

The U.S. Cannabis Homegrow Market

Motivations, Processes,
and Outcomes

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AS THE CANNABIS industry grows, attention is increasingly paid to the opening of new markets, the introduction of new products, and the complex, ever-evolving web of regulations that shape the legal market. The legal industry is also casting new light on well-established but little understood aspects of the cannabis economy. One such area is the homegrow market – consumers who cultivate a small number of plants to serve their own needs or those of a small number of consumers.

Six percent of American cannabis consumers report growing their own cannabis. In a country with an estimated 52 million consumers in 2022, this means more than 3 million Americans grow their own cannabis. With the number of American consumers forecast to increase to 71 million by 2030, there will be nearly 4.1 million homegrowers in the country if those rates hold.

Additionally, based on the consumer data, we conservatively forecast spending for homegrow supplies to increase significantly, from \$2.7 billion in 2022 to \$3.7 billion in 2030, representing a significant growth opportunity for homegrow suppliers over the next decade.

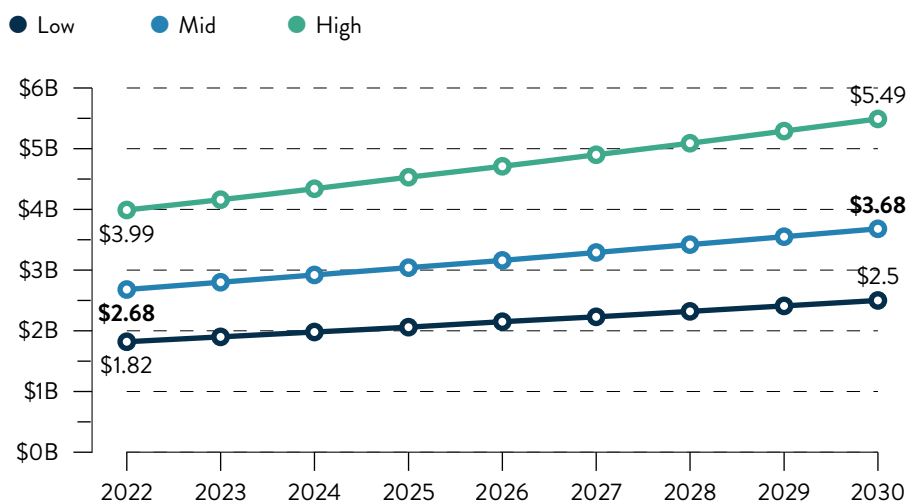
Despite the large number of homegrowers, and the significant amount of time, energy, and capital they invest in their grows, very little is known about this community, their motivations, processes, or outcomes.

In this first-of-its-kind report based on a survey of 4,682 cannabis consumers and 1,250 non-cannabis consumers, we delve into who homegrowers are, what drives their interest in private cultivation, how they build their grows, and their experiences with homegrowing. We also explore the interest in becoming a homegrower among those who do not currently grow their own cannabis, and estimate the market's growth trajectory for this significant segment.

Homegrow Forecast

Based on estimated average spending for site set-up and cultivation inputs, annual homegrow spending is projected to increase 38% over the next decade, from \$2.7 billion in 2022 to over \$3.7 billion by 2030. Over this time span, consumers will cumulatively spend nearly \$30 billion on homegrow supplies.

Projected U.S. Homegrow Spending: \$USD Billions, 2022-2030



Total Spend on Homegrow 2022-2030	Low	Mid	High
	\$19.6 billion	\$28.5 billion	\$42.5 billion

Conservatively, homegrowers will produce an estimated 11 million pounds of dried flower in 2022, increasing to over 15 million pounds annually by 2030. Assuming an average prevailing market value of \$1,250 per pound, cannabis output from U.S. homegrowers would be valued at \$14 billion in 2022 alone.

Total Homegrow Dry Flower Output: Millions of Pounds (lbs)

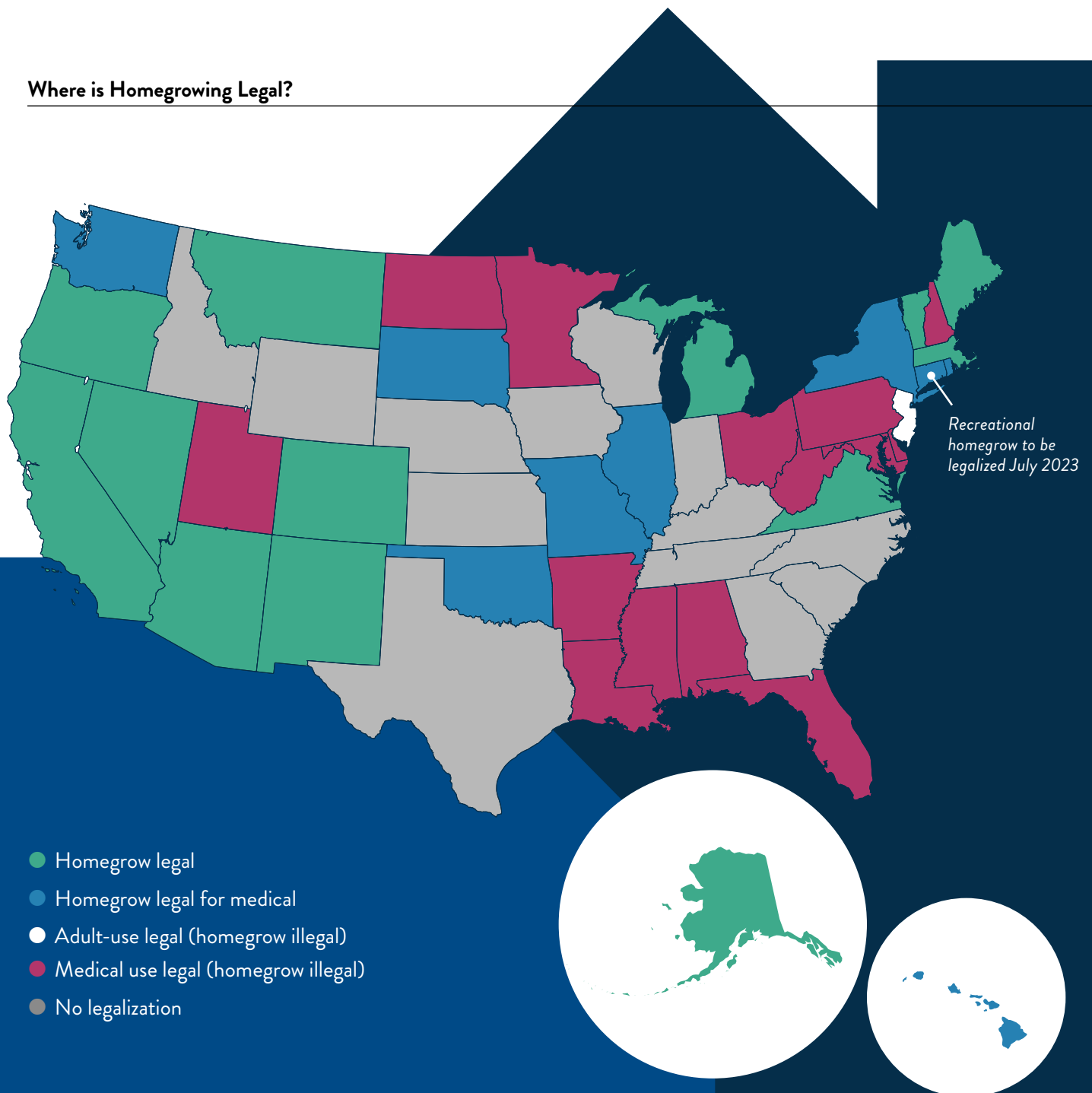


Estimated Homegrow Market Total Output	2022	2030
	11 million lbs	15 million lbs

Much as with legalization efforts across the United States, rules governing private cultivation are a patchwork. Variations in the number of allowable plants, the number of mature plants an individual can cultivate at one time,

and state-specific medical exceptions make for a complex homegrow ecosystem. Learning more about homegrowers both as cannabis consumers and cultivators can provide some insight to this distinctive slice of the market.

Where is Homegrowing Legal?



As of April, 2022

Home is Where the Grow is

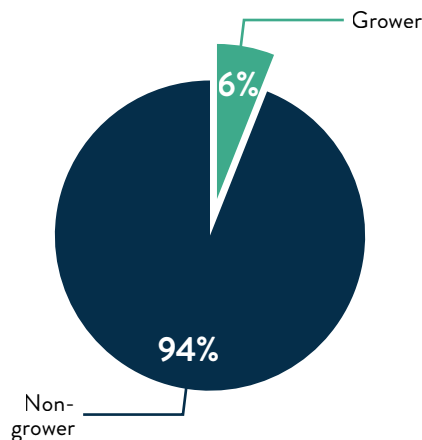
Six percent of cannabis consumers report growing their own flower – translating to 3 million growers in the U.S. We project that number to grow to 4.1 million growers by 2030.

Consumers in adult-use markets are slightly more likely to grow their own cannabis (7%) compared to those in medical (5%) or illicit (4%) markets.

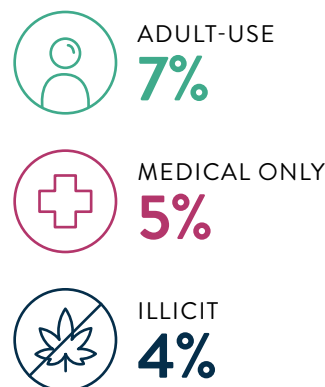
More than 8 in 10 (84%) of homegrowers have grown in the past two years. A little over half (56%) have less than three years of homegrowing experience.

Homegrowers tend to be far more engaged with the cannabis industry than non-growers, and they are twice as likely to know someone working in the cannabis industry (38% have at least an acquaintance working in the cannabis industry vs. 19% of non-growers).

Cannabis Consumers: Growers vs. Non-growers



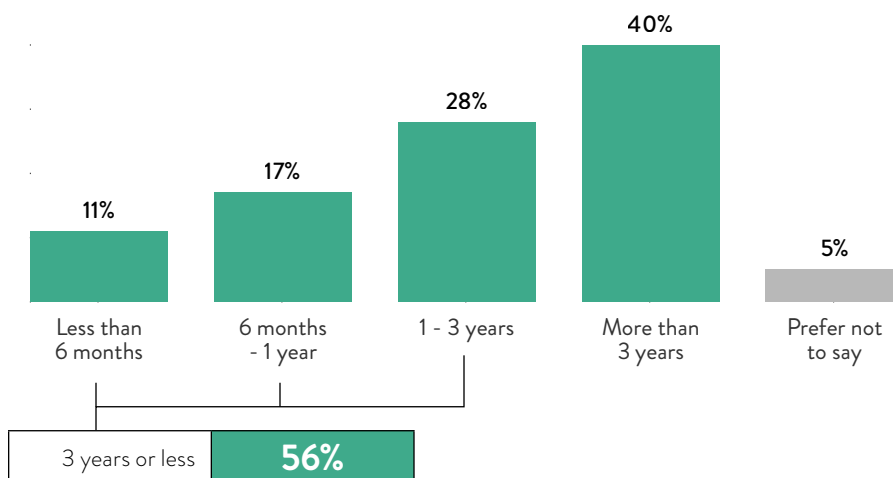
Propensity to Homegrow: By Market Type



Have you grown cannabis in the last two years?

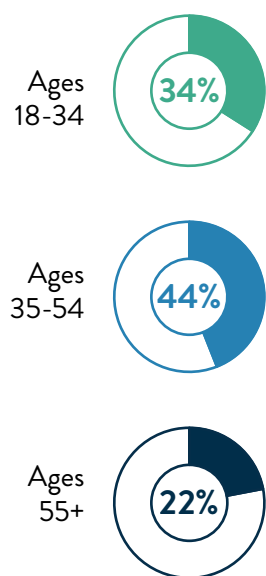


How long have you be growing cannabis?

