



MODERN ADAPTOGENS AND MINOR CANNABINOIDS

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WEBINAR & PANEL DISCUSSION MODERN ADAPTOGENS & MINOR CANNABINOIDS



Leah Spokojny - Moderator

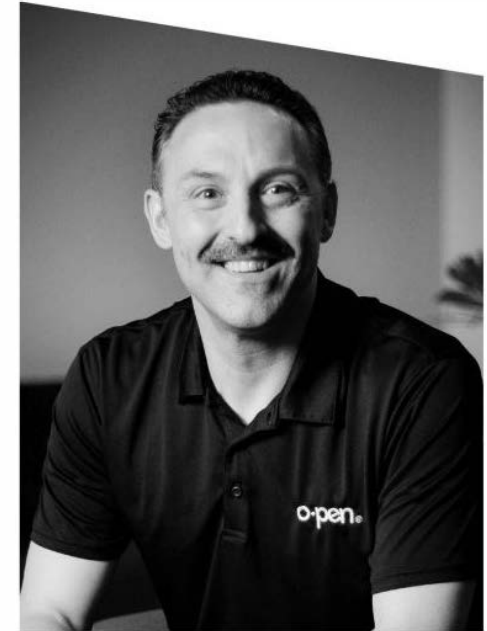
Brendan Mitchel-Chesebro - Insights Presenter



TIM SHAW
CHIEF OPERATING OFFICER
MARIMED



GRETA BRANDT
PRESIDENT
THE FLOWER SHOP



ALLEN PETTYJOHN
DIRECTOR OF BUSINESS
STRATEGY, SLANG

INTERESTED IN MORE?

Dive Deeper with BDSA's full suite of services:



Retail Sales Tracking

- + Track and evaluate category, brand, and product sales
- + Identify trends and innovate



Menu Analytics

- + Uncover store-specific pricing and assortment
- + Identify intel on brand markup, velocity, distribution, and price



Consumer Insights

- + Track evolution of consumer segments
- + Know the how and why of consumer behavior



Market Forecasts

Where are global markets today and where are they going tomorrow



Professional Services

Assess market dynamics, trends, and expectations of changing regulations



What are minor cannabinoids?

Delta8

CBL

CBG

CBN

CBC

THCV

THCa

THCO

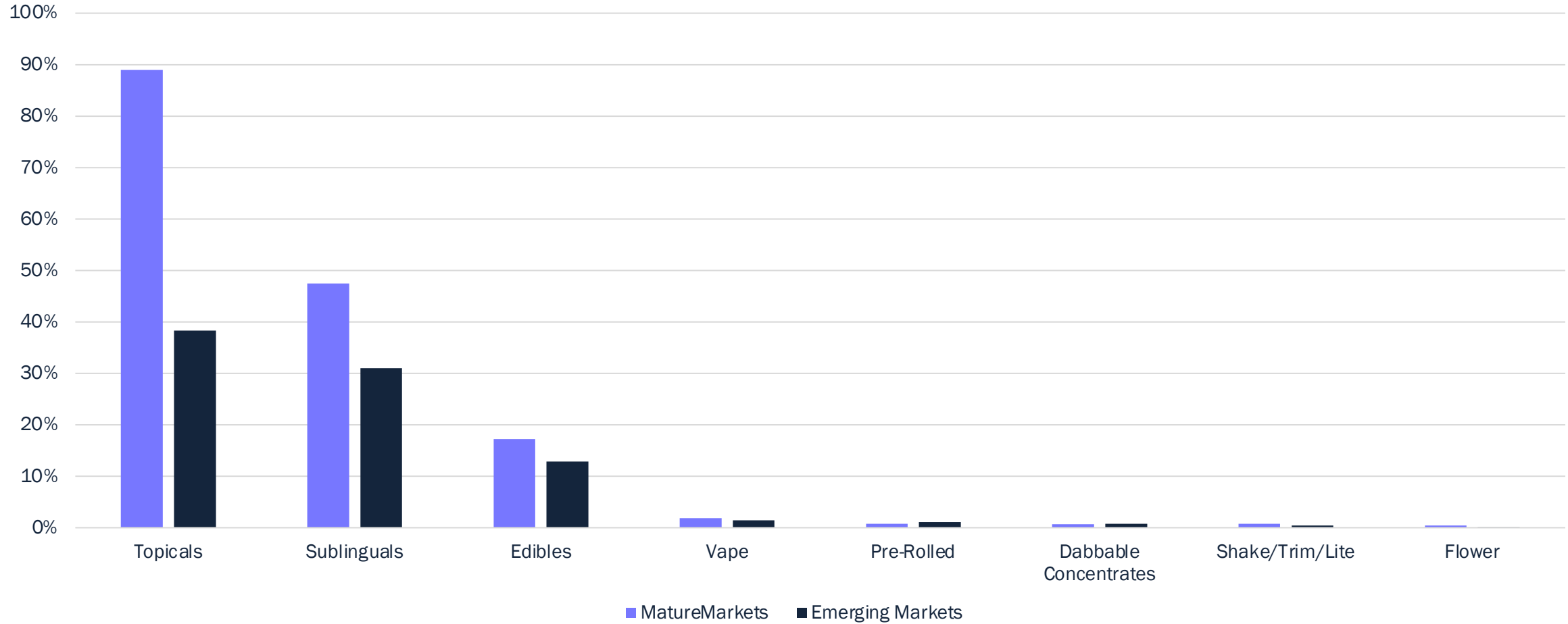
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HOW BIG CAN MINOR CANNABINOIDS BE? THE CBD EXAMPLE



