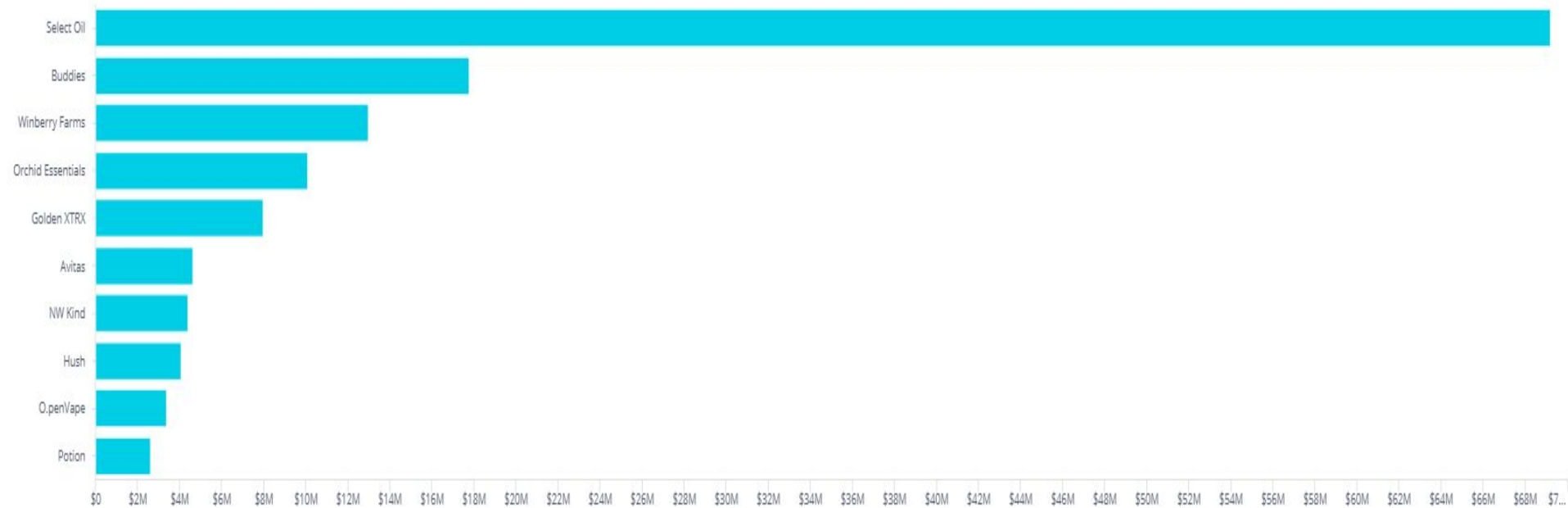


Vape Market

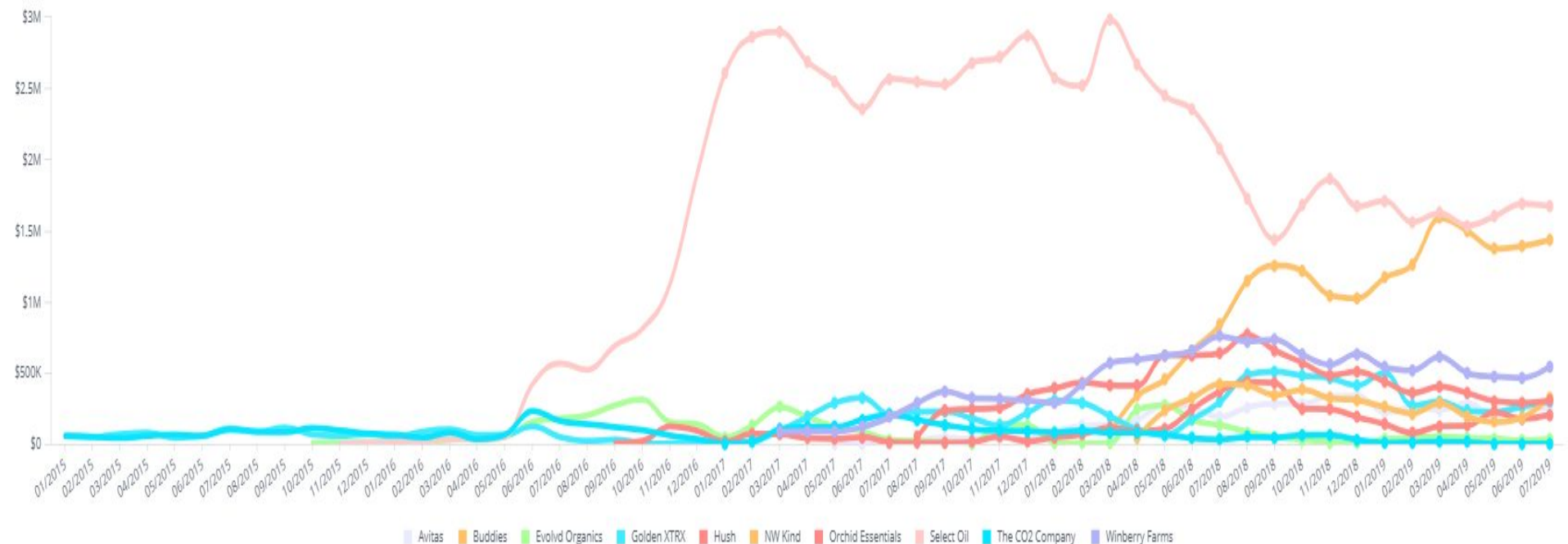


Top 10 Brands by Dollars Sold



DATA REPRESENTED IN THIS PRESENTATION are from January 1st 2017 to July 2019
Select saw success early, was approaching a million in sales going into 2017. Hit 1 million in sales with what was mostly Co2 in November 2016.