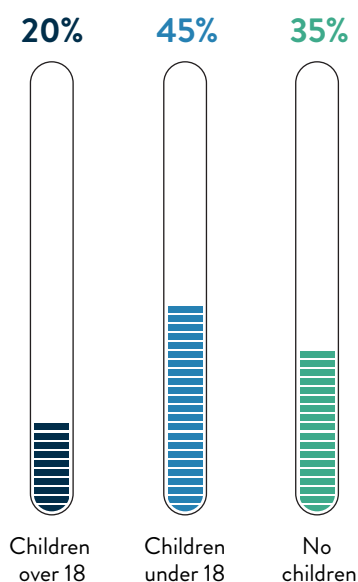


Homegrower Demographics

Homegrowers: Age Distribution

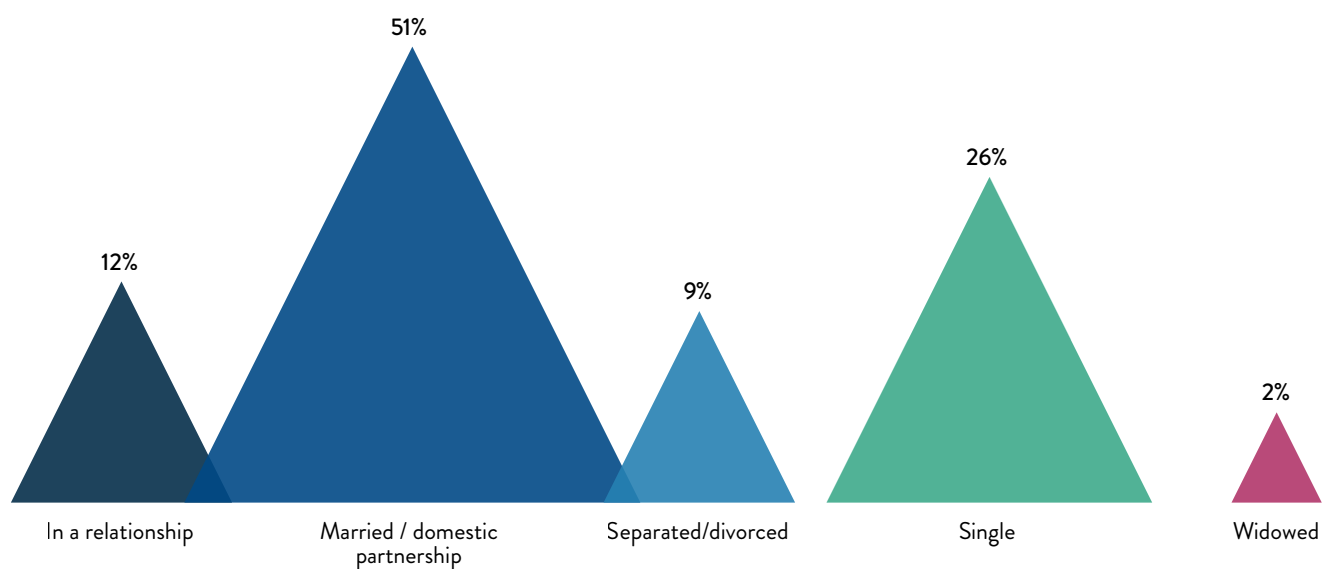


Homegrowers: Children

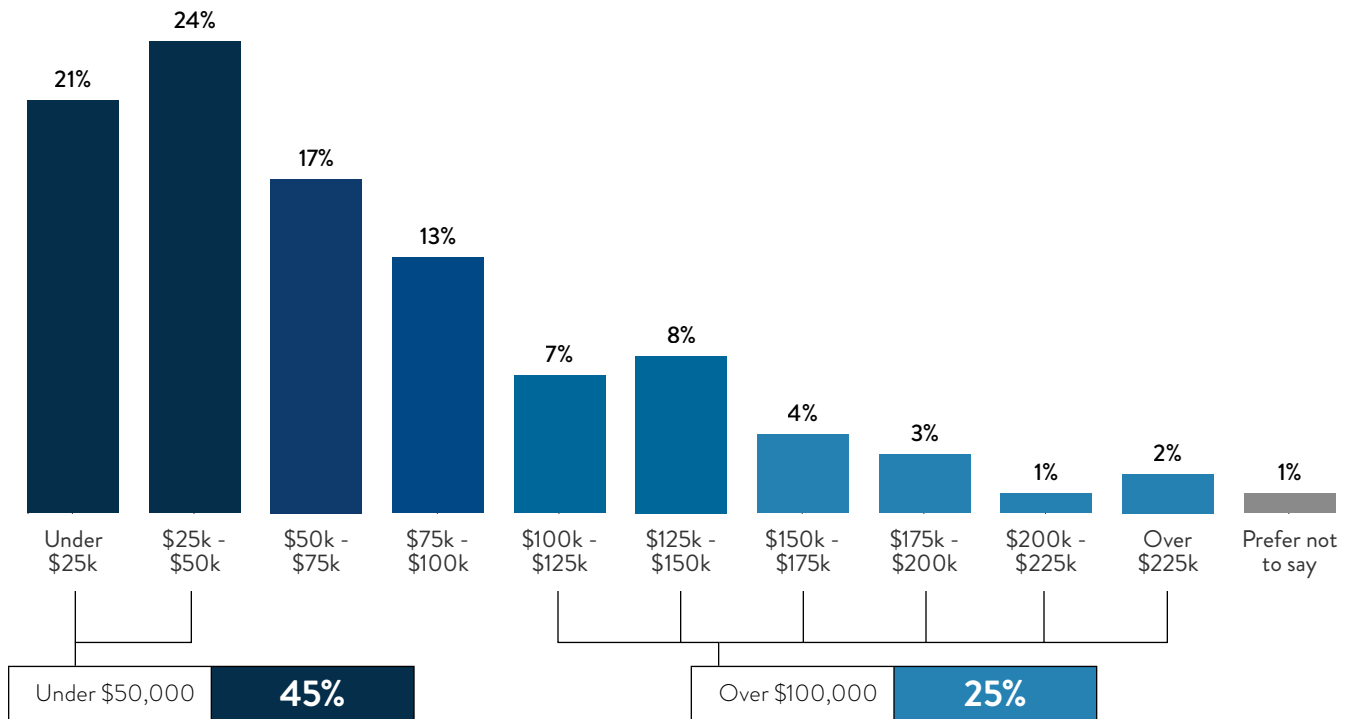


Homegrowers follow a similar age distribution to the general consumer population, and live largely domesticated lives. More than half (51%) are married, and two in three (65%) have children; they are proportionally distributed across the entire socio-economic spectrum.

Homegrowers: Relationship Status

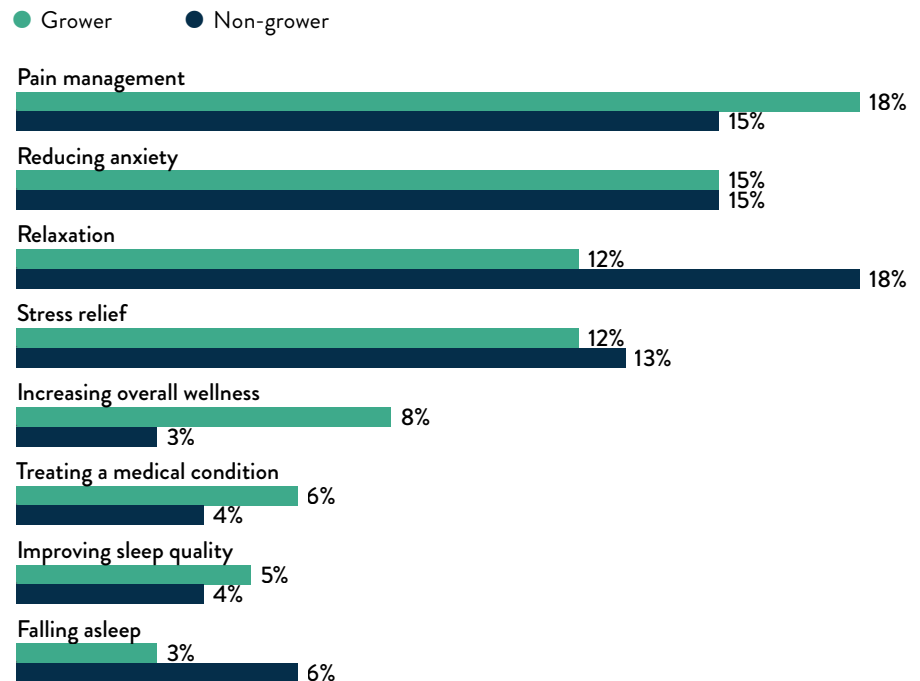


Homegrowers: Annual Income

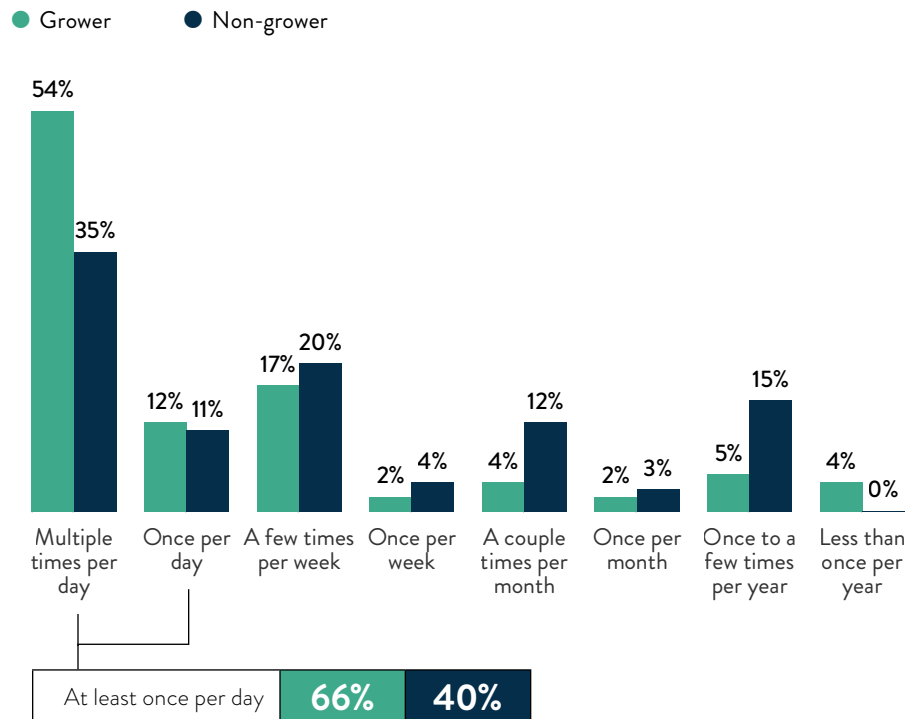


Homegrowers consume cannabis for many of the same reasons as the average consumer. However, they were significantly less likely to say they consume primarily for relaxation, and significantly more likely to say they consume primarily to improve their overall wellness.

Primary Reason for Use: Growers vs. Non-growers



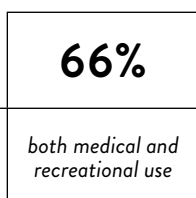
Frequency of Use: Growers vs. Non-growers



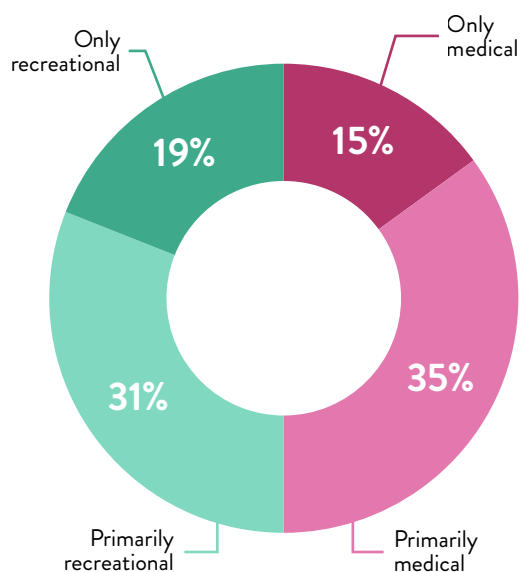
Homegrowers also consume cannabis far more frequently than non-growers (66% vs. 40% consume at least daily).

Two in three homegrowers (66%) report consuming cannabis for both medical and recreational reasons. Consumers claiming to use cannabis for both medical & recreational reasons tend to be more intentional in their cannabis use, and nuanced in which products they use to achieve specific effects or outcomes.

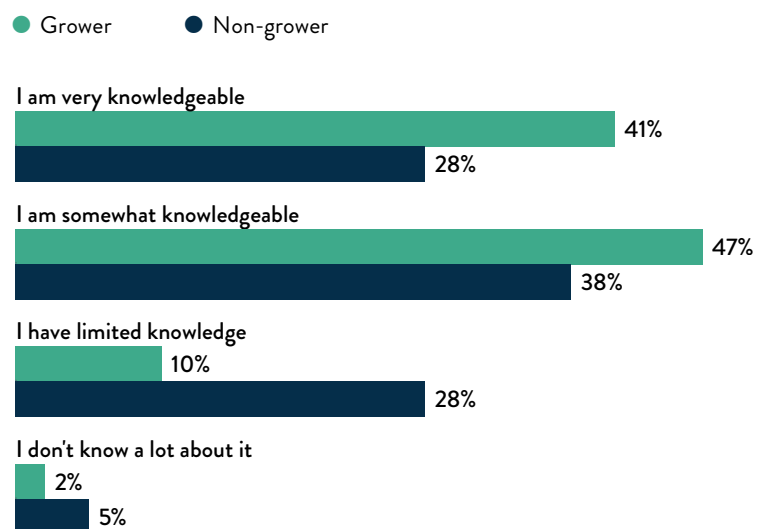
Self-identified User Type



Growers are 2x more likely to know someone in the industry.



