



FROM DATA TO DECISIONS

Turning insight into real business impact

NuProject Portland Cohort | April 2026

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303-317-3901

Today's presentation is designed to strengthen how you think about—and apply—data in your business.

- Where to start
- The gaps most businesses don't see
- How small changes drive real growth
- What this looks like in practice
- Q&A

Where to Start with Data

- Data removes bias and drives insight, planning, and action.
- Use data to set, track, and refine your goals and metrics.
- Data will often raise more questions than it answers—and that’s a good thing.
- Start scrappy. That’s part of the process.
- Just know: your data needs—and appetite—will evolve as your business grows.

Where Businesses Get Stuck

Different Roles, Same Challenge

Retailers: What should I carry? What's not moving? How does my pricing compare to local dispensaries?

Brands: Why are competitors outperforming me? How do I increase my market share?

Startups: What does "good" actually look like in my market?

Ancillary: How do I prove value to clients?

Common thread:

Limited visibility beyond your own data

The Gap

Your Data \neq The Full Picture

- Internal data shows *what happened*
- **It doesn't show:**
 - What you're missing
 - Where competitors are winning
 - How your market is shifting

Result:

Decisions are often directionally right—but incomplete

The Shift

From Reactive → Strategic

Reactive:

- Reordering based on last week
- Chasing competitors without a clear understanding of what's driving their success
- Gut feel decisions
- Limited context

Strategic:

- Benchmarking vs. local market
- Identifying assortment gaps
- Pricing with intention
- Identifying the levers that move your rank and grow revenue

The Opportunity

Closing Gaps = Big Movement

- Revenue gaps between competitors are often **single digit (%)**
- **Availability** alone can be the difference between moving up—or staying stuck
 - Retailers: How does letting a top selling product or brand fall out-of-stock affect your daily sales?
 - Brands: How large is your distribution footprint and what are you doing to penetrate new stores?
 - Ancillary: Are you building solutions that help clients stay in stock and expand their reach?

Implication:

Even modest improvements in availability or execution can materially impact rank and revenue

What High-Performing Teams Do

Winning Teams Don't Guess

- Benchmark performance vs. local market and competitors
- Use pricing strategically to influence performance
- **Optimize:**
 - **Retailers:** assortment and shelf space
 - **Brands:** distribution and product mix
 - **Ancillary:** align your services or products directly to measurable market performance
- Focus on the changes that will drive the greatest impact



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BDSA Solutions

Bringing It to Life

Visibility Beyond Your Own Data

Introducing: **BDSA**

- Market-level insights
- Competitive benchmarking
- Actionable data across categories, brands, and pricing

Purpose:

Turn insight into decisions—not just information

Use Case 1: Opening a Store or Optimizing an Existing Location

Setting Up for Success

- What categories drive the most revenue locally?
- Which brands actually move in your market?
- Where are the pricing sweet spots?

Outcome:

Stronger assortment + fewer costly missteps

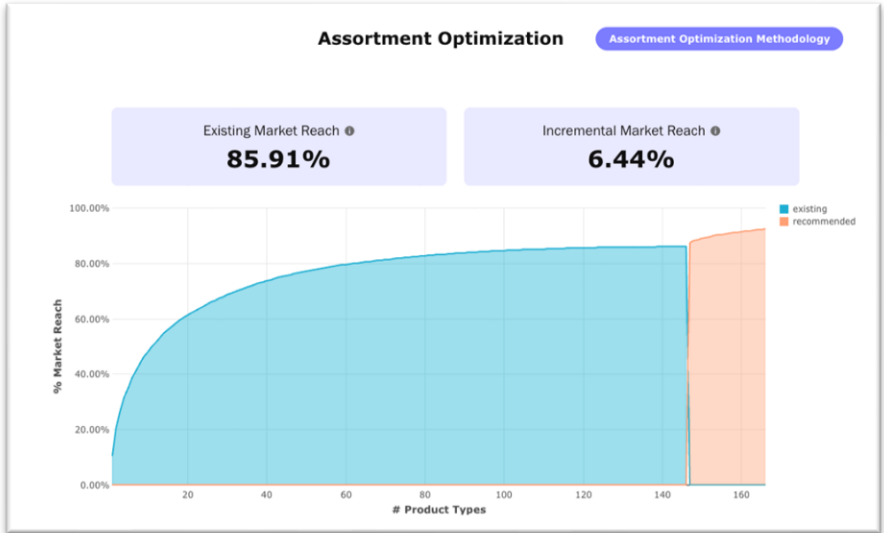
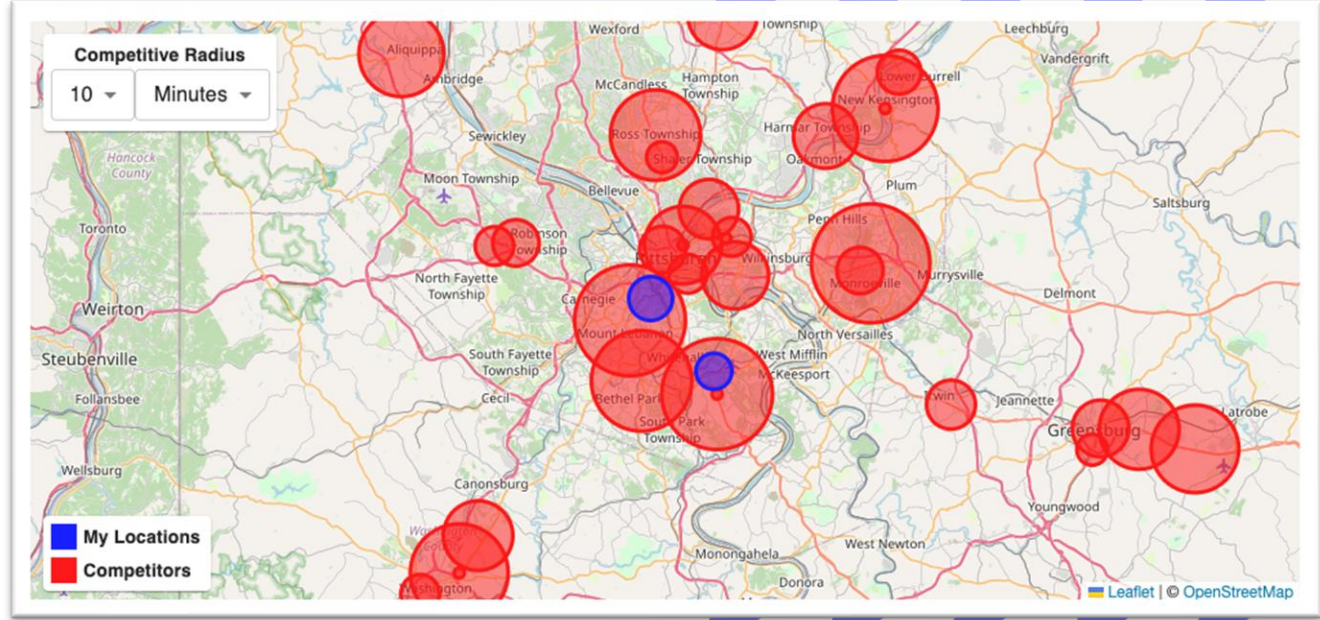


