

# Oregon Flower Market



**Will be approaching this different than I have from other presentations as flower is a market that has dealt with different aspects of market maturation from others.**

Dollars Sold

Dollars Sold  
**\$1.14B**

Units/Grams Sold **185.60M**

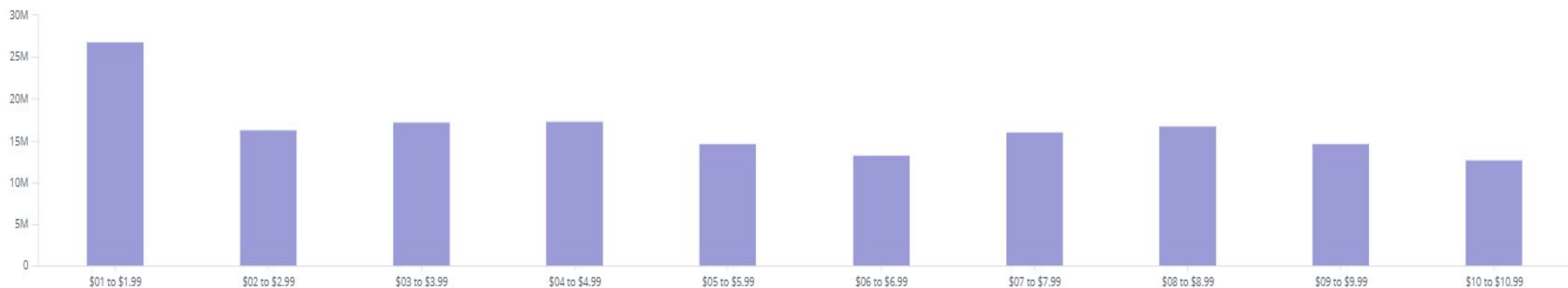
Average Retail

Average Retail Price Per Gram  
**\$6.13**

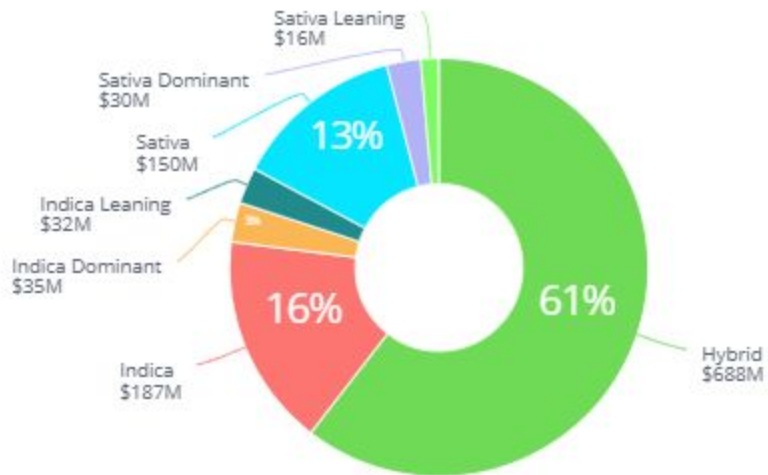
Number of Flower Brands

Number of Brands  
**435**

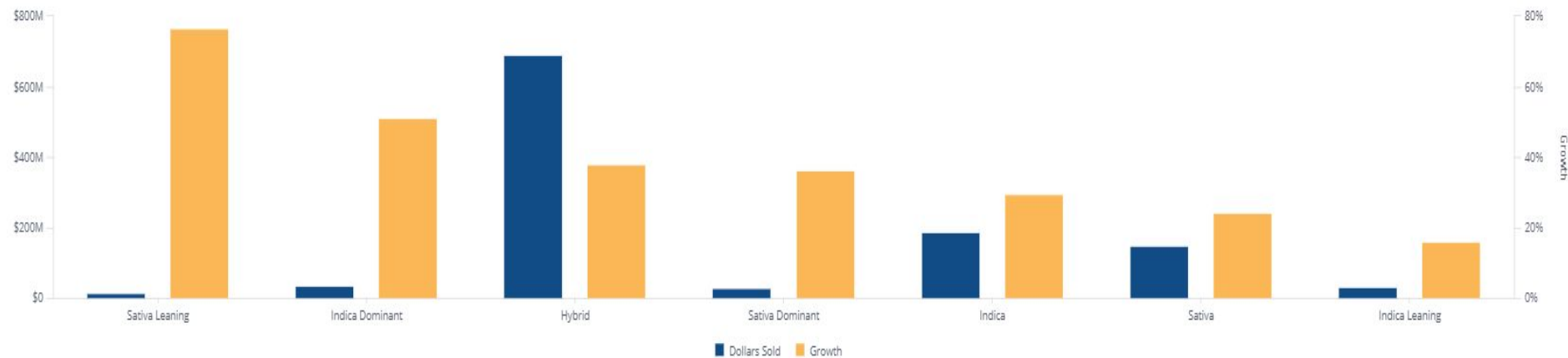
Grams Sold by Price Point (Top 10 \$1 Bands)



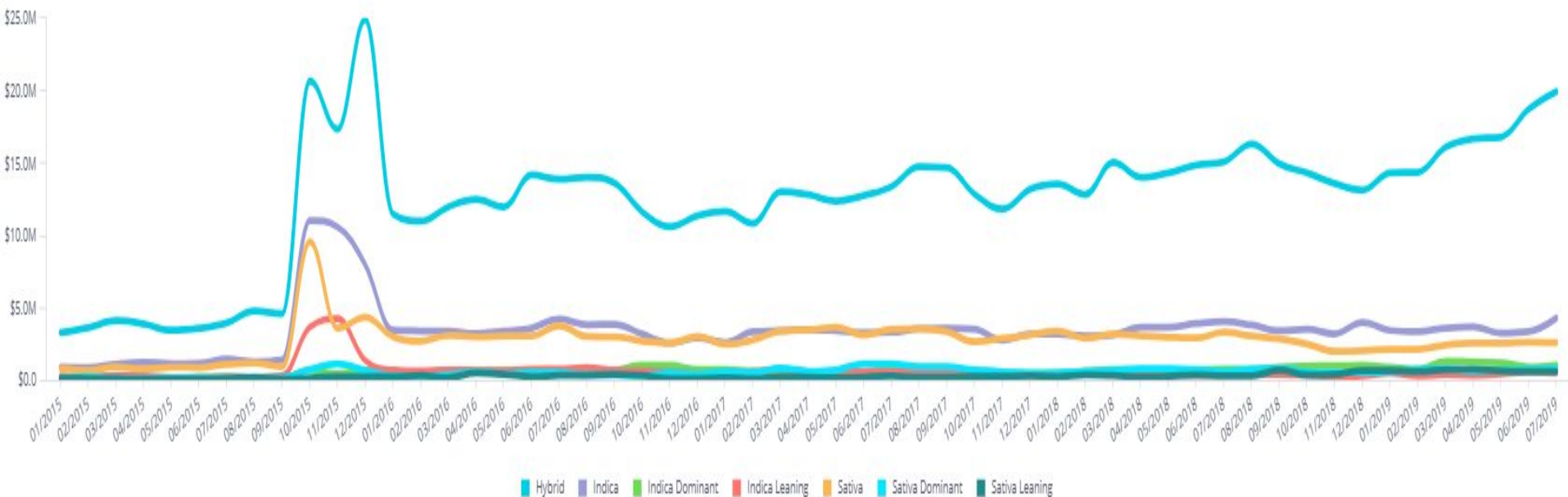
- Oregon's flower assessment from 2015-2019, this valuation **doesn't include biomass sold to processors for extraction.**
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Year over Year Growth