Self-Perceived Knowledge of Cannabis: Growers vs. Non-growers

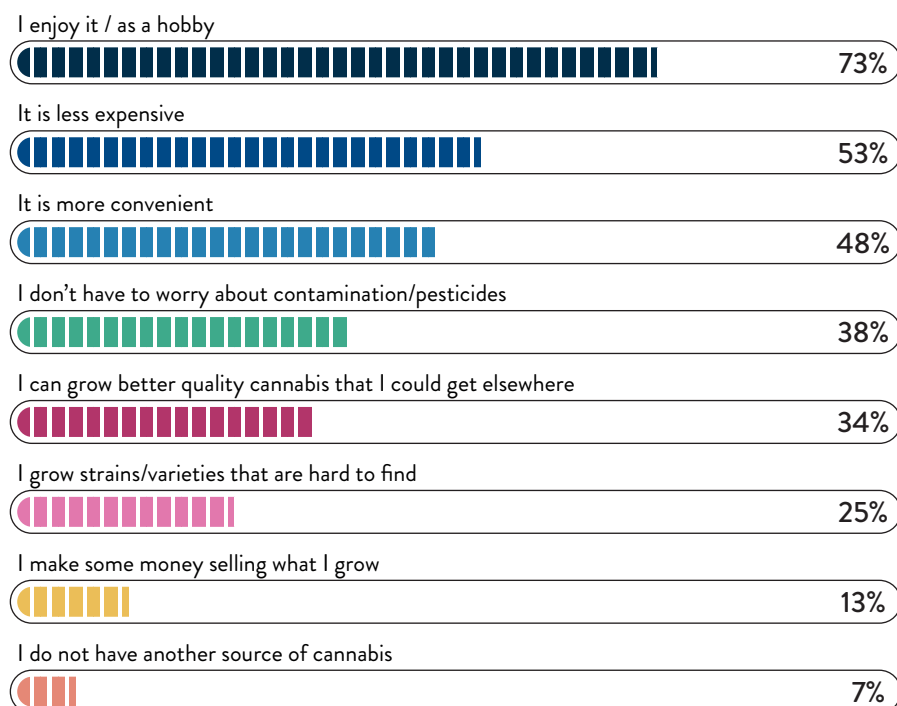


Why Homegrow?

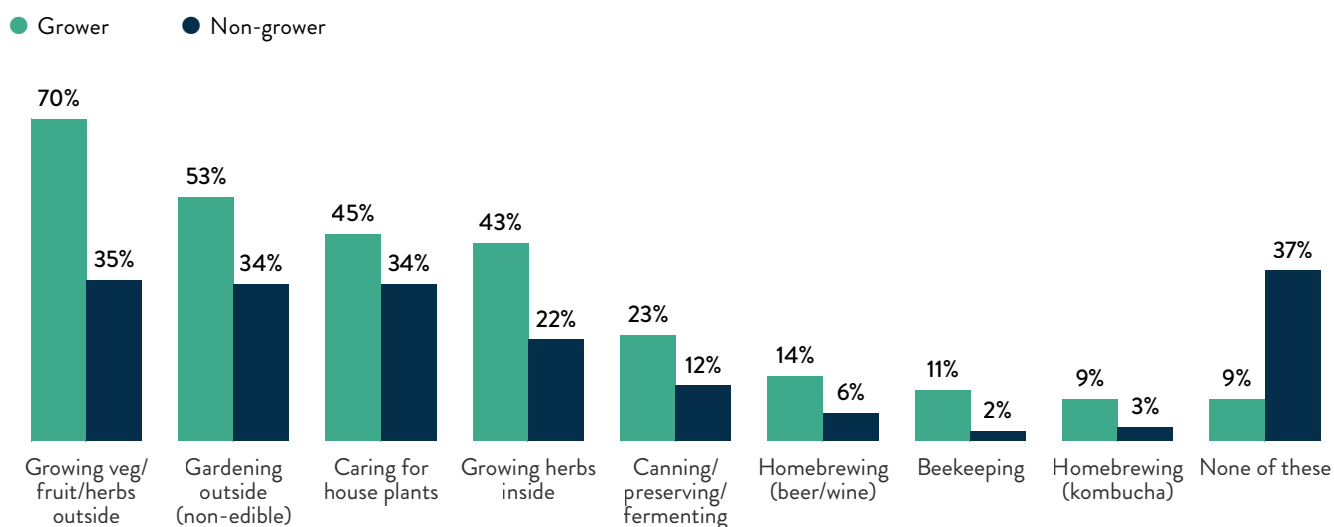
Homegrowers grow cannabis for a wide variety of reasons, but most do it for pleasure. Cost and convenience are also primary motivators.

Moreover, cannabis consumers who engage in growing at home were significantly more likely to have a green thumb in other aspects of their lives — engaging in a variety of horticultural activities at higher rates than non-grower consumers.

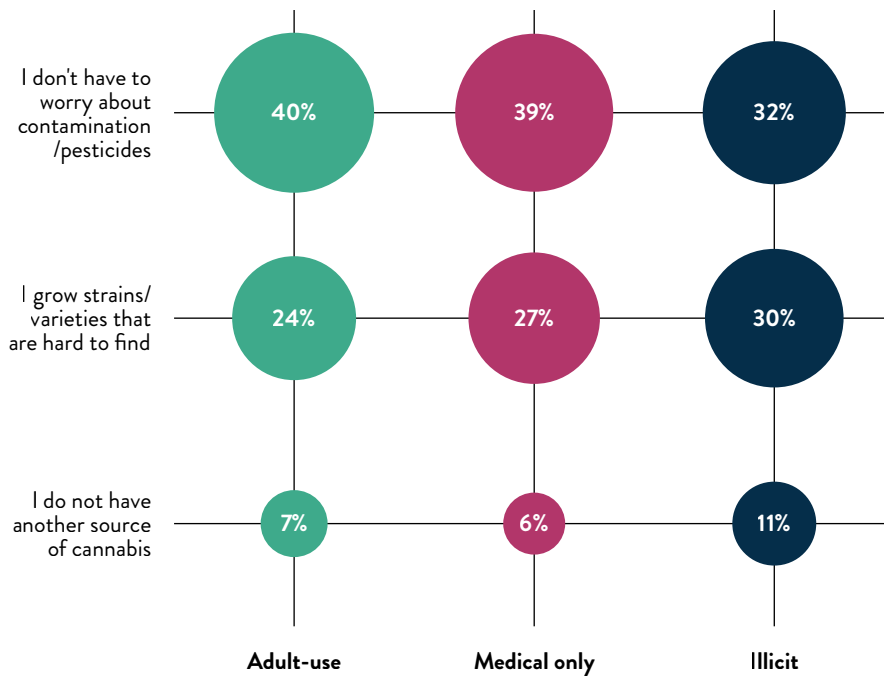
Why do you grow cannabis?



Hobbies: Growers vs. Non-growers

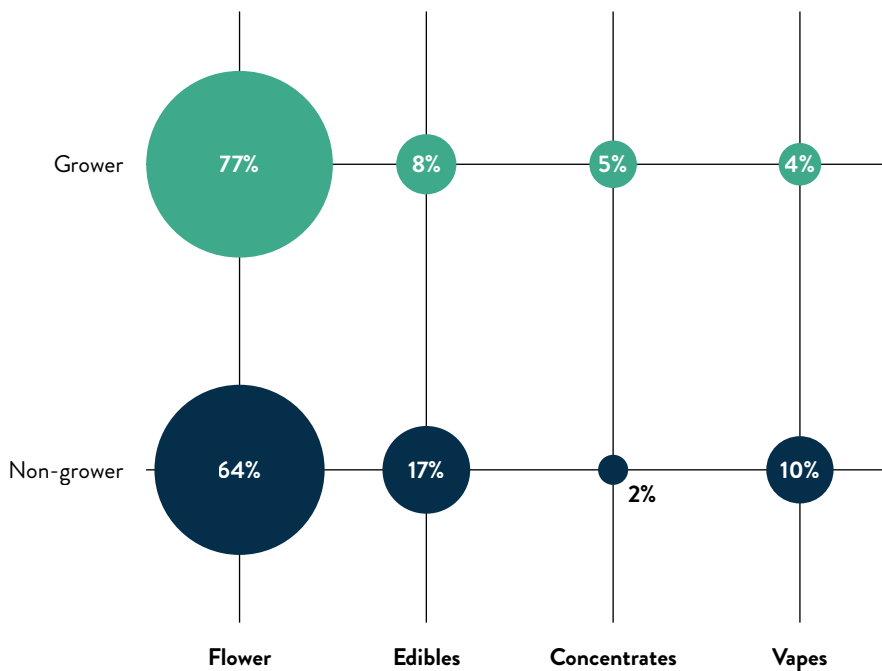


Reason for Growing: By Market Type



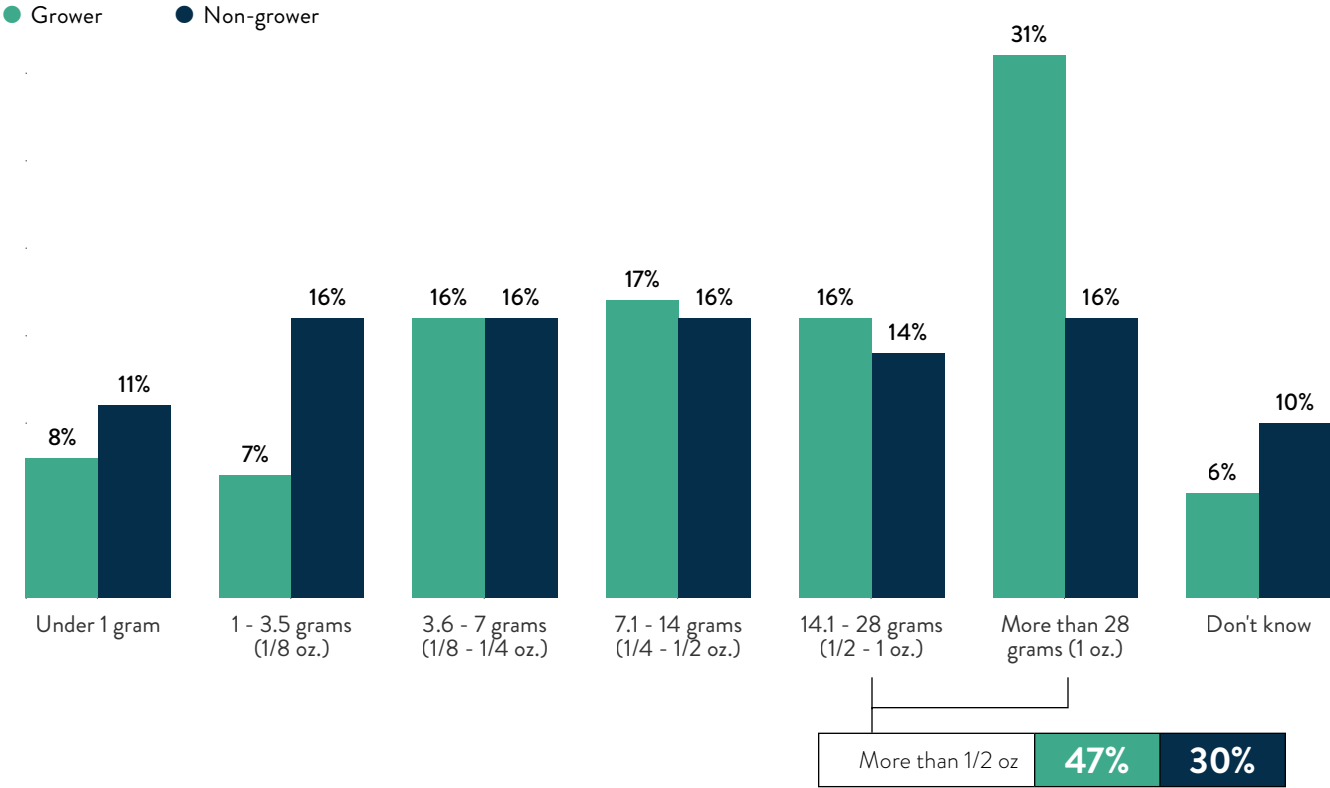
Local laws pertaining to cannabis also appear to have an impact on the concerns cited by growers. Growers in adult-use and medical markets are more likely to cite concerns about contamination as a reason to grow while growers in markets where cannabis is still illegal are marginally more likely to grow due to market constraints.