Dollars Sales by Month of Top 10 Brands



Note Selects decline and Buddies, Golden, NW Kind, Orchid and Hush's response!

Overall Vape Market in Oregon

Dollars Sold

Dollars Sold
\$354.58M
Units/Grams Sold **10.00M**

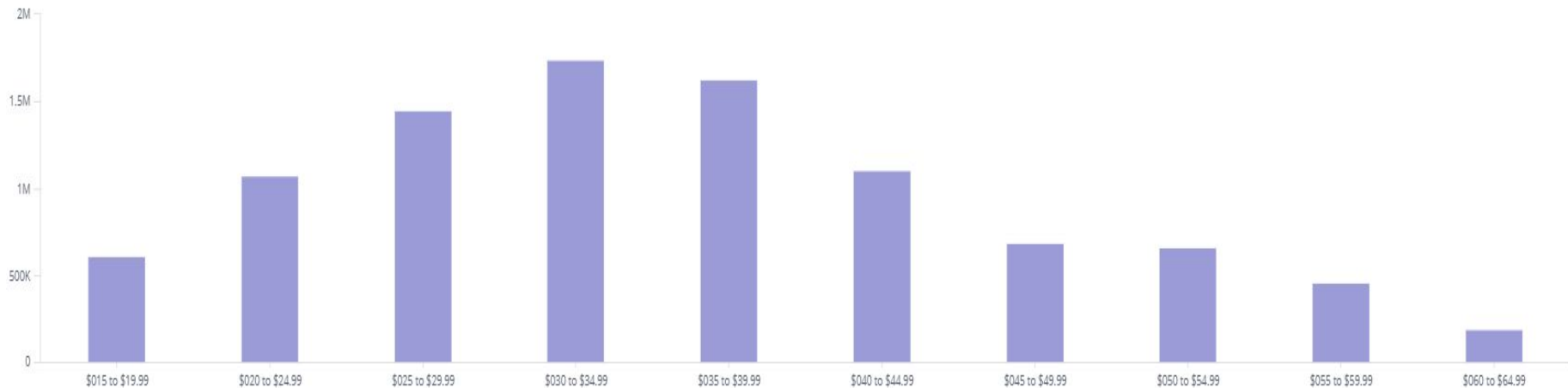
Average Retail

Average Retail Price Per Unit
\$35.45

Number of Vape Brands

Number of Brands
152

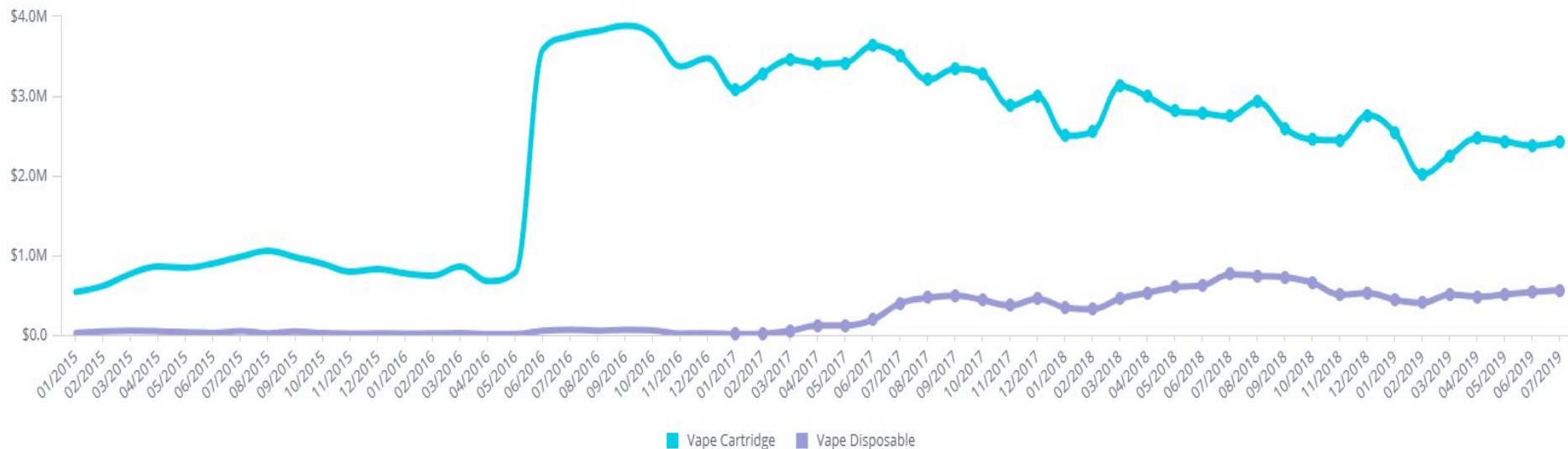
Units Sold by Price Point (\$5 Bands)



Overall vape market trend

52% of this markets purchase is .5g's, 36% 1g's.

Category Level 4 - Dollar Sales Trend



Distillate Market (half of the vape market)