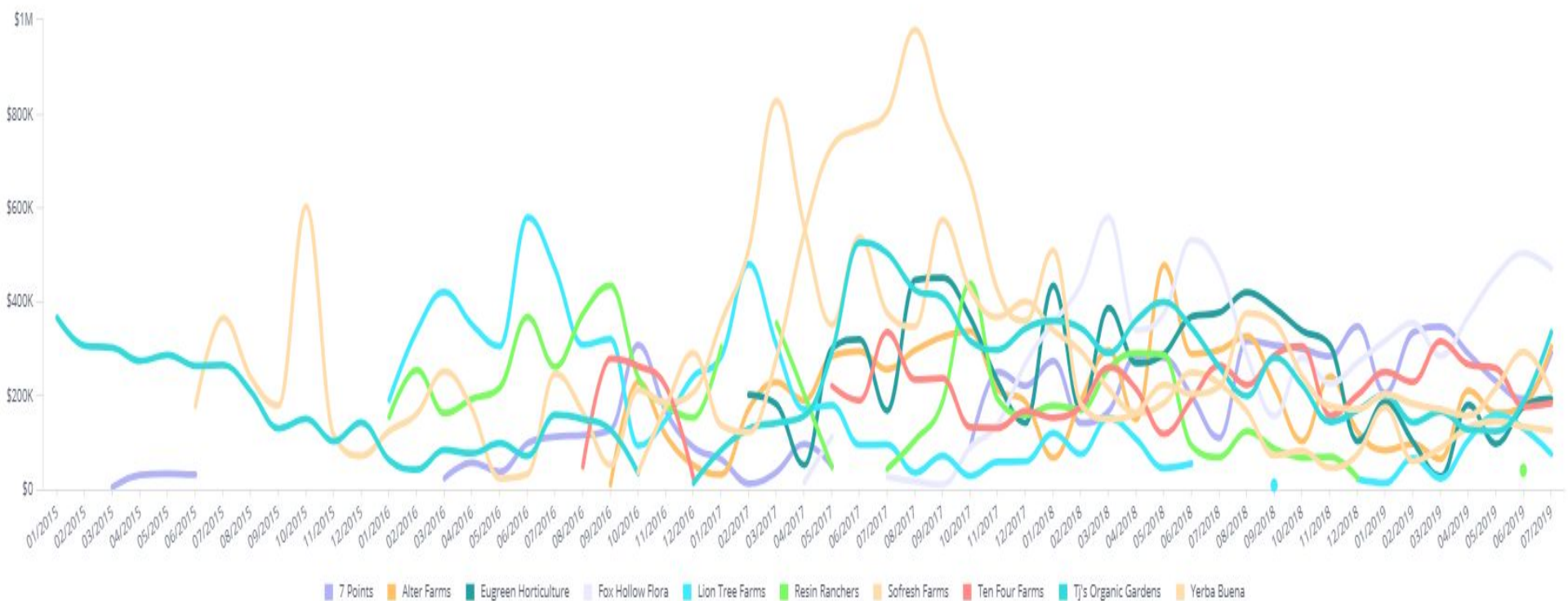


Dollar Sales Trend

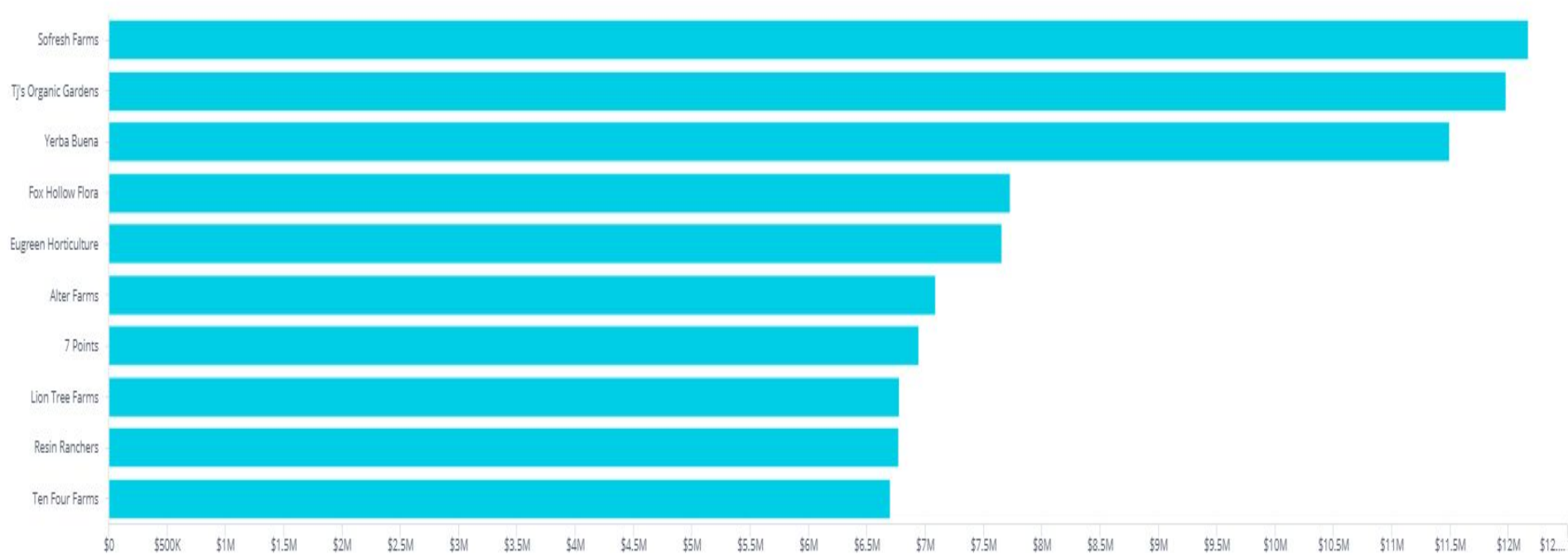


- Cannabis due to its subsistence in the black market and how genetics were bred has led to most strains that's inhaled these days to mostly be hybrids.
- Also a lack of a reliable resources that categorizes what makes a hybrid, sativa or indica...aside from phenotypic characteristics.