Most Frequent Form of Cannabis: Growers vs. Non-growers

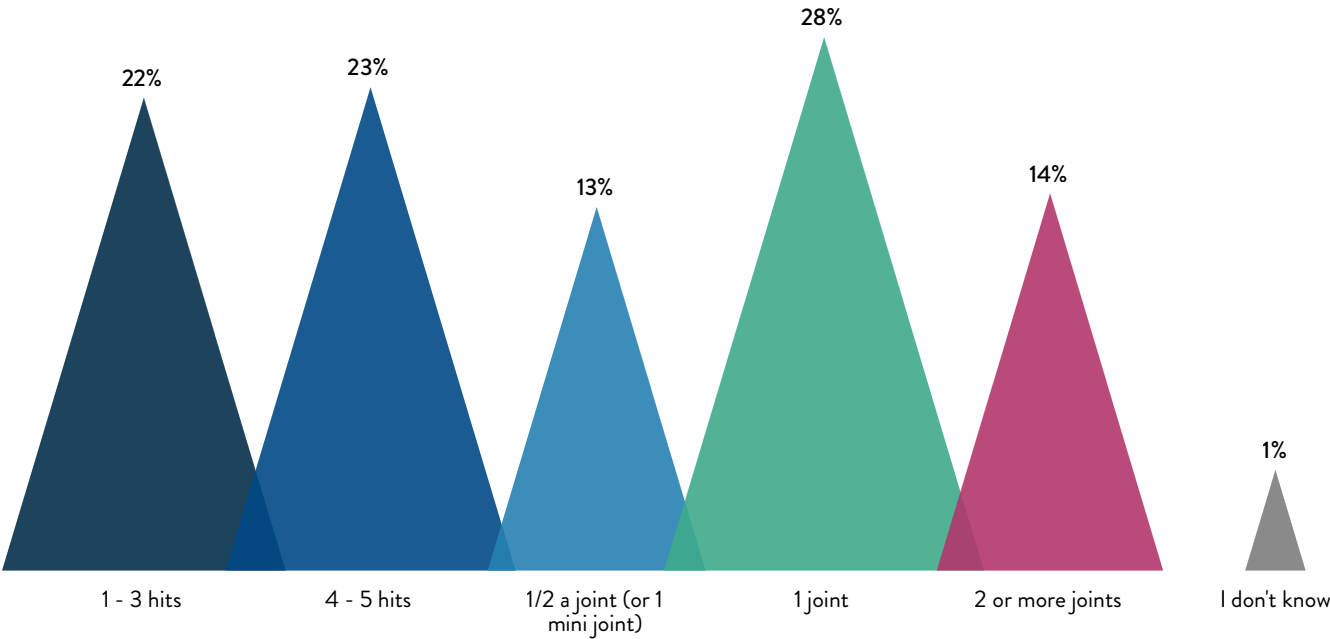


Homegrowers are more likely to consume flower (and at higher rates) than are non-growers.

Monthly Flower Consumption: Growers vs. Non-growers



Amount Consumed in a Single Session



How much of the cannabis which you consume do you grow yourself?

All or almost all



Most



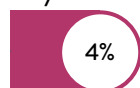
About half



Some



Very little or none



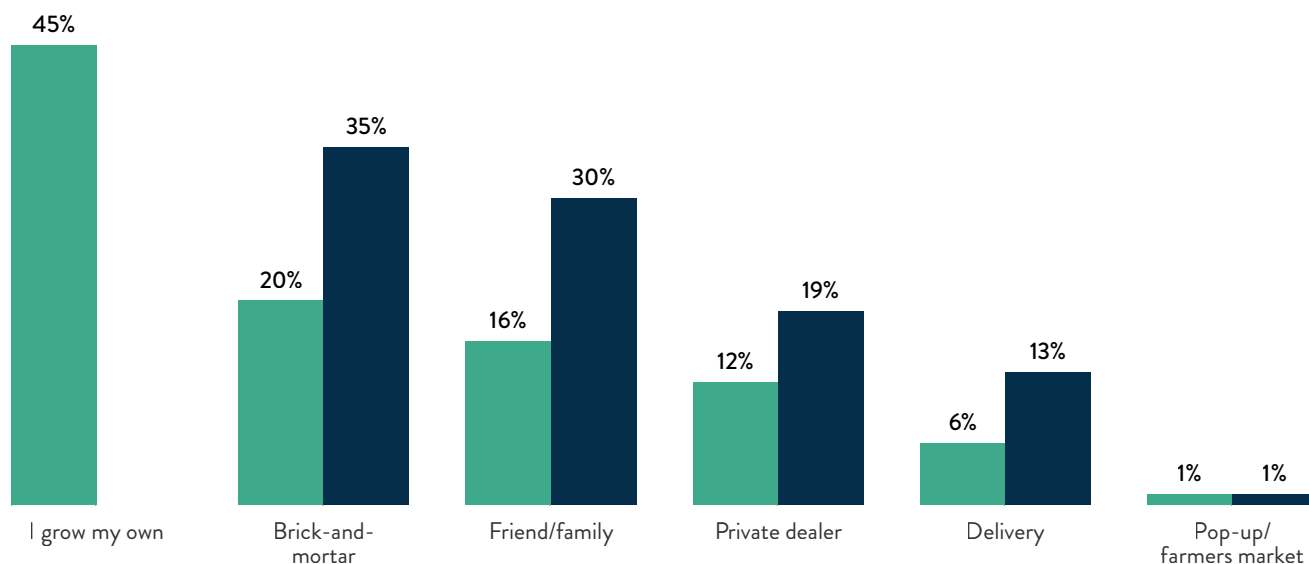
Having a personal supply may help facilitate this increased flower consumption. Six in 10 (60%) report that they grow all or most of the cannabis that they consume. Furthermore, while homegrowers get cannabis from many different sources, 45% say that the cannabis they grow is their primarily supply.

60% of homegrowers produce all or most of what they consume.

Primary Source: Growers vs. Non-growers

● Grower

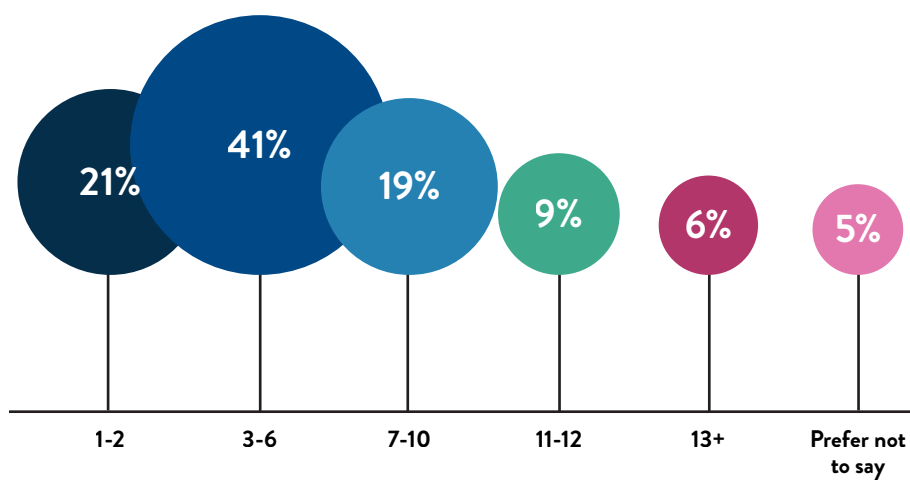
● Non-grower



How Much Cannabis

Most growers keep six plants or less at a time (62%) and harvest up to three times a year (73%). This falls in line with most state regulations which limit homegrowing to six plants at a time per person.

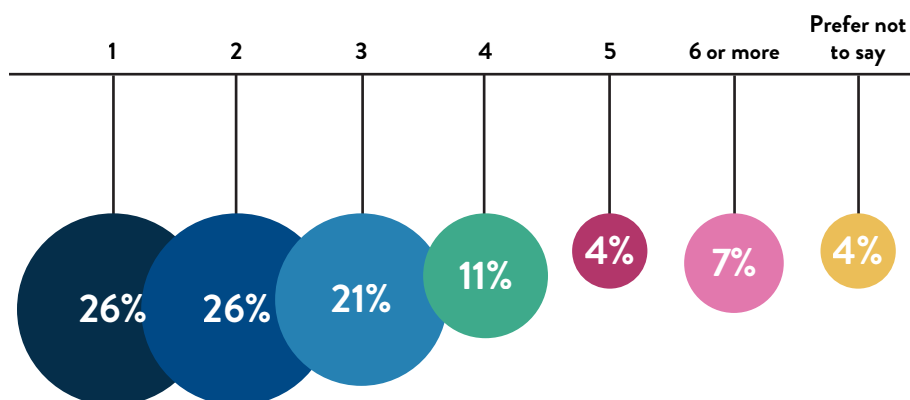
Number of Plants Grown at a Time



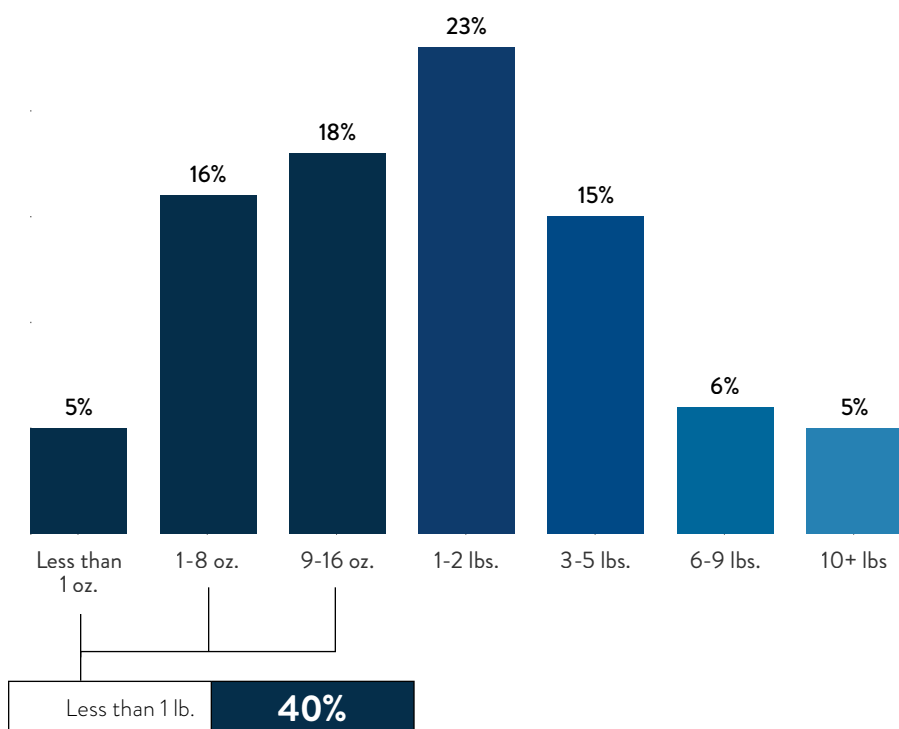
62%

grow six or fewer plants

Number of Harvests per Year

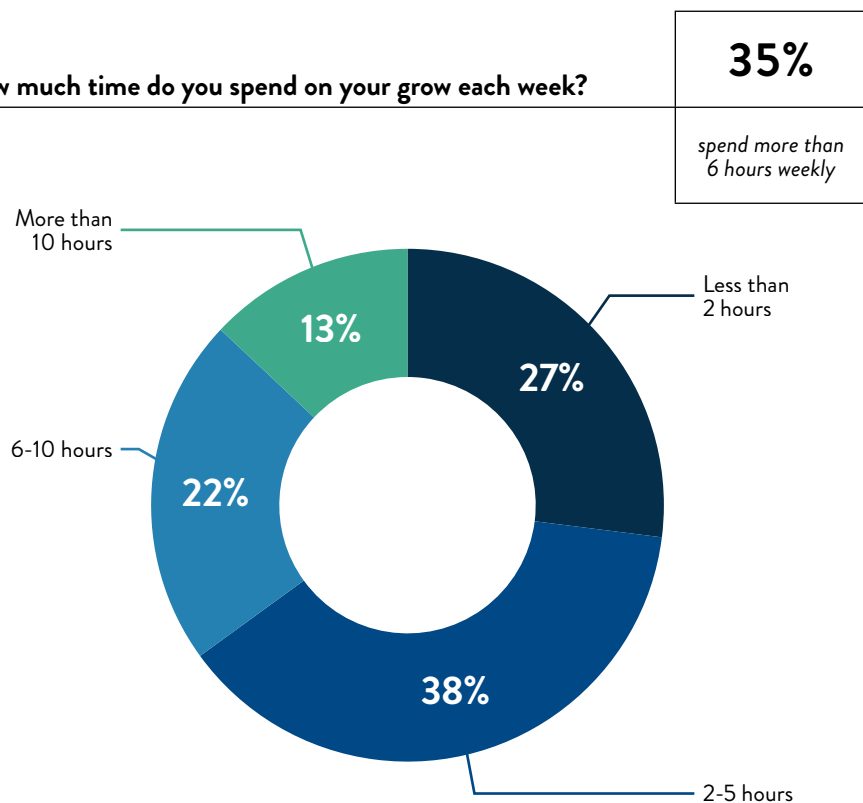


Dried Flower Yield per Harvest



More than 6 in 10 (63%) of growers say they produce less than 2 pounds of dried flower per harvest, and more than one-quarter (26%) say that they produce more than 3 pounds.

How much time do you spend on your grow each week?



Nearly two-thirds (65%) of growers say that they spend 5 hours or less on their grows each week.

One in three homegrowers say they are the only ones who consume the flower they grow. Just under half (49%) say they share with friends or family. Younger growers are more likely to report being the only ones who consume their crop, while older cohorts are more likely to share their yields with their families.

