



The Hemp-Derived THC Beverage Boom: A Report

Based on Q1 2025 Data
May 2025



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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

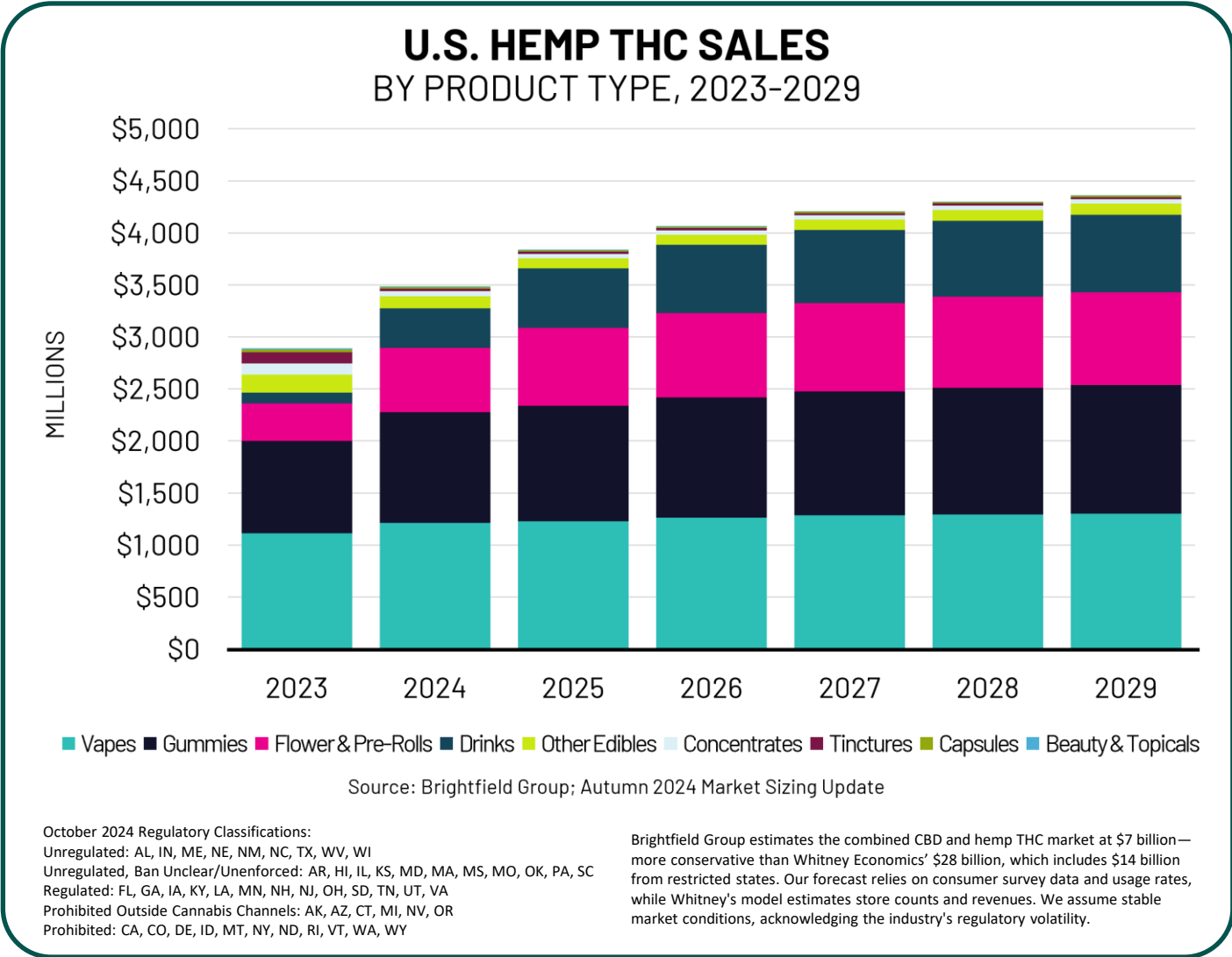


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Hemp THC Legal Overview & Market Projections