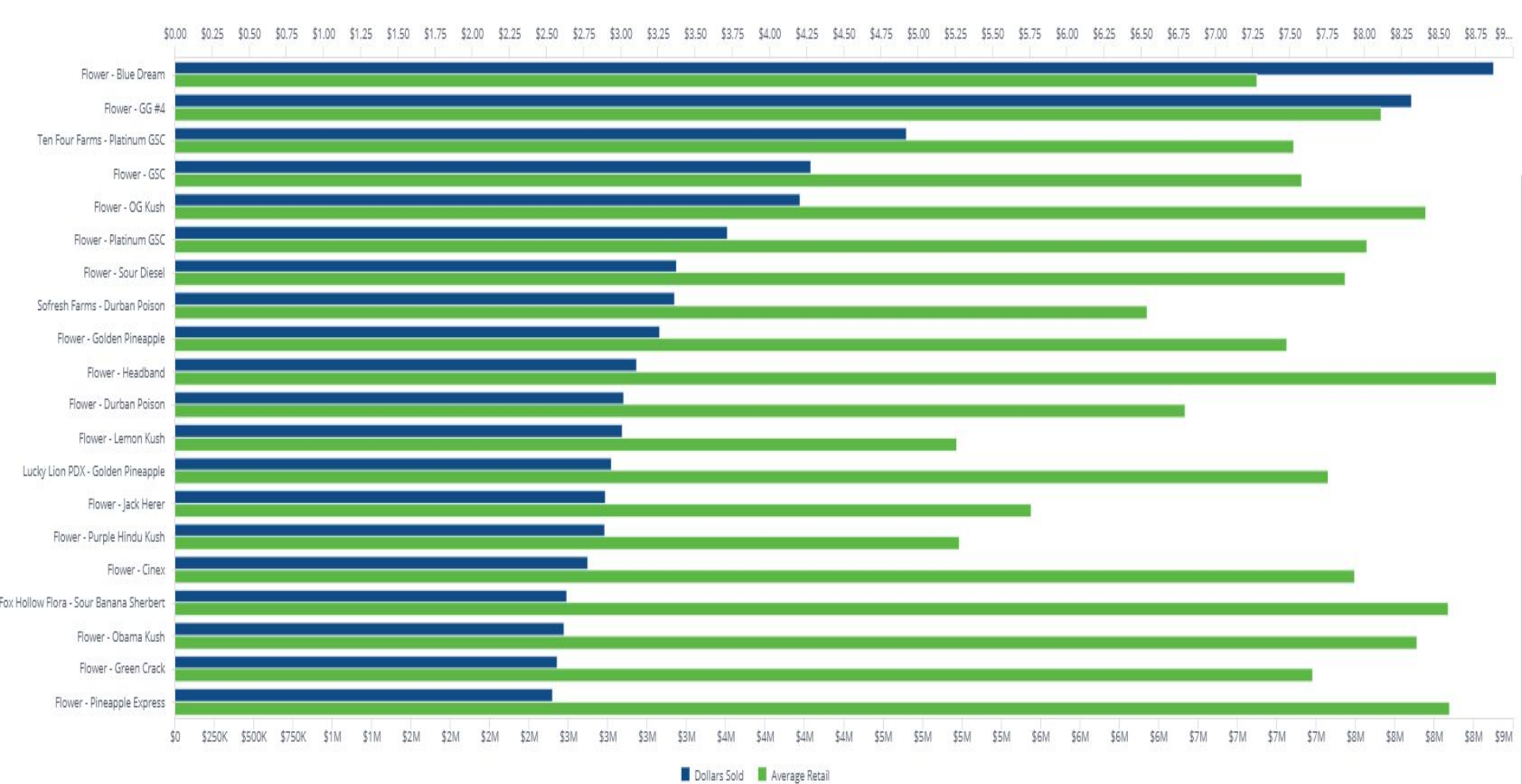
Dollars Sales by Month of Top 10 Brands

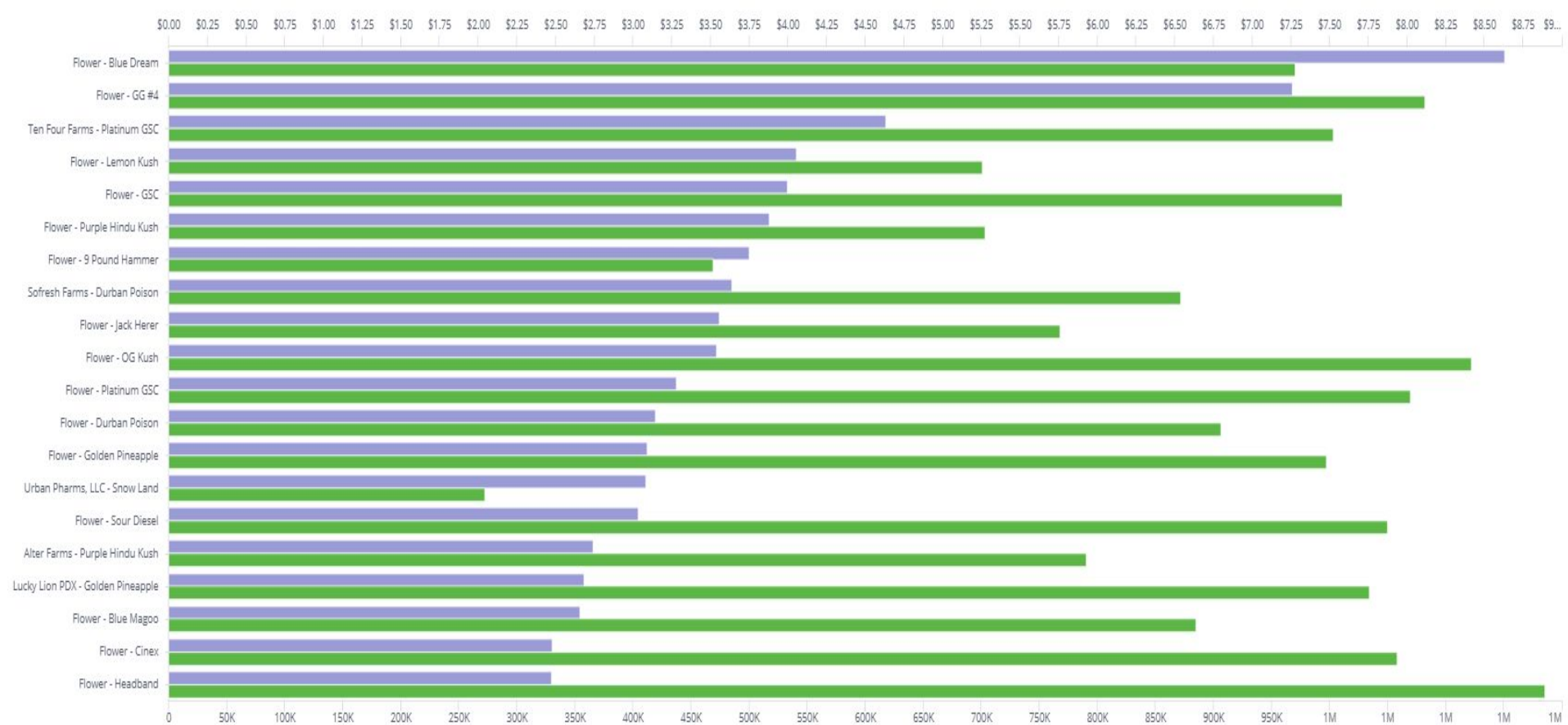


Category Mix by Dollars Sold



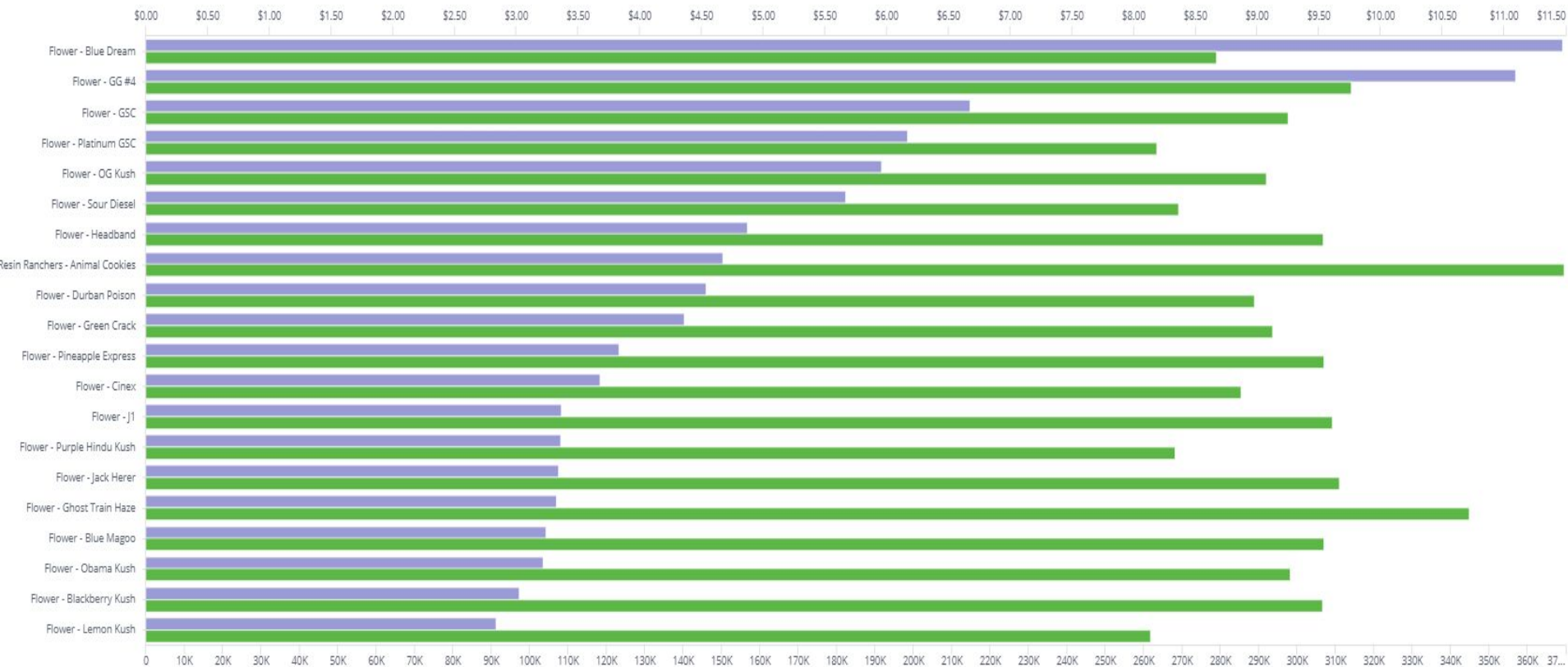
- Brands that have sold the most amount of flower in Oregon (in terms of dollars sold) and not actual grams of flower sold in Oregon's market.





Green = Average retail price. Blue = Units sold





# 2016 Top Flower Units Sold

Dollars Sold

Dollars Sold  
**\$248.52M**

Units/Grams Sold **26.81M**

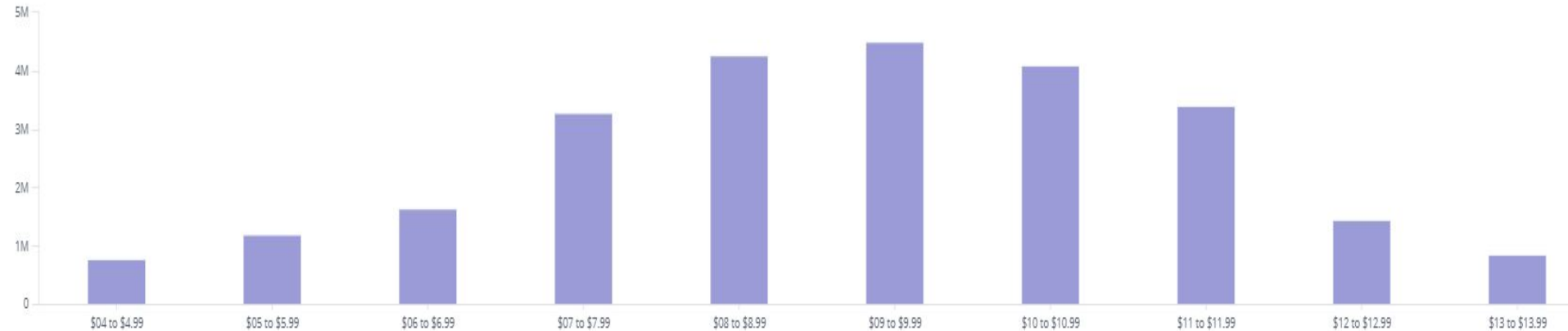
Average Retail

Average Retail Price Per Gram  
**\$9.27**

Number of Flower Brands

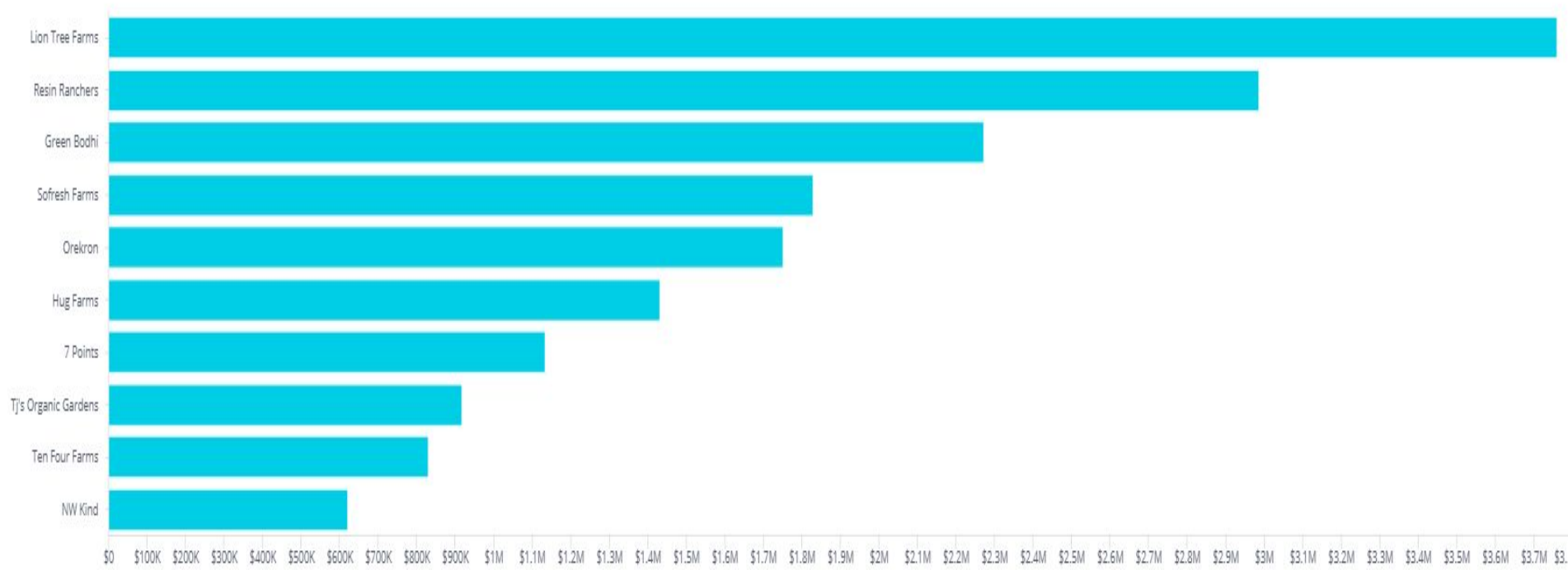
Number of Brands  
**108**

Grams Sold by Price Point (Top 10 \$1 Bands)