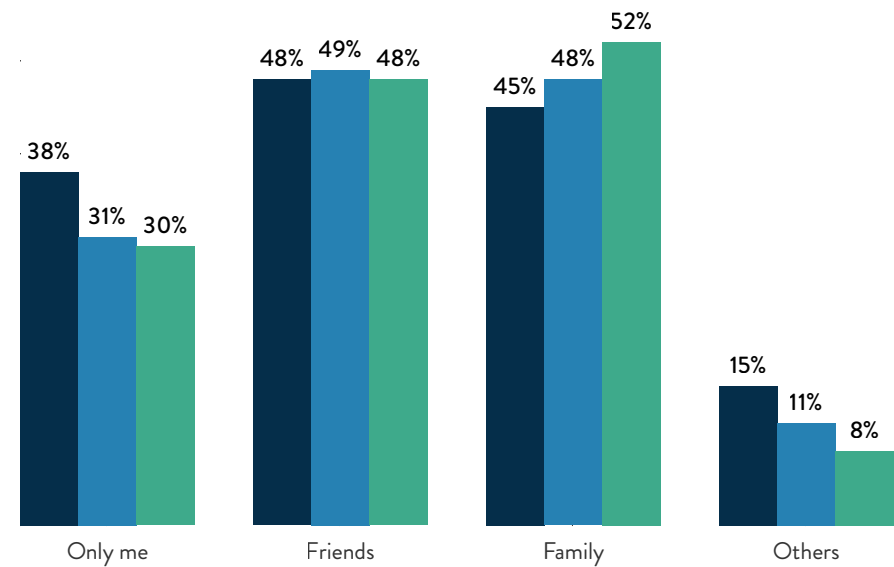
Who consumes the cannabis you grow?

BY AGE

● 18-34

● 35-54

● 55+



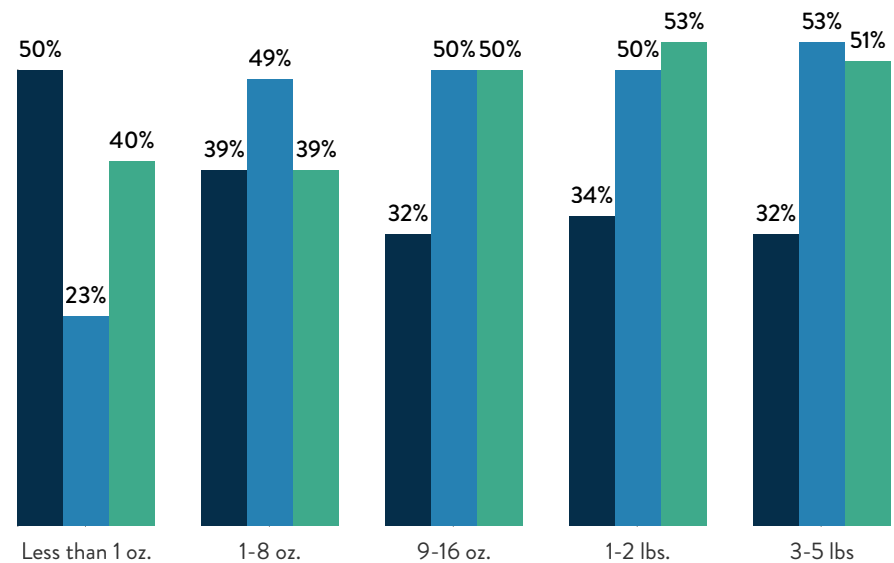
Production output was strongly associated with whether a grower shared their yield; half of those producing less than 1 ounce consumed it alone, while about one-quarter (26%) of those producing 3 or more pounds consumed it all alone.

BY PRODUCTION VOLUME

● Only me

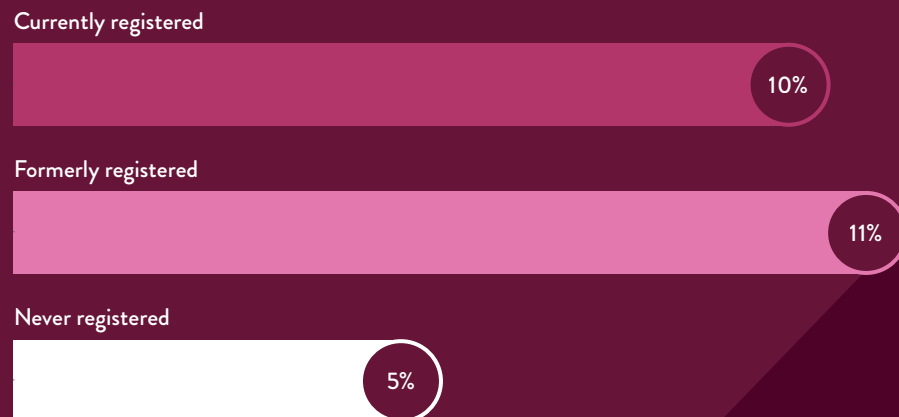
● Friends

● Family



Holistic Horticulture

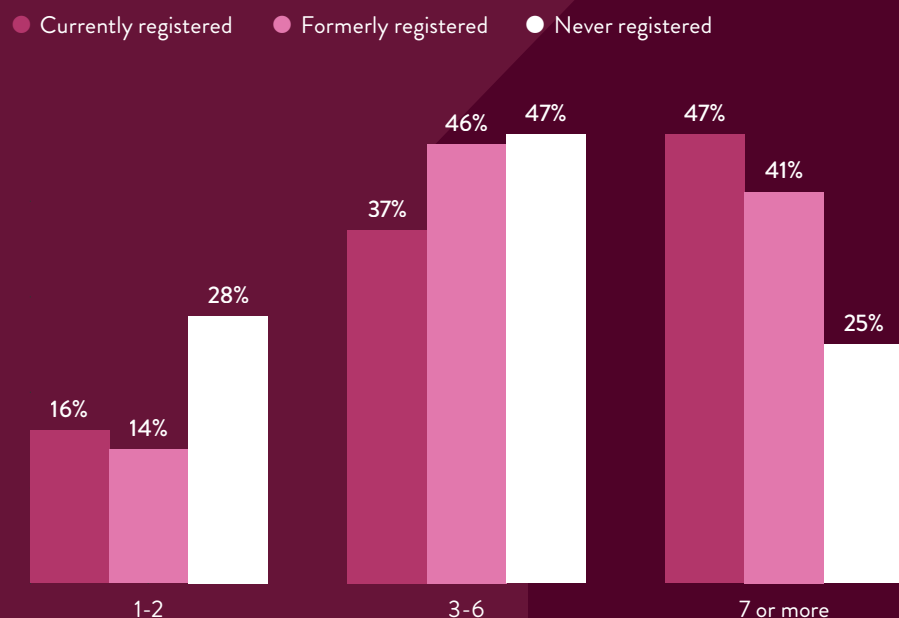
Propensity to Grow: By Medical Patient Status



Registered medical patients are twice as likely to have tried to grow their own cannabis at home.

Many states impose limits on the number of plants that can be grown simultaneously—six plants is a common cap—however, limits are often higher for state-registered patients. Just under half (47%) of currently registered medical patients report growing seven or more plants at a time.

Number of Plants: By Medical Patient Status



Currently registered medical cannabis patients were also more likely to claim that they alone consume the cannabis they grow (39%) compared to consumers who have never registered as medical patients in their state (29%).

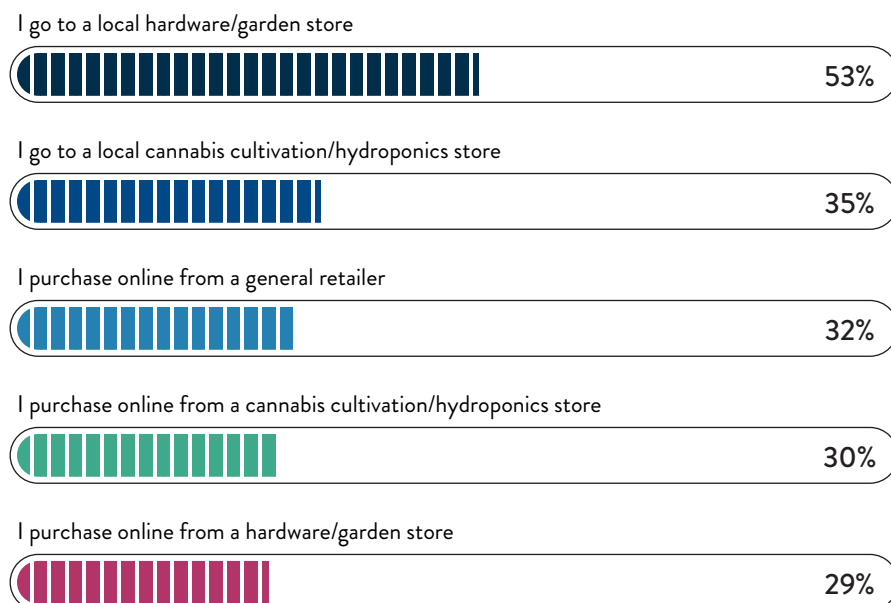
Building the Grow

Many growers utilize multiple sources to acquire the equipment for their grow operation and set up.

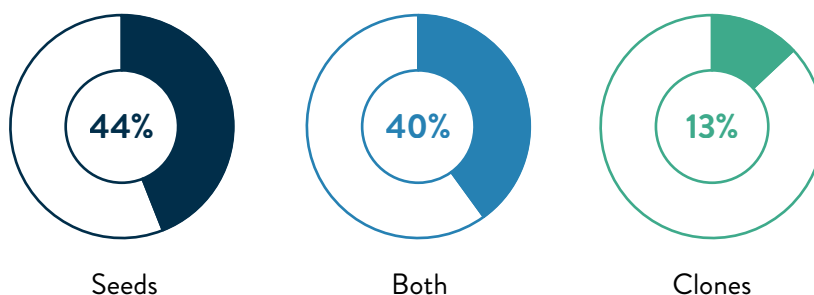
Just over half (53%) of growers have gone in person to a hardware store or garden center to acquire equipment while approximately one in three cited using an online source.

When it comes to the actual cannabis however, sourcing is often far less formal. Most growers start with seeds as opposed to clones (i.e. a small cutting from a parent plant).

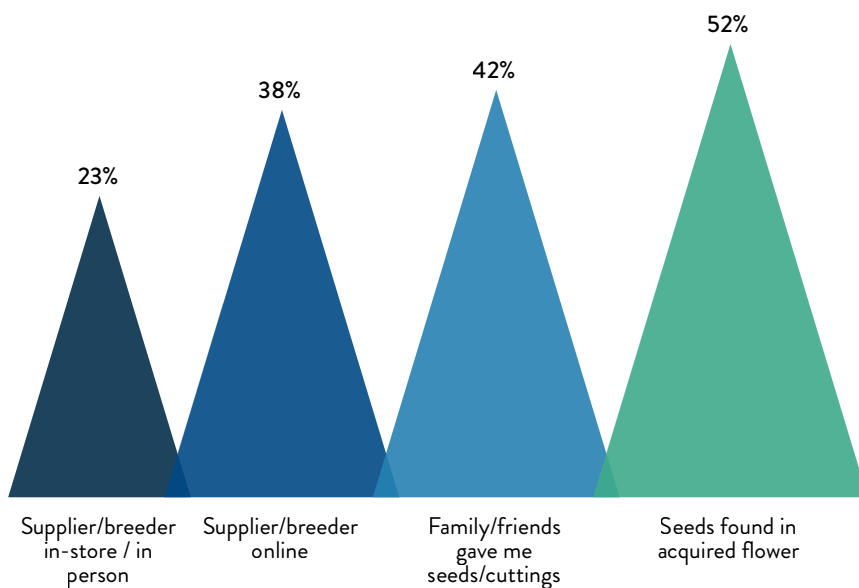
Where do you get your grow supplies?



Do you use seeds or clones?



Where do you get your seeds?



More than half (52%) say they acquired their seeds from flower they had purchased.

Seed Sourcing

In April 2022, the DEA announced that it would stop treating marijuana seeds as a controlled substance, stating “*marihuana seed that has a delta-9-tetrahydrocannabinol concentration of not more than 0.3 percent on a dry weight basis meets the definition of ‘hemp’ and thus is not controlled under the [Controlled Substances Act]*”.

This significant policy shift potentially opens up the market for national seed distribution, increasing the breadth of genetics available to homegrowers, and making it possible for homegrowers to produce strains that are not widely commercially available.

Ross et al. conducted an investigation to determine $\Delta 9$ -THC content in cannabis seeds. While drug-type cannabis seeds contained more $\Delta 9$ -THC than did hemp seeds, both fell well within the legal limit.

Source: *Cannabis sativa (Hemp) Seeds, $\Delta 9$ -Tetrahydrocannabinol, and Potential Overdose*

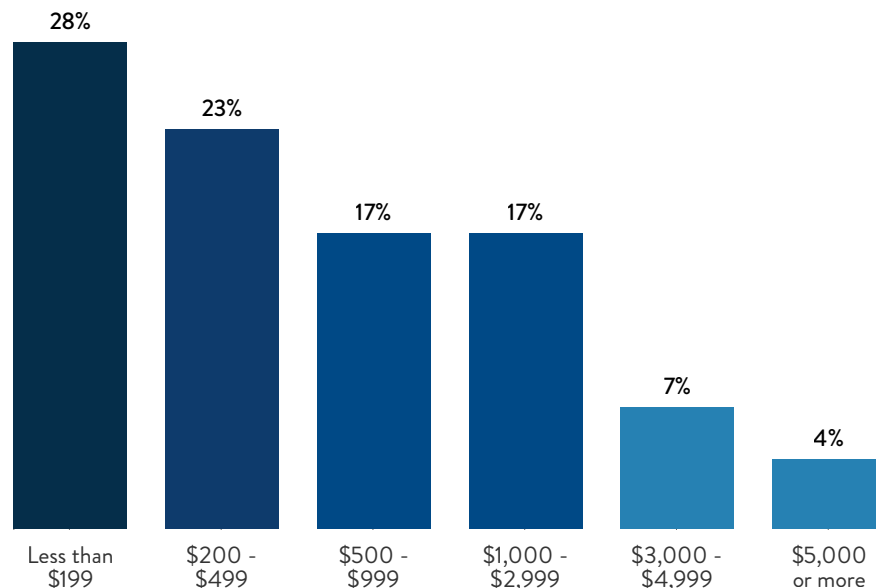
Half of growers surveyed (50%) claim to have spent less than \$500 on their equipment, while one in four (27%) say they spent more than \$1,000 on equipment.

