

# BDSA ESSENTIAL CANNABIS INSIGHTS

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

### MSOs and Vape Brands Take Top Spots in BDSA's TOP 3Q 2021 Cannabis Brands List

The third quarter of 2021 has just closed and BDSA's analysis of top cannabis brands across markets shows stability at the head of the pack, with some jockeying for a position in the top five. As in BDSA's 1H 2021 brand rankings, multi-state operators and vape brands dominate.

#### INTRODUCING BDSA's 3Q 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. Ozone

#### THE WHYS BEHIND THE TOP CANNABIS BRANDS:

- **INHALABLES DOMINATE:** ~55% of cannabis consumers prefer using inhalable products per BDSA's ongoing Consumer Insights tracking and those preferences come across in market results. Inhalables, including flower, vape, and other concentrates, accounted for 84% of total sales year-to-date 2021.
- **VAPE SHARE RISING GRADUALLY:** Vape sales have accounted for 22% of total dollars across BDSA-tracked markets through 3Q. Vapes are the second most preferred inhalable product after flower, with ~25% of cannabis consumers in adult-use and medical states citing vape as their preferred inhalable format.

- **BORDER CROSSING:** The US legal cannabis market is highly fragmented and operating across state borders is more difficult for cannabis companies than most others, but a requirement for top brands. The top four brands in BDSA's list are in at least four and as many as seven of the markets listed above. New entrant Ozone, ranked fifth in 3Q 2021, is in two (IL and MA).

## SPECIAL PROFILE

### OZONE : #5 US BRAND OVERALL, #2 US PRE-ROLL, #3 US FLOWER, #4 IL BRAND

Ascend Wellness Holding's Ozone brand, launched in 2019, and offers premium-tier flower, vapes, and gummies in IL, MA, and MI. Ozone Premium Cannabis generated ~\$151 million in sales YTD in 2021 in IL and MA and moved into the fifth-ranked spot in 2Q 2021 and held on to that rank in 3Q. It is the #2 pre-roll brand across markets where BDSA tracks brands and #3 in flower. Ozone is the fourth-ranked brand overall in Illinois.



### INTRODUCING BDSA'S 3Q 2021 BEST-SELLING CANNABIS BRANDS:

1. **Cresco Cannabis:** Cresco has generated ~\$334 million in sales YTD 2021 across AZ, CA, IL, MA, MD, and PA, and holds first-place in BDSA's top-five brand list for 3Q 2021. The company's offerings include: vapes (35% of brand sales), flower (42%), pre-roll (3%) and dabbables (20%).
2. **Rythm:** The leading brand of Green Thumb Industries, Rythm continues to hold second-place and has been the best-selling brand in Massachusetts throughout 2021. Offering a product portfolio of flower (44% of brand sales), vape (52%) and concentrate products (4%), Rythm sales neared \$334 million YTD 2021 in MA, IL, PA and NV.
3. **Stiiizy:** Stiiizy has expanded rapidly, becoming the best-selling vape brand across all BDSA-tracked markets and holding on to the fourth-ranked spot in Q3 2021. The company generated ~\$194 million in sales YTD 2021.

**4. Select Oil:** Curaleaf subsidiary Select Oil is one of the biggest players in the cannabis vape market, with products available across 17 states. The brand has seen ~\$175 million in sales so far in 2021 across AZ, CA, CO, IL, MA, MD, PA and OR.

**5. Ozone Premium Cannabis:** SEE ABOVE!

### INTRODUCING BDSA's Q3 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	Wyld	Cresco Cannabis

Source: BDSA Retail Sales Tracking

### INTRODUCING BDSA's Q3 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