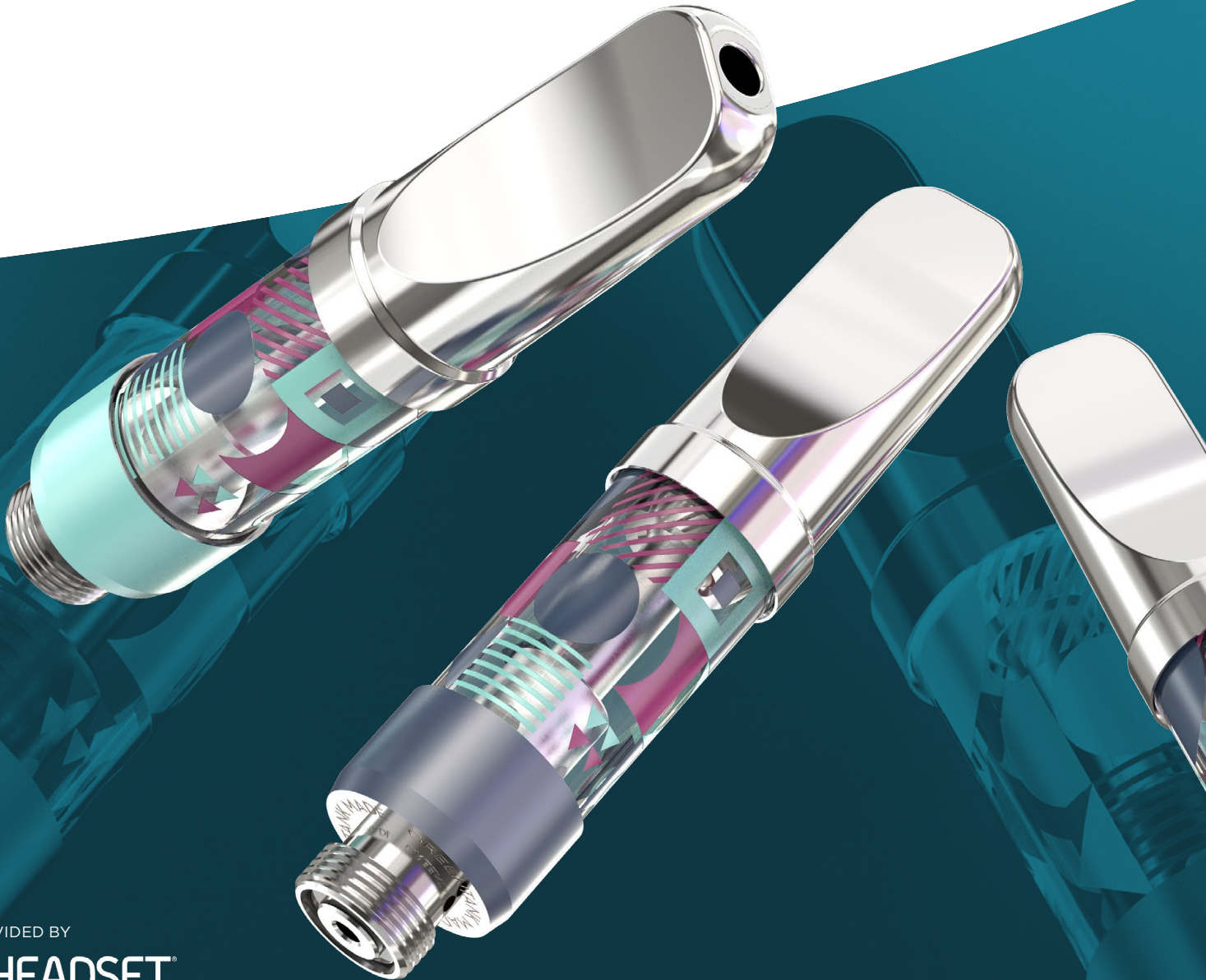


# North American Vape Market

2021: A Year in Review



DATA PROVIDED BY

 **HEADSET**

# Let's Quickly Take an Opportunity to Acknowledge How Hectic the Last Two Years Have Been

As the annual odometer rolls over yet again, let's quickly take an opportunity to acknowledge how hectic the last two years have been. A global pandemic has continued to overstay its welcome, teaching us that in business, nothing is permanent and forecasting is tenuous ... with one glaring exception: the cannabis industry. While chaos continues its domination of the headlines, our segment of the industry has continued its ascension unabated.

We've changed up the format for this installment of the Greentank Vape Report with a look at 2021, as a whole, rather than a single quarter. Thanks to our friends at Headset and their incredible next-day POS data platform, we've been able to create this year-in-review in record time. Quicker data means more opportunities for any brands and businesses that get their hands on these datasets first. After all, the early bird gets the worm, and in the vape industry, brands that identify and adapt early to emerging trends are almost always among the most successful.

So let's put chaos in the backseat and champion the tangible. That cold, hard data—with a couple of jokes sprinkled in here and there, of course. Because keeping up to date with the data should never be a chore. It should be informative and fun, inspiring ideas and strategies at every turn.