CBD HAS OBTAINED MAINSTREAM STATUS IN THE LEGAL CANNABIS INDUSTRY

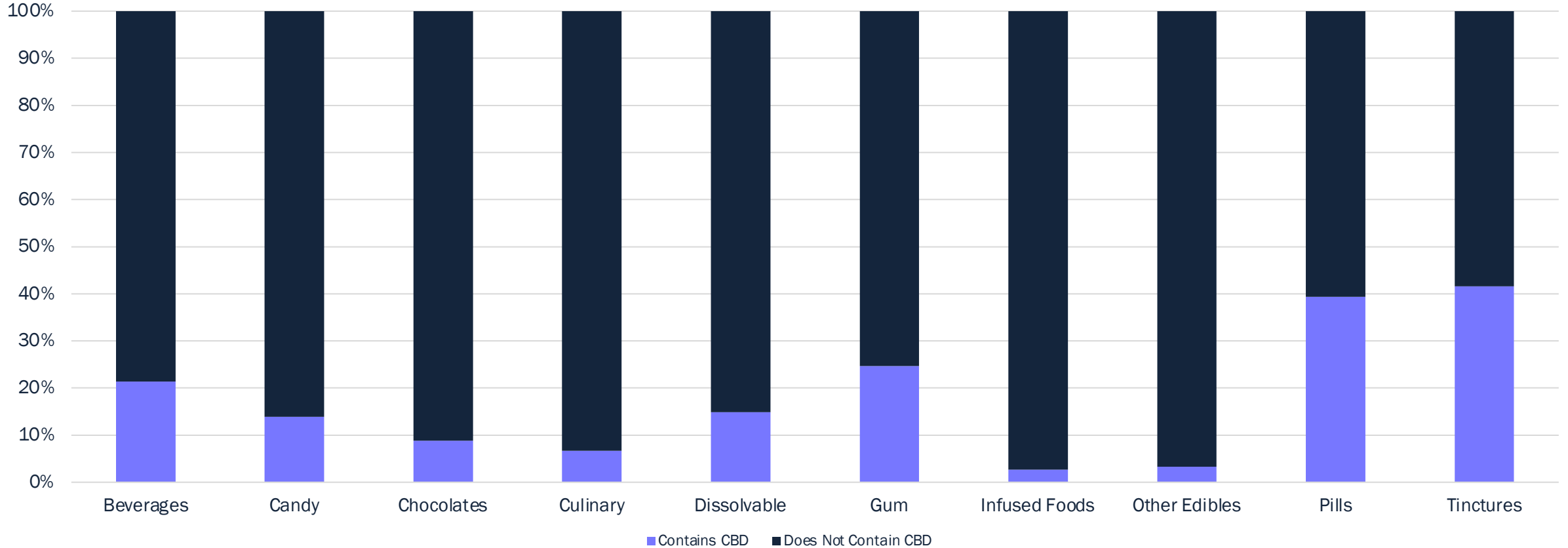
Share of Sales by Products Containing CBD by Category