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

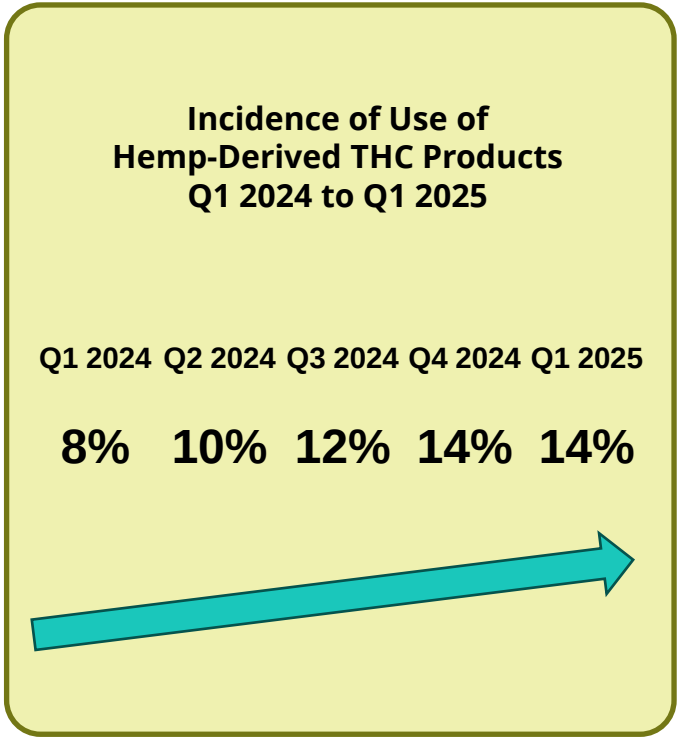
14% of general population U.S. adults surveyed in Q1 2025 reported using some type of hemp-derived THC product, a similar incidence rate to calcium and fish oil supplements and a bit below herbal tea (16.0%).

Cannabinoid Awareness

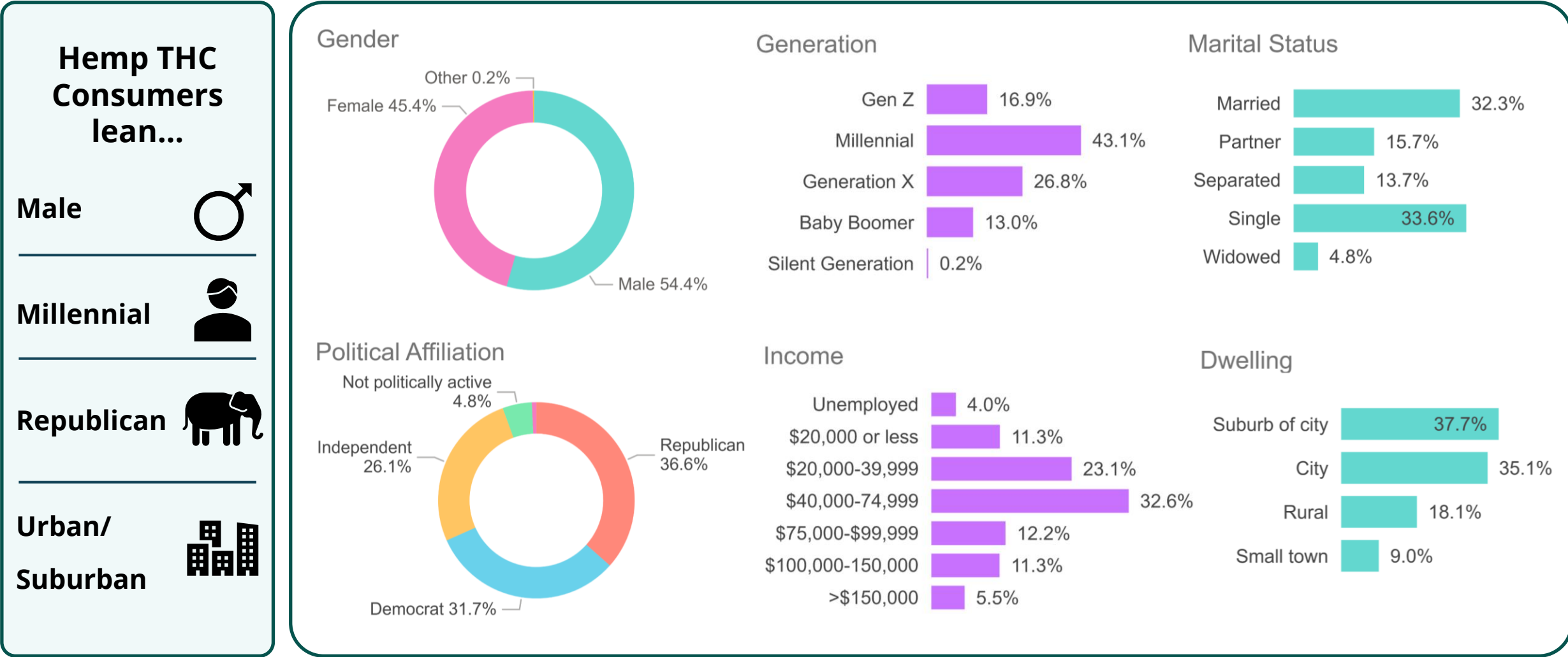
	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
CBD	52.0%	54.0%	52.0%	54.7%	53.8%	54.4%	57.2%	53.6%	58.6%
Delta-8 THC	20.9%	18.7%	19.1%	20.3%	18.5%	20.9%	23.4%	25.6%	16.8%
Delta-9 THC (hemp-derived)	-	16.7%	17.5%	17.4%	16.3%	19.3%	23.0%	23.5%	25.3%

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%



Who is buying hemp-derived THC products?