DISPENSARY PLAYBOOK

The competitive edge for Dispensaries



- My Store Benchmark
- Detailed Basket Analytics
- Assortment Optimizer
- Pricing Navigator
- Discount Tracker
- Report Builder



Retailer Top Brands

Use the above toggle to break by location or look at top brands across all locations.

Brand/Product	Total Retail Sales	Total Pack Units	Total EQ Unit
Eleven	\$49.1k	1.86k	8.6
Good Green	\$38.7k	971.22	7.57
Rythm	\$37.0k	932.99	3.08
The Lab	\$36.8k	1.47k	1.28
Savvy	\$35.5k	1.01k	5.4
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SeChE	\$22.4k	551.02	4.8
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Grassroots Cannabis	\$20.1k	506.42	36.44
Double Bear Premium...	\$19.9k	617.38	22.67
Organic Remedies	\$19.5k	572.39	141.36

ROM Top Brands

Brands not available in the selected store(s) are highlighted in green.

Brand/Product	Total Retail Sales	Total Pack Units	Total EQ Unit
Strane	\$451k	13.87k	31.5
Eleven	\$316k	11.05k	56.19
Cresco Cannabis	\$252k	7.69k	14.51
High Supply	\$227k	6.82k	35.99
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Double Bear Premium...	\$70.2k	1.75k	54.46
The Lab	\$67.8k	2.64k	2.19
Good News Cannabis	\$51.2k	2.12k	479.43
&Shine	\$48.0k	1.62k	207.67

Use Case 2: Growing a Brand

Closing the Gap

- Where do you rank today – and how close are you to the next position?
- Is the gap driven by:
 - Distribution, pricing, or product mix?
- Are you priced to compete—or leaving room on the table?
- Which SKUs are driving velocity vs. underperforming?
- Where are the highest-impact opportunities to improve performance?

Reality:

Most brands are closer than they think—they just can't see it

Retail Sales Tracking

- Market Overview
- Category Performance
- Top Brands and Products
- Price Tiers
- Innovation & Seasonality
- Report Builder

Avg Original List Price

\$8.25

↓ 0.0% vs Market Average

Avg Purchase Price

\$6.20

↑ 0.0% vs Market Average

% of Sales on Disc...

7.11%

0.00% vs Market

Lift in Sales by Discount

Discount	Sales Lift
10.00%	-6.47%
15.00%	-20.93%
20.00%	-37.89%
25.00%	-42.36%
30.00%	-28.54%
35.00%	-16.26%
40.00%	-20.79%
45.00%	-80.02%
50.00%	-21.01%
55.00%	4.07%
60.00%	-38.17%
65.00%	-87.27%
70.00%	-65.80%
75.00%	-67.45%
80.00%	-75.87%
85.00%	-80.66%

States (1) California

Categories Vape Disposable

Exclude My Stores True

Include Delivery Yes No

Date Last 13 weeks in...

Pack Size 0.5g

Brand Brand H...

Competitive Set

No data

Brand Ranks

Top N 10

Top 10 Selling Brands

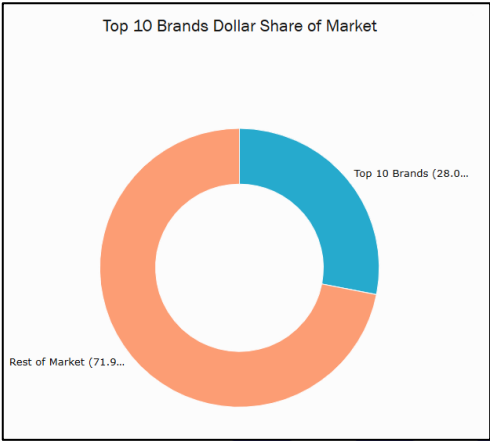
Excluding generic brands

Stizly	\$3,660M
Raw Garden	
710 Labs	
BLOOM	
Jelly Extracts	
Jester	
Himalaya	
Turn	
Punch	
Cannabiotix	

10 Highest Velocity Brands

Excluding generic brands

Quickies	\$337
Stizly	\$172
Big Red Farms	\$155
710 Labs	\$150
Halfpipe Cannabis	\$135
Shasta	\$133
Hella Dank	\$133
Nuvata	\$120
Kali Gold	\$119
Real Deal Resin	\$111



Sales Enablement

The Smarter Way to Maximize Your Sales

Sales Enablement

- Distribution Assistant
- Inventory Stock-out Reports & Alerts
- Expansion Opportunities
- Discount Tracker
- Dispensary Level Brand Rankings

Stock Out

● = 50+% of products are in stock, ● = < 50% of products are in stock, ● = All products are out of stock