Dollars Sold

Dollars Sold
\$186.11M
Units/Grams Sold **5.04M**

Average Retail

Average Retail Price Per Unit
\$36.96

Number of Vape Brands

Number of Brands
65

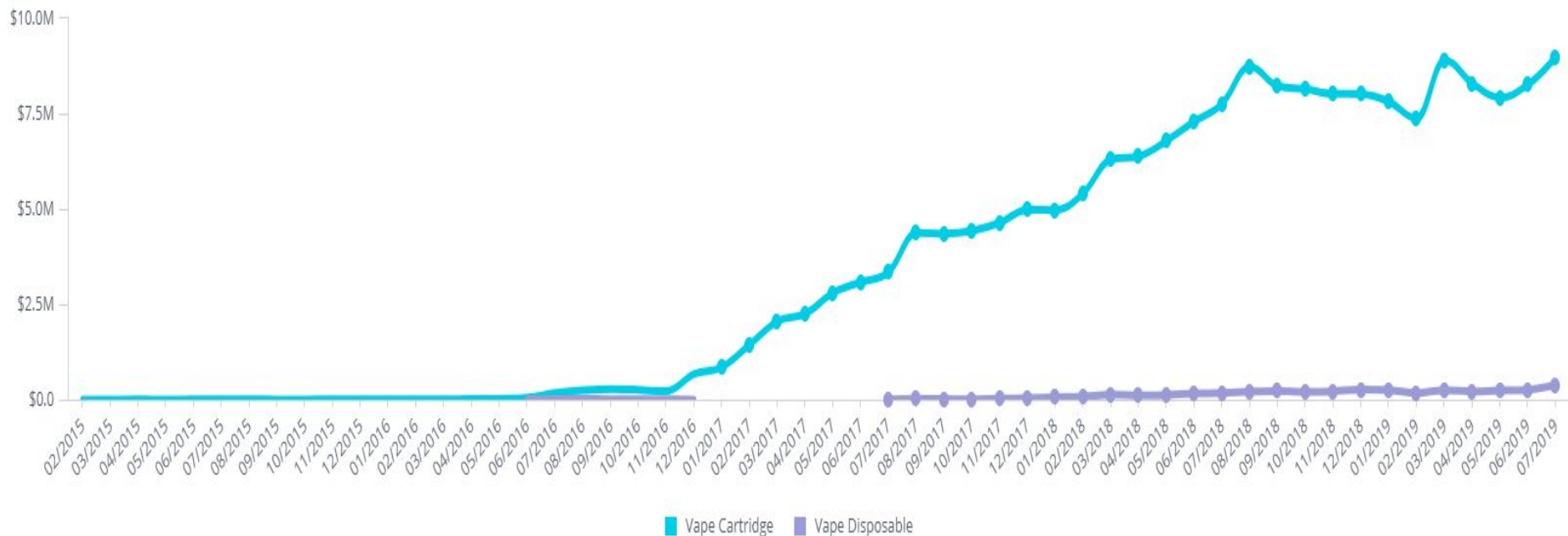
Units Sold by Price Point (\$5 Bands)



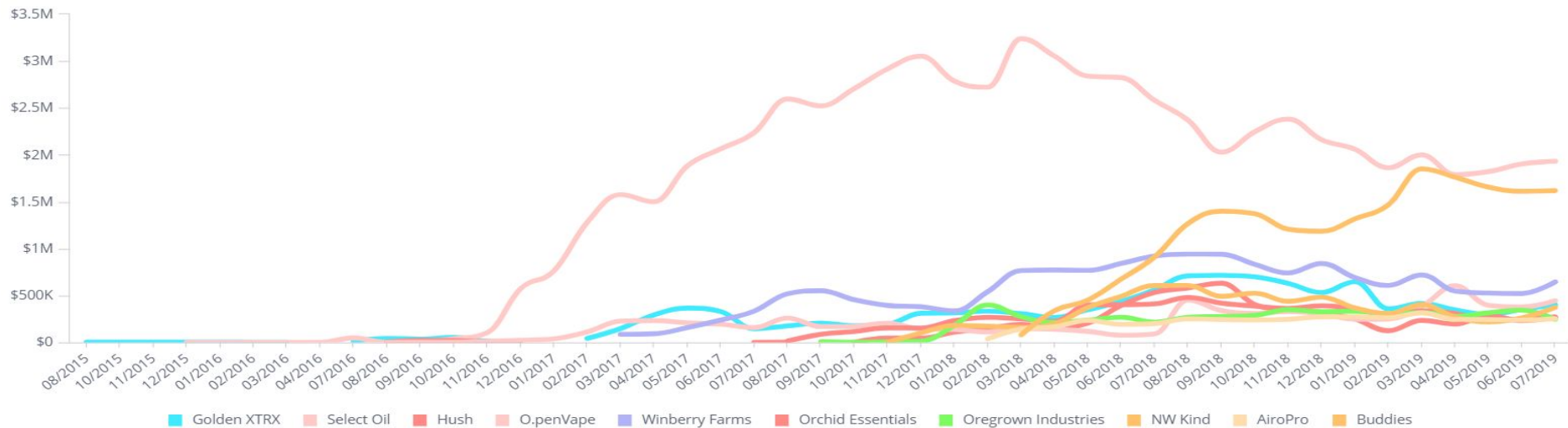
Distillate Sales Trend \$\$

61% of sales are 1g's. Distillate sales started to grow as the market for Co2 saw its decline. Although all cartridges are disposable, Oregon's disposable market isn't popular.