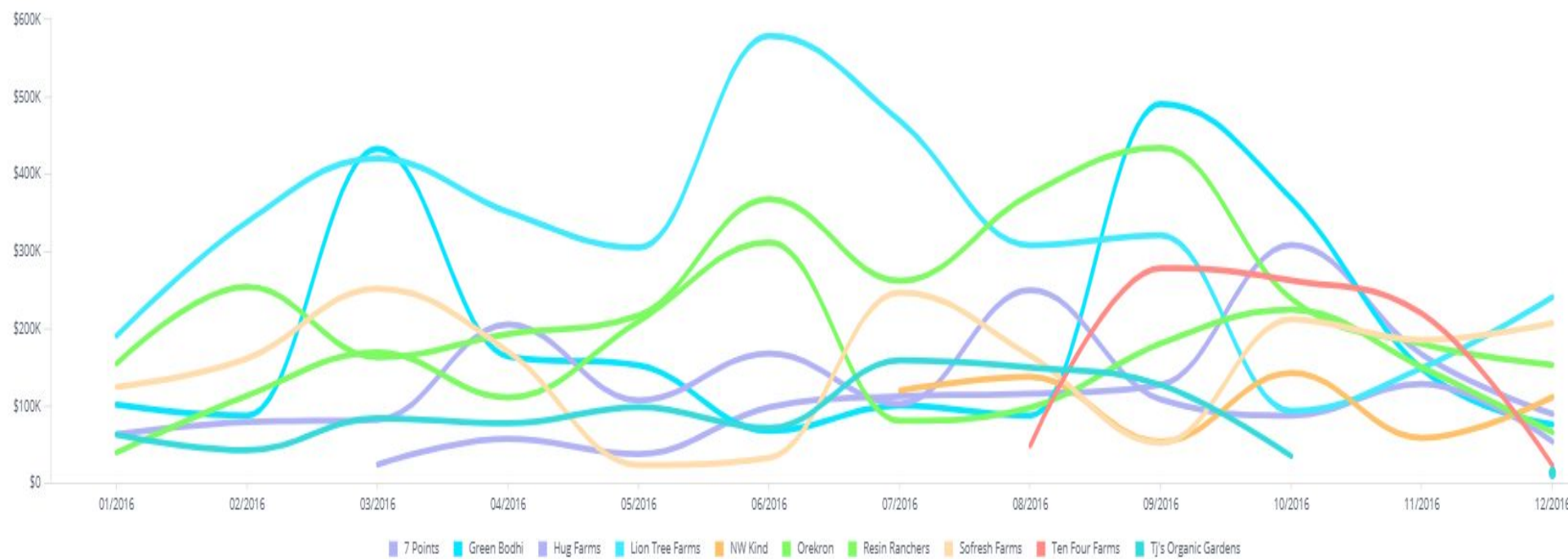


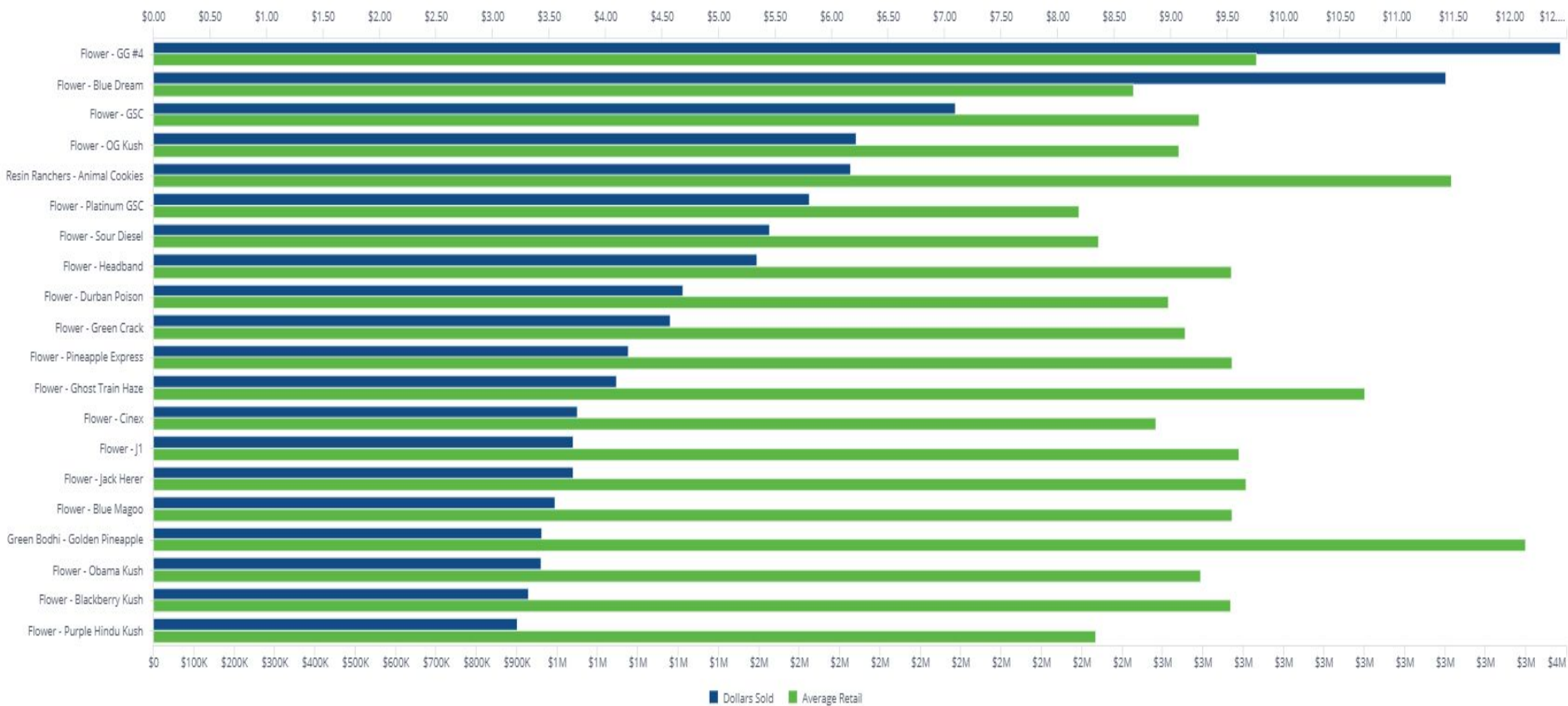
**- 2016 market assessment**

Category Mix by Dollars Sold

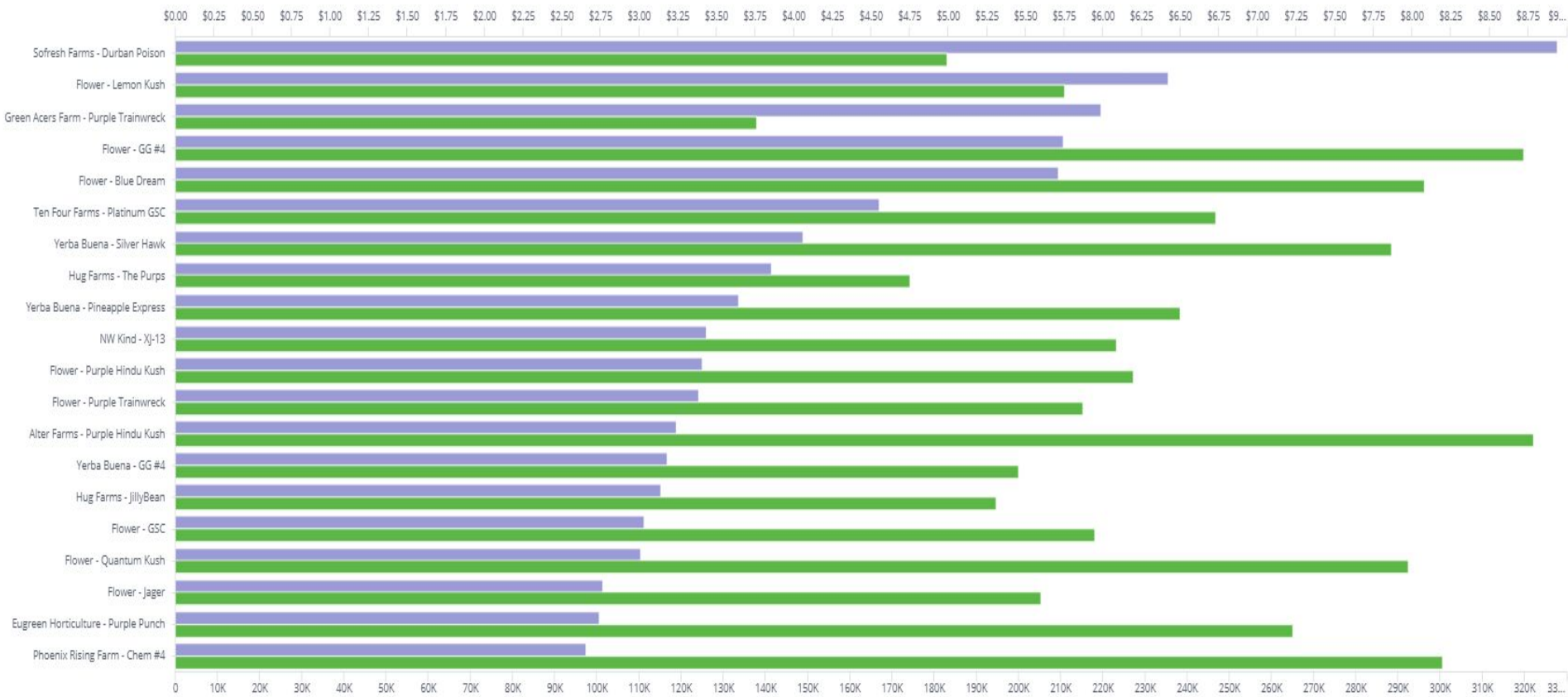


Dollars Sales by Month of Top 10 Brands





2016's flower in terms of dollars sold and average retail price attributed to it.