51% of growers earning more than \$100k spend \$1000 or more on equipment...

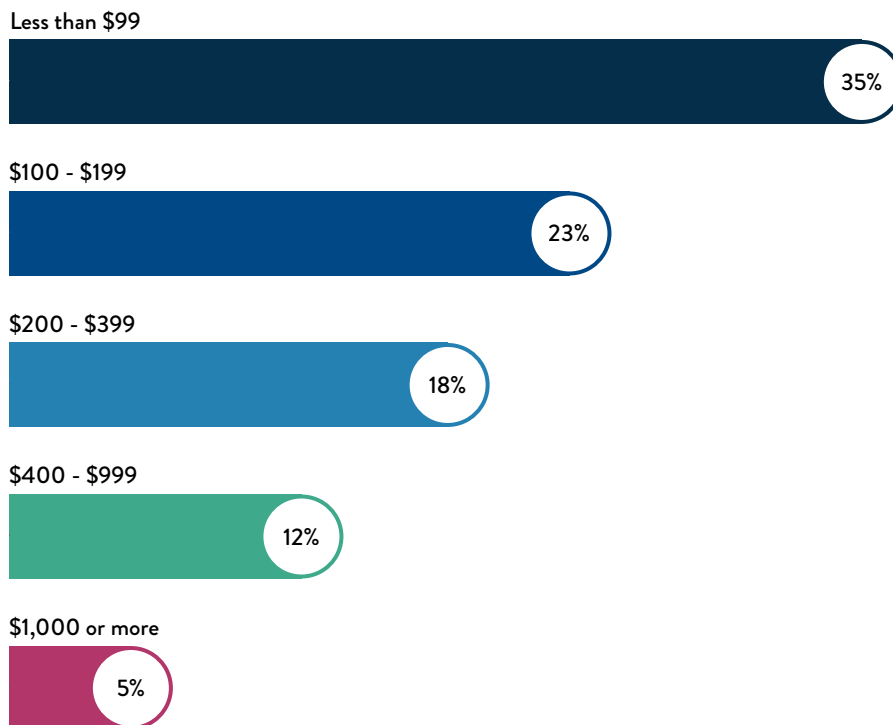
versus 13% of growers earning less than \$50k.

Just under six in ten (58%) say they spend less than \$200 per harvest.

Cost of Homegrow Equipment



Spend per Harvest



Commercial Growers

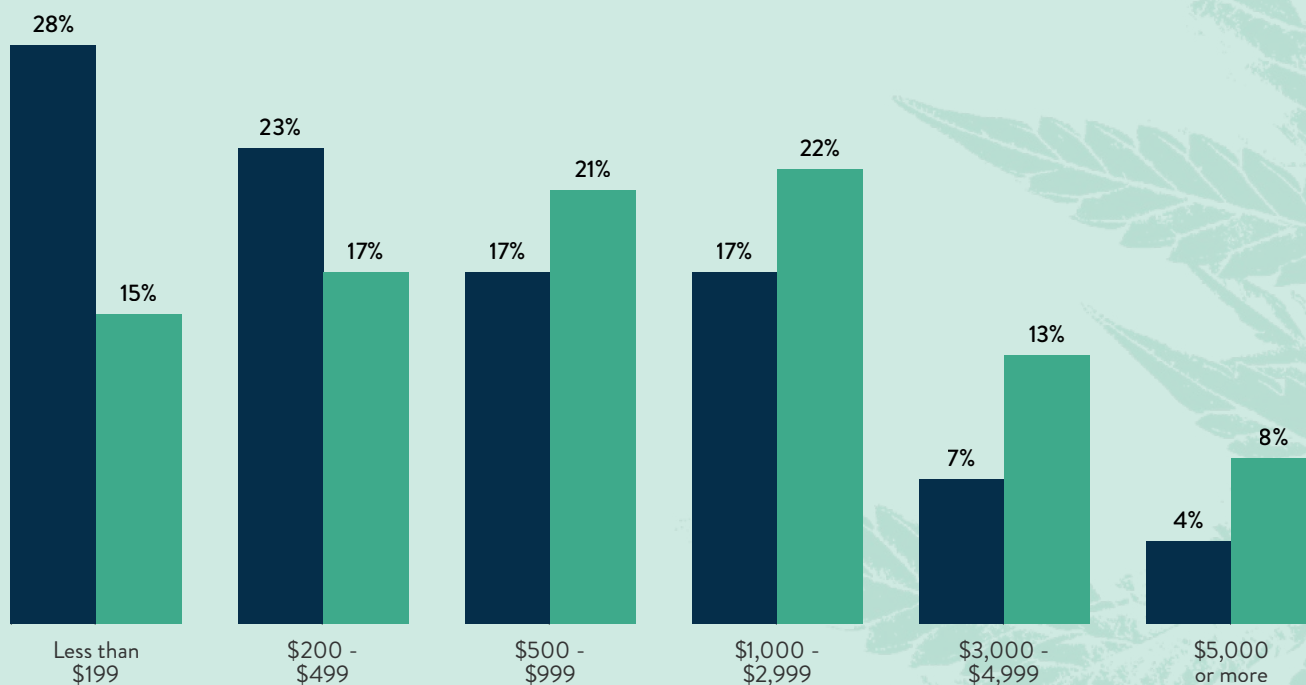
APPROXIMATELY ONE IN FOUR growers (26%) say that their grow is either both a hobby and commercial endeavor or exclusively commercial. Self-identified commercial growers tend to grow more plants at a time, produce more dried flower per harvest, and yield more harvests in a year when compared to the average homegrower.

Self-identified commercial growers also report having spent more on supplies as well as committing more time each week to their growing activities. Half of the commercial growers report spending 6+ hours a week on their grows, while 35% of hobbyist growers surveyed reported spending that much time.

One-time Supplies Cost: Commercial vs. Average Grower

● Average grower

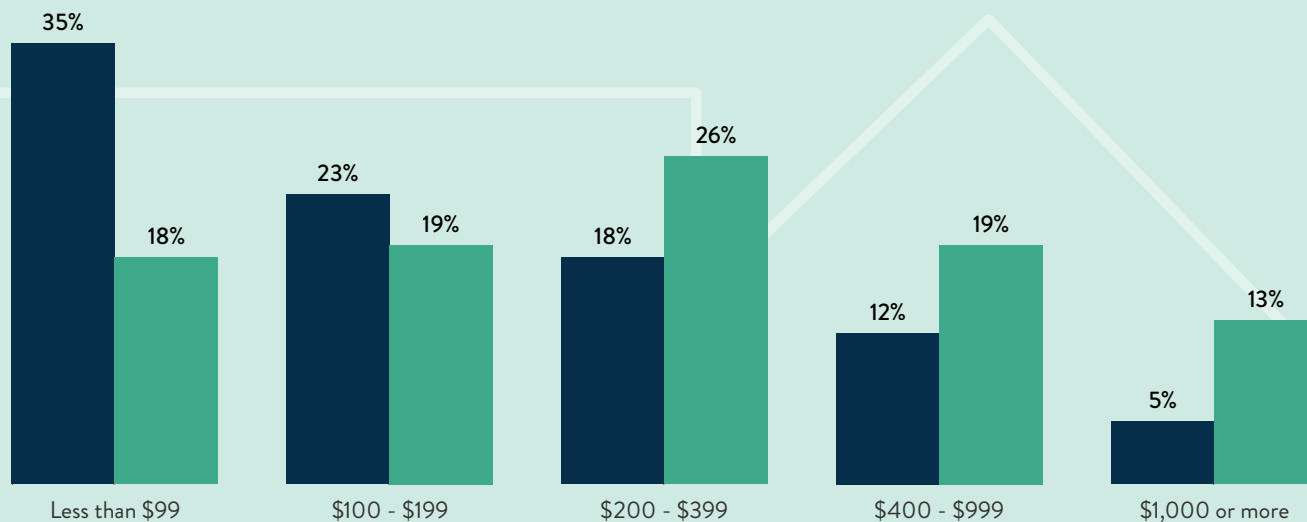
● Commercial grower



Per Harvest Cost: Commercial vs. Average Grower

● Average grower

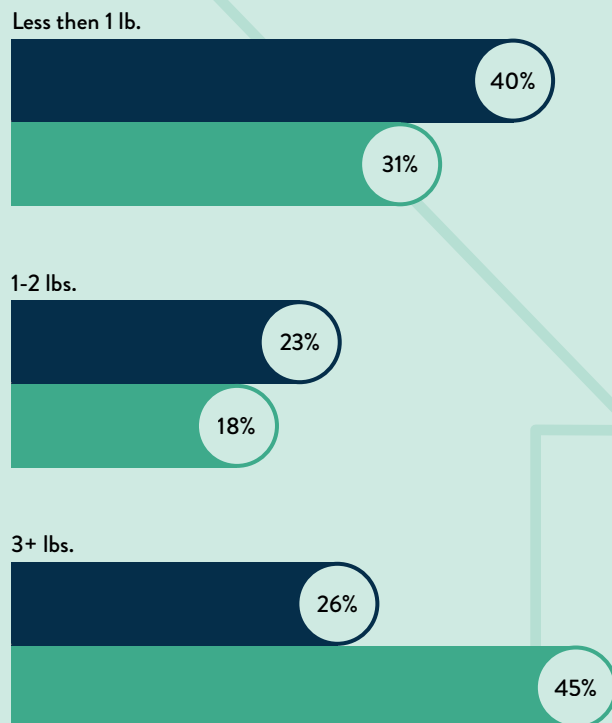
● Commercial grower



Pounds of Dried Flower per Harvest: Commercial vs. Average Grower

● Average grower

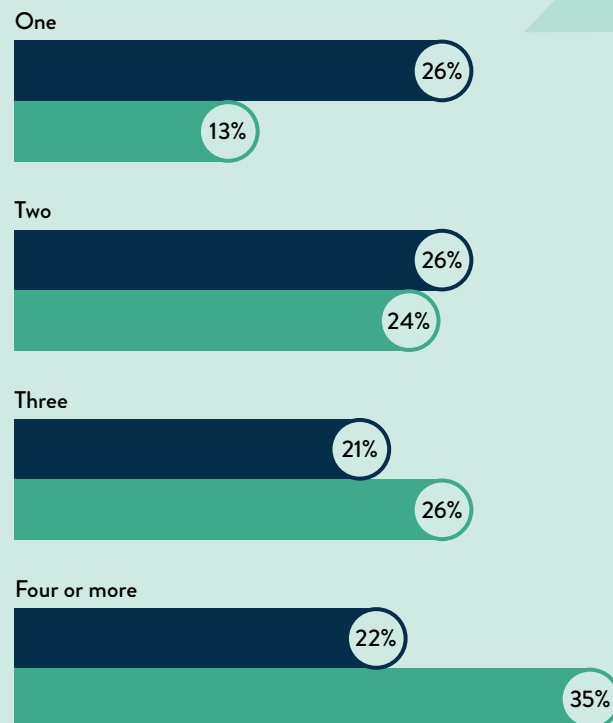
● Commercial grower



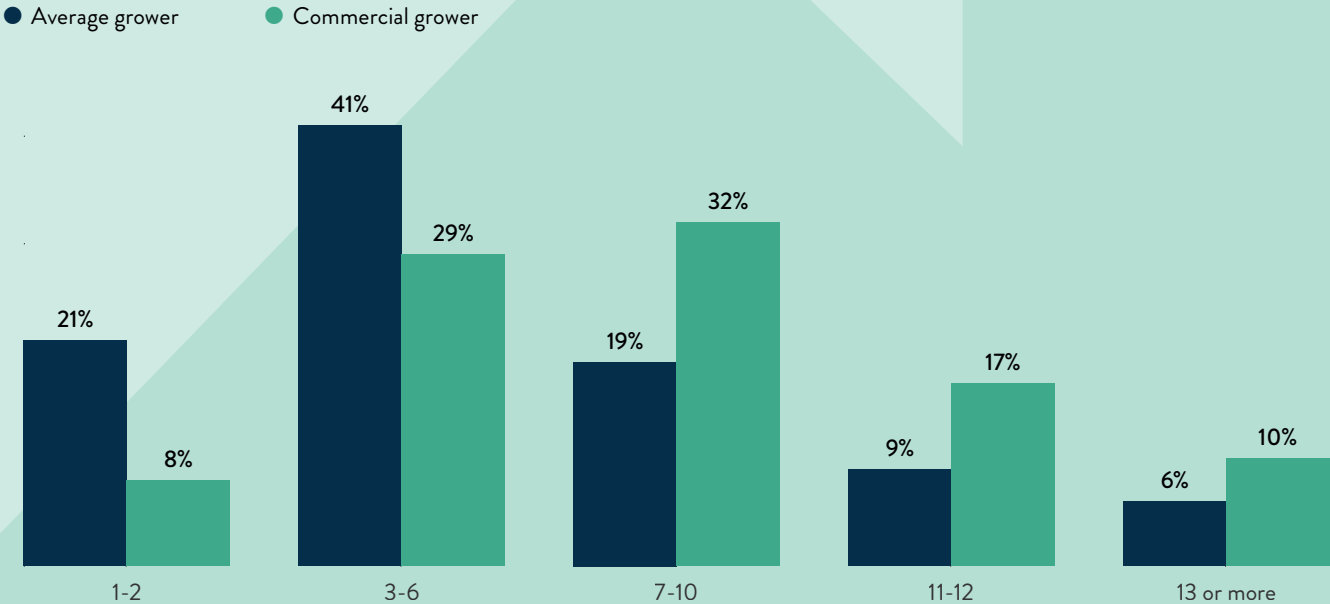
Harvests per Year: Commercial vs. Average Grower