## Let's get down to it!

**Sales data in this report includes 10 North American markets in the United States and Canada:**



California



Colorado



Washington



Oregon



Nevada



Michigan



Alberta

British  
Columbia

Saskatchewan



Ontario

# Acknowledgements



Headset is the cannabis industry's leading data analytics company, serving over 2000 retailers across 30 markets. Headset's mission is to help businesses make better-informed decisions through data by collecting and analyzing consumer transaction information. Headset's models and dashboards help cannabis retailers better optimize their day-to-day operations. These tools also help licensed producers, product manufacturers, processors and distributors leverage retail sales data in real-time to identify trends and opportunities, stay competitive, and collaborate with their retail partners and customers.

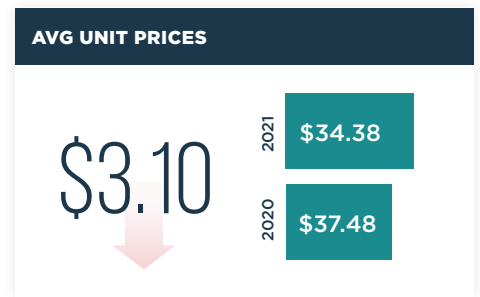
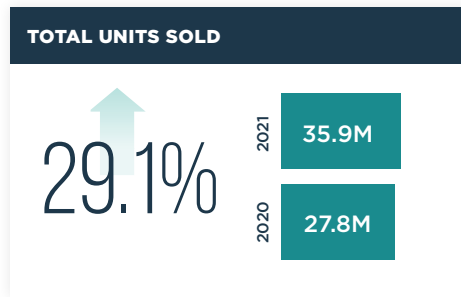
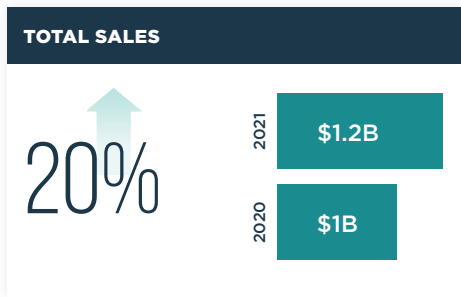
Learn more at [headset.io](https://headset.io)

# California



The California vape market was a runaway train in 2021, improving across the board on an already unprecedented and record-setting 2020.

Total revenue blew past the \$1B mark set one year earlier, fueled by the sale of 35.9M products. Nearly two-thirds of these products were 1g units—a package size that has now risen steadily in market share by approximately 10% in each of the last four years—and 89.1% were cartridges. Disposables had their best year on record, accounting for over 10% of California’s total vape sales for the first time ever. The popularity of live resin extracts, the fastest growing product segment in the industry, continued to thrive with over \$365M in revenue. And yet, overarching metrics aside, it was actually a brand that made the biggest and most noteworthy jump. LA-based STIIIZY turned into an absolute juggernaut in 2021, growing its market share to 24.1% of all unit sales from 15.9% in 2020. Its 8.6M units sold and \$267M in sales revenue weren’t only the most, by far, of any brand in California, they were more than the Oregon, Nevada, or Ontario markets sold outright over the course of the year! Should they grow even more, we might need to consider referring to California as “The STIIIZY Market” going forward.



**DISPOSABLE SALES**



**1G UNIT SALES**



**TOP BRANDS**

	2020	2021
DISPOSABLES	STIIIZY	STIIIZY
CARTRIDGES	RAW GARDEN	STIIIZY

**BEST SELLING CARTRIDGE**

**STIIIZY**

Blue Dream Distillate - 1g

**BEST SELLING DISPOSABLE**

**STIIIZY**

Blue Dream Live Resin - 0.5g

\*DATA SOURCE: HEADSET

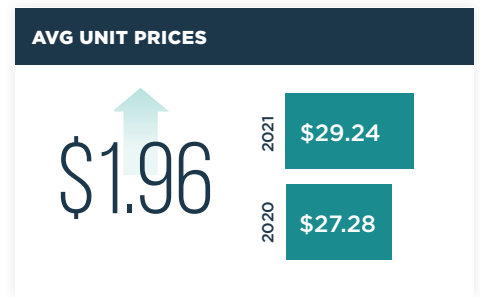
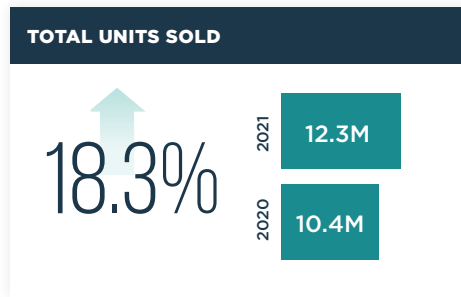
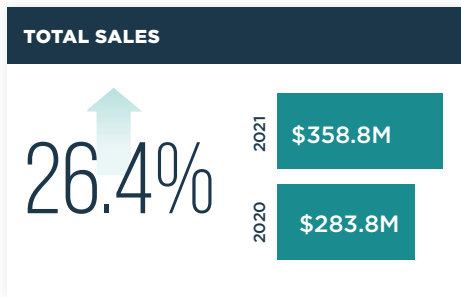


# Colorado

The word that best describes Colorado's vape market in 2021? Parity.

