

# 2024

## NORTH AMERICA VAPE REPORT

FORECAST INNOVATE LEAD





## UNLOCKING SUCCESS IN THE VAPE MARKET: NAVIGATING TRENDS WITH PRECISION

Welcome to our comprehensive 2024 vape report, your guiding star in the ever-evolving landscape of the vape industry! As we delve into the intricate world of vape sales, we bring to you a treasure trove of insights gleaned from 2023 point-of-sale data, offering a clear and actionable pathway to propel your brand to new heights.

In the dynamic and fast-paced vape market, staying ahead isn't just about keeping pace; it's about being a trendsetter. That's where our report comes in - a meticulous compilation of data and trends across various Provinces and States, tailored to give your brand the foresight it needs to thrive. We've done the heavy lifting by analyzing the trends in your regions, equipping you with the knowledge to not only stay ahead of the curve but to define it.

Our report is your strategic ally, spotlighting the nuances of consumer preferences, shifting market dynamics, and emerging opportunities. Whether it's a spike in the popularity of certain extracts or a growing demand for innovative device types, we uncover the patterns that matter. This isn't just data; it's a window into the future of vape sales, offering you the clarity and confidence to make informed decisions.



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# A R I Z O N A



Arizona showed a modest increase in total vape sales, with a 2.8% rise year-over-year. Interestingly, all-in-one devices saw a significant jump of 132.8%, despite a decrease in cartridge sales by 10.8%. This suggests a shifting preference towards convenience and perhaps a single-use experience. The capacity size data indicates a stark contrast with a 30.6% decrease in sales for devices 0.50ml and under, but a substantial increase of 37.1% for over 0.50 devices, implying a preference for larger capacities. Extract types like Diamonds experienced a massive surge, increasing by 3855.2%, highlighting a significant consumer interest in this product type.

## H I G H L I G H T S

10,484,505  
vapes sold in  
**2023**

**+11.6%**  
live resin vapes  
**SOLD**

2,224,120  
all-in-one vapes  
**SOLD**

**+3855%**  
liquid diamond vape  
**SALES**



# CALIFORNIA

California's market grew by 8.3% in total vape sales. The all-in-one device sales increased by 45.4%, which is a testament to the growing popularity of these convenient devices. There was a substantial decline of 28.0% in smaller capacity vapes (0.5ml and under), while larger capacity vapes (0.5ml and larger) rose by 22.4%. This could indicate a value-seeking behavior among consumers. The cured resin extracts saw a notable increase of 44.4%, and Diamonds grew by 132.5%, showcasing a diversifying market interested in a variety of extract options.

## HIGHLIGHTS

41,072,586  
vapes sold in  
**2023**

**+45%**  
all-in-one vapes  
**SOLD**

**+22%**  
in vapes over  
**0.5ml**

**+16.8%**  
live resin vapes  
**SOLD**



# COLORADO



Colorado experienced a 4.1% increase in total vape sales. The state had a very slight growth in all-in-one devices and a modest 4.9% increase in cartridge sales. The capacity size trend is polarizing, with a significant decrease of 36.4% for 0.50ml and under, but a strong increase of 41.9% for over 0.50. The extract market showed varied interest with a 19.3% increase in Distillate and a notable 117.2% increase in Rosin/Solventless, suggesting a trend towards high-potency options.

## HIGHLIGHTS

**13,158,727**  
vapes sold in  
**2023**

**+117%**  
solventless extract vapes  
**SOLD**

**10,802,904**  
510-cartridges  
**SOLD**

**2,120,698**  
live resin vapes  
**SOLD**





# ILLINOIS

Illinois showed robust growth with a 14.5% increase in overall vape sales. The state also observed a significant rise in all-in-one device sales by 8.0% and an 18.6% increase in cartridge sales. There was a notable increase of 83.5% in sales for larger capacity vapes. The extract types data indicated strong growth across several categories, with Distillate sales up by 23.5% and Live Resin by 3.9%, reflecting a diverse market with varied consumer preferences.