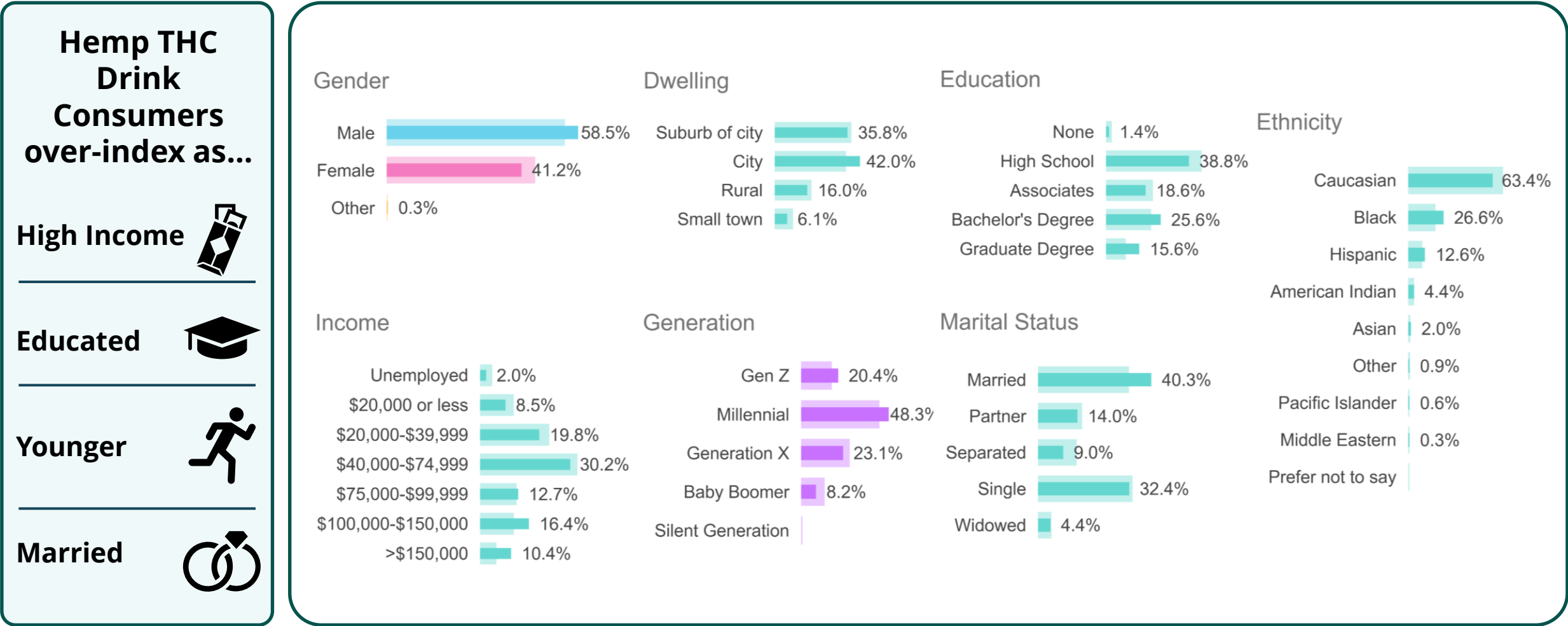


Hemp Beverage Consumer Overview



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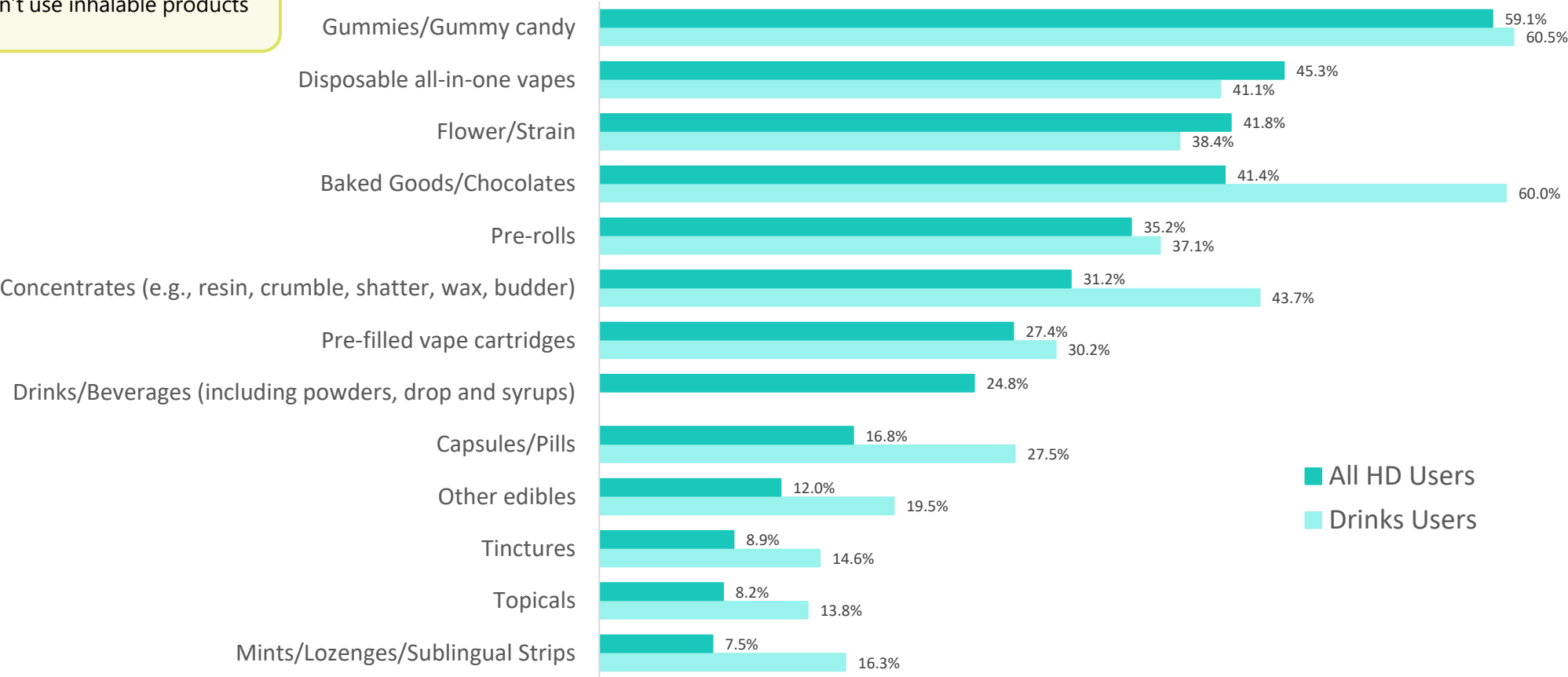
Compared to the average hemp THC users, drink users are