While the top four brands in California accounted for 44.3% of all units sold last year, Colorado's top four—Craft, Colorado Cannabis Co, Spectra, and EvoLab—made up an aggregated 27.5%. That's down significantly from the 39.6% combined stake held by Colorado's top four brands in 2020 and is surely a welcome metric for any emerging or new brands in the market.

On the product side, disposables were more popular in Colorado than they've ever been, and the breakdown of package sizes sold within the product segment was far more even than you might expect. 0.3g units made up one-third of all disposable sales, but not far behind were 1g units at 26.2% and 0.35 units at 23.1%. Half-gram units also accounted for a sizable portion of the disposable pie at 14.6%, which goes to show that there's currently opportunities for profit in Colorado at almost every disposable package size.



**DISPOSABLE SALES**



**1G UNIT SALES**



**TOP BRANDS**

	2020	2021
DISPOSABLES	<b>EVOLAB™</b> CANNABIS EVOLVED	<b>EVOLAB™</b> CANNABIS EVOLVED
CARTRIDGES	<b>openVAPE™</b>	<b>craft™</b>

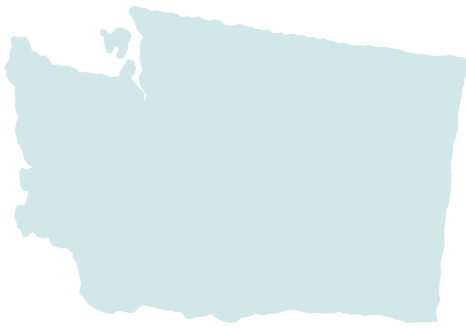
**BEST SELLING CARTRIDGE**

Sesh - 1g

**BEST SELLING DISPOSABLE**

Colors Sweet Melon CO2 - 1g

\*DATA SOURCE: HEADSET

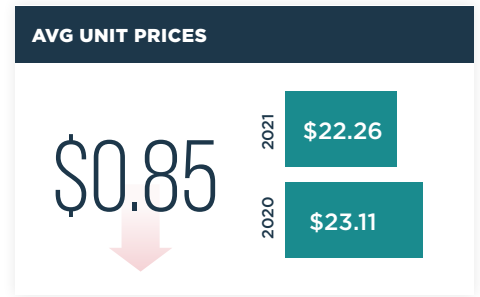
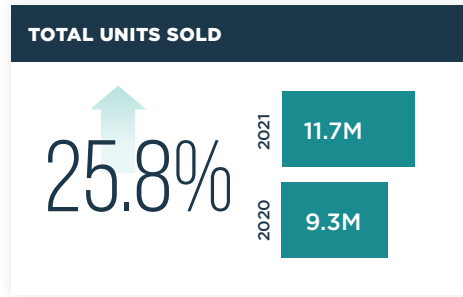
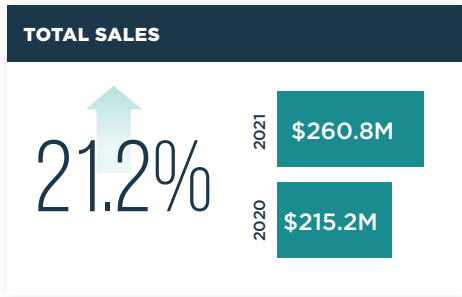


\*Excise taxes not included in data

# Washington

2021 proved that a maturing Washington market isn't always an entrenched one.

As expected from such an established market, Washington's segment share of 1g products increased to 89%, and its cartridges continued to dominate its vape sales, but not nearly to the same extent they did in 2020. Disposable sales surged to 6.0% last year in the Evergreen State, and we're not entirely sure why. One possible explanation is that 1g disposable products became more widely available and the larger unit sizes appealed to consumers. The data partially corroborates this theory given that the number of 1g disposable products sold in 2021 grew from 11K to 200K. But that doesn't tell the entire story, as the number of 0.5g disposable units sold doubled to over 400K and still led the way at 60% of the disposable market. Another possible explanation is that the quality of disposable extracts or hardware in the state drastically improved last year, attracting more consumers to the product segment. Look no further than the Sticky Frog brand, with its high-terpene extract disposable products launching them into third place in the category with over \$3M in sales after generating just over \$70K in 2020. Or perhaps it was the return of tourism and music festivals in the state? Or a combination of all three? Whatever the explanation, disposables are suddenly a very enticing opportunity in Washington.



