users

Identify your next opportunity and delight your customers with user-friendly data on:



Brand
Health



Consumer
Insights



Market
Landscape



Distribution
Trends

To learn more about our insights solutions for cannabis, [request your demo here.](#)



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Brightfield Group is the leading research firm for emerging categories including hemp, 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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