Source: BDSA Retail Sales Tracking, Q1 2023, All Markets

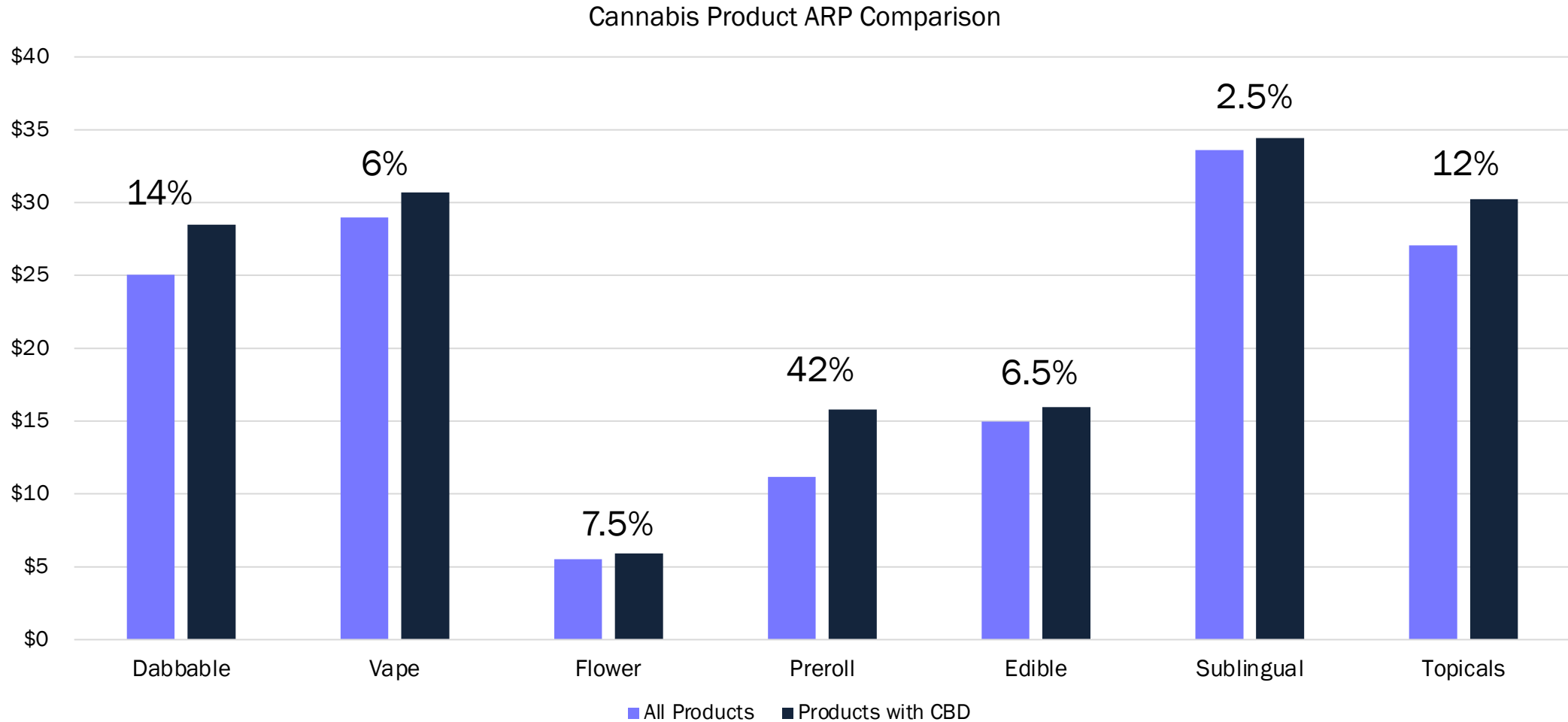
CBD HAS STRONG PRESENCE IN MOST INGESTIBLE FORM FACTORS

Share of Ingestible (\$) Sales by CBD Products by Subcategory



Source: BDSA Retail Sales Tracking, Q1 2023, All Markets

CBD CONSISTENTLY DRIVE HIGHER PRICES AT RETAIL



Source: BDSA Retail Sales Tracking, Q1 2023, All Markets

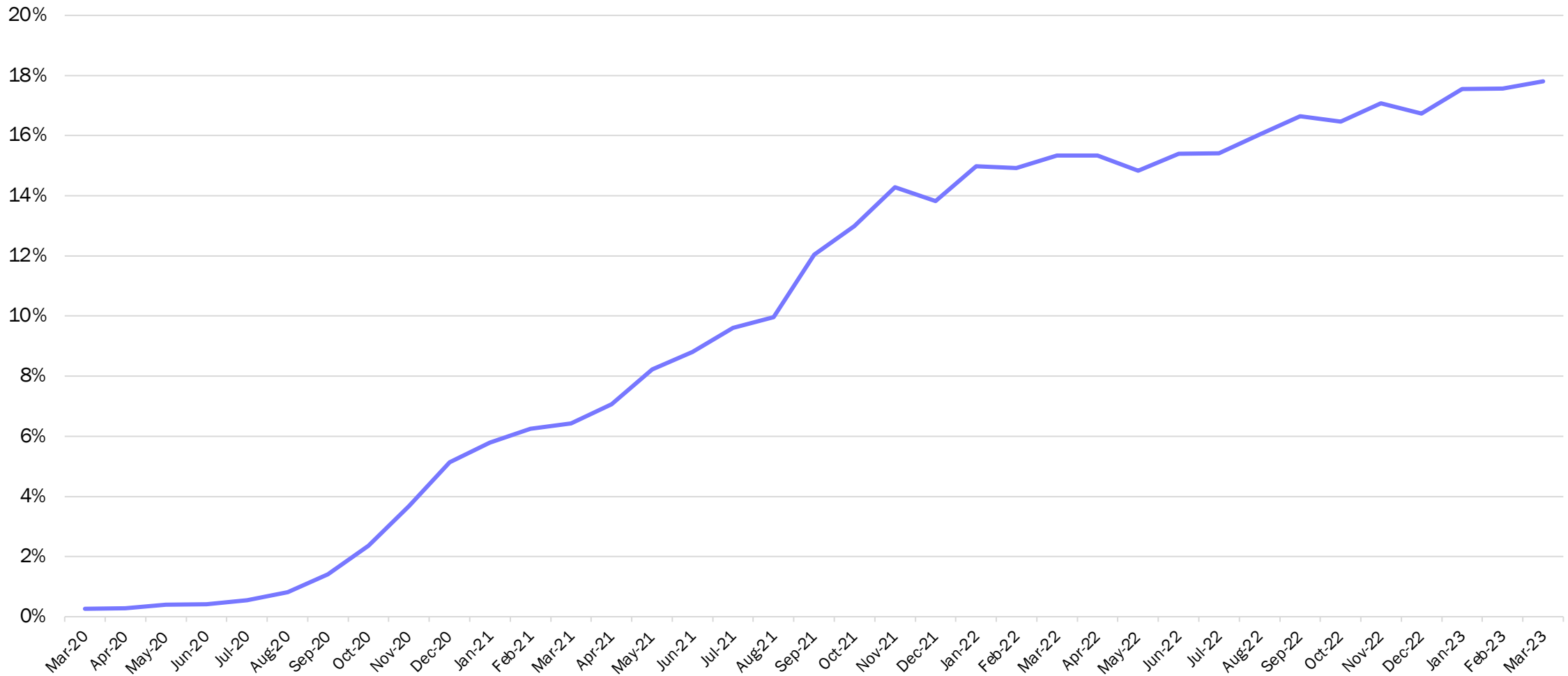


MINOR CANNABINOIDS, ADAPTOGENS AND THE CANNABIS CONSUMER



