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# Top Performing Brands: US CBD Market Refresh

Q3'2022 – Public Version



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# Learn more as a Brightfield Partner!

This report includes **just a fraction of the data and insights** that Brightfield Group clients receive. Contact us **to access the full report** and learn how consumer **insights amplify Point-of-Sale data** to help you better understand the roadblocks and opportunities across the CBD market.

## In the full report, you'll learn:

- The top 20 CBD companies and how they've changed since Q1
- A full category spotlight on CBD Drinks, including the top 10 players
- Key moves drinks brands have made to increase sales
- A category spotlight on CBD gummies with the top 10 players

To learn more about our solutions for CBD, [request your demo here.](#)

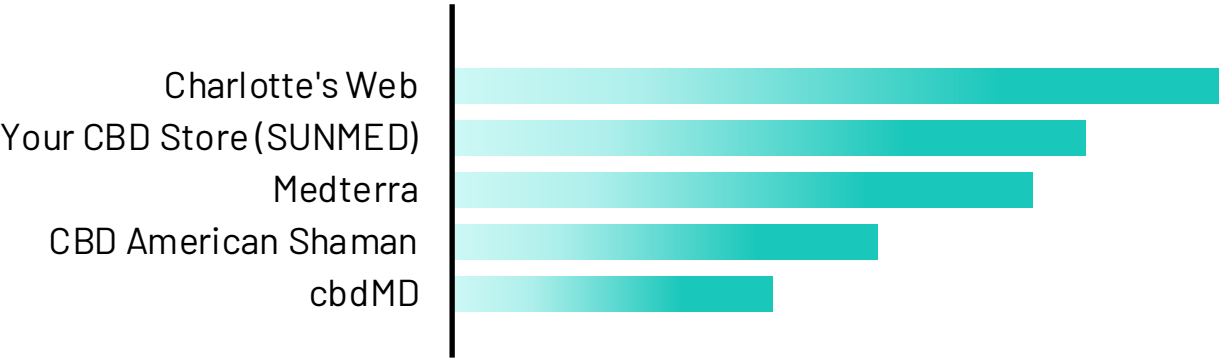


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# US CBD Company Shares

- The Top 20 CBD companies remain largely unchanged since Q1 2022.
- Market share of the Top 20 remained largely flat quarter-over-quarter with little consolidation occurring during Q2.
- The top companies in terms of revenue also remain largely the same, with Charlotte’s Web and Medterra leading online sales and dedicated CBD retailers and brands Your CBD Store (SUNMED) and CBD American Shaman spearheading retail.
- Companies in the CBD market continue to face a difficult environment, with continued hindrance from limited access to mainstream retail and increased inflationary concerns.

## TOP 5 COMPANIES BY REVENUE Q2 2022



# TOP CBD DRINK BRANDS

H1 2022



## Category Spotlight: Drinks

- **CBD Drink brand shares saw multiple additions during H1 2022**, resulting in a significantly different list of brands.
- **Many of the top drink brands have retail distribution that emphasizes specific states/regions.**
- Compared to other product categories, **CBD drinks have a high level of consolidation and top-level competition.**
- **Some top brands, have created non-CBD beverages to boost revenues and gain access to mainstream retailers while others have doubled down on the CBD category** by diversifying their product offerings.

# Category Spotlight: Gummies

- CBD gummies have been attracting increasing interest from a variety of brands, **though the category continues to be dominated by the two largest US CBD companies**
- All **top 10 gummies brands** are owned by **Top 20 CBD companies**.
- Though only two brands have a greater than 2% share in the category, **gummies have a high concentration of companies with a 1-2% share**, reflecting increased interest in the space.
- **Top gummies brands are increasingly incorporating a variety of cannabinoids alongside CBD**, often utilized in order to appeal to a variety of consumer need states.

## TOP CBD GUMMIES BRANDS

H1 2022



# See what's next in CBD and Cannabis, and emerging CPGs with user-friendly data on:

## Market Landscape

Understand market position for strategic planning

### Market Sizing

- Overall sizing and 5-year forecasts by product type and distribution channel.

### Product Innovations

- Up-to-date product trends and innovations.

### Company Profiles

- Detailed profiles with positioning, strengths, news and more to understand the composition.

### Global Reach

- Understand the landscape across the US, Europe, LaAm, and Asian Pacific region.

## Consumer Insights

Foster authentic customer relationships

### Identify Target Personas

- Utilize standard personas or create your own for robust segmentation.

### Understand Product Usage

- Insights into how, when, why, and which cannabis products consumers use.

### Recognize Market Needs

- Take a forward-looking view at cannabis consumers to understand market needs.

*Data collected quarterly via balanced survey, N = 5000/quarter. Integrated with social media. First collection was Q3 2019.*

## Brand Health

Monitor brand performance across the top CBD brands

### Understand the Competitive Landscape

- Track where you rank alongside competitors within the purchase funnel and across key satisfaction metrics.

### Perfect Your Brand Positioning

- Leverage consumer data on your brand to hone in on the right audience that aligns with your brand strategy.

### Diagnose Brand Roadblocks

- Solve marketing pitfalls across your purchase funnel—awareness, consideration, purchase, and loyalty.

*Data collected quarterly via balanced consumer survey, N = 5000/quarter. First collection was Q3 2019.*

To learn more about our solutions for CBD, [schedule a demo](#).

**Brightfield Group** is the leading research firm for emerging categories including CBD, cannabis, and wellness. By integrating multi-source data with AI and research expertise into our cross-comparable data lake, we uncover robust insights as new markets develop. We have helped Marketing, Innovation, and Insights leaders drive customer-centric strategies on their next big idea since 2015.

See what we can do for you at [brightfieldgroup.com](https://brightfieldgroup.com).



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