Inventory	Date						
	Nov 28	Nov 29	Nov 30	Dec 01	Dec 02	Dec 03	
365 Recreational Cannabis Dispensary (San Francisco)	In Stock	In Stock	In Stock	In Stock	Partially Stocked	Partially Stocked	Out
Airfield Supply Co. (Redwood City)	In Stock	In Stock	In Stock	In Stock	Partially Stocked	Partially Stocked	Parti
Alternatives East Dispensary (Santa Rosa)	In Stock	In Stock	In Stock	In Stock	In Stock	In Stock	Parti
Alternatives Health Collective (Santa Rosa)	In Stock	In Stock	In Stock	Partially Stocked	Partially Stocked	Partially Stocked	Parti
Authentic 415 (San Francisco)	In Stock	In Stock	Partially Stocked	Partially Stocked	Partially Stocked	Partially Stocked	Out
BASA SF (San Francisco)	In Stock	In Stock	In Stock	In Stock	In Stock	In Stock	Partially Stocked
BLOOMERANG	In Stock	In Stock	In Stock	In Stock	Partially Stocked	Partially Stocked	Partially Stocked
Bay Care Delivery	In Stock	In Stock	Out Of Stock	Out Of Stock	Out Of Stock	Out Of Stock	Out Of Stock
Berkeley Patients Group (Berkeley)	In Stock	In Stock	In Stock	In Stock	In Stock	Partially Stocked	Partially Stocked
Berkeley Patients Group Delivery - Martinez/...	In Stock	In Stock	In Stock	In Stock	Out Of Stock	Out Of Stock	Out Of Stock
Better Health Group - Marijuana Dispensary ...	In Stock	Partially Stocked	Partially Stocked	Partially Stocked	Partially Stocked	Partially Stocked	Out Of Stock
Bloomerang (San Francisco)	In Stock	In Stock	In Stock	In Stock	Partially Stocked	Partially Stocked	Partially Stocked
Bud's Pub & Grill (Dixon)	In Stock	In Stock	In Stock	In Stock	In Stock	Partially Stocked	Out Of Stock
Butterfingers Co.	In Stock	In Stock	In Stock	Out Of Stock	Out Of Stock	Out Of Stock	Out Of Stock
Butterfingers Delivery	In Stock	In Stock	In Stock	Out Of Stock	Out Of Stock	Out Of Stock	Out Of Stock
Buzz Delivery - Fremont / Milpitas / Union City	In Stock	In Stock	In Stock	In Stock	In Stock	Partially Stocked	Partially Stocked

Unavailable Locations
All Locations

Location
 Select values

Retailer Info
Competitive Brands
Competitive Products
Demographics

All Locations Detail

Location / Brand	Brand Rank	Most Common Original List Price	Most Common Post Discount List Price	Number of Products
Purple Star MD (San Francisco)		\$28.00	\$20.00	1173
Jeeter	1	\$28.00	\$28.00	119
Stilzy	2	\$10.50	\$10.50	120
Wyld	3	\$16.50	\$16.50	13
Turtle Pie Company	4	\$80.00	\$80.00	8
Cake	5	\$19.00	\$19.00	40
710 Labs	6	\$60.00	\$60.00	46

Find Best Opportunities

Lost Sales

Use Case 3: Supporting the Industry

Turning Insight into Value (Ancillary)

- Marketing → align campaigns with category growth
- Product innovation → focus on high-velocity segments
- Services → tie strategy to real market performance

Outcome:

Clearer ROI + stronger client conversations

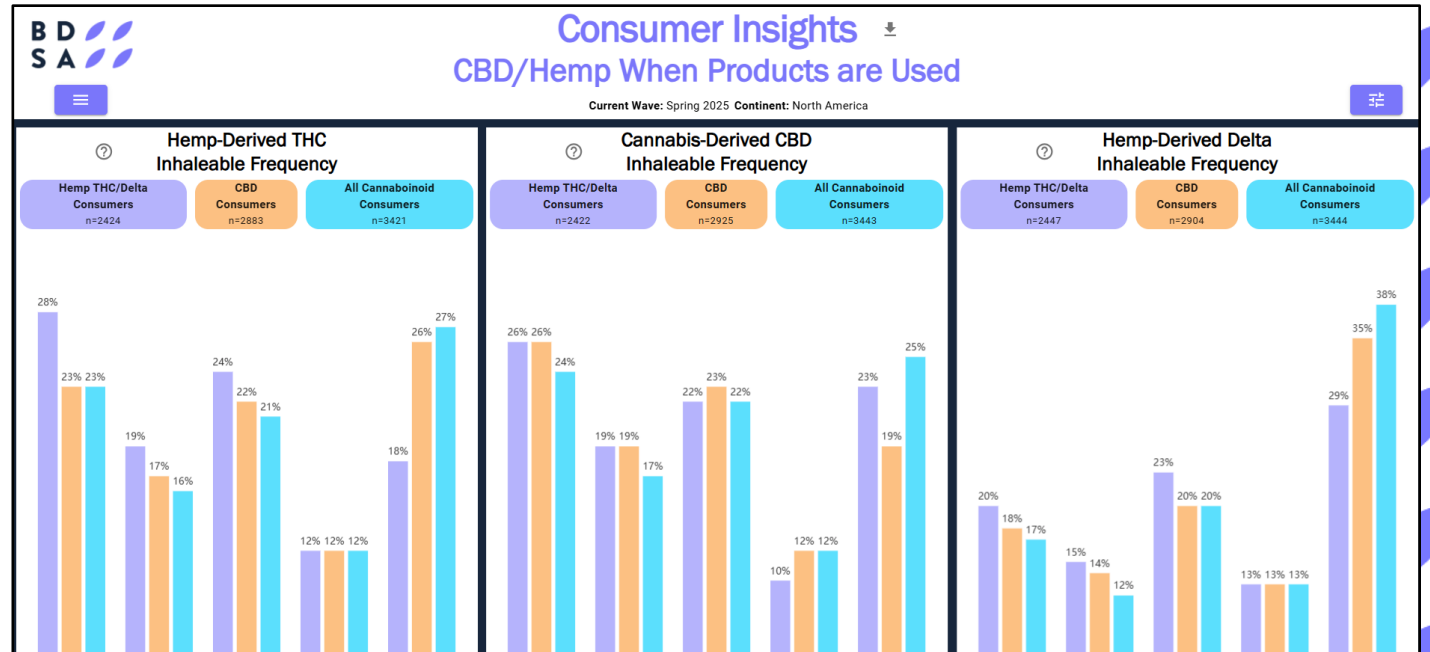
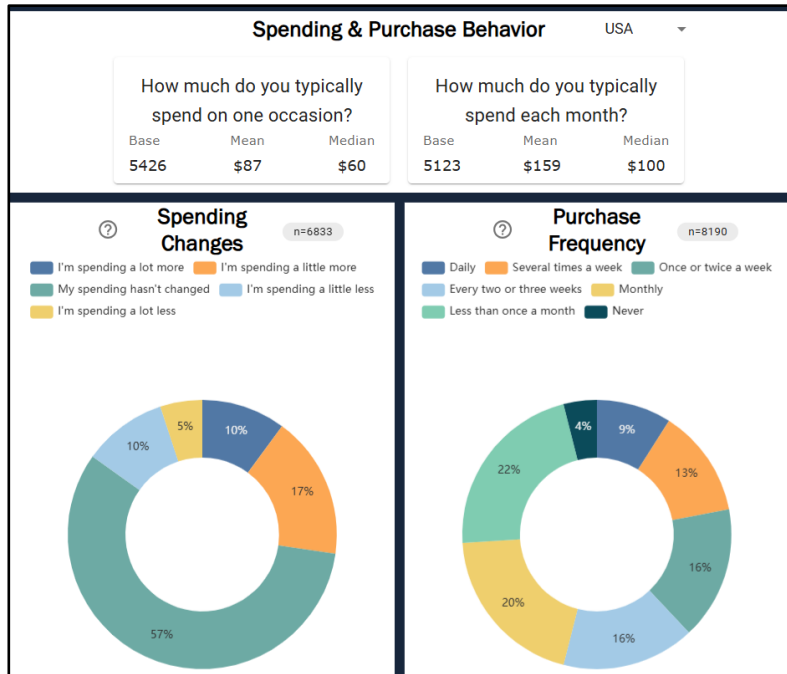
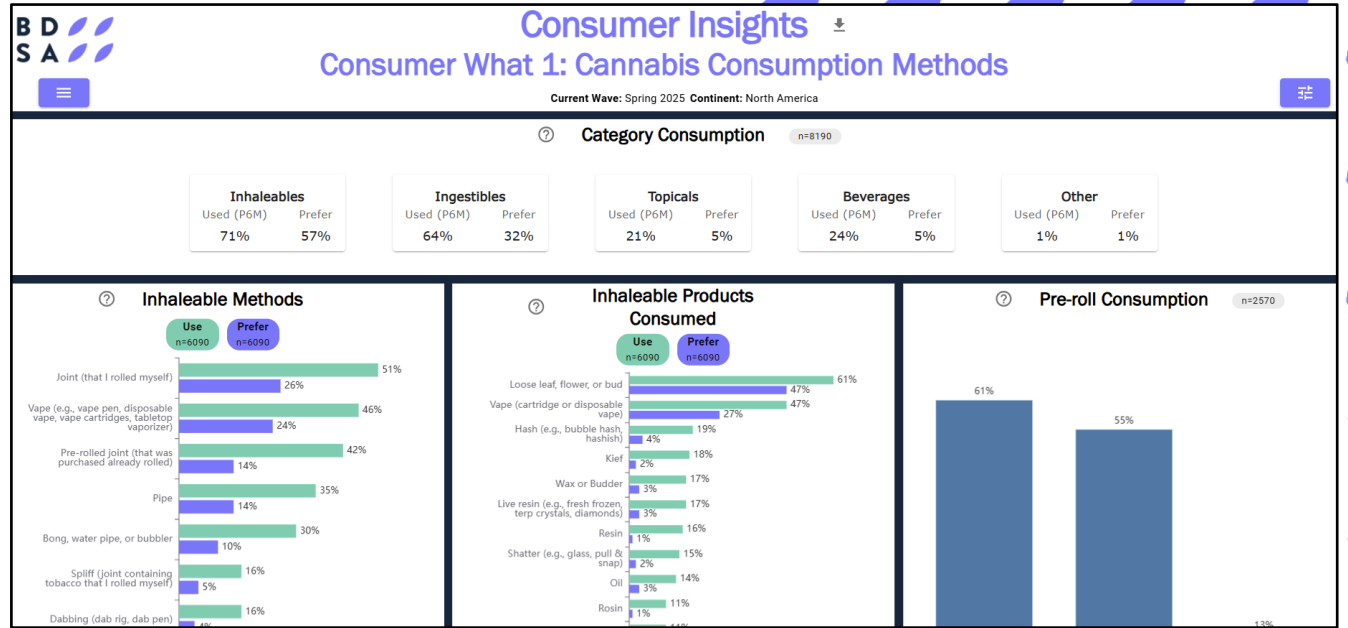


Consumer Insights

Data That Drives Cannabis Decisions.



- Consumer Profiles & Demographics
- Consumption Trends
- Shopping Behavior
- Hemp & CBD Insights
- Segment by Focus Category



Key Takeaways

What This Means for You

- Better decisions start with better visibility into your market
- What you can't see is often where the opportunity is
- Small adjustments can drive meaningful impact
- The earlier you act, the greater the advantage

Closing

Final Thought

- Performance isn't random—it's driven by a few key decisions
- Growth comes from focusing on what *actually* moves the needle
- If you're not benchmarking, you're guessing

Most of the opportunity isn't obvious – you must surface it.

The teams that do are the ones that win.