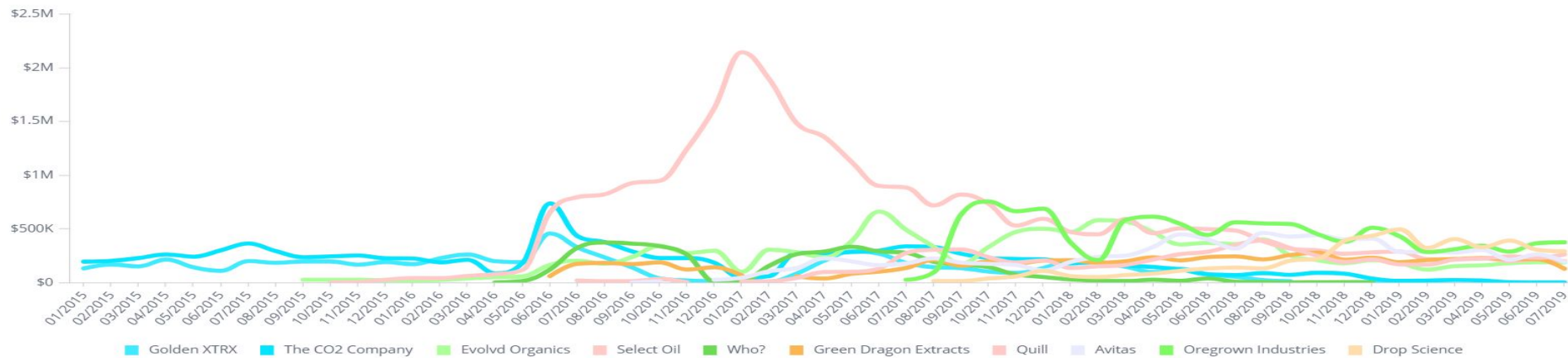
Category Level 4 - Dollar Sales Trend



Dollars Sales by Month of Top 10 Brands



Dollars Sales by Month of Top 10 Brands



Live Resin and Rosin Vape Market

- Most immature of the other vape markets
- Will likely become a more popular 1g market than .5g eventually? Although it's possible that what keeps the .5g's more popular are its pricing.

Dollars Sold

Average Retail

Number of Vape Brands

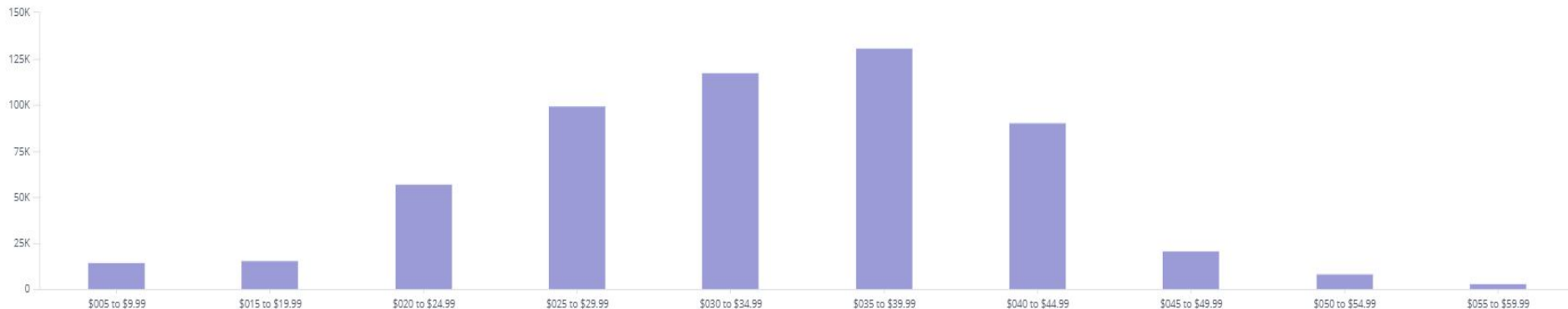
Dollars Sold
\$18.76M

Units/Grams Sold **564,968.90**

Average Retail Price Per Unit
\$33.20

Number of Brands
26

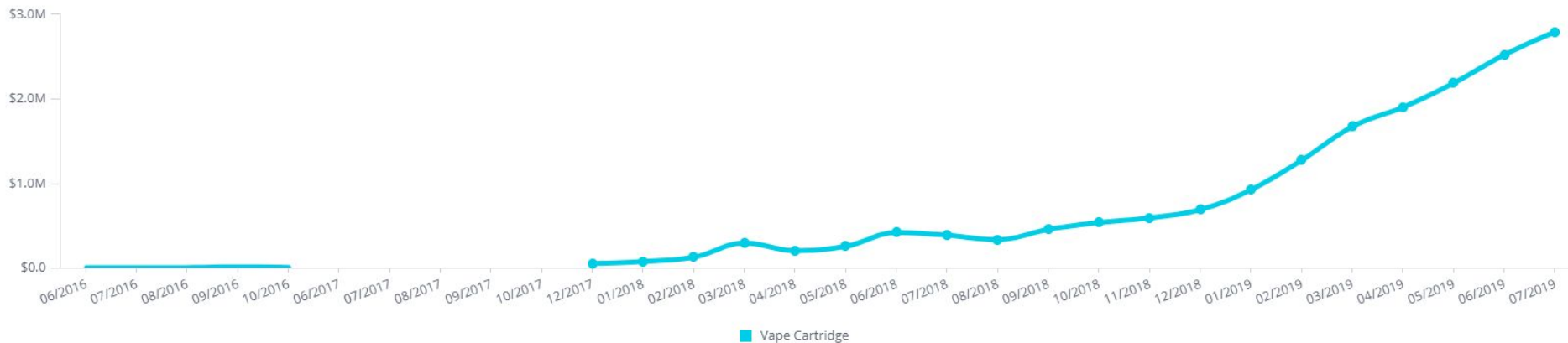
Units Sold by Price Point (\$5 Bands)



Live resin and Rosin Vape Market Trend

- 75% of items sold are .5g's
- Lower viscosity oils have a higher fail rate.