## HIGHLIGHTS

**13,439,866**  
vapes sold in  
**2023**

**8,730,024**  
distillate vapes  
**SOLD**

**4,849,039**  
all-in-one vapes  
**SOLD**

**10,281,457**  
vapes with **0.5ml** or less  
**SOLD**





## MASSACHUSETTS

Massachusetts stands out with a significant 29.8% jump in total sales. All-in-one devices surged by 50.5%, suggesting a strong trend towards these products. There was a substantial 176.2% increase in sales for larger capacity vapes (over 0.5ml), indicating a market shift. The extract types reflected a keen interest in variety, with a 466.7% increase in Diamonds and a solid growth in Rosin/Solventless by 170.1%.

### HIGHLIGHTS

8,412,229  
vapes sold in  
**2023**

5,620,335  
distillate vapes  
**SOLD**

2,202,052  
all-in-one vapes  
**SOLD**

**+176%**  
vapes with **0.5ml** or less  
**SOLD**





# M I C H I G A N

Michigan had the highest growth in the dataset with a 61.3% increase in total sales. All-in-one device sales skyrocketed by 171.1%, and cartridge sales also saw a substantial increase. Larger capacity vapes (over 0.5ml) had a significant increase of 66.4% in sales. The extract types in Michigan saw dramatic increases, especially in Diamonds, which grew by 293.5%, and Rosin/Solventless by 135.8%.

## H I G H L I G H T S

**38,091,326**  
vapes sold in  
**2023**

**30,259,927**  
510-cartridges  
**SOLD**

**36,846,808**  
with over 0.5ml  
**SOLD**

**+60.3%**  
distillate vapes  
**SOLD**





# N E V A D A

Nevada's cannabis vape market demonstrated a moderate year-over-year growth of 3.7%. All-in-one devices showed a 10.2% increase in sales, while cartridge sales remained relatively flat with only a 0.8% increase. When looking at capacity sizes, there was a notable decrease of 10.4% in smaller vapes (under 0.5ml), contrasted by a significant increase of 53.7% for vapes with a capacity over 0.5ml, which suggests a customer preference for larger, potentially longer-lasting vape products.

In the realm of extract types, the state experienced a decline in CO2 extract sales by 14.7% and an increase in Distillate sales by 8.8%. There was also positive growth in Live Resin sales by 13.7%, indicating an increased interest in high-terpene, full-spectrum extracts.

## H I G H L I G H T S

6,607,044  
vapes sold in  
**2023**

**+53%**  
in vapes over  
**0.5ml**

2,177,082  
all-in-one vapes  
**SOLD**

**+13.7%**  
in live resin vapes  
**SOLD**



# O R E G O N



Oregon's market saw a robust increase in sales by 14.5%. The state had a significant uptick in all-in-one device sales by 151.8% and a healthy 10.2% increase in cartridge sales, which indicates a strong shift towards convenience in vaping products. For capacity size, there was a marked decrease of 32.2% in sales for vapes 0.5ml and under. However, vapes over 0.5ml saw a growth of 17.8%, suggesting that consumers in Oregon might be purchasing larger volume products for longer-term use. Regarding extract types, Oregon's data reflected a strong increase in interest for diverse extracts. Cured Resin saw a 35.2% increase, and Diamonds grew by a notable 1270.7%. Live Resin vape sales also rose by 23.3%, and there was an 87.6% increase in Rosin/Solventless sales, pointing towards a consumer trend that favors full-spectrum and high-quality concentrates.