# 2017 Top Units Sold

Dollars Sold

Dollars Sold  
**\$255.12M**  
Units/Grams Sold **34.85M**

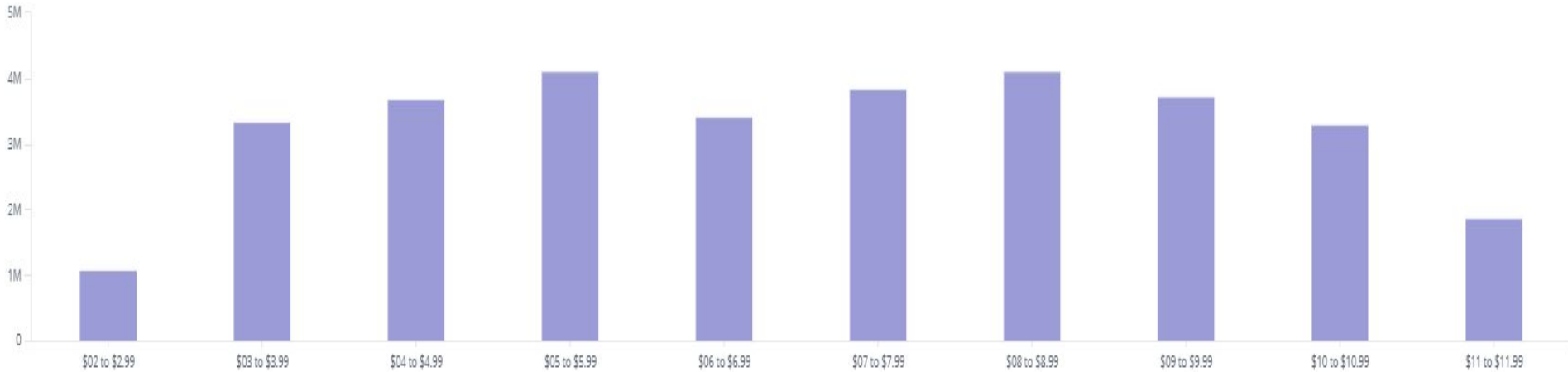
Average Retail

Average Retail Price Per Gram  
**\$7.32**

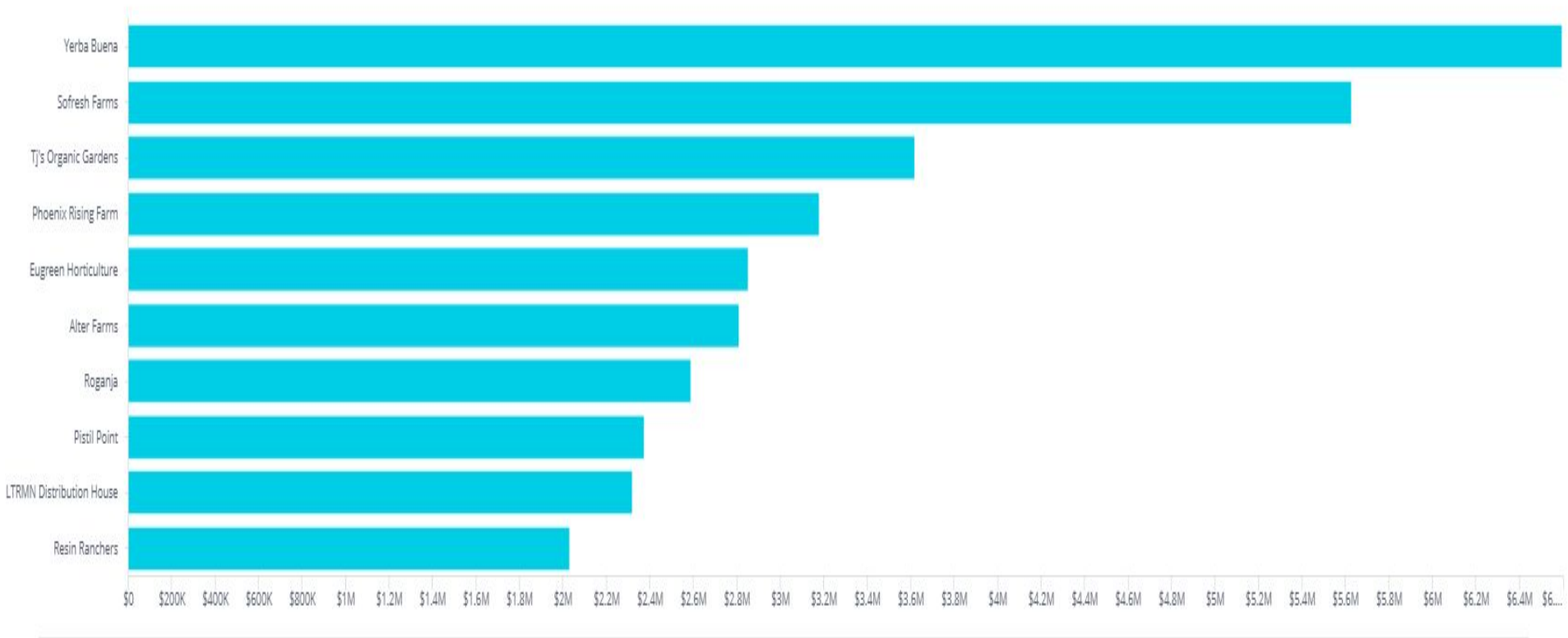
Number of Flower Brands

Number of Brands  
**249**

Grams Sold by Price Point (Top 10 \$1 Bands)