MINOR CANNABINOIDS STILL ON THE RISE, ESPECIALLY IN CANDY SECTOR

Share of Candy Dollar Sales by Products With CBN or CBG



CBG AND CBN SALES GROWTH OUTPERFORMED GUMMIES IN ALL MARKETS, WHILE CBD LARGELY UNDERPERFORMED.

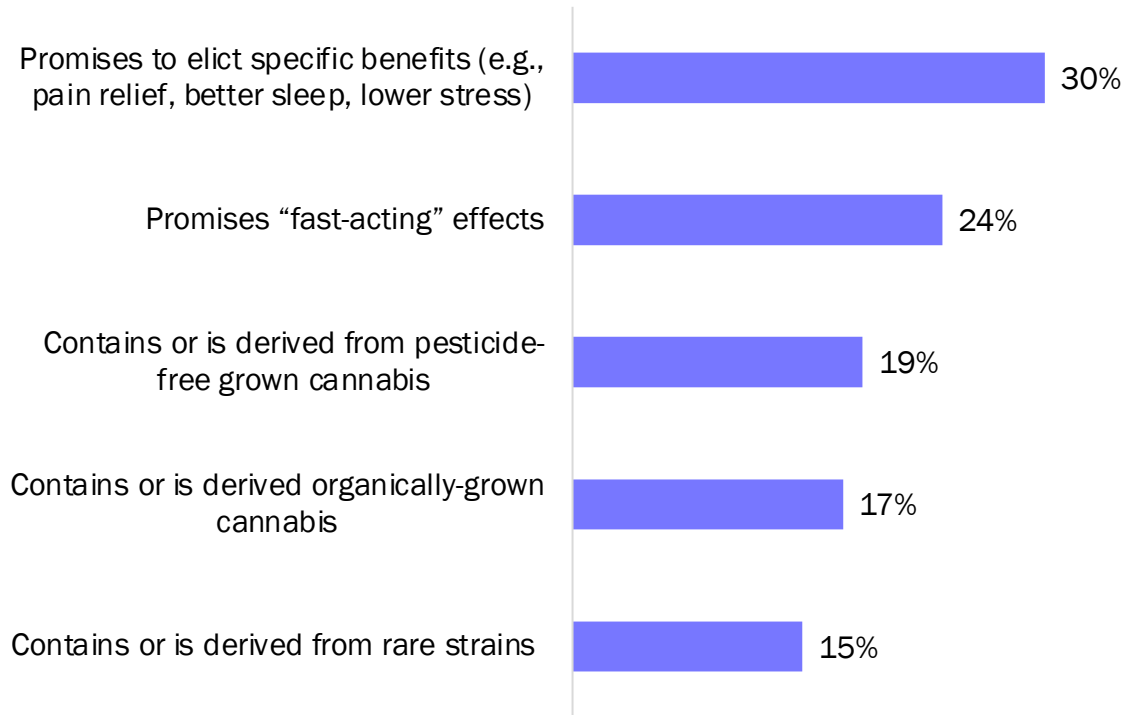
	Containing CBG	Containing CBN	Containing CBD
Total	93%	40%	-2%
OR	63%	24%	18%
NV	78%	9%	7%
*MO	252%	146%	3%
MI	709%	111%	-5%
MA	66%	410%	28%
*MD	1836%	43%	-46%
IL	292%	42%	4%
CO	20%	-1%	-27%
CA	19%	23%	-7%
AZ	244%	65%	34%