**DISPOSABLE SALES**



**1G UNIT SALES**



**TOP BRANDS**

	2020	2021
DISPOSABLES		
CARTRIDGES		

**BEST SELLING CARTRIDGE**

Crystal Clear  
Blue Dream  
Live Resin - 1g

**BEST SELLING DISPOSABLE**

Strawberry Haze  
Distillate - 0.5g

\*DATA SOURCE: HEADSET

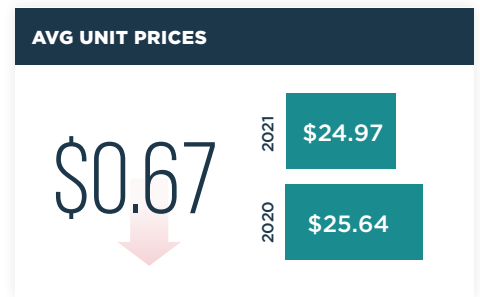
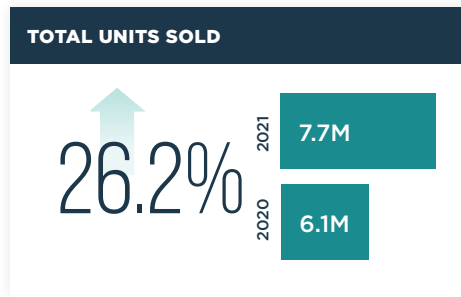
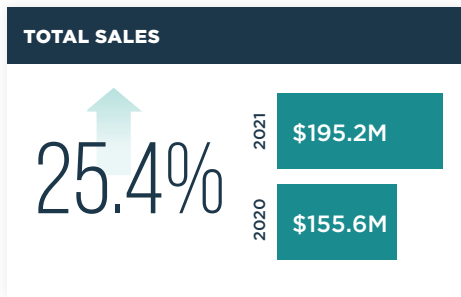


# Oregon

Oregon is the most entrenched vape market in North America, and it's not even close.

Last year, while neighboring markets were experiencing upticks in new and unexpected trends, the Oregon market doubled down on the trends we've come to associate with it over the years: cartridges, larger package sizes, and specialty extracts.

Oregon overtook Washington in the pacific northwest's annual race toward complete cartridge domination, although that was mainly due to Washington's unexpected uptick in disposable sales. Oregon's cartridge segment share really didn't change in 2021, making it the only US market to not undergo a significant uptick in disposable segment share. It was also the only market in which the sale of 1g units accounted for 90% or more of its total vape sales. The popularity of live resin products in the state also continued to gain momentum, constituting just over one out of every four products sold throughout the year—a 30% increase from 2020. Approximately 90% of these products were 1g cartridges, but the extract type has also made its way into the disposable segment where the number of live resin products more than doubled in 2021 to 119.



**DISPOSABLE SALES**



**1G UNIT SALES**



**TOP BRANDS**

	2020	2021
DISPOSABLES		
CARTRIDGES		

**BEST SELLING CARTRIDGE**

Tropical Trainwreck Distillate - 1g

**BEST SELLING DISPOSABLE**

Energy Sunshine Lime Live Resin - 0.3g

\*DATA SOURCE: HEADSET

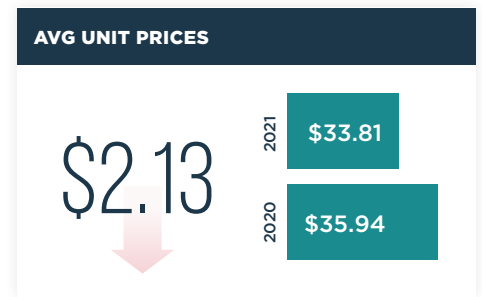
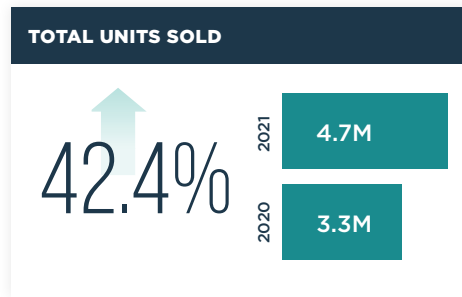
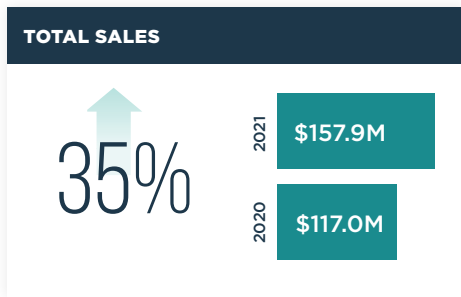


# Nevada

When it comes to vape trends, the Nevada market has historically done its own thing. 2021 was no exception.

One way that Nevada differed in 2021, for instance, was its decreased 1g unit sales relative to 2020. Nevada was the only market in this report to undergo this trend and the only one where 0.5g units accounted for over 60% of its total vape sales last year. Another interesting trend that only occurred in Nevada was the surge in popularity of its 0.8g vape cartridges. The package size, which only made up 0.4% of total unit sales in 2020, grew its unit share by 1100% to 4.8% of all units sold in 2021. In every other US market we track, 0.8g cartridges either didn't sell at all or registered as infinitesimally small blips on the radar.