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Questions and Discussion



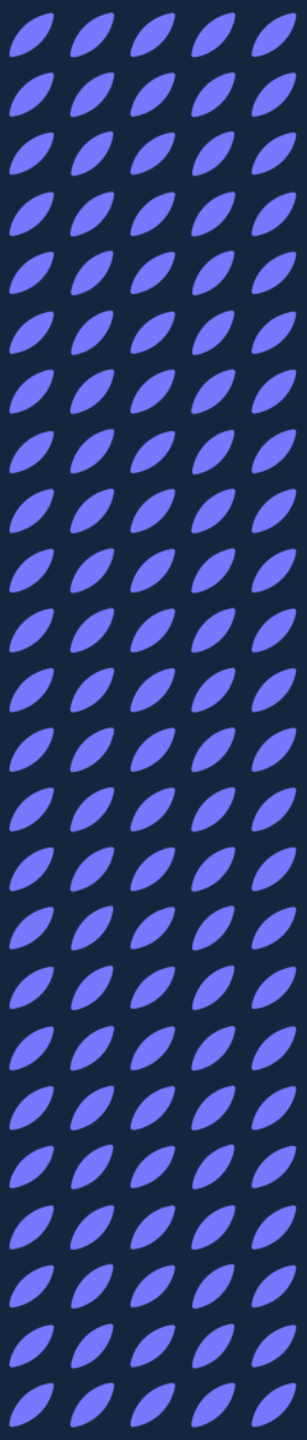
THANK YOU FOR JOINING!

Please contact me directly to schedule a live demo

Kelsey Hyde | Senior Account Executive

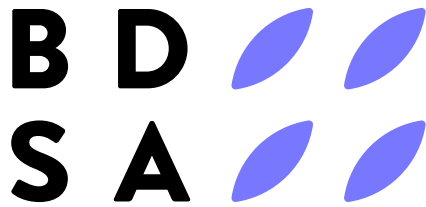
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Appendix



Driving Growth through Comprehensive Cannabis Market Intelligence

BDSA is the leading provider of cannabis market data and insights, offering an unmatched 360-degree view of the competitive landscape to drive growth and market success.

- **Local Product Pricing and Discounts**
- **Product Sales and Velocity**
- **Brand and Competitive Intelligence**
- **Availability and Stock-Out Tracking**
- **Shopper Insights**

The Data that Fuels Cannabis Businesses

BDSA is the most trusted source of cannabis market intelligence. We deliver the data, insights, and forecasting that dispensary operators, brands, and investors need to navigate a rapidly evolving industry with confidence.



Retail Sales Tracking

Know exactly what is selling where, when, and at what price point across 39 states, featuring daily, city-level analysis.



Sales Enablement

Identify sales opportunities, reduce stock-outs, and optimize pricing with real-time dispensary data. No manual tracking required.



Dispensary Playbook

Local competitive insights to benchmark your performance and market-informed recommendations to improve pricing, assortment, and promotions.



Market Forecasts

Gain a comprehensive understanding of market size and future opportunity across all states/provinces and at the category level.



Consumer Insights

Understand the evolving cannabis and hemp consumer (and non-consumer), including sizing, demographics, consumption patterns, and purchase drivers.



Professional Services

Leverage BDSA's team of expert analysts to hone your pricing strategy, track new markets and competing brands, build custom consumer segments, and much more.



Why BDSA Is the Right Partner

Actionable Market Intelligence



- ✓ Next-day reporting across all 39 markets
- ✓ Hyper-local, store-level insights
- ✓ Unmatched attribute breadth & depth
- ✓ Extensive CPG metrics for precise performance analysis
- ✓ Customizable reports and territories with automated delivery and alerts



Data Integrity & Accuracy

- ✓ Cleanest and most robust product catalog with weekly new products
- ✓ Rigorous validation and transparency across data updates and changes



Partnership & Adaptability

- ✓ Senior-level support to maximize the value of data across your org
- ✓ Dedicated development time for customized solutions
- ✓ CPG Expertise across leadership and product



Retail Sales Tracking



Sales Enablement



Dispensary Playbook



Market Forecasts



Consumer Insights



Professional Services



Client Voices: Our Impact Speaks Volumes



"It's critical for our business and brand to be experts in the pre-roll space, and we regularly provide valuable market and trend analysis to help support that position. But the insights we give our customers are only as good as the data we use to back them up. That's why we rely exclusively on BDSA as our data partner. We trust their numbers so that our customers will trust us!"
Jonathan McFarlane, VP Sales and Marketing



"The Sales Enablement tools allow for a great level of detail when it comes to seeing in which stores our products are carried and where we are in/out of stock, but also it helps to illustrate where they are most successful and how they rank against competitors. When prioritizing sales efforts, it is useful to understand where we have the most untapped potential, whether by store location or by region. BDSA helps us to do that quickly and with the level of detail we need."
Ry Prichard, Sr. Director of Product Marketing



"TerrAscend subscribed to BDSA's Sales Enablement solution as soon as it became available, and it has quickly become an essential tool in our data arsenal. We leverage the detailed information around inventory, distribution, velocity and price almost daily to refine our product assortment for our stores and our retail partners, pricing strategies, promotional events and our innovation pipeline. BDSA's products are best-in-class."
Allison Miller , VP, Strategy & Insights



"As a leading provider of cannabis in OH, Bloom uses BDSA to track our dispensaries' performance internally and compared to our competitors. BDSA has been invaluable in identifying opportunities to improve Bloom's pricing, optimize our stores' product mix, and meet our customers' needs."
Ari Siegel, CFO



"Our access to BDSA data has been invaluable in underwriting investment opportunities, providing us with an in-depth understanding of the markets where we aim to operate, grounded in real, actionable data. As institutional investors, we rely on this data as critical validation of assumptions informing our investment decisions."
Charlie Kauss, Managing Principal
Vega Strategic Ventures





Subscription Services

For your critical, ongoing business questions

What's selling, where, when, for how much

Retail Sales Tracking

How can I increase distribution and sales?

Sales Enablement

How do I compare to stores around me and how can I improve?

Dispensary Playbook

Who is the consumer and why are they consuming?