● Average grower

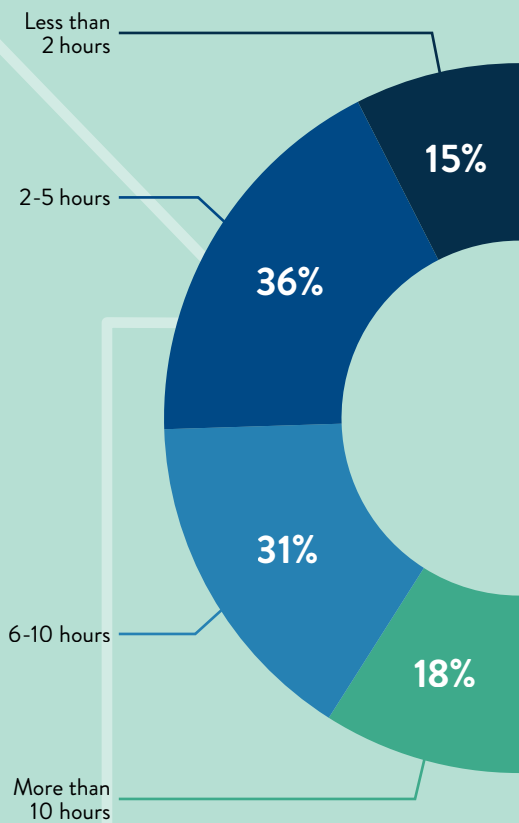
● Commercial grower



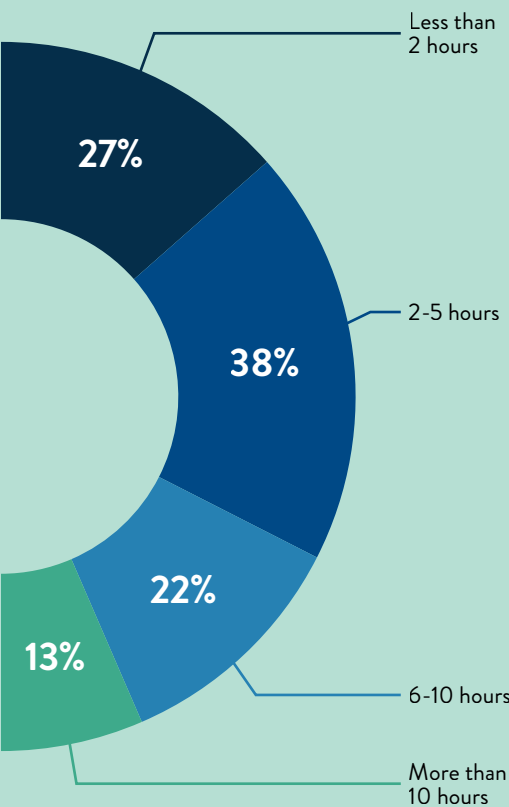
Number of Plants at a Time: Commercial vs. Average Grower



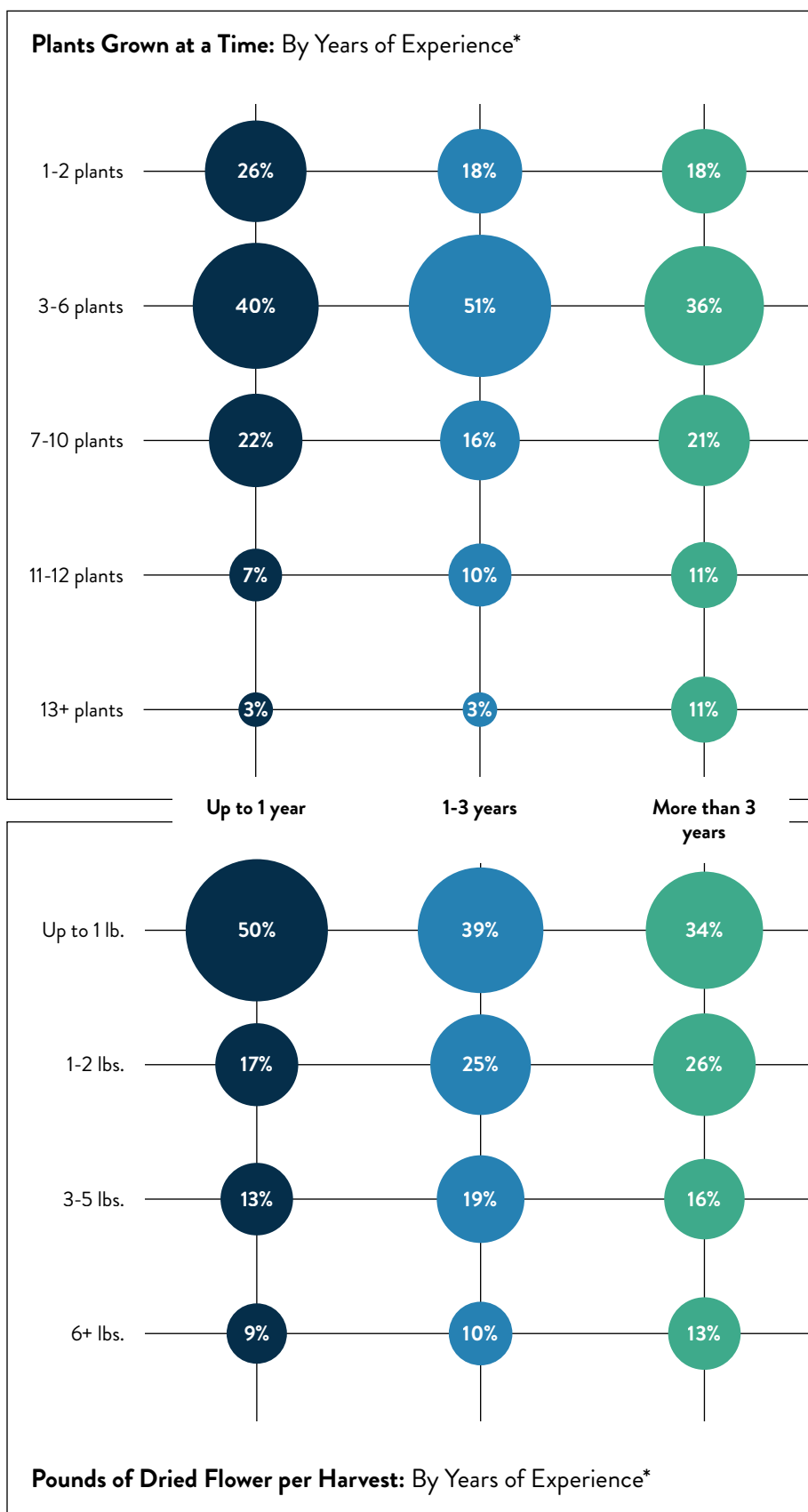
Hours per Week: Commercial Grower



Hours per Week: Average Grower

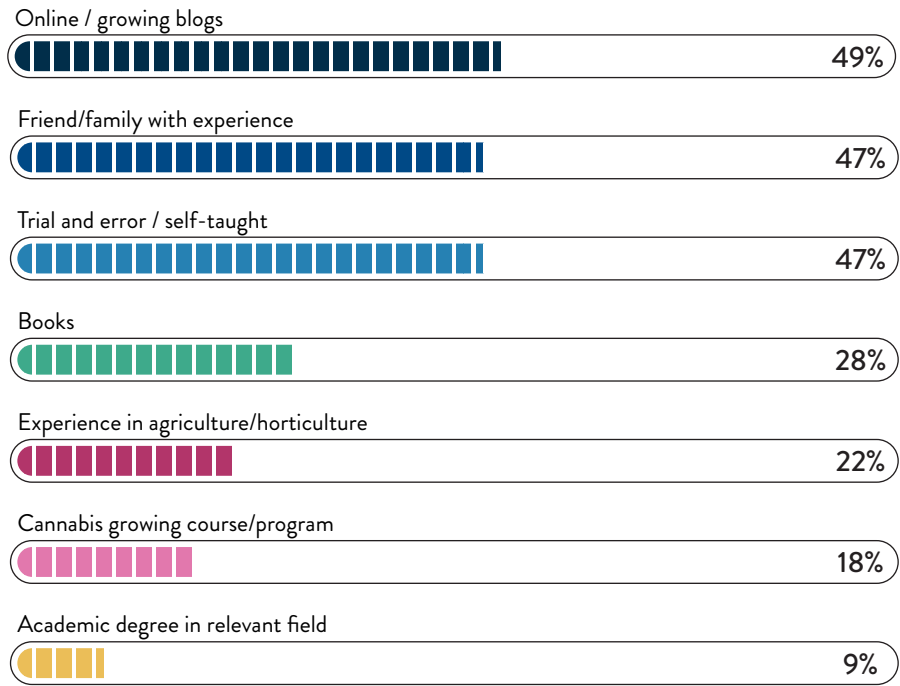


Growers with more experience are more likely to report growing more plants at a time, and report higher volume yields from each grow. Those growing more than six permitted plants may be doing so as part of medical collectives (e.g., as allowed in states like California) or may be growing outside the confines of the law.



*Does not include "Don't know" and "Prefer not to say".

How did you learn to grow?



When asked where they learned their skills cultivating cannabis, the top three responses were online sources (49%), learning from someone in their social circle (47%), or through trial and error (47%). A minority cited agricultural or academic experience.

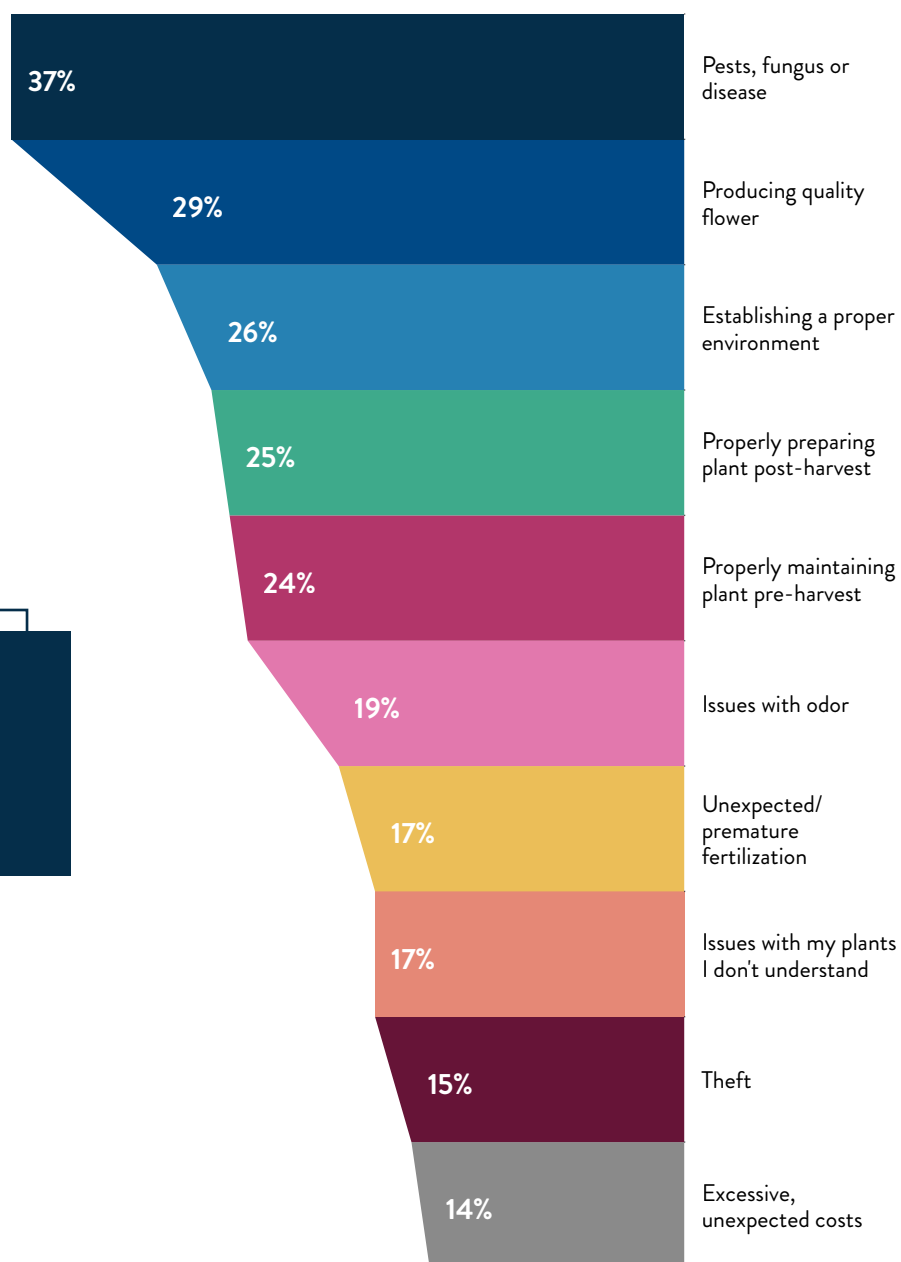
Challenges & Concerns

When it comes to the actual growing, challenges optimizing plant health dominated the issues cited.