We respect the dichotomy, to be honest. It's refreshing to see Nevada zig when other markets zag, and the metrics coming out of that market serve as a constant reminder to us that all markets are, in fact, unique in their own ways.



**DISPOSABLE SALES**



**1G UNIT SALES**



**TOP BRANDS**

	2020	2021
DISPOSABLES	STIIZY	STIIZY
CARTRIDGES	aiopro ADVANCED VAPOR SYSTEM	aiopro ADVANCED VAPOR SYSTEM

**BEST SELLING CARTRIDGE**

Blueberry CO2  
0.8g

**BEST SELLING DISPOSABLE**

Blue Dream  
0.5G

\*DATA SOURCE: HEADSET



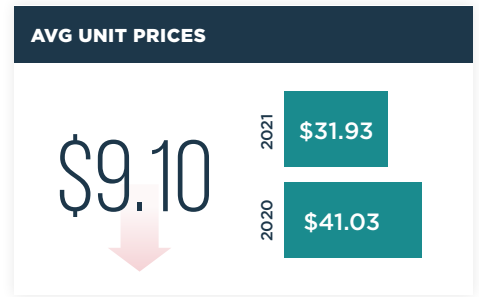
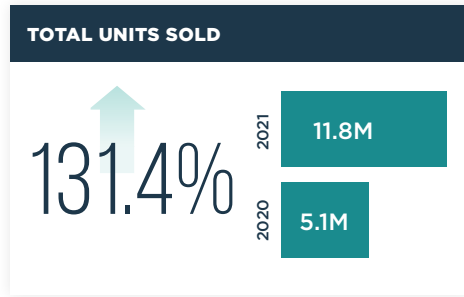
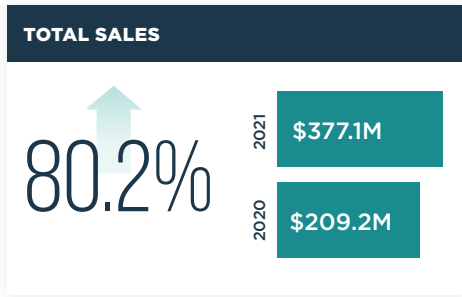


# Michigan

Michigan's 2021 data was so surprising that we had to go back and check our math!

The first surprise was the state's massive jump in vape revenue, which increased 80% to \$377M. In doing so, it surpassed Colorado and Washington as the second highest-grossing vape market in this report. That's no small feat for a market that only came into being in December 2019. Likewise, its 131% jump in units sold relative to 2020 also led all US markets and trailed only Ontario's massive 2021 unit growth. The state's 1g unit segment share—which at 77% in 2020 was already inexplicably high for a nascent market—rose again to 79.1% of all vape sales. Yet, the average unit price of vapes in Michigan dropped \$9 over the course of 2021, which is not easy to reconcile. In 2020, there were 62 brands operating in Michigan's disposable segment, generating a combined \$5.0M. The number of disposable brands decreased to 24 in 2021, yet disposable sales revenue nearly tripled to \$14.4M.

Okay, one more ... just because you enjoyed those last two so much! As expected, live resin products haven't made a significant splash in the Michigan market, accounting for just 8.3% of all unit sales last year—the lowest mark of any US market. Yet, despite the dominance of 1g products in the state, half-gram units were the package size of choice (72.1%) for consumers that purchased live resin vape extracts in 2021. Go figure.



**DISPOSABLE SALES**



**1G UNIT SALES**



**TOP BRANDS**

	2020	2021
DISPOSABLES		
CARTRIDGES		

**BEST SELLING CARTRIDGE**

Blue Dream Distillate - 1g

**BEST SELLING DISPOSABLE**

Purple Punch Distillate - 0.5g

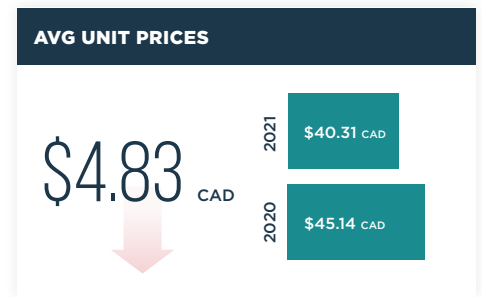
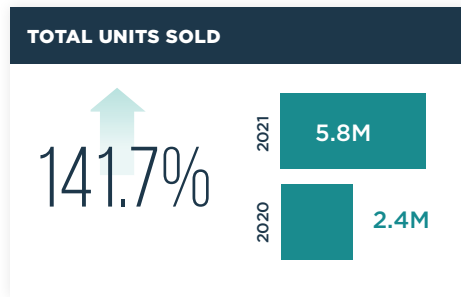
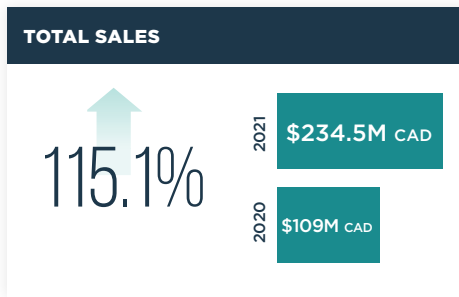
\*DATA SOURCE: HEADSET

# Ontario

The Ontario vape market completely transformed itself in its second year.