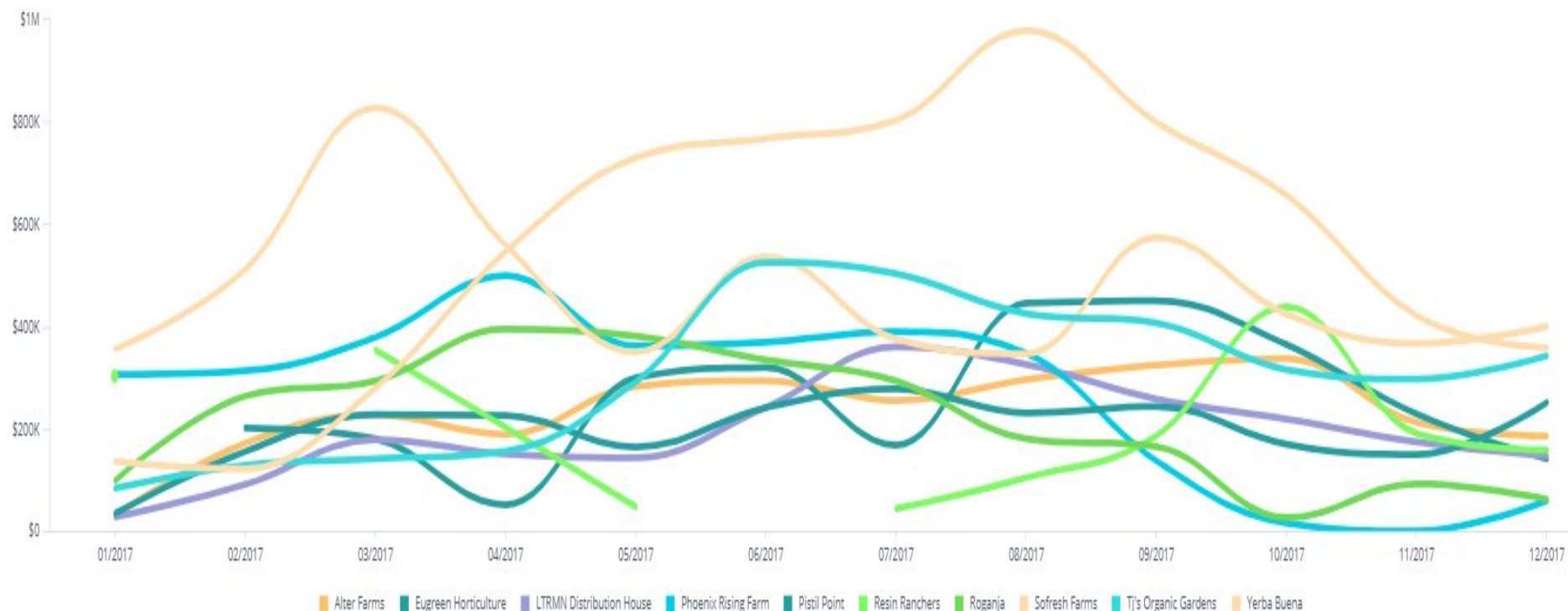
Category Mix by Dollars Sold

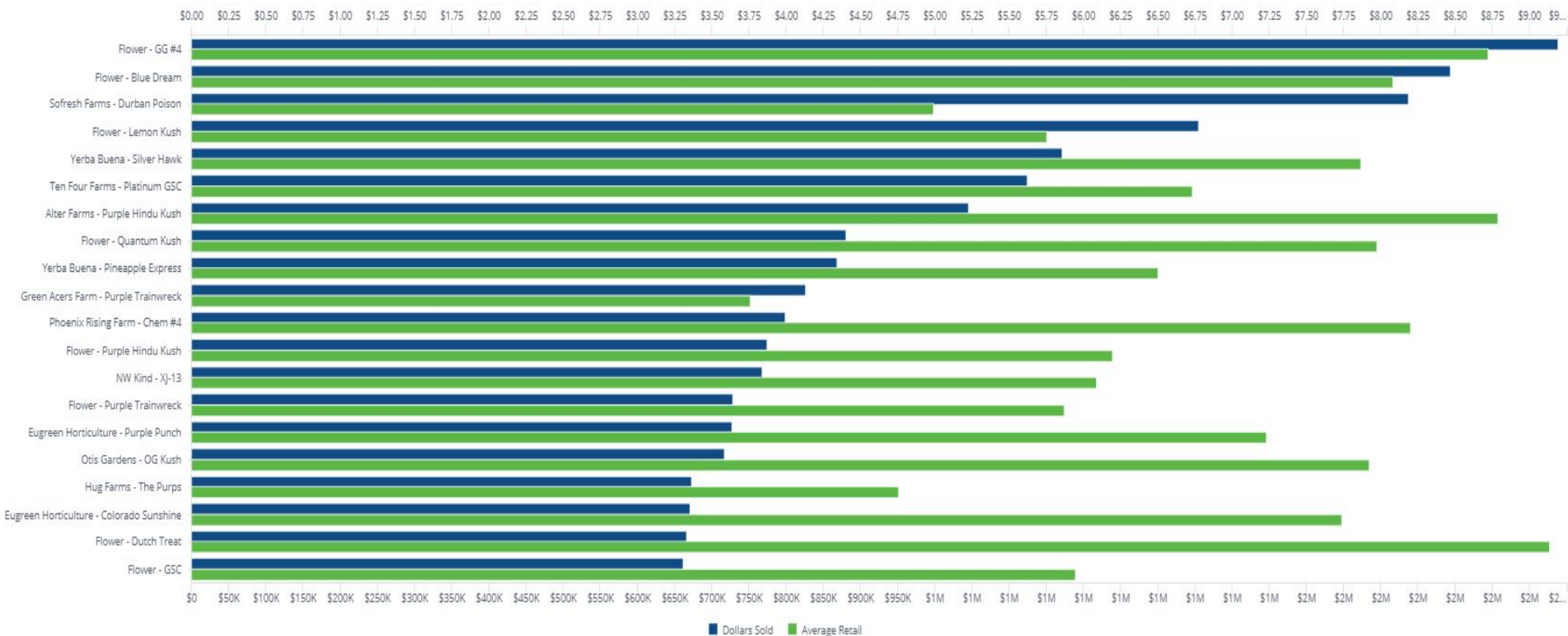


- 2017 Top flower brands

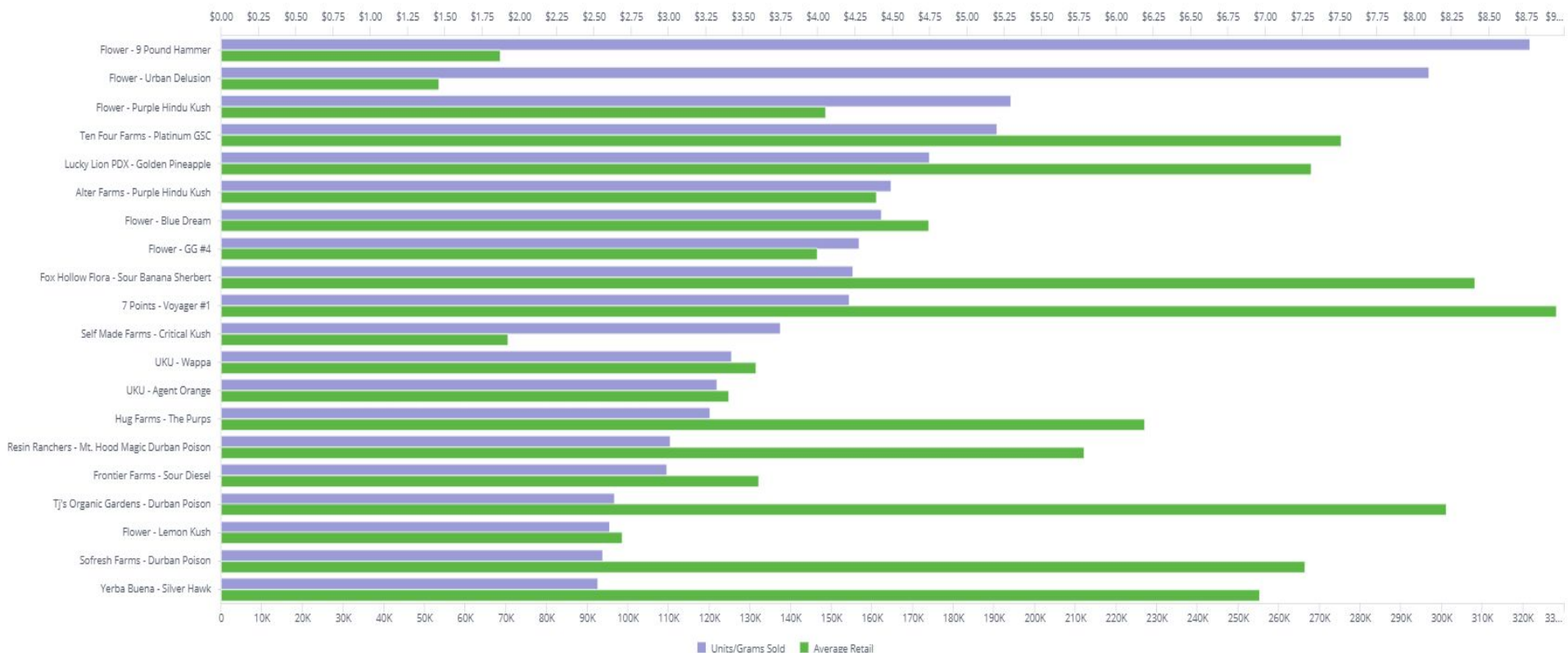


Dollars Sales by Month of Top 10 Brands





-2017 Flower dollars sold and avg retail



- 2018 top flower units sold

Dollars Sold

Dollars Sold  
**\$272.98M**  
Units/Grams Sold **55.33M**

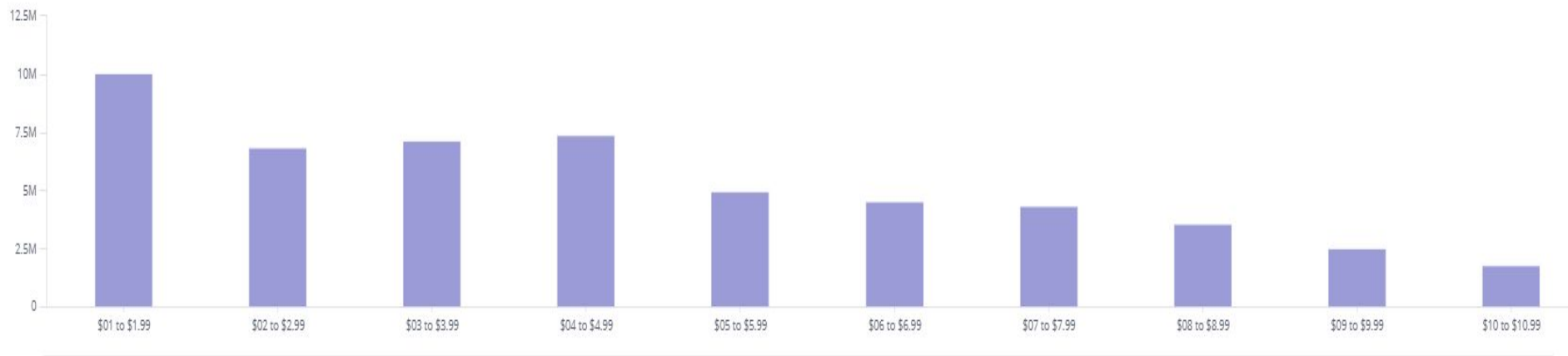
Average Retail

Average Retail Price Per Gram  
**\$4.93**

Number of Flower Brands

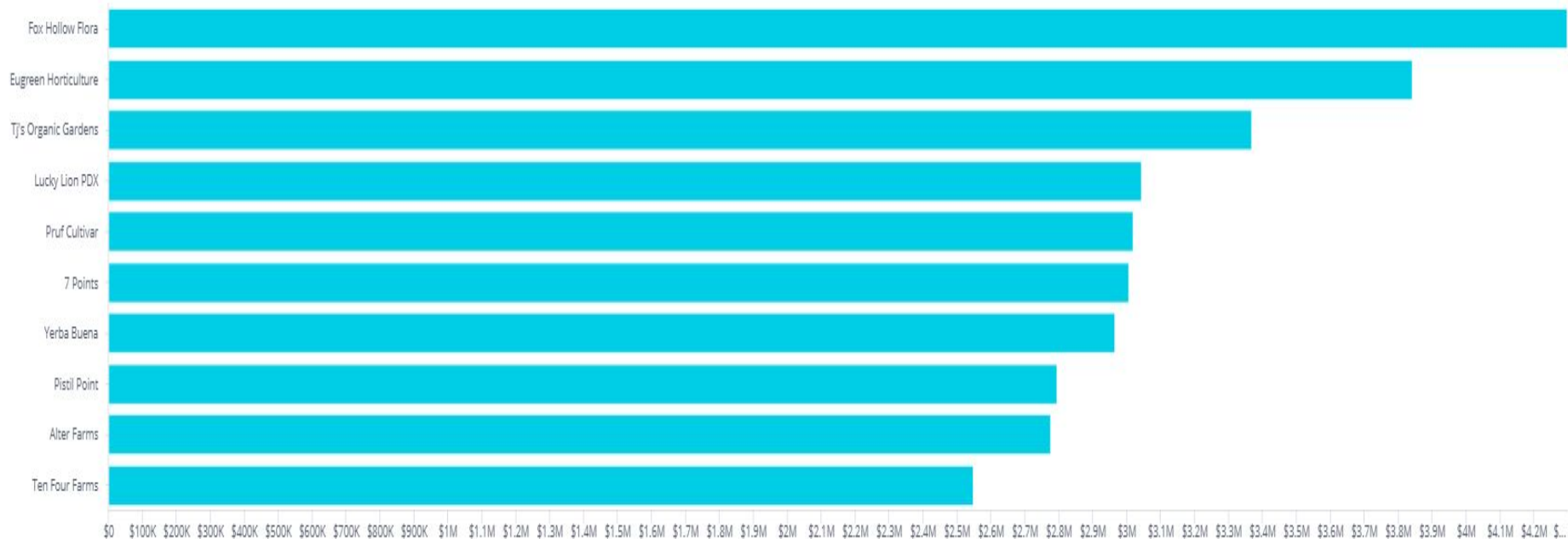
Number of Brands  
**328**

Grams Sold by Price Point (Top 10 \$1 Bands)