younger, higher educated, higher income, and even more male



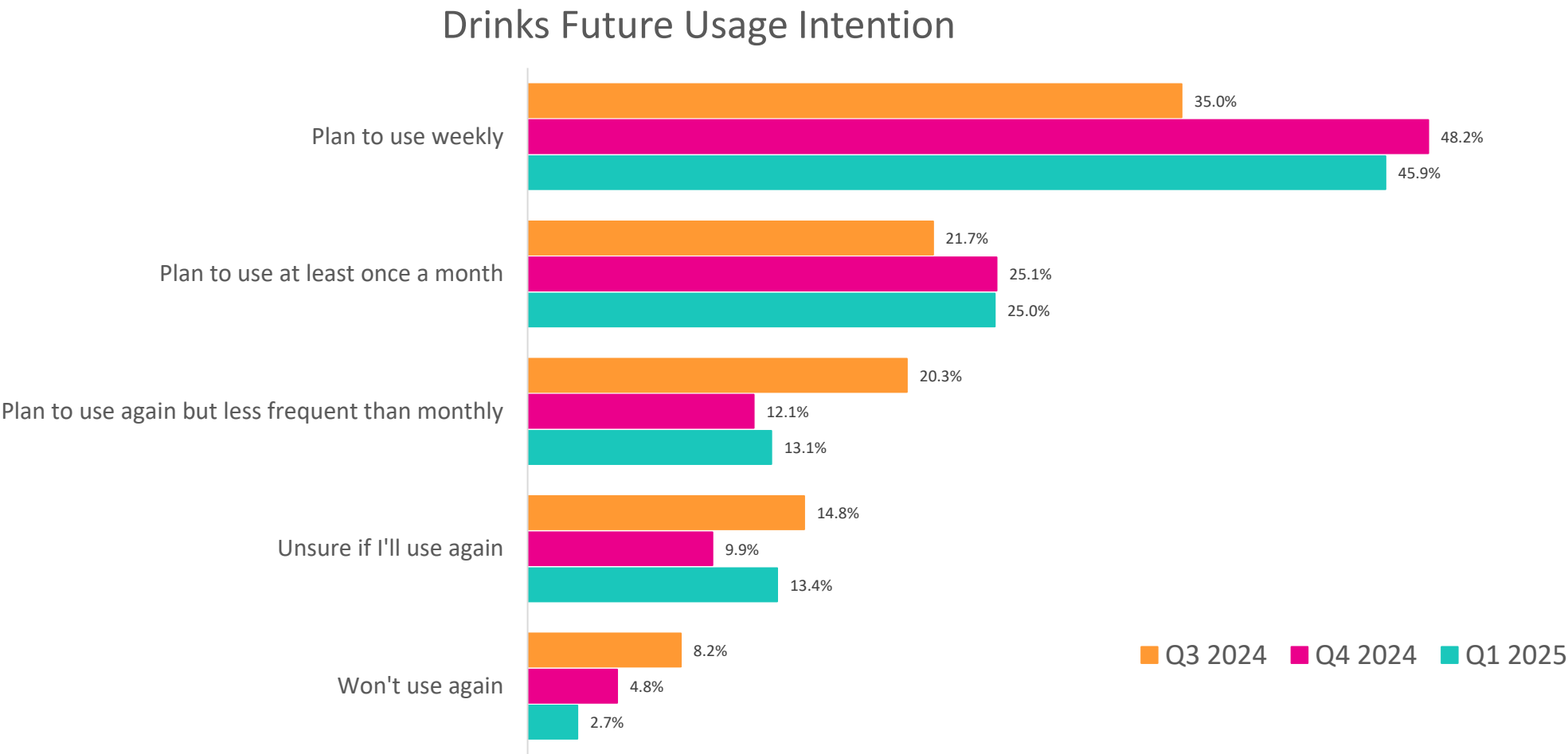
Drink users purchase a variety of formats, with just 5.5% reporting using ONLY drinks without any additional product formats