Consumer Insights

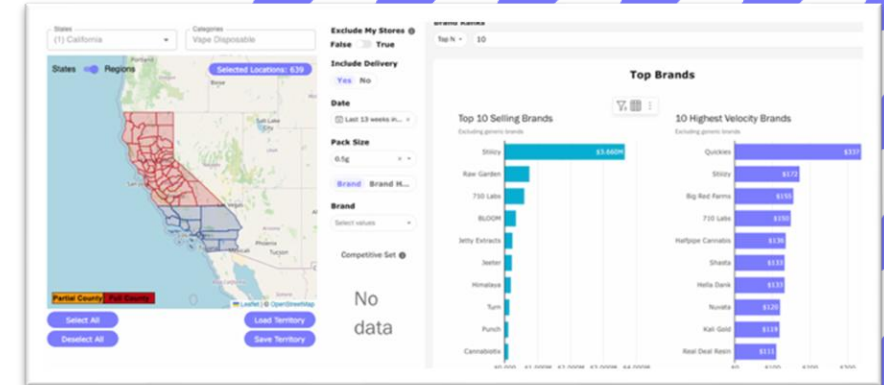
What will the size of the market be in the coming years?

Market Forecast

RETAIL SALES TRACKING

Empower brands to maximize revenue with **localized, daily insight** into what's selling, where, and at what price.

- ✓ **Brand and Product Performance Tracking**
- ✓ **Competitive Intel and Benchmarking**
- ✓ **Comprehensive Pricing and Discount Detail**
- ✓ **Product Attribute Insights to Inform Product Development**
- ✓ **CPG Metrics, including Velocity, %ACV, and Discount Lift**



A SOLUTION SET TO FIT YOUR NEEDS



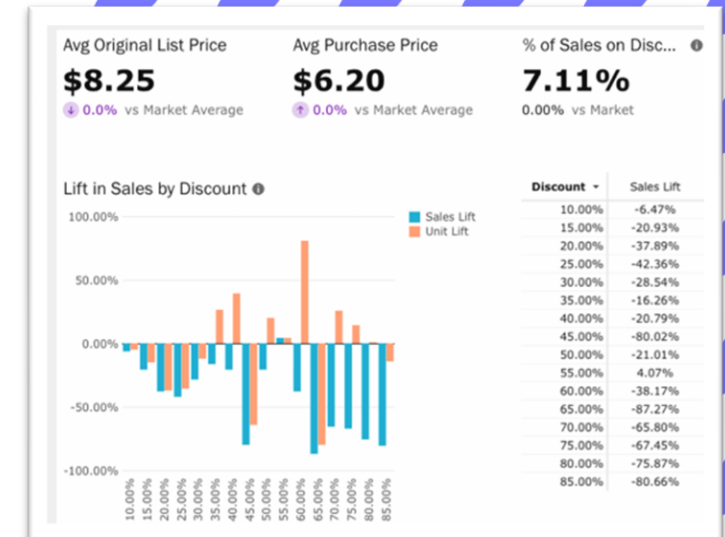
ANALYST SUITE

For the most data savvy companies who want to uncover the story beneath the story through deep analysis of the underlying datasets.



BUSINESS SUITE

Less analytics, more answers. Designed for those that appreciate the value of data-driven decision-making and want a simple but incredibly effective tool.



Sales Enablement

The Smarter Way to Maximize Your Sales

Equips brands and distributors with the tools to expand retail presence, refine sales strategies, and optimize performance in a highly competitive market. With real-time data and intuitive insights, it's designed for fast, confident action—no more time wasted on individual menu crawling and no advanced analytics required.

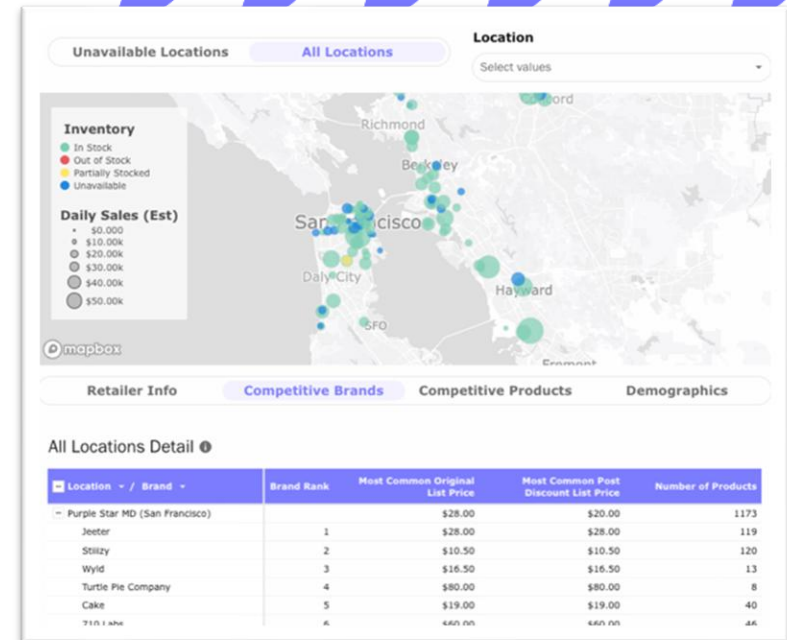
- ✓ **Daily Stock-Out Alerts** – Stay ahead of inventory gaps with real-time reporting of units and days of stock on hand.
- ✓ **Dispensary-Level Pricing & Product Assortment** – Know what's on shelves and at what price.
- ✓ **Estimated Dispensary Sales** – Identify top sales opportunities with store-level revenue, brand and product sales, share, and velocity insights.
- ✓ **Go-Get Lists for Expansion** – Identify gaps in brand availability and set your targets.
- ✓ **Customizable Sales Territories** – Align reporting with your team structure.
- ✓ **Local Velocity & %ACV Trends** – Track brand and product performance at a granular level.
- ✓ **Automated Email Reports** – Schedule reports for yourself and your team to deliver go-get lists and relevant information right to their inbox.

Daily data updates, customizable territories, and intuitive filtering make insights accessible and actionable. Whether used independently or alongside BDSA's Retail Sales Tracking, the Distribution Assistant simplifies your path to smarter distribution.