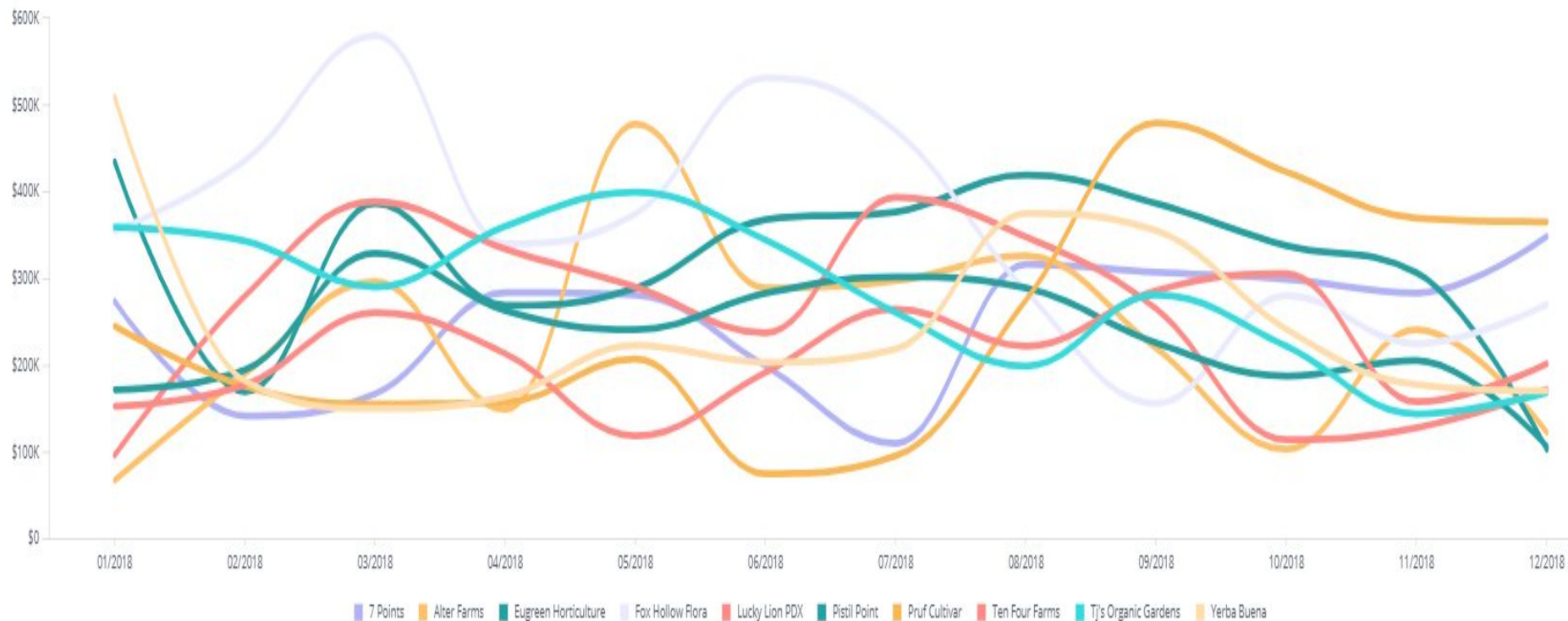
# 2018 Market Overall

Category Mix by Dollars Sold

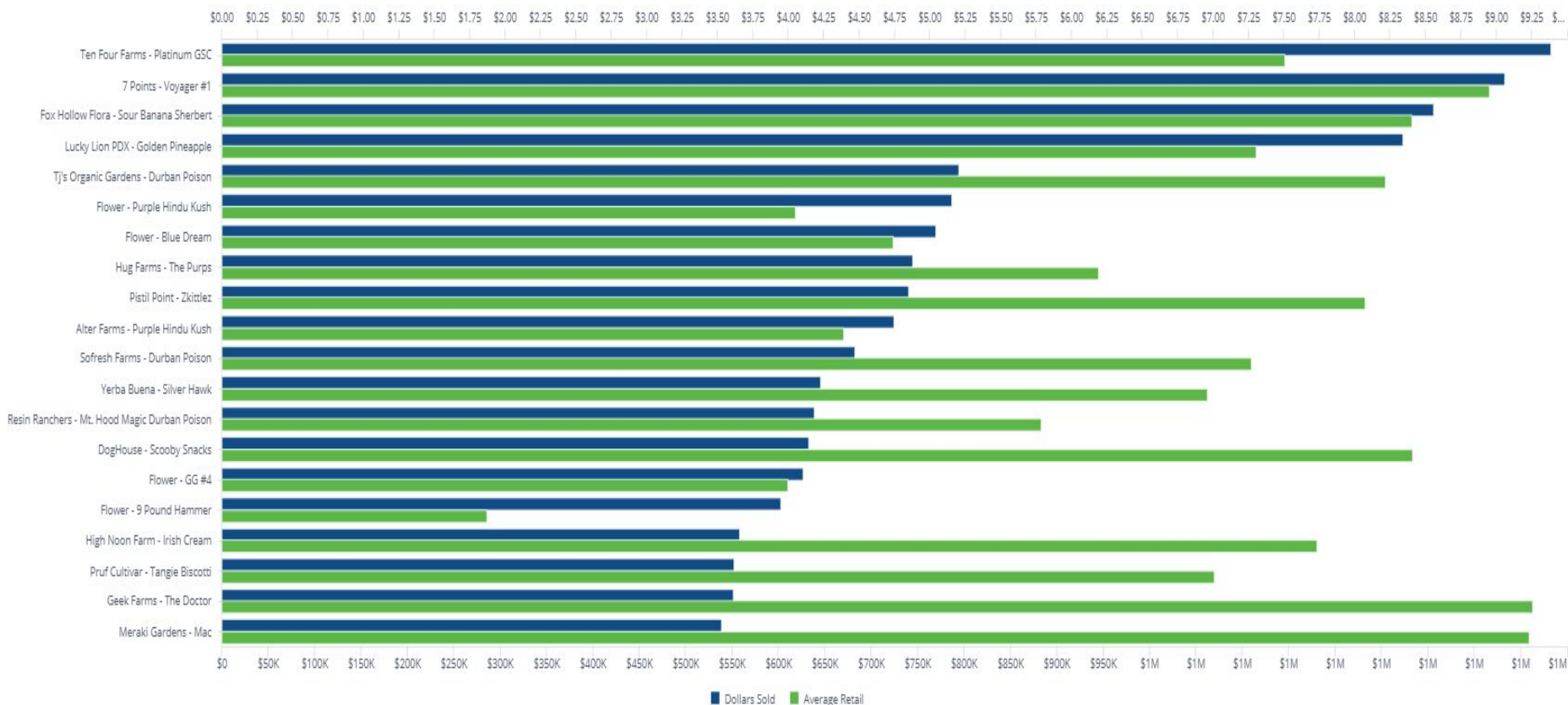


# 2018 Top Brands

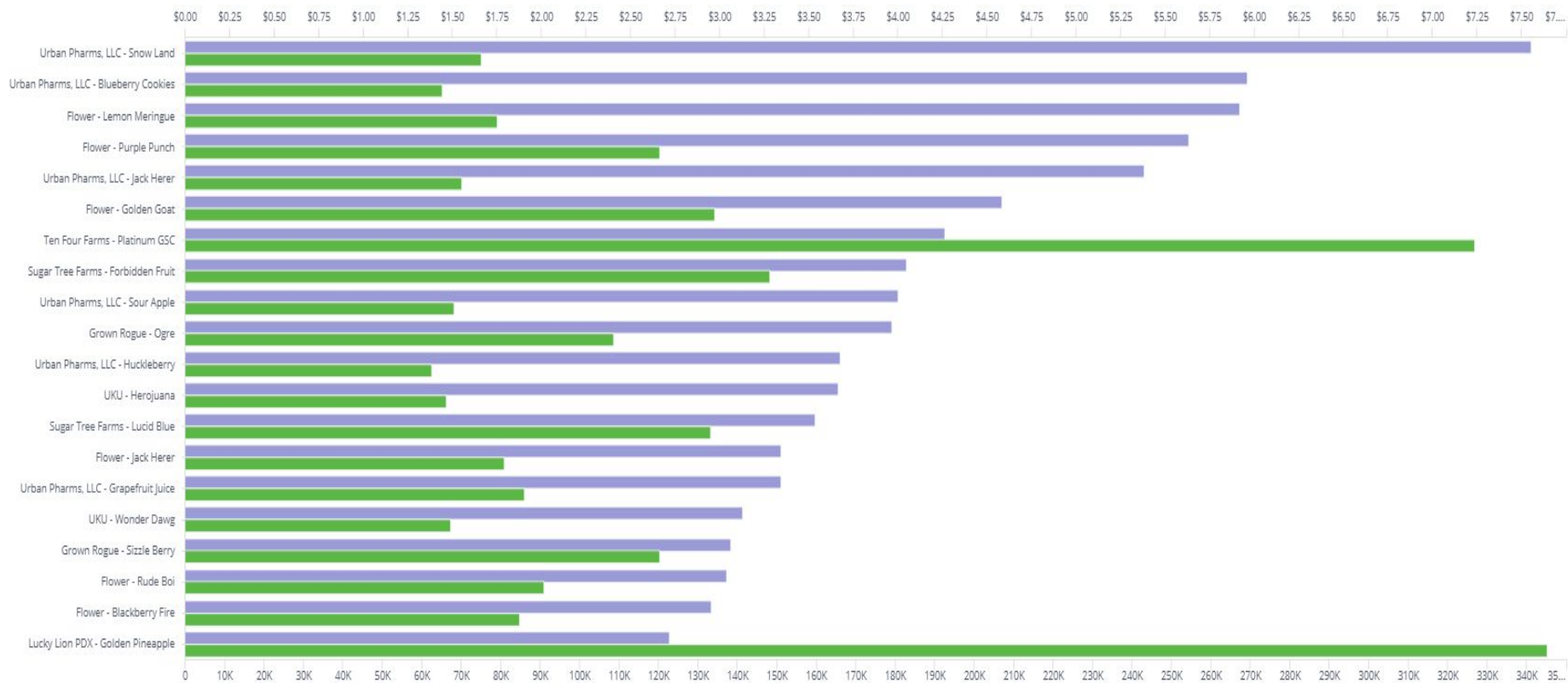
Dollars Sales by Month of Top 10 Brands



# 2018 top brands trend



- 2018 top flower sold and avg retail



- 2019 Top flower units sold



Dollars Sold

Dollars Sold  
**\$177.89M**

Units/Grams Sold **47.35M**

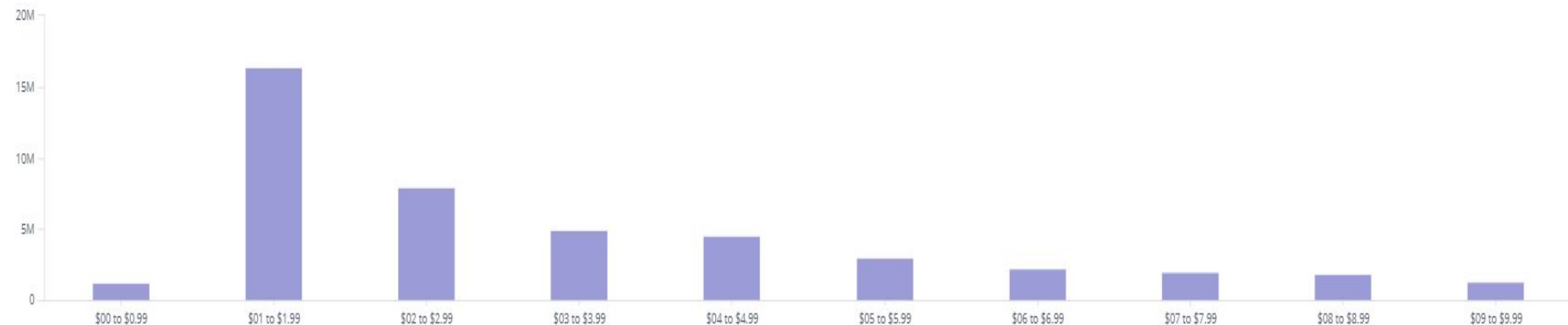
Average Retail

Average Retail Price Per Gram  
**\$3.76**

Number of Flower Brands

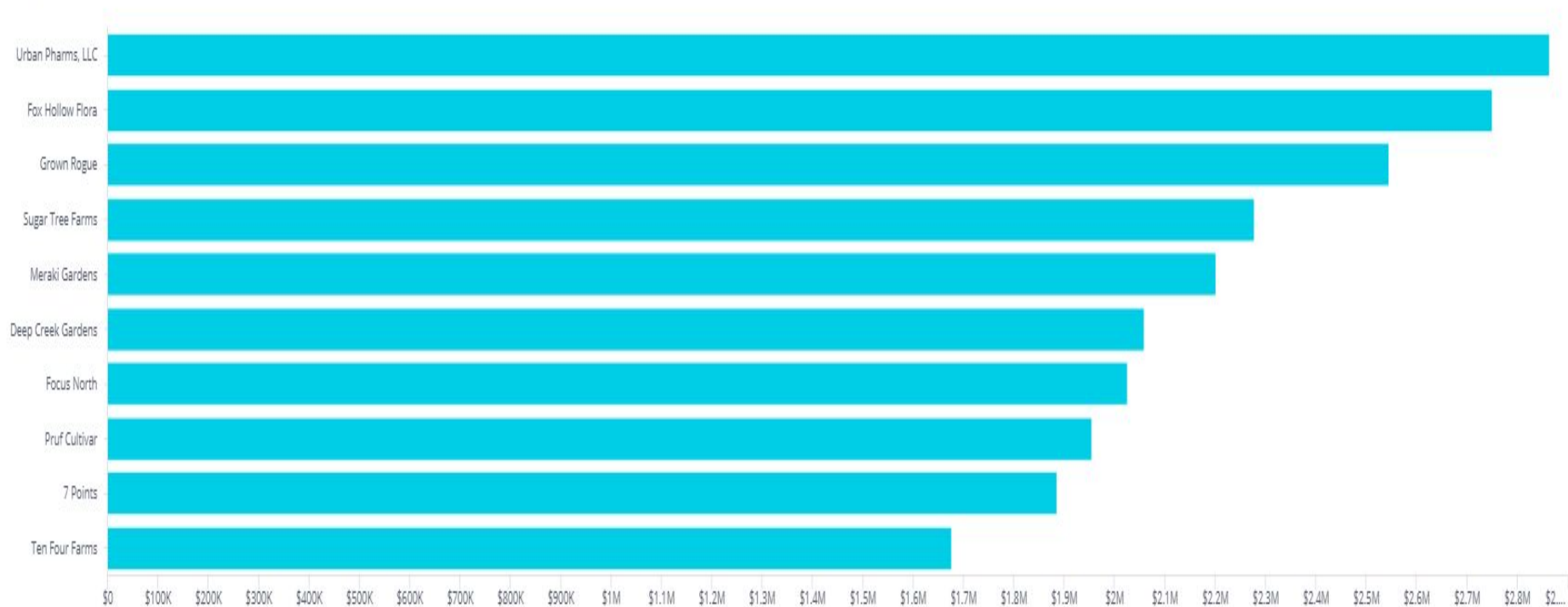
Number of Brands  
**324**

Grams Sold by Price Point (Top 10 \$1 Bands)



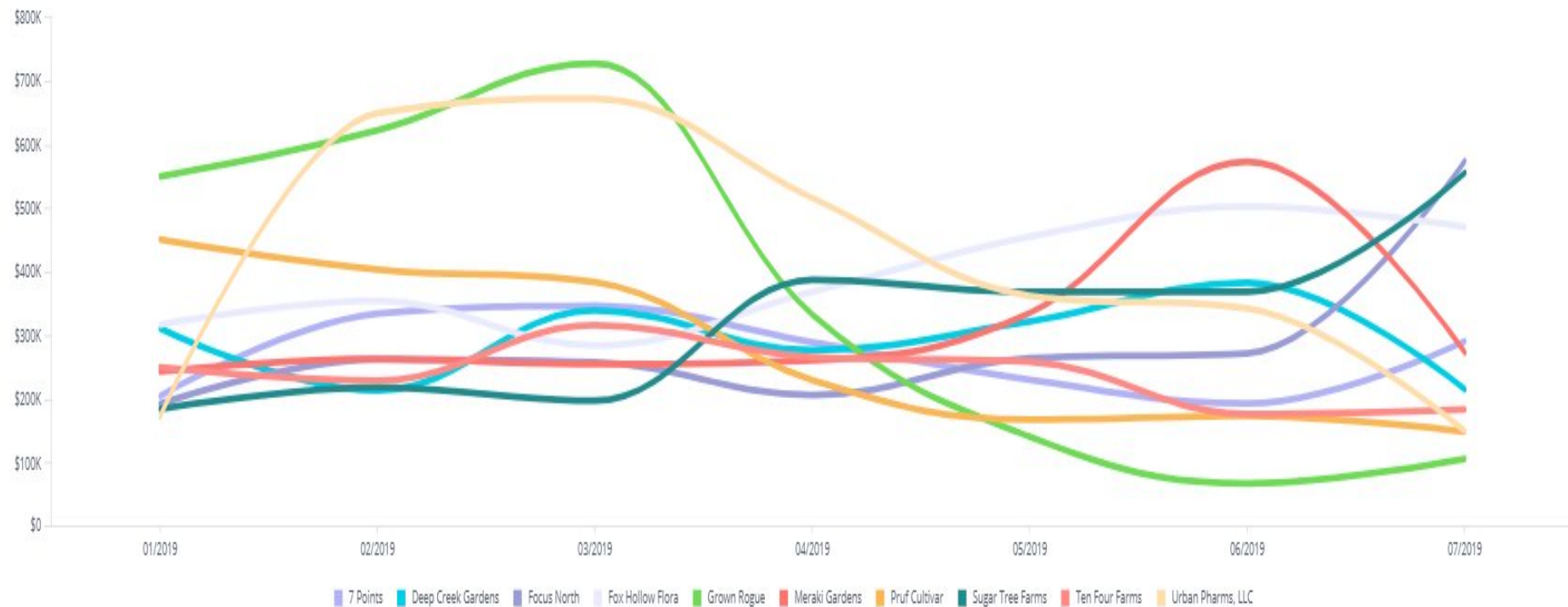