Sales \$ % CHG
(Q4 '22 vs. Q4 '21)

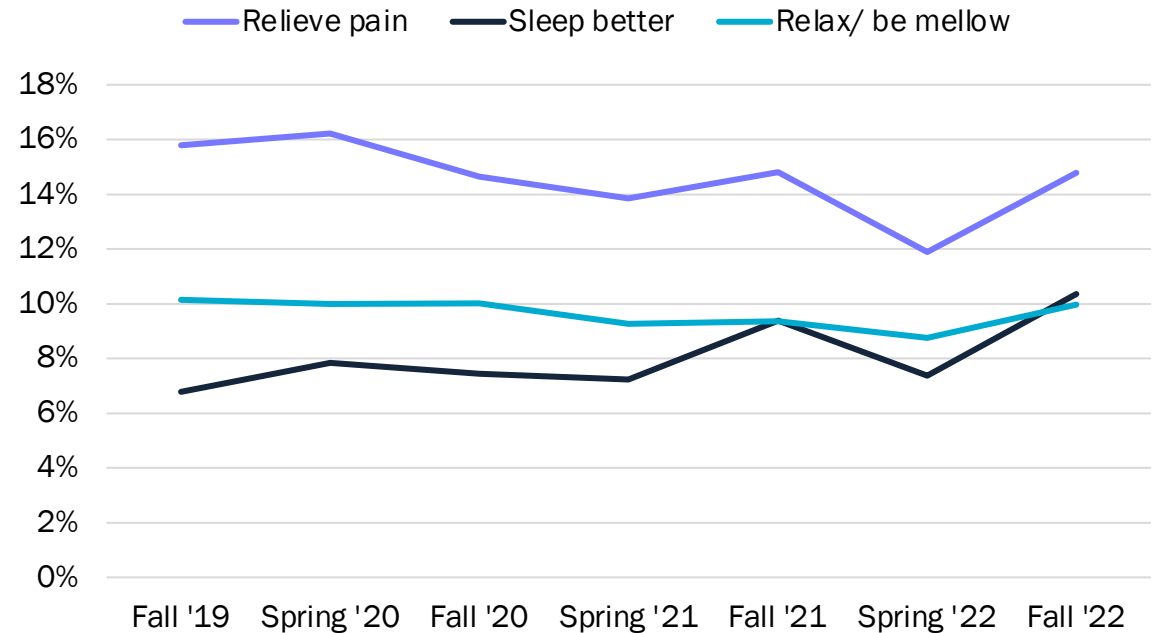
Total Gummies	6%
CBG	+93%
CBN	+40%
CBD	-2%