## H I G H L I G H T S

9,520,568  
vapes sold in  
**2023**

96%  
all vapes sold were  
**+ 0.5ml**

8,887,772  
510 Cartridges  
**SOLD**

4,660,651  
distillate vapes  
**SOLD**



# WASHINGTON



Washington displayed a considerable increase in total vape sales, with a 23.6% growth from 2022 to 2023. All-in-one devices experienced a massive jump by 192.1%, while cartridge sales saw a more modest increase of 4.2%. This highlights a potential consumer shift towards the ease of use offered by all-in-one options. In terms of capacity size, there was a dramatic decrease of 56.4% in sales for smaller vapes (under 0.5ml), with a corresponding increase of 28.6% for larger capacity vapes (over 0.5ml). Extract types in Washington also show interesting trends. The Diamonds category saw an extraordinary increase of 12433.1%, indicating a booming interest in this high-potency extract. Live Resin and Rosin/Solventless also saw substantial growth, by 35.5% and 50.1% respectively, which underscores a growing consumer interest in premium concentrates.

## HIGHLIGHTS

**16,755,298**  
vapes sold in  
**2023**

**+192%**  
All-in-one vapes  
**SOLD**

**10,268,801**  
distillate vapes  
**SOLD**

**+97%**  
vapes sold were over  
**0.5ml**



## NEW MARKETS

We had 3 brand new States enter the charts in 2023. While sales numbers are likely not reflective of a total annual sales cycle (some States not selling products throughout the entire year), there are some very interesting early trends.

### MARYLAND



- **5,284,425** vapes sold in **2023**
- **77%** of vapes sold were **510-carts**
- **1,199,113** all-in-one vapes were sold
- **63%** of vapes were **0.5ml** or smaller
- **3,886,392** distillate vapes were sold
- **930,003** live resin vapes were sold

### NEW YORK



- **532,202** vapes sold in **2023**
- **59%** of vapes sold were **510-cartridges**
- **215,465** all-in-one vapes were sold
- **62%** of vapes were over **0.5ml** in capacity
- **363,291** distillate vapes were sold
- **95,388** live resin vapes were sold

### OHIO



- **3,468,471** vapes sold in **2023**
- **81%** of vapes sold were **510-cartridges**
- **77%** of vapes sold were over **0.5ml**
- **2,257,564** distillate vapes were sold
- **609,184** live resin vapes were sold



# A L B E R T A



# AB

In 2023, Alberta's cannabis vape sales rose by 19.4%, indicating a growing market. The most notable surge was in the 'All-in-one' device type, which skyrocketed by 68.0%, possibly due to the convenience these devices offer. However, there was a sharp 30.7% decline in the sales of smaller capacity vapes (0.50ml and under), but a significant uptick of 32.2% for vapes over 0.50ml capacity, suggesting a consumer shift towards larger, possibly more cost-effective options.

The extract types reveal a staggering 2942.0% increase in Diamond sales, suggesting a newfound popularity or increased availability of this product. Meanwhile, CO2 extracts saw a solid 32.4% growth. However, there was a contrasting performance in the Distillate category, with a modest 11.0% growth, indicating a plateau in its popularity. Live Resin's robust growth at 51.3% showcases a demand for higher-quality, potentially more potent products.

## H I G H L I G H T S

5,624,066  
vapes sold in  
**2023**

**+68%**  
all-in-one vapes  
**SOLD**

4,958,602  
vapes sold with over  
**0.5ml**

**+2942%**  
liquid diamond vape  
**SALES**



## BRITISH COLUMBIA



British Columbia experienced an impressive 39.5% increase in overall vape sales. The 'All-in-one' devices were the star performers with a 162.0% jump, possibly reflecting a preference for ease of use and discreetness. The province also saw a considerable growth of 42.2% for larger capacity vapes (over 0.5ml), while smaller vapes (under 0.5ml) did increase but at a lower rate. BC's extract market was dynamic, with Diamonds seeing an extraordinary 1557.5% increase, suggesting a surge in consumer interest or enhanced marketing efforts. CO2 extracts doubled, likely due to their perceived purity and taste.

### H I G H L I G H T S

**3,823,768**  
vapes sold in  
**2023**

**+162%**  
all-in-one vapes  
**SOLD**

**2,238,871**  
distillate vapes  
**SOLD**

**+42%**  
in vapes over  
**0.5ml**



# O N T A R I O



Ontario's vape market expanded by 15.2%, with 'All-in-one' devices again leading the way with a 94.3% increase. However, there was a significant drop in sales of smaller capacity vapes (under 0.5ml) by 52.3%, while larger vapes (over 0.5ml) grew by 34.3%, echoing a trend seen in other provinces.