# 2019 Market Overall

Category Mix by Dollars Sold

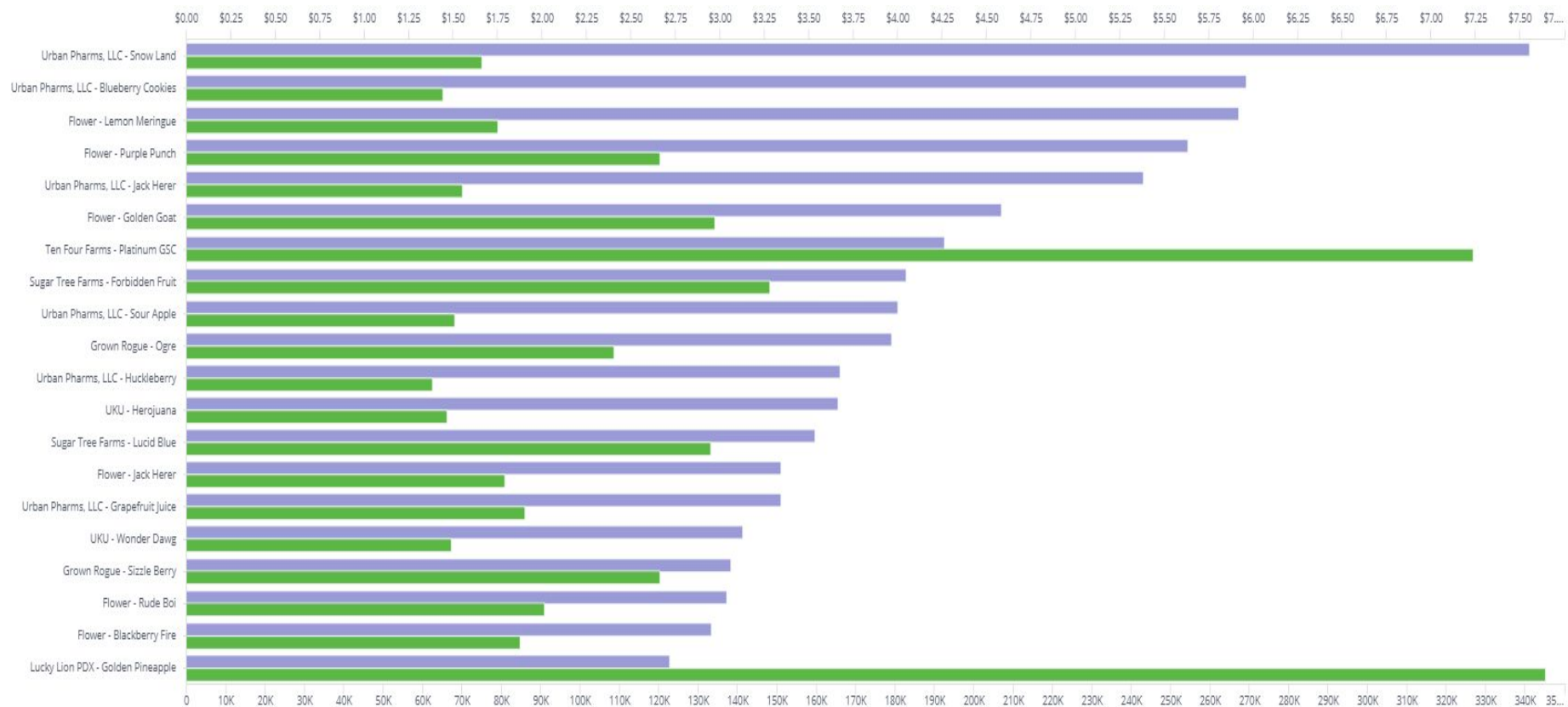


# 2019 top flower brands

Dollars Sales by Month of Top 10 Brands



2019 top flower brand graph



2019 top flower sold in \$ amt's and avg retail price

# Notable Info

- Many brands that Oregonians have grown to recognize over the years have experienced difficulties, consolidation has occurred as well. Brand representation from 2 years ago or even now are very much different.
  - Strains that are grown as well
- Flower is about 41% of the market at the time this was created.
  - Will likely experience an increase with distrust among vapes and a potential vape ban?