Ontario's disposable segment, for instance, plummeted to 7.8% of its total vape sales from 22.9% in 2020. One-gram units, which debuted in 2020 at a slight, yet promising, 4.7% of all units sold, went in the opposite direction, skyrocketing to 33% of all units sold in the province. In fact, each of Ontario's top four selling vape SKUs in 2021 were 1g products, a far cry from the single 1g unit that cracked the province's Top 10 list in 2020. Half-gram units, meanwhile, decreased to less than 50% segment share for the first time.

On the other hand, live resin products have yet to really catch on in Ontario. They accounted for a mere 2.8% of the market's 2021 vape sales, although their segment share has been consistently on the rise since July. Experts and consumers alike believe that it's just a matter of time until live resin gains more mainstream popularity in the province. Until then, we're left to wonder in which package size these products will sell best when that time comes. Half-gram units accounted for 83.5% of Ontario's live resin products in 2021, but that statistic is misleading given that 1g live resin products didn't come online until August. Since then, 1g live resin products have increased in segment share by a minimum of 3% every month, culminating at 18.6% in December.



**DISPOSABLE SALES**



**1G UNIT SALES**



**TOP BRANDS**

	2020	2021
DISPOSABLES	REDECAN	ACE VALLEY
CARTRIDGES	REDECAN	BACK FORTY

**BEST SELLING CARTRIDGE**

**BACK FORTY**

Kush Mint Distillate - 1g

**BEST SELLING DISPOSABLE**

**CANACA**

THC Distillate 0.5g

\*DATA SOURCE: HEADSET

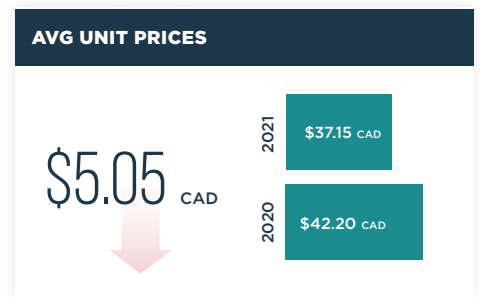
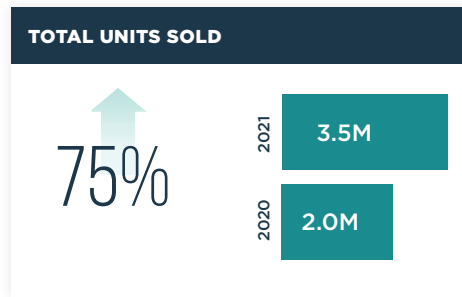
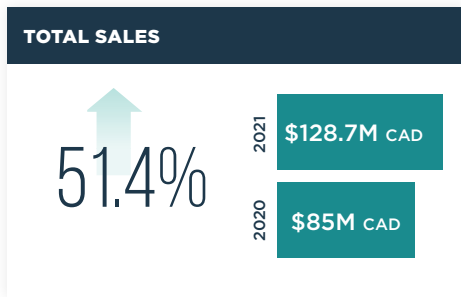


# Alberta

Like Ontario, the 2021 Alberta vape market was almost unrecognizable relative to where it was one year earlier.

Vape revenue and total sales went up ... like, way up. Cartridge sales ballooned to 94.3% of Alberta's vape market, edging out Saskatchewan for the second-highest stake in the country, and the number of brands operating in the province more than doubled to 108 from 50. Brands played musical chairs in terms of provincial sales rankings, none more so than General Admission, which grew its vape revenue 10x over the course of 2021, vaulting from 22nd to 2nd overall in the process.

The popularity of 1g products also took flight, increasing its segment share to 38% of all unit sales from 3.6% in 2020. To put that into perspective, Alberta had only one 1g SKU in its 2020 Top 10 list. In 2021, all 10 were 1g products! Live resin products began trickling into the market as well last year. At 4.8% of Alberta's vape sales, which is nearly twice that of the segment's share in Ontario, there is still clearly plenty of room for the product segment to grow in 2022 and beyond.