Category Level 4 - Dollar Sales Trend



“Other Market” Co2, RSO, etc

Dollars Sold

Dollars Sold
\$101.81M
Units/Grams Sold **3.06M**

Average Retail

Average Retail Price Per Unit
\$33.30

Number of Vape Brands

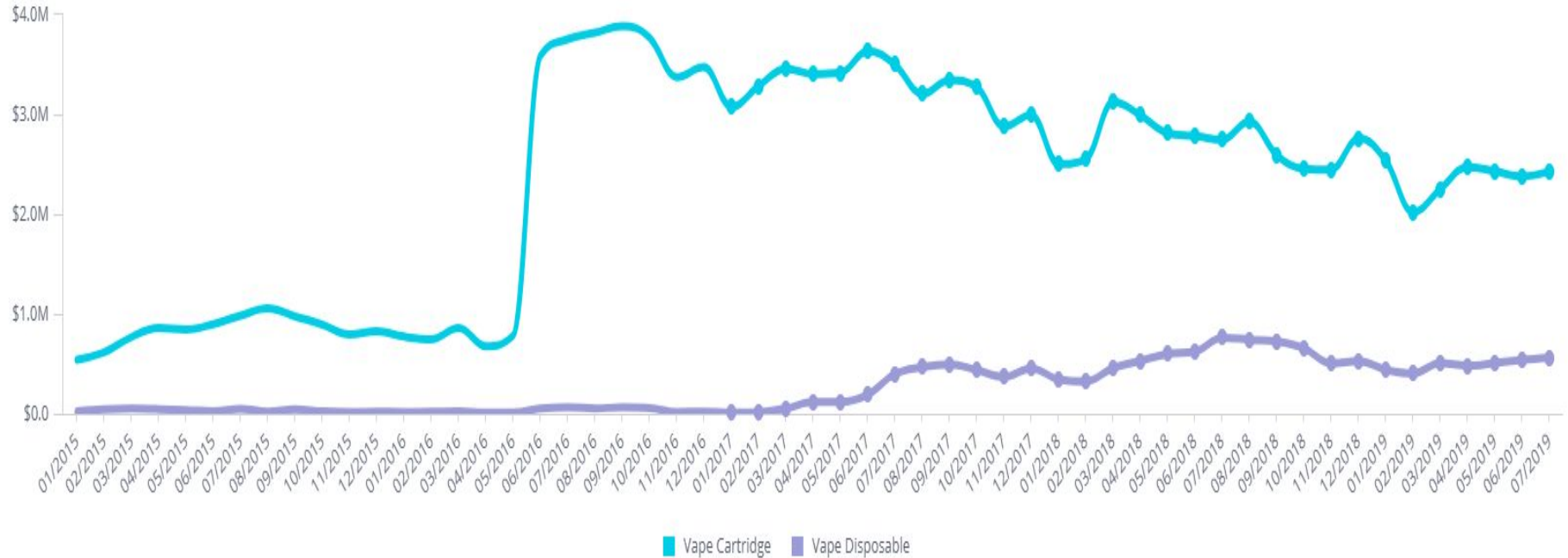
Number of Brands
100

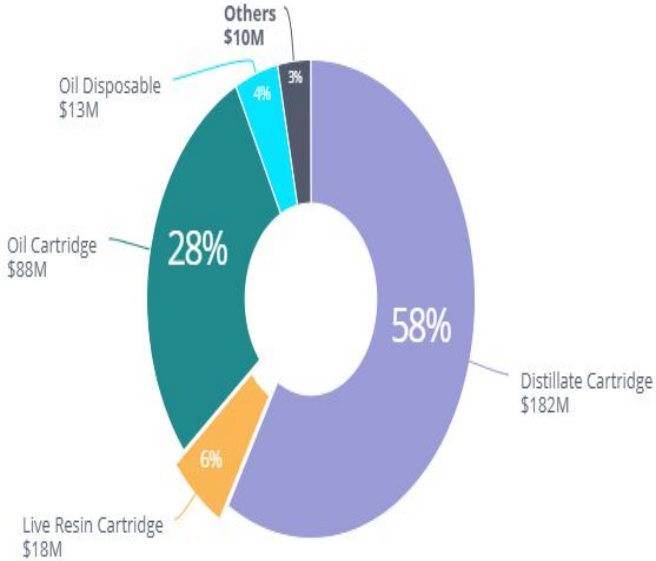
Units Sold by Price Point (\$5 Bands)



“Other oil market trend”

