

B D S A ESSENTIAL CANNABIS INSIGHTS

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BDSA TOP 5 US CANNABIS BRANDS: AZ, CA, CO, IL, MA, MD, NV, OR, PA

MSOs and Vape Brands Dominate BDSA's TOP 1H 2021 Cannabis Brands List

As we've passed the first half of 2021, it's become clear which brands are the frontrunners in legal cannabis markets. Judging by BDSA's retail sales tracking data from the first half of 2021, the leading brands list has laid out a clear trend of multi-state operators and vape brands dominating the rankings.

INTRODUCING BDSA's 1H 2021 Best Selling Cannabis Brands (AZ, CA, CO, IL, MA, MD, NV, OR, PA):

1. Cresco Cannabis
2. Rythm
3. Stiiizy
4. Select Oil
5. Raw Garden

THE WHY'S BEHIND THE TOP CANNABIS BRANDS:

- **Inhalables are king:** ~55% of cannabis consumers prefer using inhalable products per BDSA's ongoing Consumer Insights tracking. Preference for inhalable form factors across all markets can definitely help explain the continued dominance of flower, vape and concentrate products in dispensary sales. Despite a lot of media focus and innovation within edibles, INHALABLES are still king among cannabis consumers in both absolute dollar sales and format preference.

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- **Vape performance remains strong (with more brand ‘dominance’ than seen in flower):** Vapes have made up ~20% share of dollars across BDSA-tracked markets in the first half of 2021, making it no surprise that vape brands broke into the top brand rankings. Vapes are the second most preferred inhalable product after flower, with ~25% of cannabis consumers in adult-use and medical states citing vapes as their preferred inhalable format.
- **Winning in California is a big deal:** While other markets continue to see rapid growth in legal cannabis sales, California is still the largest cannabis market in the US (and the largest global legal cannabis market), bringing in \$3.5 B in sales in 2020 and almost \$2B in sales already in the first half of 2021. With four of the five top brands being players in California, it’s clear that succeeding in this legacy market is for many a must to generate sales required to be a top player across the US.

SPECIAL PROFILE

STIIIZY: #3 US BRAND OVERALL, #1 US VAPE BRAND, #1 CA BRAND

One especially deserving of a callout is Stiiizy, the California based vape brand well known for their proprietary vape pod system which has allowed the brand to bring in over 20% of California vape dollar sales in 2021 so far. After capturing the attention of discerning California consumers, Stiiizy has expanded to Washington, Nevada, Arizona, Florida and Michigan. With the popularity of their pods and disposable vapes, Stiiizy has claimed the titles of: best-selling vape brand across all BDSA-tracked markets, best-selling brand overall in the California market, and third best-selling brand across all BDSA-tracked markets, bringing in over \$116 million in sales in the first half of 2021.



INTRODUCING BDSA'S 1H 2021 BEST SELLING CANNABIS BRANDS:

- 1. Cresco Cannabis:** Cresco Cannabis is an inhalable brand coming from another Chicago-based company, Cresco Labs. Offering vapes (35% of brand sales), flower (42%), prerolls (3%) and dabbable concentrates (20%), Cresco has brought in \$227 million in sales in 2021 so far across the AZ, CA, IL, MA, PA and MD markets, claiming the title of best-selling brand across BDSA tracked states for the first half of 2021.
- 2. Rythm:** The leading brand of Green Thumb Industries, Rythm has quickly risen to the number two spot on the BDSA brand ranking and was the best-selling brand in Massachusetts for the first half of 2021. Offering a product portfolio of flower (44% of brand sales), vape (52%) and concentrate products (4%), Rythm has brought in roughly \$224 million in sales so far in 2021 in MA, IL, PA and NV.
- 3. Stiiizy:** [See page 2.](#)
- 4. Select Oil:** A subsidiary of Curaleaf, Select Oil is one of the biggest players in the cannabis vape market, with products available across 17 states. The brand has seen \$111 million in sales so far in 2021 across AZ, CA, CO, IL, MA, MD, PA and OR.
- 5. Raw Garden:** Raw Garden has been a top selling concentrate brand in the California market since the launch of adult-use sales in 2018, offering both dabbable concentrates and a variety of vape products. So far in 2021, Raw Garden has brought in \$96 million in sales in the California market, with plans to expand to Arizona later in the year.

INTRODUCING BDSA'S 1H 2021 Best Selling Cannabis Brands by State:

AZ	CA	CO	IL	MA	MD	NV	OR	PA
Timeless Vapes	Stiiizy	Wana Edibles	Cresco Cannabis	Rythm	Curio Wellness	Cookies	Buddies	Cresco Cannabis

Source: BDSA Retail Sales Tracking

INTRODUCING BDSA'S 1H 2021 Best Selling Cannabis Brands by Category:

Flower	Pre-Rolls	Vape	Beverages	Dabbables	Infused Foods	Gummies	Tinctures	Pills	Topicals
Rythm	Jeeter	Stiiizy	Keef Cola	Cresco Cannabis	Big Pete's Treats	Wyld	Care By Design	1906	Mary's Medicinals

Source: BDSA Retail Sales Tracking