

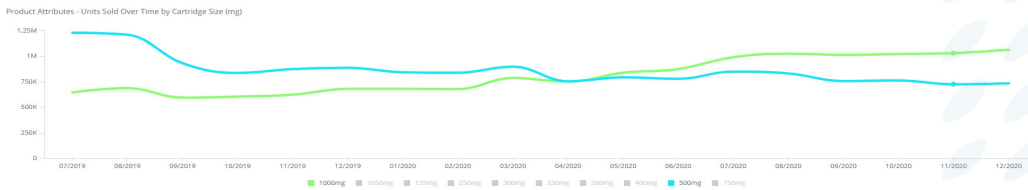
1) LIVE RESIN VAPE GROWTH

Magnitude of growth unique to CA and driven by...



2) LARGER CART SIZES 'WIN'

1g overtook 500mg carts in CA in 2020 and steal share in other markets—a trend that started in 2019



3) INFUSED PRE-ROLLS ARE 'IT'

BDSA tracked 95 NEW Infused Pre-Roll brands YoY in 2020

Sublime takes #1 brand position and Sublime Mini Fuzzies take #1 and #2 top sku spots



Jeeter surpassed Sublime in Dec 2020



4) VERTICAL/MISO STRENGTH...

...in FLOWER cannot be ignored. Store brands or brands associated with a retailer show dominance, especially in newer markets

Top 3 BDSA Tracked Brands OVERALL in Q4 are MISO FLOWER:



5) ROSIN ON THE RISE

Rosin Growth in Dabbable Concentrates across markets
In CA Q4 2020: Rosin +110% YoY vs. Live Resin +36%