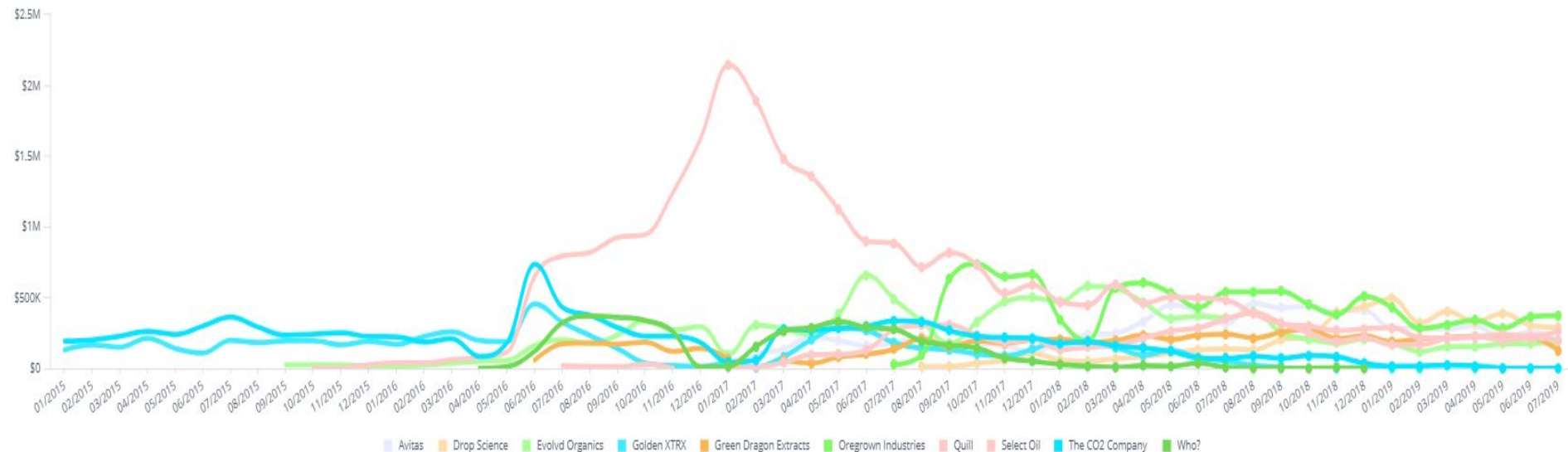
Category Level 4 - Dollar Sales Trend

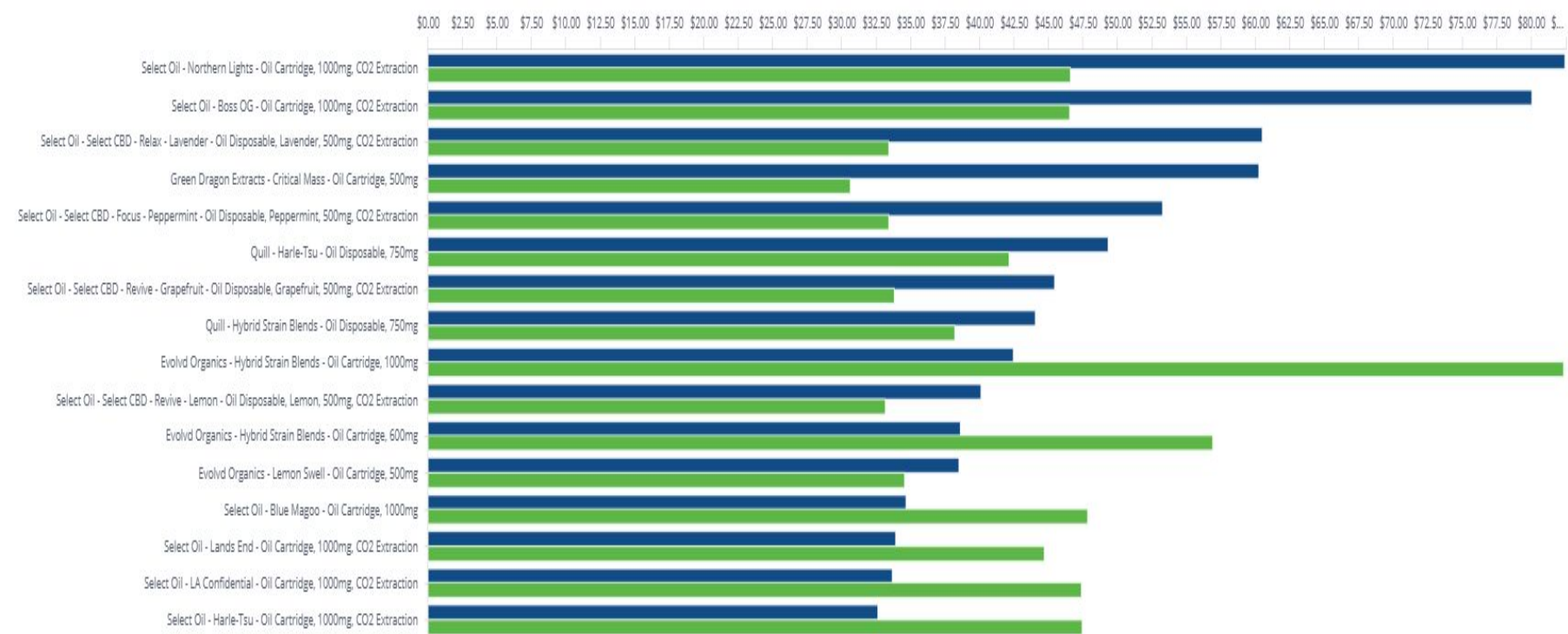




Top 10 brands for “other” category

- Co2's market seems to have "bottomed out", Select had a seamless transition from Co2 to distillate. Buddies will be in the same trajectory with going from distillate to live resin.
- Regardless of Co2 or distillate Select has had a popular base seemingly?