CONSUMERS WANT PRODUCTS THAT DELIVER CONSISTENT, REPEATABLE EXPERIENCES

Top 5 Attributes Consumers Would Pay More for

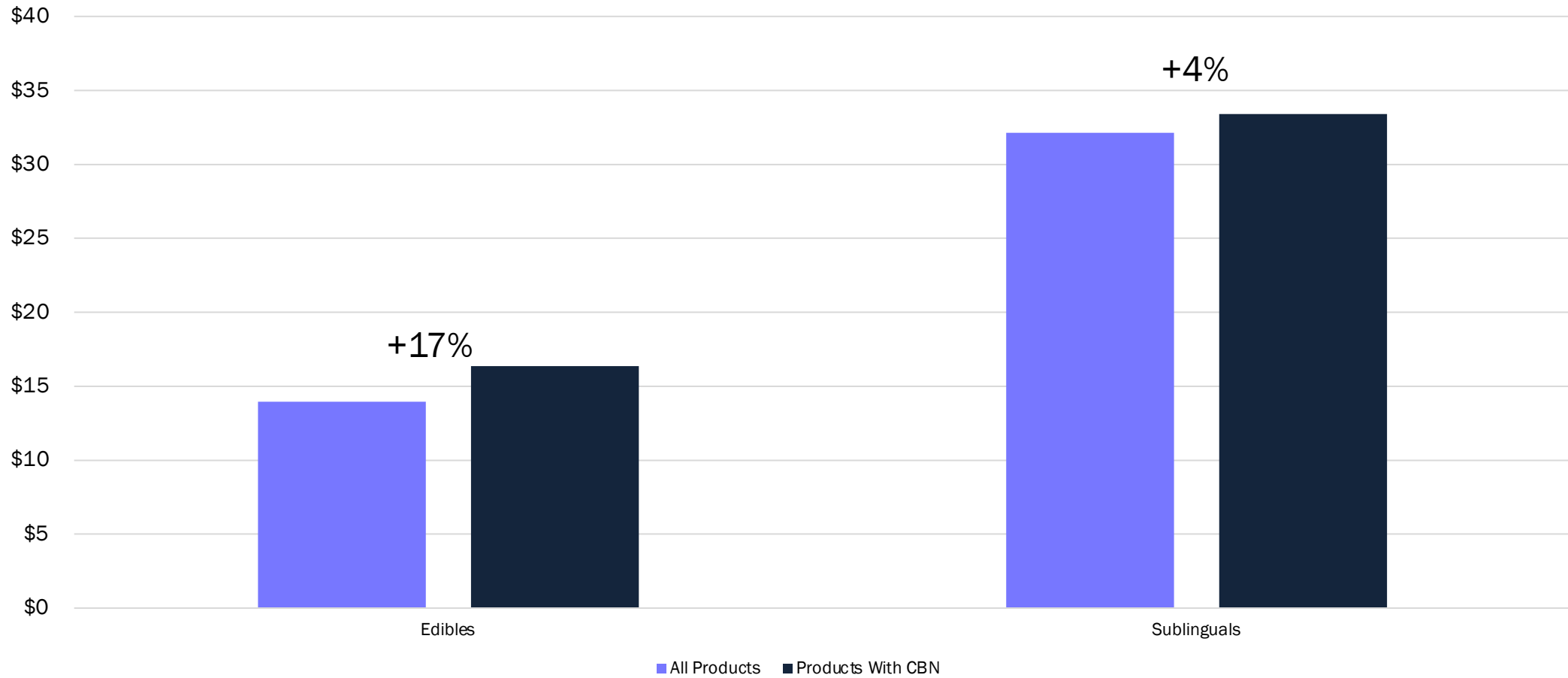