5.5% of drinks users only use drinks
25.3% don't use inhalable products

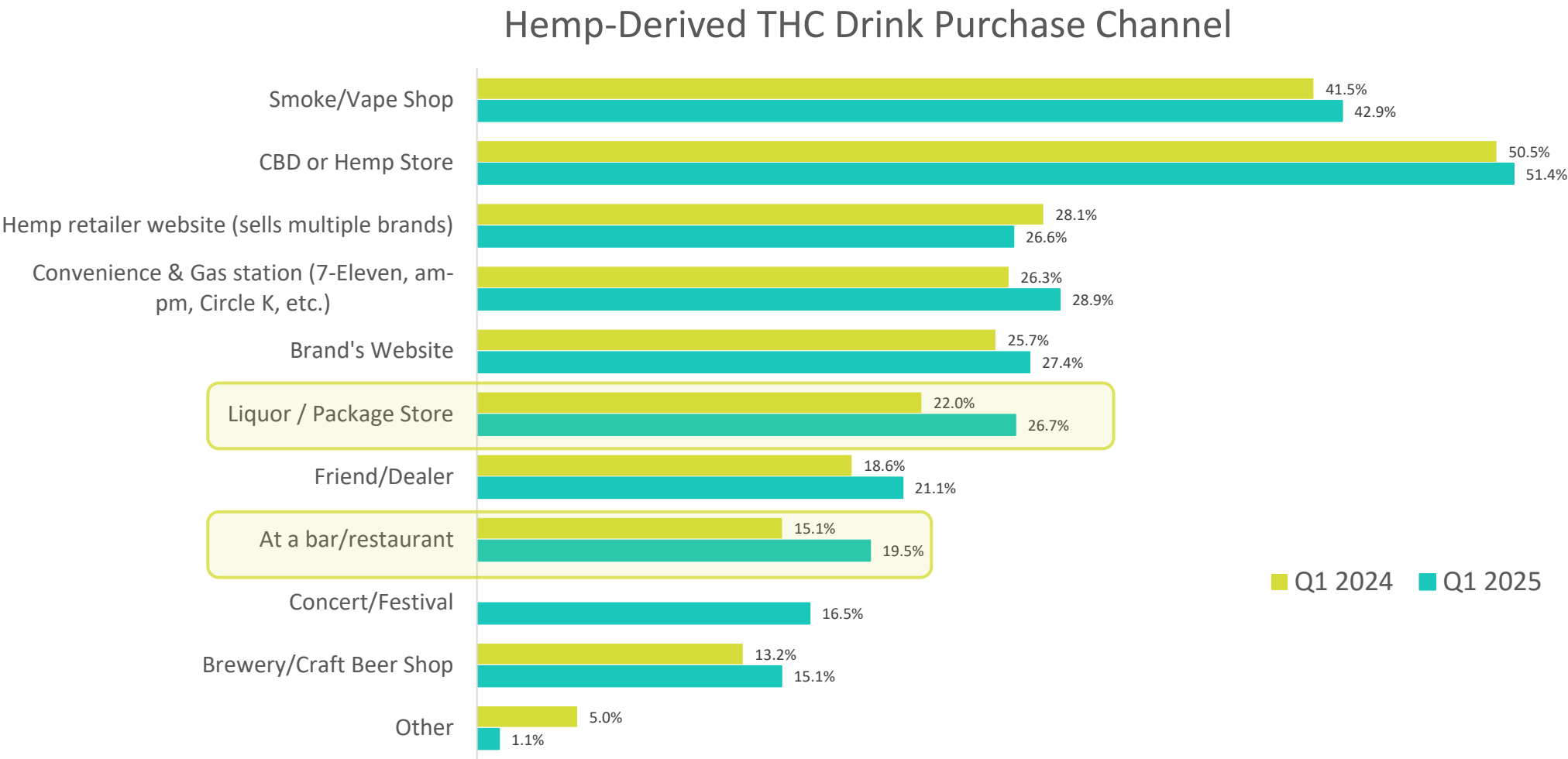
P6M Product Usage by Consumer Type



Drinks users are very likely to use again in the future with almost half saying they will use weekly

