



# Washington State Liquor and Cannabis Board

## Legislative Request

Per section 6 of HB 2320 (Rep. Davis, 2024), the agency was tasked with collecting data on the legal cannabis market in Washington to answer three important questions:

- 1. How many products are sold in Washington, by category (usable cannabis, cannabis concentrates, and cannabis-infused products)?**
- 2. What is the average THC concentration in those products, by category?**
- 3. What is the range of the THC concentration, in both usable cannabis and cannabis concentrates?**

This summary answers those questions and discusses the validity of the data, and why these estimates may differ from others.

## Methods

To answer these questions, the agency staff used the Cannabis Central Reporting System (CCRS), a database of licensee-reported data on the cannabis market, from December 2024 through September 2025. The results reported here are the product of the agency's analysis of the CCRS data. Agency data examiners segregated sales by product type and linked those products to their certificate of analysis performed by certified cannabis labs. This enabled analysis of the products' THC concentration. While CCRS data is self-reported, it has grown more reliable as several improvements to it have been made by the agency over the past 12-18 months.

To validate the data, we also examined data from Headset, a private data analysis tool on the cannabis industry. Headset collects data from point-of-sale software at retail cannabis establishments throughout the state. Headset has direct point-of-sale data from most retailers in the state (over 90%). Data for missing stores are inferred to create an estimated total for the entire I-502 market. Headset has very granular data, but it does not include the THC concentration of products.

The advantage of CCRS data is that it is an element of state-mandated traceability, and licensees can be sanctioned by the agency's enforcement and education staff if they are not meeting traceability requirements (e.g., not inputting products in the system, inputting false data in the system, etc.). The advantage of Headset is that its reach and integration with retailers means it is very accurate and timely.

A key difference between CCRS and Headset is in how they define the various types of cannabis products. This study requirement lists the categories of products examined and uses the statutory definition in RCW 69.50.101. Headset uses different categories that may correspond better to the ways retailers label and purchase for their stores. This makes it harder to compare the results directly, as products are categorized differently in each dataset.

For example, CCRS categorizes infused pre-rolls (pre-rolled cannabis joints to which concentrated cannabis products are added) in the “cannabis concentrates” category, as they contain some amount of cannabis concentrates. Headset would categorize these as “pre-rolls” because they have a separate category for such products, whether infused or not. “Vapor products” are a distinct category in Headset, and they make up a considerable share of total sales. But in the scheme used here, they are classified as “cannabis concentrates.” The inclusion of these products in the concentrates category has two effects.

- First, it dramatically increases the sales figures for the category. In Headset, “concentrates” are a somewhat small share of the market, but in the CCRS taxonomy, they are the largest category.
- Second, their inclusion pushes the average THC concentration down, because infused pre-rolls and vapes often have lower THC concentrations than the waxes and dabs that make up the bulk of the “concentrates” category that Headset uses.

Finally, for sales data, the CCRS data underestimates the size of the market. This is due to underreporting, an issue that the agency is actively working to rectify. Improvements in the system’s business logic as well as education to licensees have reduced the gap between sales registered by CCRS and sales registered by the agency’s fiscal data or by Headset, but CCRS figures remain lower. The agency is not aware of any systematic errors that could cause the numbers presented here to be unrepresentative, for example, if CCRS captures more flower sales but fewer concentrates, but that is a possibility.

## **Findings**

Over the course of the study, the I-502 market sold on average of 2.6 million (\$33 million in sales) concentrate products per month (including vapor pens, infused pre-rolls, and concentrates); 2.2 million (\$30 million in sales) usable cannabis products per month (including flower and non-infused pre-rolls); and just shy of 1 million (\$10 million in sales) edible/infused products per month (including beverages).

The average THC concentration during this time period was 61.7% for concentrates, and 20.9% for usable cannabis. THC concentration for cannabis-infused products like edibles is measured differently from concentrates and usable cannabis and is instead measured in milligrams of THC contained in the product. The most common amount of THC (in milligrams) was 100mg for both beverages and edible products. For this report, the total milligrams in edible packages was reported, as serving sizes vary.

The range of potency for concentrates was between <1% and 99%. The range of potency for usable cannabis was: <1% and 37%. The range of potency for edibles was >1mg-100mg ([WAC 314-55-095](#) caps the maximum amount of THC in a package of an infused product at 100mg). The very low concentrations in concentrates and usable cannabis is the result of a group of products designed to have high CBD or other cannabinoid ingredients, limiting the amount of THC they contain. They are generally derived from low-THC hemp. While not a large segment of either the usable cannabis or cannabis concentrates markets, they are a part of the story.

	Total Units Sold	Average THC concentration	Range of THC concentration
<b>Cannabis Concentrates</b>	26,276,697	61.7%	<2%-99%
<b>Usable Cannabis</b>	22,268,347	20.9%	<1%-37%
<b>Cannabis Edibles</b>	9,493,381	0.4%, >90mg	<1mg-100mg