Trended: Top 3 Primary Reasons for Consuming Cannabis



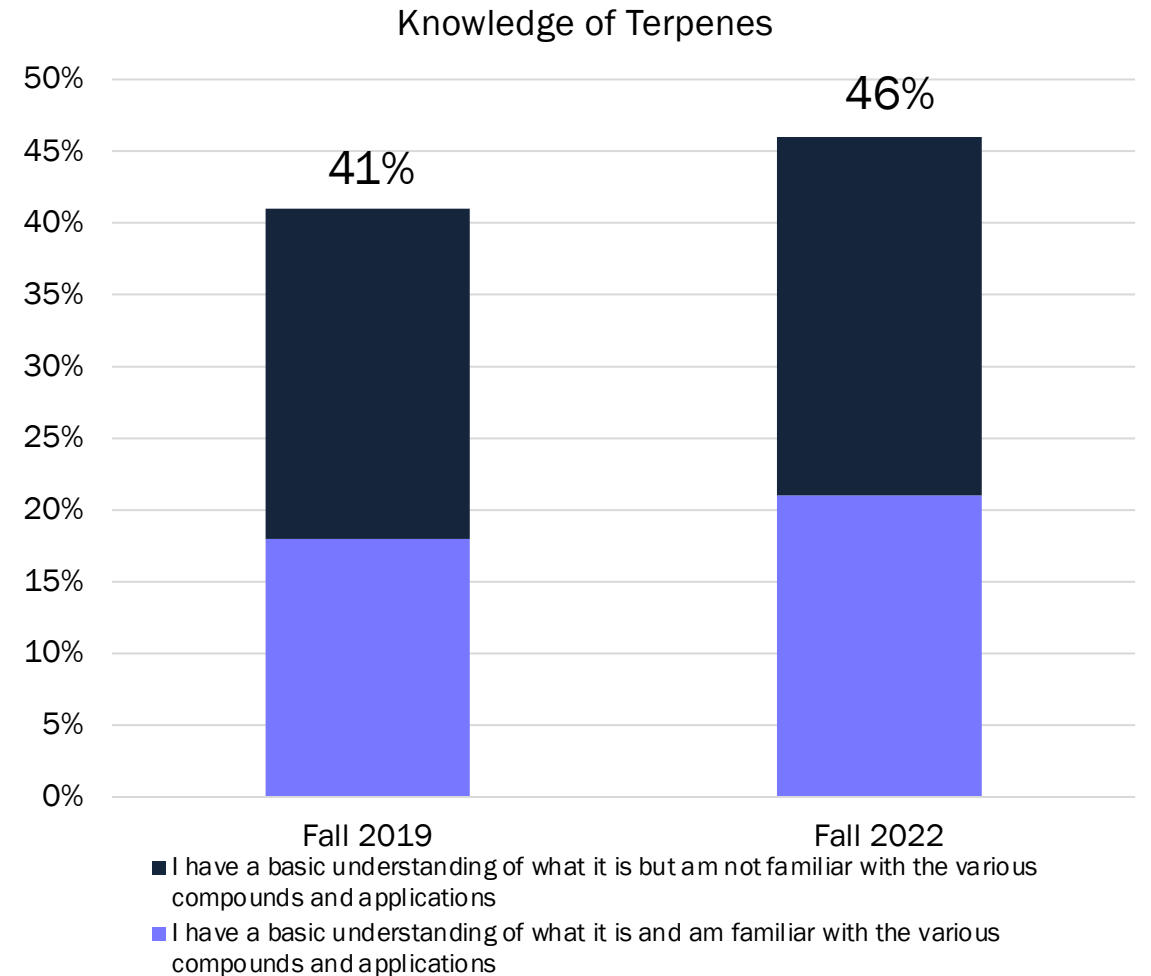
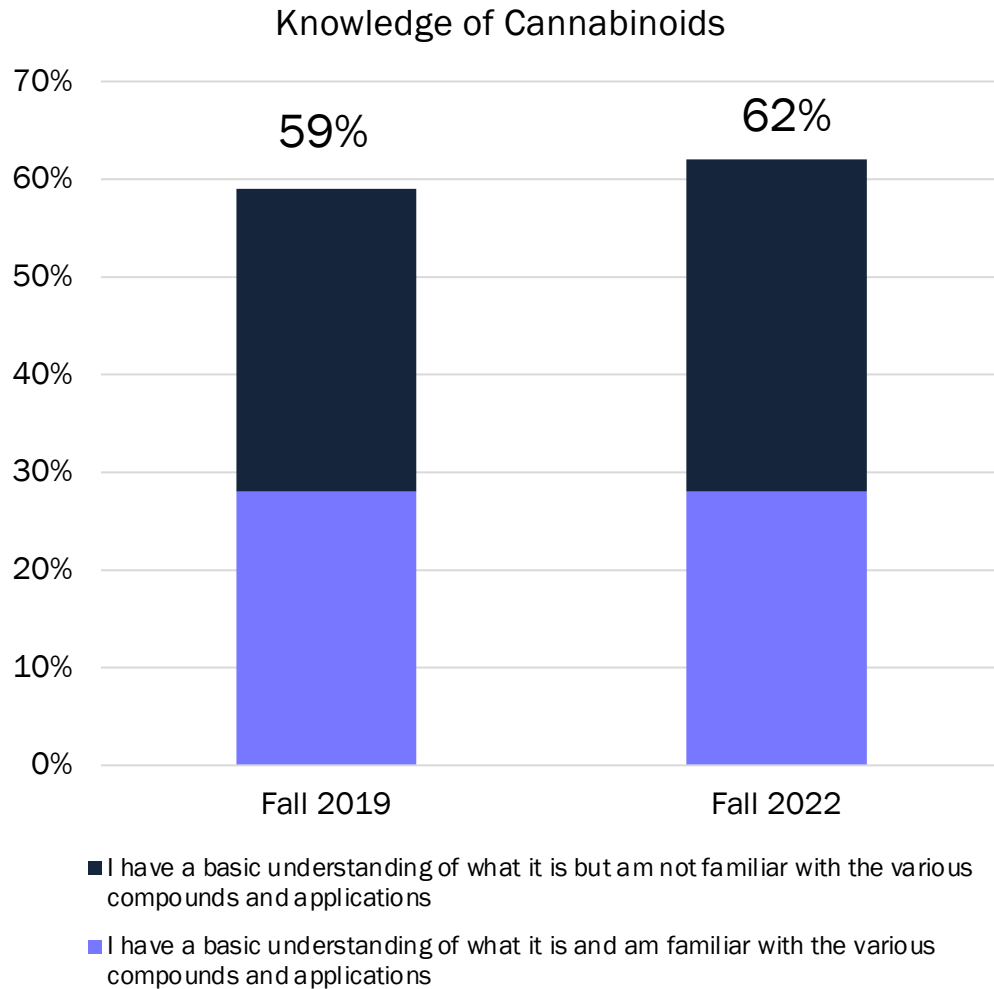
LIKE CBD, MINOR CANNABINOIDS DRIVE HIGHER PRICES AT RETAIL