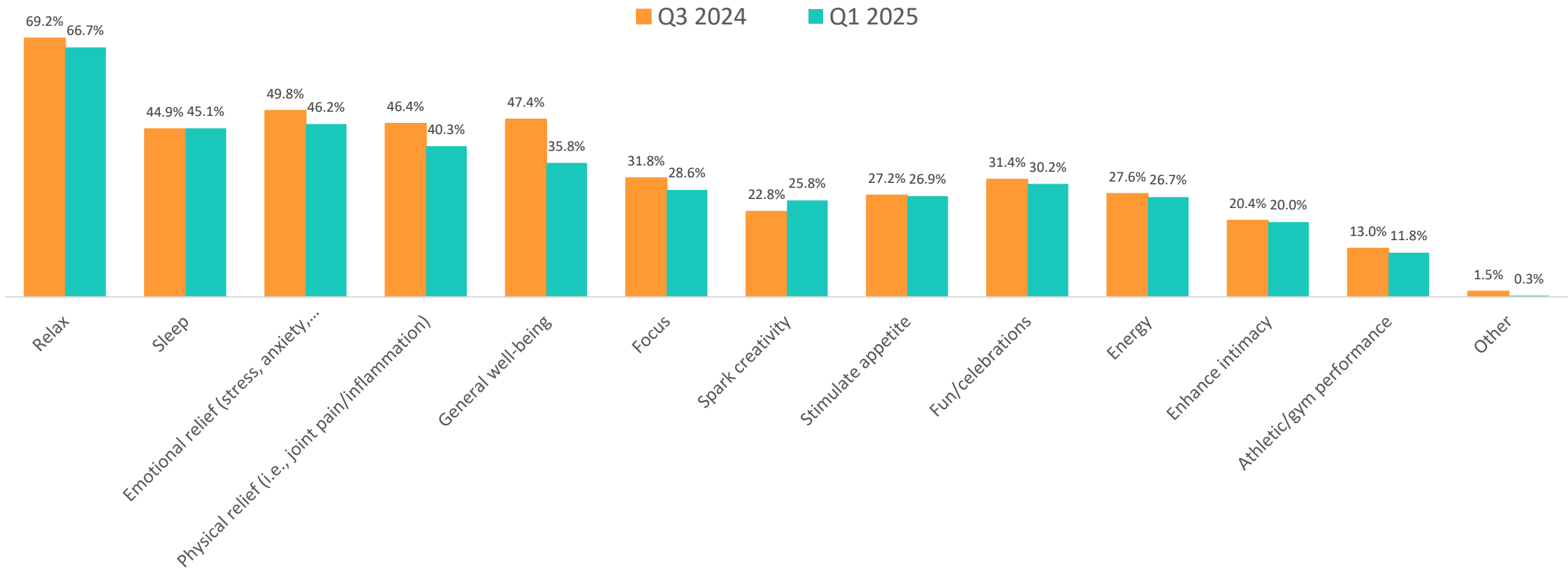


Hemp Store leads drink purchase channels, but more consumers are buying at liquor stores and bars/restaurants than they were a year ago