**DISPOSABLE SALES**



**1G UNIT SALES**



**TOP BRANDS**

	2020	2021
DISPOSABLES	REDECAN	48 <sup>N</sup>
CARTRIDGES	GOOD SUPPLY	GOOD SUPPLY

**BEST SELLING CARTRIDGE**

**BACK FORTY**

Kush Mint Distillate - 1g

**BEST SELLING DISPOSABLE**

**48<sup>N</sup>**

Trail Mix Daytrip Eclipse Full Spectrum 0.4g

\*DATA SOURCE: HEADSET

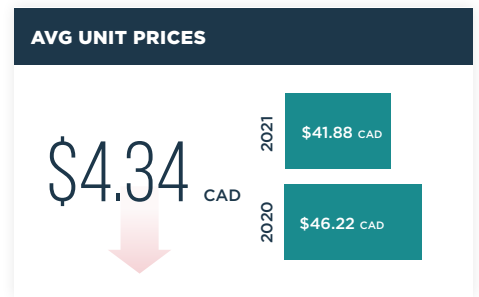
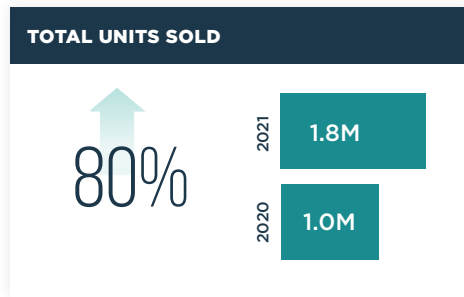
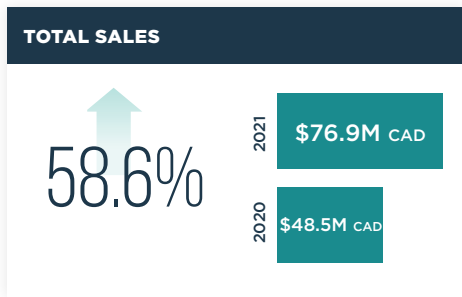


# British Columbia

Canada's third largest vape market said farewell to disposables in 2021.

The product segment's 2.6% share of British Columbia's total vape sales for the year was the lowest, by far, of any Canadian market and second to only Oregon outright of the 10 markets tracked in this report. With over 97% of its vape sales, cartridges reigned on Canada's west coast, and 45.1% of all cartridges sold were 1g units. That's a massive stake increase from 2020, when 1g units accounted for only 5.4% of all cartridge sales, and it's extremely telling of where this province is likely headed in 2022.

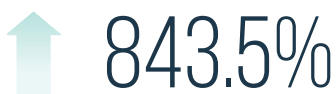
There's certainly opportunity for new entrants in British Columbia. Although the number of vape brands operating in the province increased to 79 from 47 one year earlier, it was still significantly lower than in either Alberta or Ontario. Plus, brand loyalty doesn't seem to be much of a driving factor for consumers given the way that General Admission and Back 40 Cannabis both vaulted up the provincial brand rankings to 1st and 2nd overall in 2021 from relative obscurity—25th and 23rd, respectively—in 2020. The data suggests that BC's consumers will seek and purchase quality vape extracts, regardless of brand name, if affordable.



**DISPOSABLE SALES**



**1G UNIT SALES**



**TOP BRANDS**

	2020	2021
DISPOSABLES	KOLAB PROJECT	EDISON CANNABIS CO
CARTRIDGES	KOLAB PROJECT	GENERAL ADMISSION

**BEST SELLING CARTRIDGE**

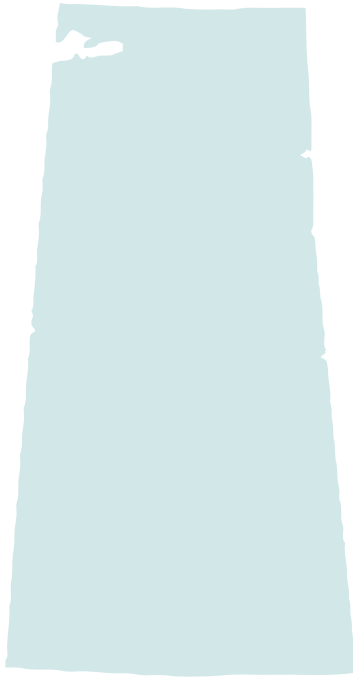
General Admission  
Berry Gelatti #33 Distillate - 1g

**BEST SELLING DISPOSABLE**

Edison Cannabis Co.  
Limelight Distillate 0.3g

\*DATA SOURCE: HEADSET

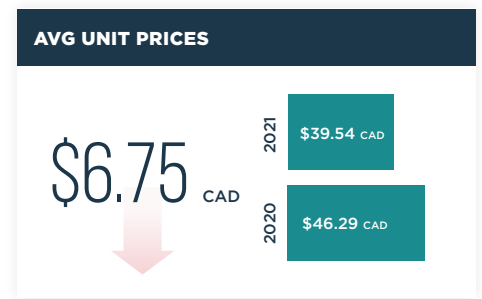
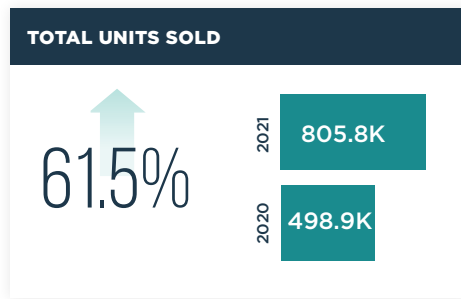
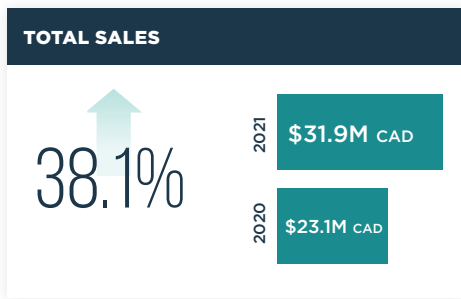
# Saskatchewan



As Saskatchewan's vape revenue and total units sold increased in 2021, so too did the number of opportunities to succeed in nearly every corner of its vape industry.