Pricing Comparison, All Products vs. Products with CBN



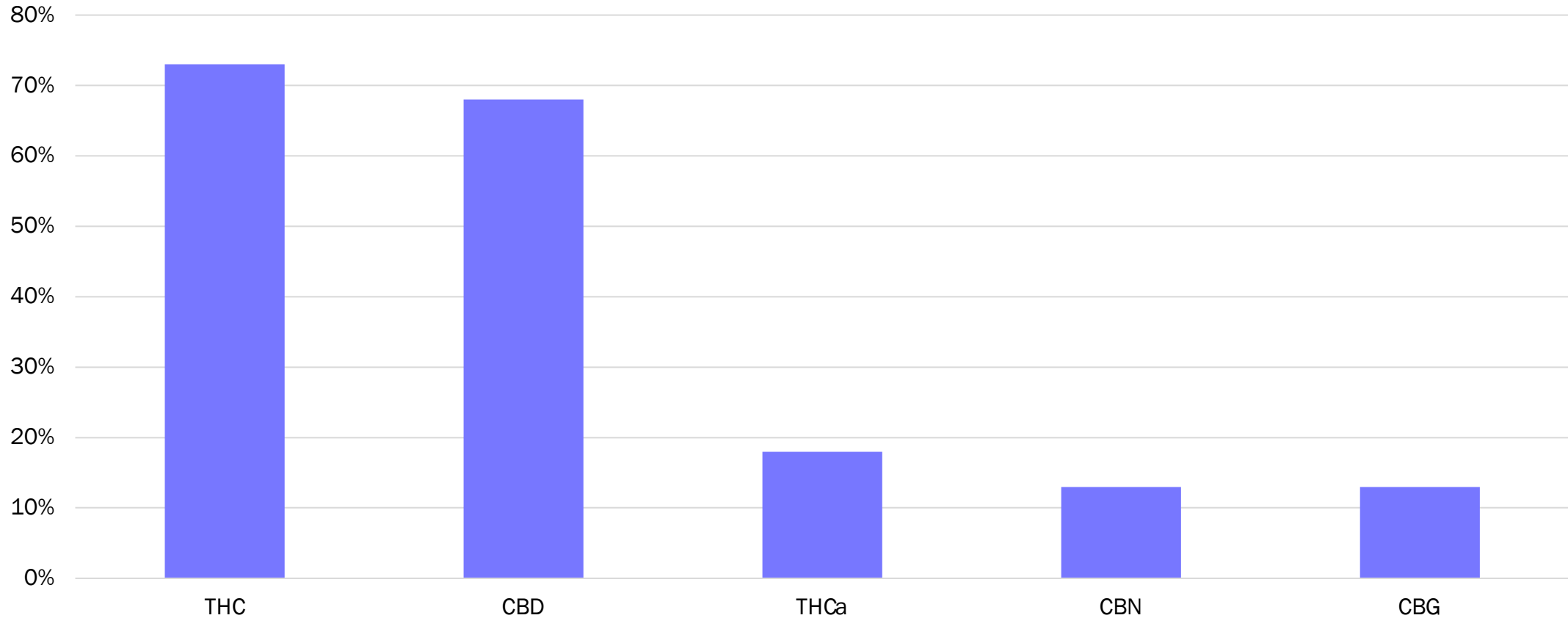
Source: BDSA Retail Sales Tracking; CA, CO, NV, OR; Q1 2023

CONSUMERS ARE MORE KNOWLEDGABLE ABOUT CANNABINOIDS AND TERPENES TODAY THAN YEARS AGO



CONSUMER KNOWLEDGE ON MINOR CANNABINOIDS SPECIFICALLY STILL NEEDS IMPROVEMENT

Awareness of Given Cannabinoids Among Consumers with Cannabinoid Knowledge



HOW SHOULD BRAND ADDRESS THIS GAP IN CANNABINOID KNOWLEDGE?



ADAPTOGENS MAKING THEIR WAY INTO CANNABIS PRODUCTS AS WELL, OFTEN IN CONCERT WITH MINOR CANNABINOIDS



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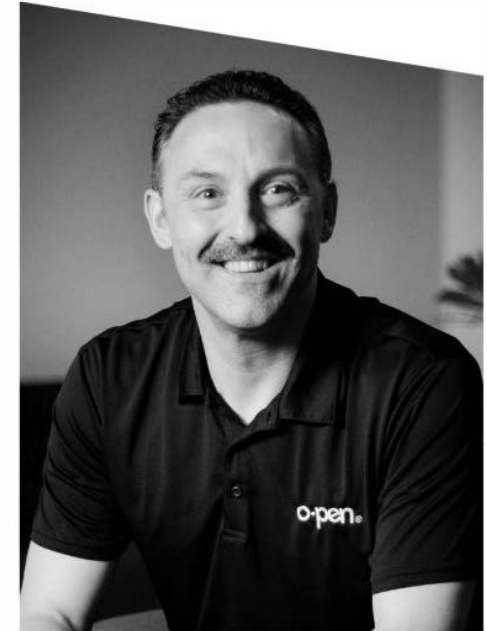
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QUESTIONS AND ANSWERS



IT'S A NEW GAME.

DATA. DEEPER.

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