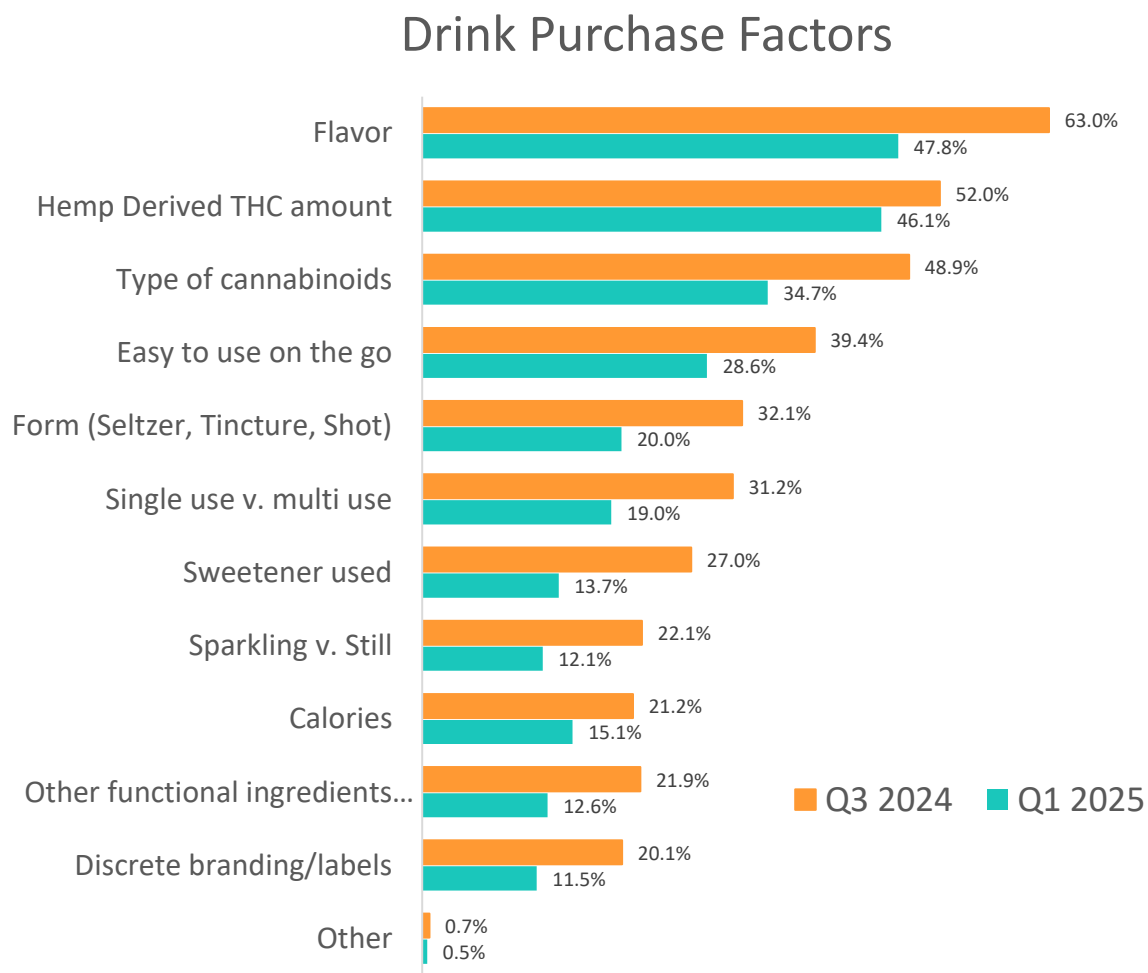


Relaxation leads desired product effects for drinks, like it does for the category as a whole

Hemp-Derived THC Drink Desired Effects



With the uptick in usage in Q1 2025, consumers selected a narrower array of purchase factors on average, though flavor still leads



Drink Flavor Change

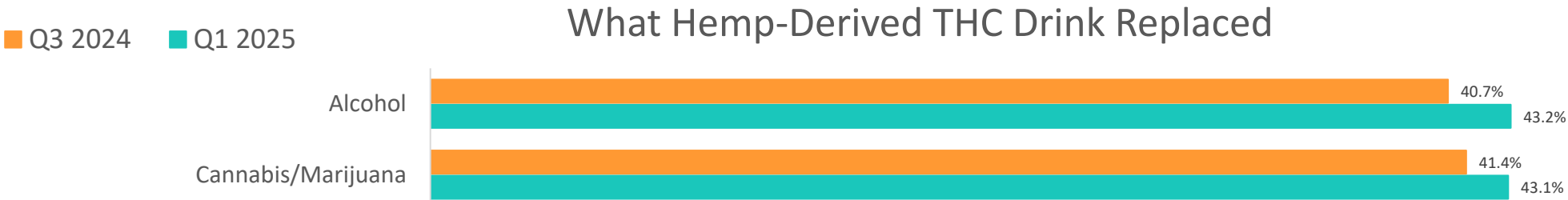
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Hemp Beverage Substitution Effect