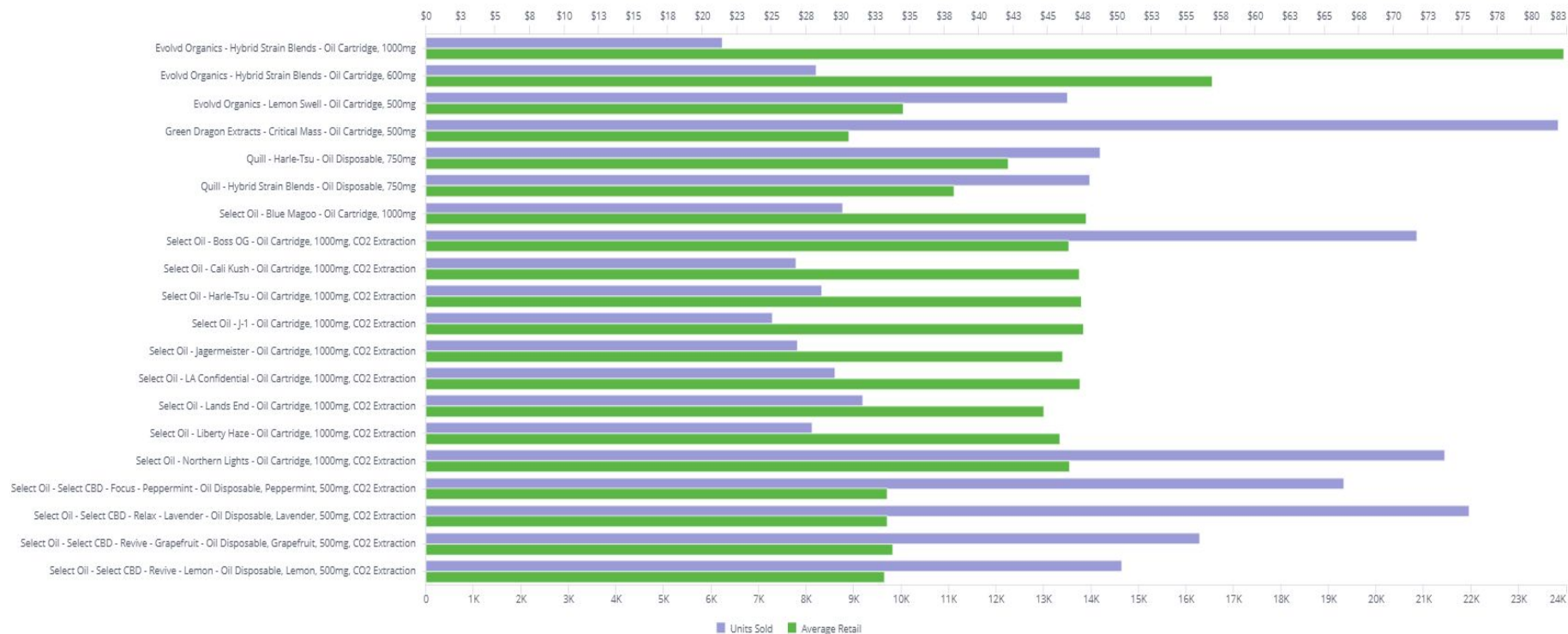




- Arranged by dollars sold followed by units.
 - Blue bar is units sold, green is average retail

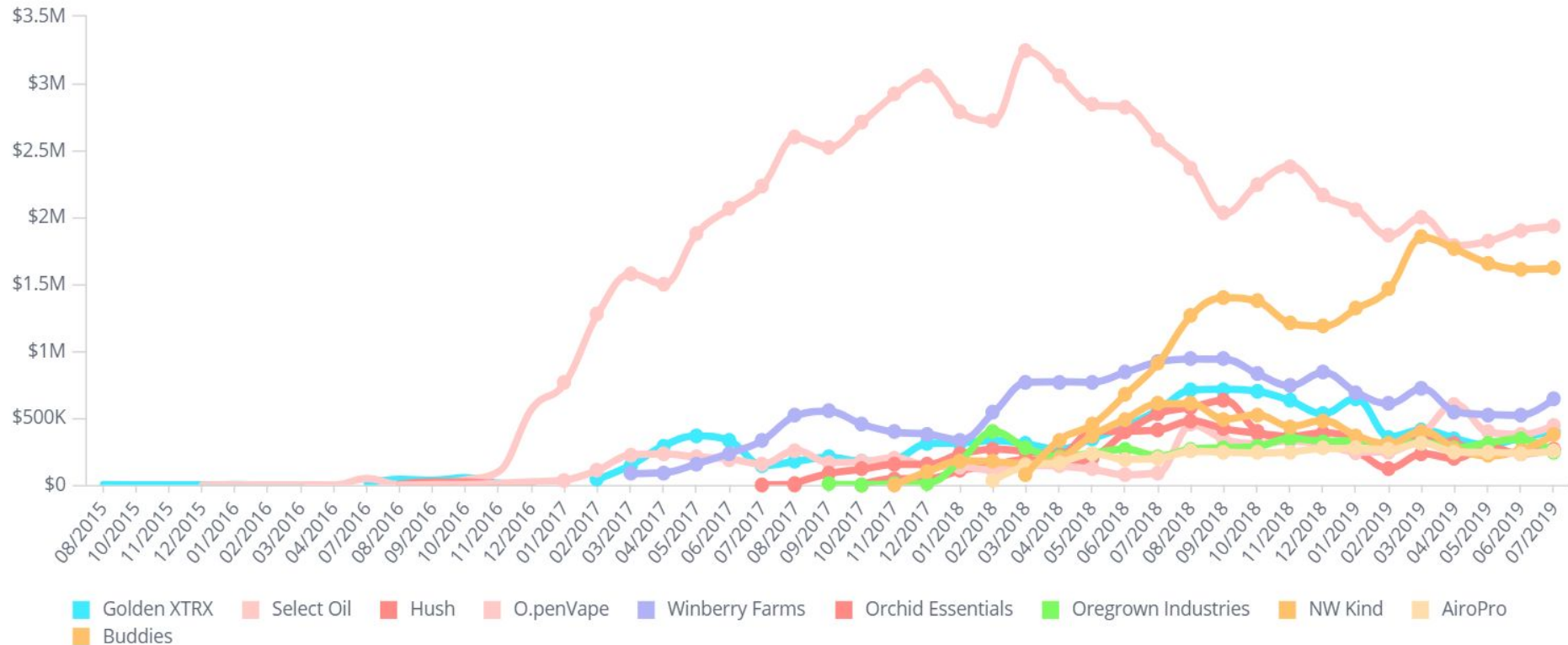
- Blue bar = units sold Green bar = avg retail