For instance, cartridges in Saskatchewan dominated at a fairly similar rate to the rest of the country with 94.1% of the province's sales, but within that segment, there was a surprising amount of parity. Half-gram units led the way with 42.5% of all cartridges sold, but less than 3 percentage points behind were 1g units, which rose astronomically in popularity during the year. Even 0.45g units accounted for nearly 10% of the pie. Although down significantly in segment share, disposables also offered brands multiple avenues to success in terms of package sizes, with 0.3g products leading the way at just under half of all disposable unit sales.

That parity extended into Saskatchewan's vape brand rankings, where opportunity abounded for brands outside of the Top 3. In 2020, the top three brands in the prairies accounted for 39.4% of all units sold. Last year, those top three brands were each replaced by newcomers, who combined to account for less than one quarter of all units sold in Saskatchewan. That metric should be particularly encouraging for the 48 brands that entered the province's market in 2021, especially those who offer live resin products. With 4.4% of Saskatchewan's total sales last year, live resin products are one of its quickest-growing product segments, and the data suggests that it will only continue to gain momentum in the coming year.



### DISPOSABLE SALES



### 1G UNIT SALES



### TOP BRANDS

	2020	2021
DISPOSABLES	REDECAN	Foray
CARTRIDGES	PHYTO COEXTRACTIONS	GENERAL ADMISSION

#### BEST SELLING CARTRIDGE

GENERAL ADMISSION

Pineapple Daze Distillate 0.45g

#### BEST SELLING DISPOSABLE

EDISON CANNABIS CO.

Limelight Distillate 0.3g

\*DATA SOURCE: HEADSET

# Conclusion

In such a time of uncertainty, one thing remains consistent: The North American cannabis vape industry is scaling exponentially and showing no signs of slowing. Total sales revenue in 2021 eclipsed \$2.6B in the U.S., barreling past the \$2B record mark it set one year earlier. The total number of units sold in the country rose to over 84M, a 34% increase from 2020, and the sector's market share, already the second highest among all cannabis product categories, rose 1.5 percentage points to 20.7% overall.

The Canadian vape industry's year-over-year gains were even larger. The number of vapes sold in the Great White North essentially doubled to 11.9M in 2021 from 6M, generating over \$472M in revenue. That's a massive increase for a relatively small national market given that vape revenue in the country barely topped \$265M one year earlier. Likewise, the market share of the product category also rose 1.8 percentage points to 16.4% total, good for third in the industry behind flower and pre-rolls.

In both countries, 1g units made significant strides. In the US, the package size rose to 64.4% of all units sold over the course of the year, up from 55.9% in 2020, and accounted for just under two out of every three units sold in the country. Smart money would be on that number surpassing this threshold in 2022. In Canada, the popularity of 1g units soared to 36.5% of all units sold from 4.1% in 2020—a YoY increase of over 790%—but really picked up steam in Q4, during which time the package size made up an average of 49.6% of all vapes purchased.

Similar trends unfolded in both countries with one notable exception. The U.S. disposable market went up from 8.2% of its 2020 sales to 10.4% last year, while Canada's disposable market share fell off the proverbial cliff, plummeting to 6.2% from a robust 19.3% one year earlier. Will the disposable market in Canada regain its footing in 2022? Will 1 gram cartridges retain their domination over their half-gram counterparts? Will the cannabis sector continue its meteoric rise? All these answers and more are coming up in this year's vape reports.

**Same Greentank time. Same Greentank channel!**



[The Arcview Group](#) is a vertically integrated financial services firm servicing the cannabis and hemp industry, built with social justice and responsibility at its core. Arcview has been a trusted global leader for over ten years and a nexus for investors, companies, entrepreneurs, and community, providing a broad spectrum of programs and services to the industry. The Arcview Group's ecosystem of companies includes Arcview Capital, Arcview Management Consulting & Market Research, and Arcview Ventures.

For additional help analyzing cannabis markets or developing a winning growth strategy for your company or brand, please reach out to [Arcview Management Consulting](#).

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Greentank designs, engineers and manufactures the highest-quality vape devices for brands and producers.

Contact us to learn more about [Market Matching](#), our complimentary, data-driven approach to the cannabis vape market.

We offer it for free because we want our partners to succeed and believe that forming a cohesive, analytics-substantiated approach at the onset of any hardware consultation puts them in the best position to do so.

That's the difference between a hardware partner and a hardware vendor. Of course, it's not the only complimentary support system that we offer our clients. It's not even the only complimentary service we offer as part of our consultation process! When you partner with Greentank, you get the [most thorough pre-sale, post-sale and personal account support](#) in the industry. **Guaranteed.**

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