****Store-level brand and product sales now available****

Stock Out
 ● 50+% of products are in stock ● 50% of products are in stock ● All products are out of stock

Inventory	State	Aug 20	Aug 21	Aug 22	Aug 23	Aug 24	Aug 25	Aug 26
303 Recreational Cannabis Dispensary (San...	In Stock	In Stock	In Stock	In Stock	Partially Stocked	Partially Stocked	Partially Stocked	Out Of Stock
Alford Supply Co. (Redwood City)	In Stock	In Stock	In Stock	In Stock	Partially Stocked	Partially Stocked	Partially Stocked	Out
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Alternatives Health Collective (Santa Rosa)	In Stock	In Stock	In Stock	Partially Stocked	Partially Stocked	Partially Stocked	Partially Stocked	Out
Auribus 415 (San Francisco)	In Stock	In Stock	In Stock	In Stock	In Stock	In Stock	In Stock	Out
BAGA SF (San Francisco)	In Stock	In Stock	In Stock	In Stock	Partially Stocked	Partially Stocked	Partially Stocked	Out
BLOOMERANG	In Stock	In Stock	In Stock	In Stock	Partially Stocked	Partially Stocked	Partially Stocked	Out
Bay Care Delivery	In Stock	In Stock	Out Of Stock	Out Of Stock	Out Of Stock	Out Of Stock	Out Of Stock	Out
Berkeley Patients Group (Berkeley)	In Stock	In Stock	In Stock	In Stock	In Stock	Out Of Stock	Out Of Stock	Out
Berkeley Patients Group Delivery - Marinema...	In Stock	In Stock	In Stock	In Stock	Out Of Stock	Out Of Stock	Out Of Stock	Out
Better Health Group - Marijuana Dispensary ...	In Stock	Partially Stocked	Partially Stocked	Partially Stocked	Partially Stocked	Partially Stocked	Partially Stocked	Out
Bloomerang (San Francisco)	In Stock	In Stock	In Stock	In Stock	Partially Stocked	Partially Stocked	Partially Stocked	Out
Boo's Pub & Grill (Oakland)	In Stock	In Stock	In Stock	In Stock	In Stock	Partially Stocked	Partially Stocked	Out
Butterfingers Co.	In Stock	In Stock	In Stock	In Stock	Out Of Stock	Out Of Stock	Out Of Stock	Out
Butterfingers Delivery	In Stock	In Stock	In Stock	In Stock	Out Of Stock	Out Of Stock	Out Of Stock	Out
Buzz Delivery - Fremont / Mission / Union City	In Stock	In Stock	In Stock	In Stock	In Stock	Partially Stocked	Partially Stocked	Out



DISPENSARY PLAYBOOK

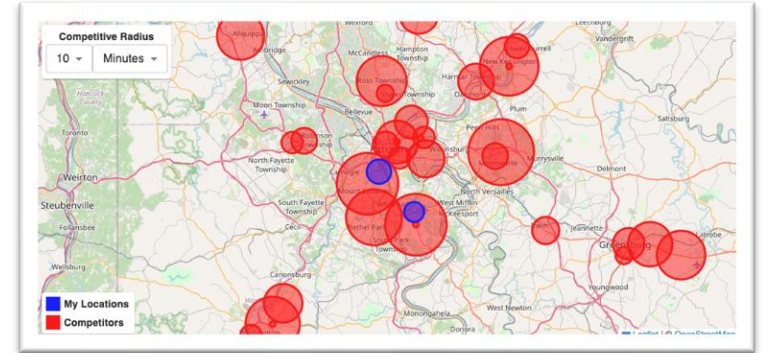
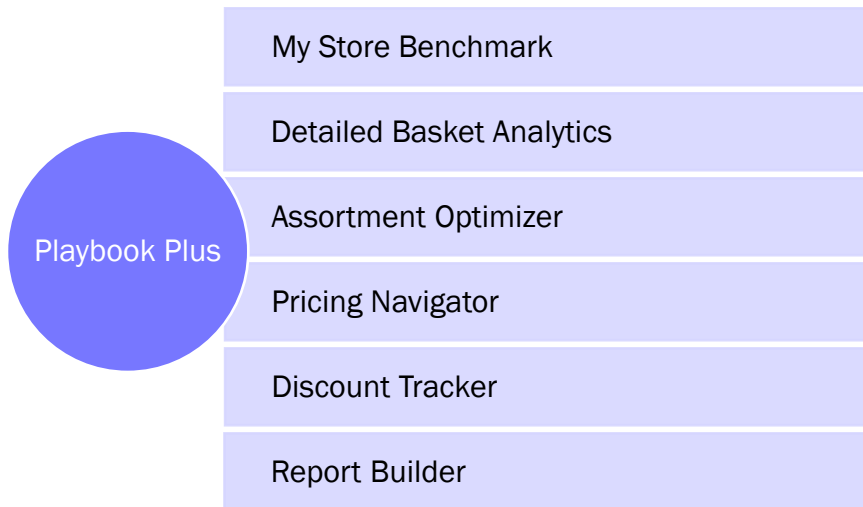
The competitive edge for Dispensaries

How are your stores **performing against local competition?**

- ✓ Track and compare performance and what's selling to your local competition and total market
- ✓ Evaluate competition by set distance, driving time, or # of closest stores

What can you do to **improve results?**

- ✓ Deep pricing, discount, and assortment insights
- ✓ Designed to evaluate impact and make decisions
- ✓ Analyst-built engines with actionable recommendations: *if* and how to adjust
- ✓ Maximize sales velocity and competitive advantage



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Consumer Insights

Data That Drives Cannabis Decisions.

BDSA's **Consumer and Shopper Insights** equips your brand with comprehensive, actionable intelligence on cannabis consumers and non-consumers across the U.S. and Canada. With over 8 years of trended consumer data, we help you understand unique state-by-state dynamics and the evolving consumer landscape as markets mature. Whether you're expanding into new markets or refining your current strategy, our data provides unparalleled clarity and depth.

✓ Consumer Profiles by State/Province

Demographics, psychographics, and behaviors to understand your audience.