Top 20 Items by Units Sold



Distillate graph

Dollars Sales by Month of Top 10 Brands



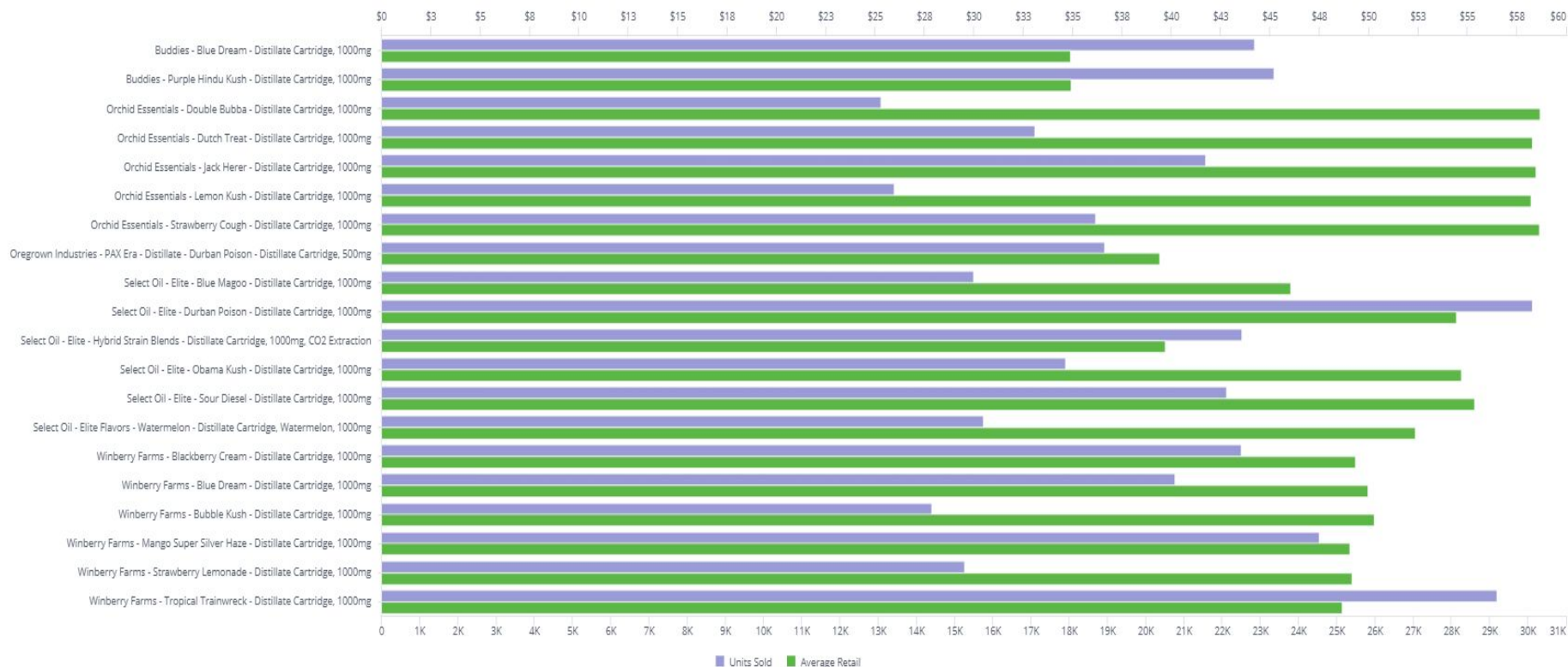
- 2017 was the year of distillate, the vape market although growing seemingly didn't like Co2 as much as distillate as can be seen by overall vape sales between 2016 and 2017.

Top 20 Items by Dollars Sold

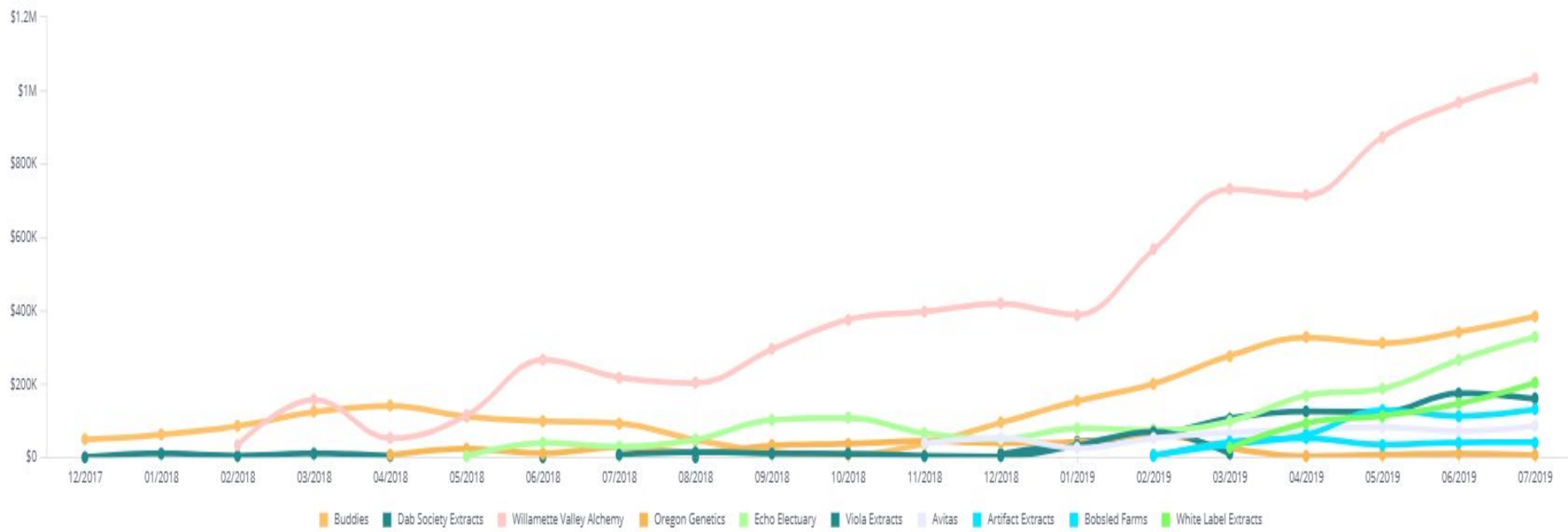


Most popular distillate units sold

Top 20 Items by Units Sold



Dollars Sales by Month of Top 10 Brands



Live Resin top 10 best sellers

Has higher .5g's sold due to higher price point?

Live Resin products top 20 by dollars sold

Top 20 Items by Dollars Sold