The Diamonds extract category saw an astronomical 4103.5% increase, a trend that is worth investigating for underlying causes such as market changes or consumer preferences. Live Resin also more than doubled, suggesting that consumers in Ontario are increasingly turning towards high-quality extracts.

## H I G H L I G H T S

**9,381,798**  
vapes sold in  
**2023**

**+94%**  
all-in-one vapes  
**SOLD**

**+4103%**  
liquid diamond vapes  
**SOLD**

**8,52,217**  
in vapes over  
**0.5ml**





## SASKATCHEWAN

Saskatchewan saw a solid 31.8% increase in vape sales. The 'All-in-one' devices increased by 41.2%, which, while significant, is less than the other provinces, hinting at a different market dynamic. The larger capacity vapes (over 0.5ml) enjoyed a substantial 58.7% growth, outpacing the smaller capacity vapes (under 0.5ml) which saw a decrease.

The Diamonds extract category in SK saw a monumental 4361.1% increase, suggesting a rapid adoption of this extract type. Rosin/Solventless experienced a 1001.4% increase, possibly due to a surge in consumer demand for premium and natural extracts. Across all provinces, the data points towards a growing consumer preference for high-quality extracts like Diamonds and Live Resin, as well as a shift towards larger capacity and all-in-one vape devices.

### H I G H L I G H T S

**1,710,567**  
vapes sold in  
**2023**

**+31%**  
in 510-cartridge  
**SOLD**

**1,194,775**  
distillate vapes  
**SOLD**

**+58%**  
in vapes over  
**0.5ml**



## PREDICTIONS

Courtesy of the experts at Greentank.

*I think within current regulated markets and new emerging markets health considerations are going to play a huge role in shaping the future of vape for the cannabis industry. From testing, validation of formulations to new technology - Health & Safety is going to become a priority.*

**TALIA LAURIE**

SENIOR ACCOUNT EXECUTIVE

*As consumer awareness and taste evolves, dilution rates and use of non cannabis derived constituents (i.e botanical/synthetic terpenes) will continue to be reduced. Further to the first part, producers will also be more inclined to reduce power levels typically associated with AIO's, as well as 510 battery settings.*

**RON SCHUR**

DIRECTOR, LAB OPERATIONS AND QUALITY

*Loyalty through brand recognition and quality. I think as relationships between vape manufacturers and license holders deepen, the perfect match of delivery device and oil will elevate certain brands/products to the top and consumers will gravitate to them on a more repeat basis. Less shopping for what's on sale, what's new etc.*

**ALLISTER WARREN**

SENIOR ACCOUNT EXECUTIVE

*I can see the rise of all-in-one devices continuing to grow in popularity for their ease-of-use and convenience. I also think we are going to see some monumental developments with heating technology this year that will enhance the vaping experience for the end consumer. Customers want better, more consistent flavor and performance, and a big change is on the horizon.*

**DEREK CHAMPOUX**

VICE PRESIDENT, MARKETING





## STEADY AS SHE GOES: FUTURE OF THE INDUSTRY LOOKS TO INNOVATION

As new markets emerge, the old saying goes, “The more things change, the more things stay the same.” Convenience, quality, and consistency are thriving for most markets and look to continue the upward trend.

The overall state of the industry feels steady but many are saying big things are on the horizon. We should see a push to stronger health regulations as it relates to manufacturing standards for the good of all consumers while brand loyalty in growing markets will remain paramount to success.

The real change to the industry in 2024 will come in the form of innovation. While many view this as a “buzzword”, the cannabis and vape industry has been oddly void of game-changing innovation or invention for quite some time. 2024 might see a massive shift in innovation as several companies will look to disrupt the vape manufacturing space with products that will look to increase potency, life span and most importantly, an increase in user safety.





# THANK YOU

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OR IT'S NOT



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