✓ Market & Consumption Trends

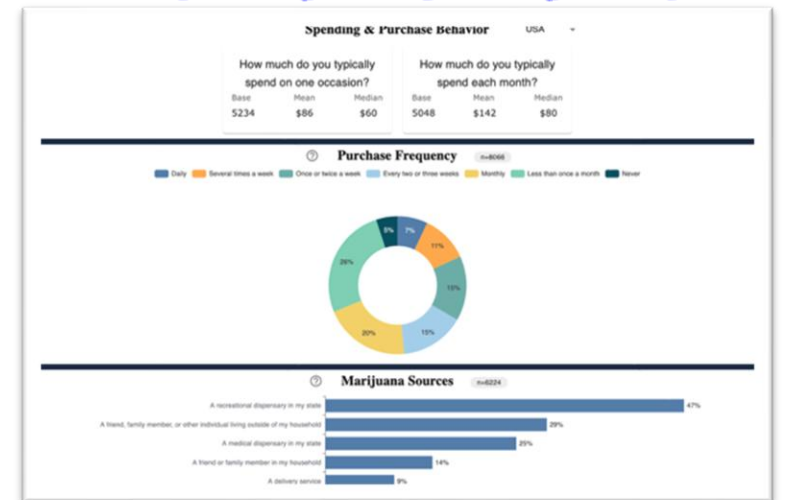
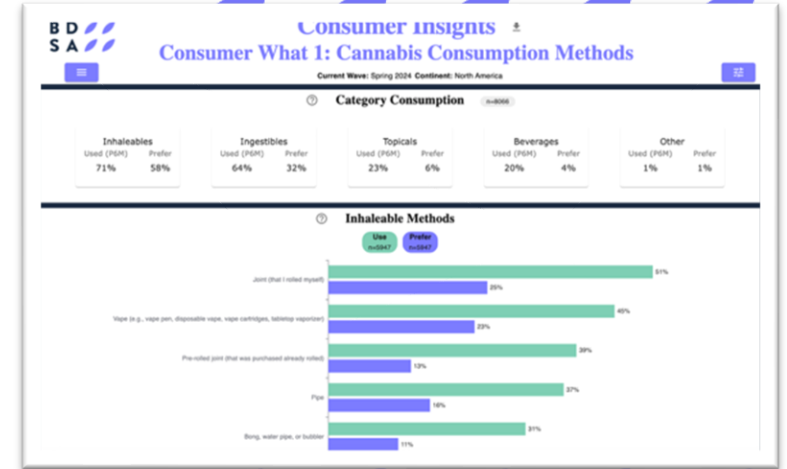
Insights into how, when, and why consumers use cannabis, including preferred form factors, need states, ailments addressed, spending habits, and key product/brand purchase influencers.

✓ Strategic Guidance

Data-driven insights to optimize product offerings, marketing strategies, and competitive positioning.

BDSA's trended data and in-depth consumer exploration give you the tools to track how preferences shift over time, understand local dynamics, and stay ahead of the competition in a rapidly evolving market. Make confident, informed decisions that align with consumer needs and fuel your brand's growth.

****Cannabis and Hemp/CBD Consumer Insights Available****





Cannabis Market Forecast

Not just informative. Predictive.

Market Forecasts enable investors, brands, retailers, and analysts to size where local and markets have been, where they are today, and where they are going. Insight into total addressable market and expectations of changing regulations help clients invest, launch, expand, and extend in the right market(s) at the right time.

✓ 5-Year Forecast

An annual forecast with a 5-year view that reflects expected market maturation trends, consumer dynamics, and regulatory shifts.

✓ US by State, CAN by Province, 40+ Countries

An expansive forecast that provides insight into the future growth and opportunity size across the US, CAN, and Internationally.

✓ Forecast by Category

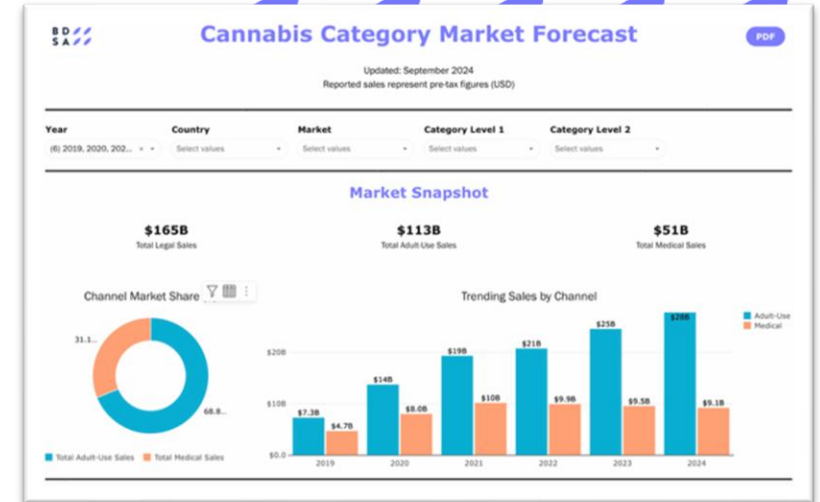
Market sizing In each U.S. State and Canadian Province, is broken down by product category.

✓ Updated Quarterly

Given the fast-moving nature of the Cannabis Industry, our forecast are updated twice per year, which provides an opportunity to align with our own ongoing Retail Sales Tracking, and make forecast updates based on regulatory progress.

✓ Summary Market Dashboards

Market Dashboards summarize key market information such as regulatory dynamics, population/patient counts, the top 3 brands, and Topline Retail Sales.





BDSA PROFESSIONAL SERVICES

Best-in-class data + Expert Analytics

With deep experience in CPG and cannabis industry analytics, our team of analysts combines our robust datasets—and yours if desired—to address critical business questions and deliver unique, actionable insights tailored to your needs.

LET BDSA DO THE WORK FOR YOU

Quarterly
Insights Reports

Assortment
Planning

Promotional
Calendar
Planning

Customized
Pricing Analytics

Distribution
Opportunity
Analysis

Custom Market
Summaries

Consumer Deep
Dives

Custom
Analytics on
Combined
Datasets