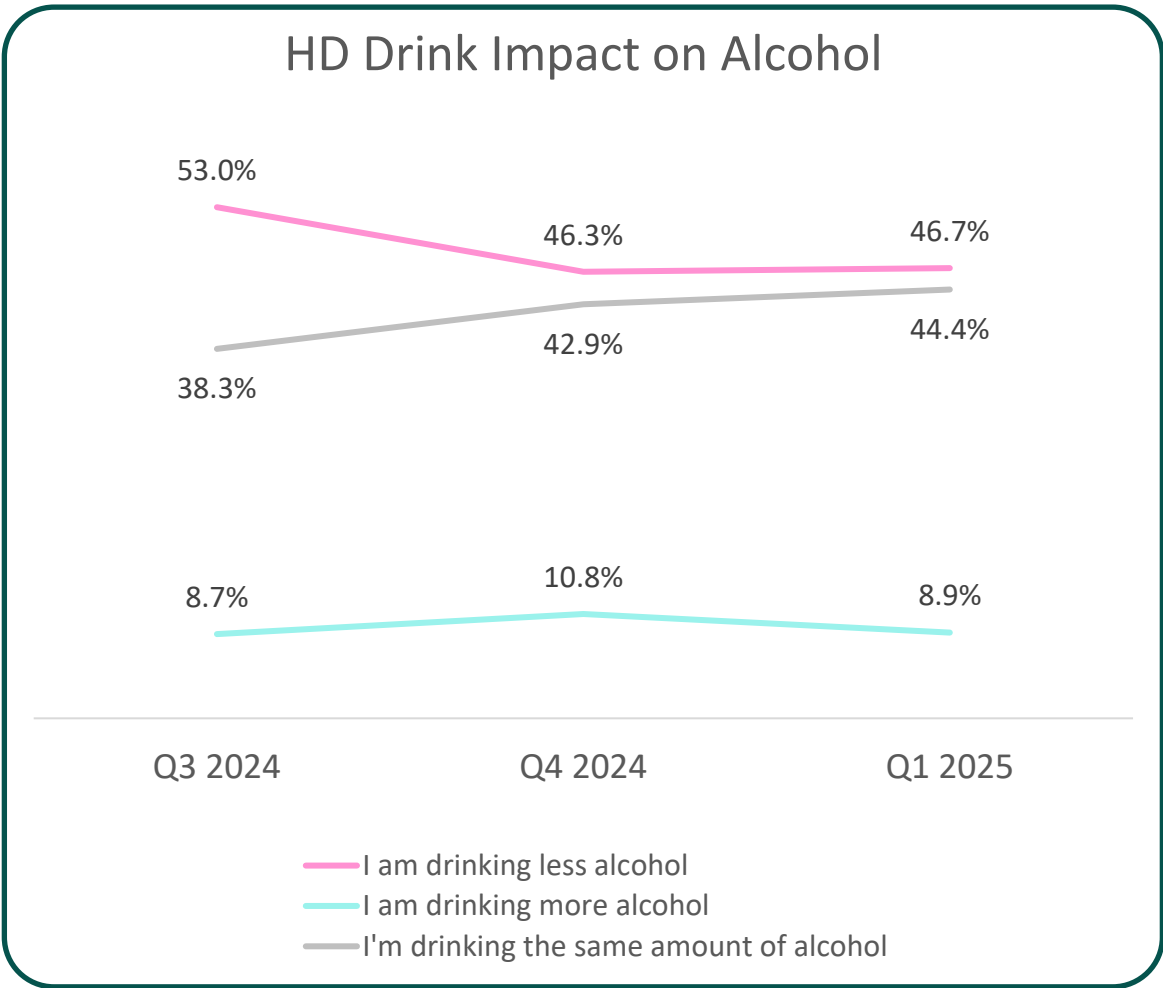
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More consumers are replacing Alcohol with hemp-derived drinks in Q1 2025 than in Q3 2024, with replacement of CBD also jumping sizably



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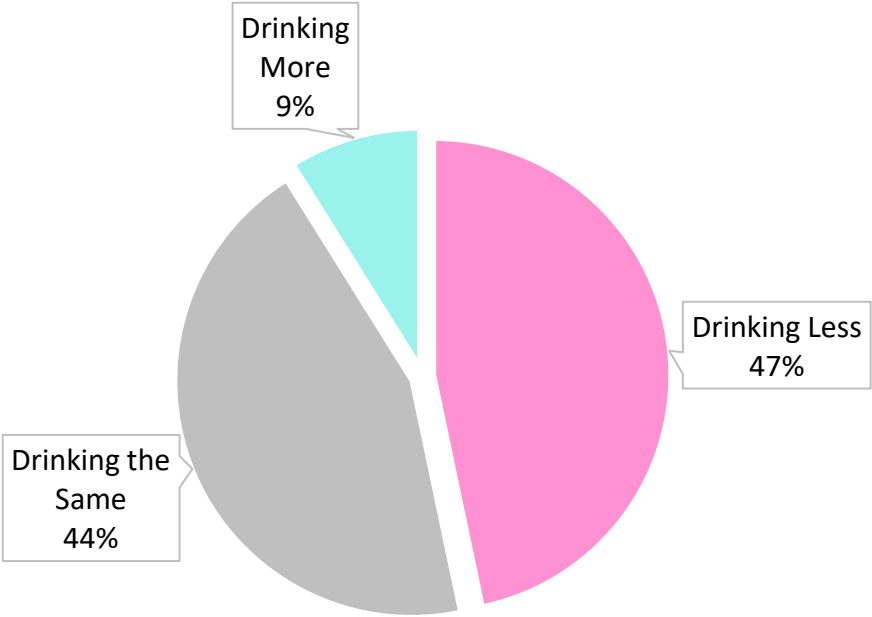
About 47% of Alcohol & Hemp THC Beverage users report reducing their alcohol intake. Most are replacing 3 out of 5 alcoholic drinks with Hemp THC



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Among those drinking less, “no hangovers” remains the primary reason, though “wanting to try something different” grew quarter-over-quarter

Hemp THC Drink Impact on Alcohol



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Hemp Beverage Dosage Preferences



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While a plurality of consumers prefer the 5-9 mg range, usage of dosages below 4 mg has grown

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This slide, along with four others in this section, is included in the full report.



Low Dose Hemp Drink Users ($\leq 4\text{mg}$)



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Low-dose hemp beverage users (4mg and below) over-index as being more highly educated, married, and in higher income brackets

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