Fewer than 1 in 5 (17%) among growers reported experiencing problems which they did not understand. On average, 7 in 10 growers reported having resolved the issues while growing.

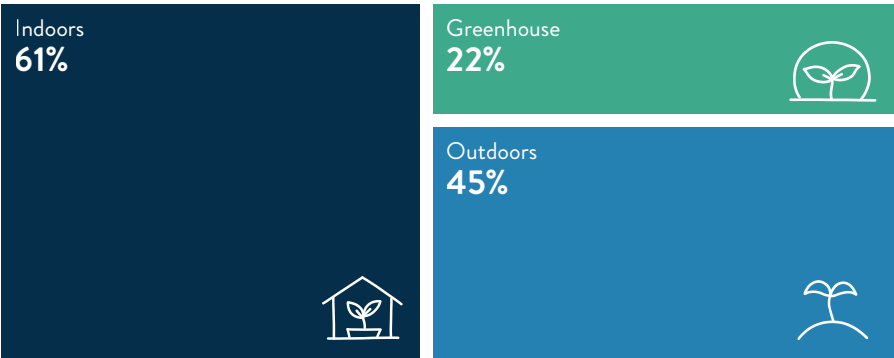
**7 in 10 growers
resolved the issues
they experienced.**

Top 10 Grow Challenges



Where the Growing Gets Done

Grow Environment: Aggregated

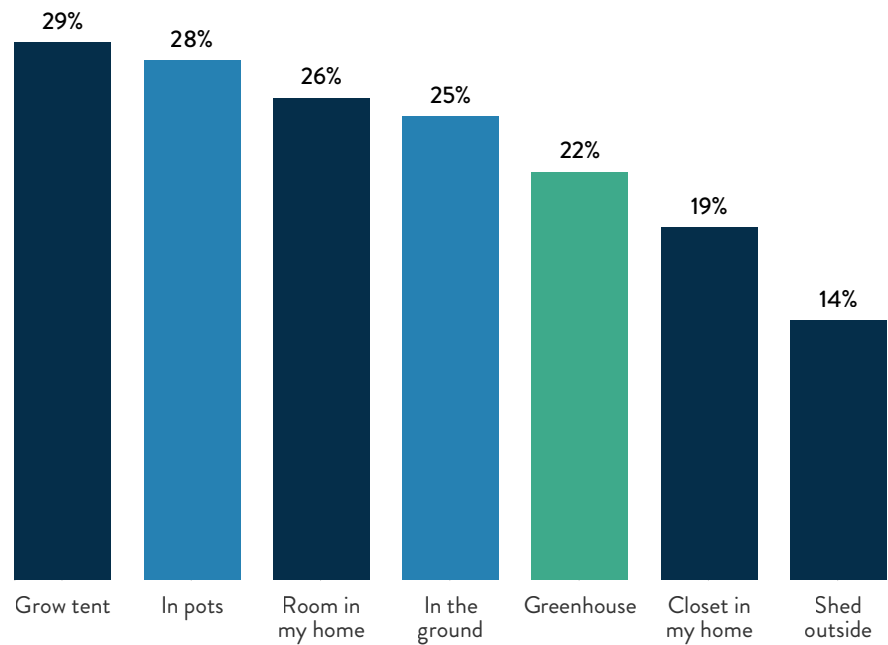


Homegrowers have a multitude of factors to consider when planning their grows, including (but not limited to) growing environment, planting methods, and grow lights.

With proper care, cannabis can be grown in a variety of different environments. Many growers have experimented with multiple growing environments. More than half (61%) report growing their cannabis indoors.

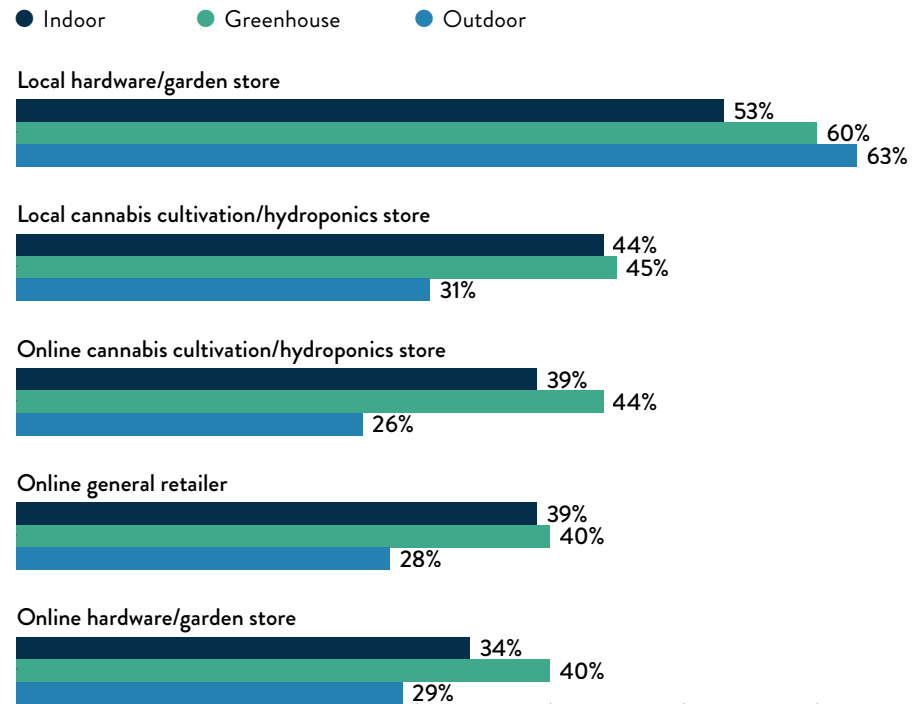
While the most commonly used grow types were grow tents and open air pots, no single type of grow dominates the market.

Where do you grow?



Outdoor growers were slightly more likely to go to a local hardware store or garden center to get their supplies. Indoor and hybrid growers were more likely to purchase from local hydroponics stores or online retailers.

Purchase Sources for Growing Supplies



Defining Different Grow Types



INDOOR GROWS

A grow situated indoors away from natural light, in an enclosed space where an individual has a greater degree of control over the various factors that impact the growth and yield of the plant.



OUTDOOR GROWS

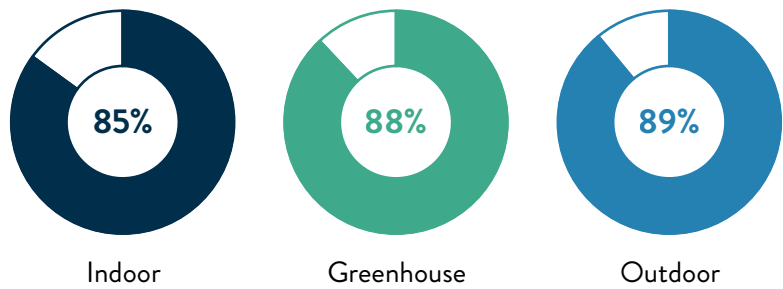
A grow situated outdoors where the plant can benefit from natural light but environmental factors play a larger role in the trajectory of the grow. Seasonality may limit the frequency with which outdoor grows are feasible or cost-effective.



GREENHOUSE GROWS

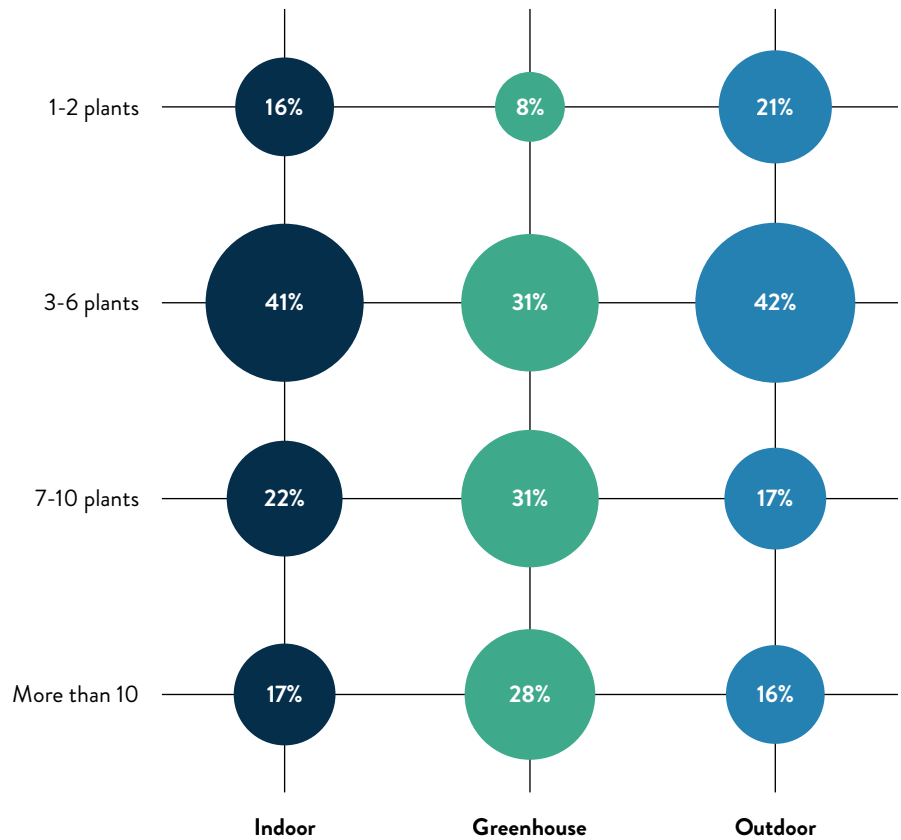
A hybrid approach where some of the benefits of outdoor grows, such as natural light, can be utilized while still maintaining some artificial control over the plant's environment.

Purchase from an Online Store



However, nearly 9 in 10 growers in each type of environment used at least one online source to acquire supplies.

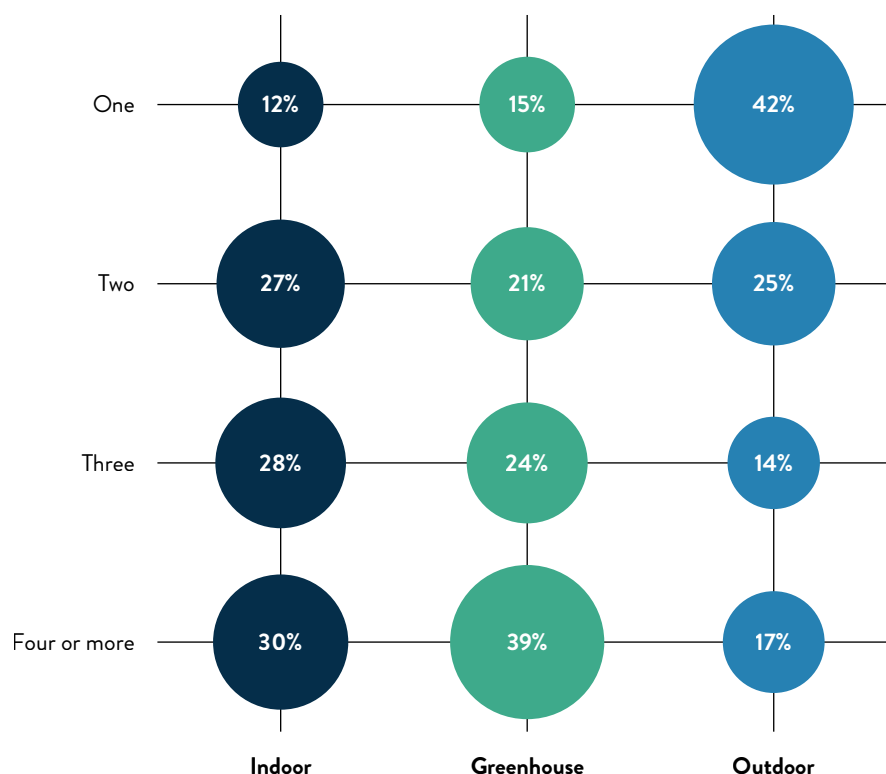
Number of Plants Cultivated at a Time



More than half (57%) of indoor growers, and nearly two-thirds (64%) of outdoor growers reported growing less than six plants at once. Conversely, more than half (59%) of greenhouse growers cultivate more than six plants at a time.

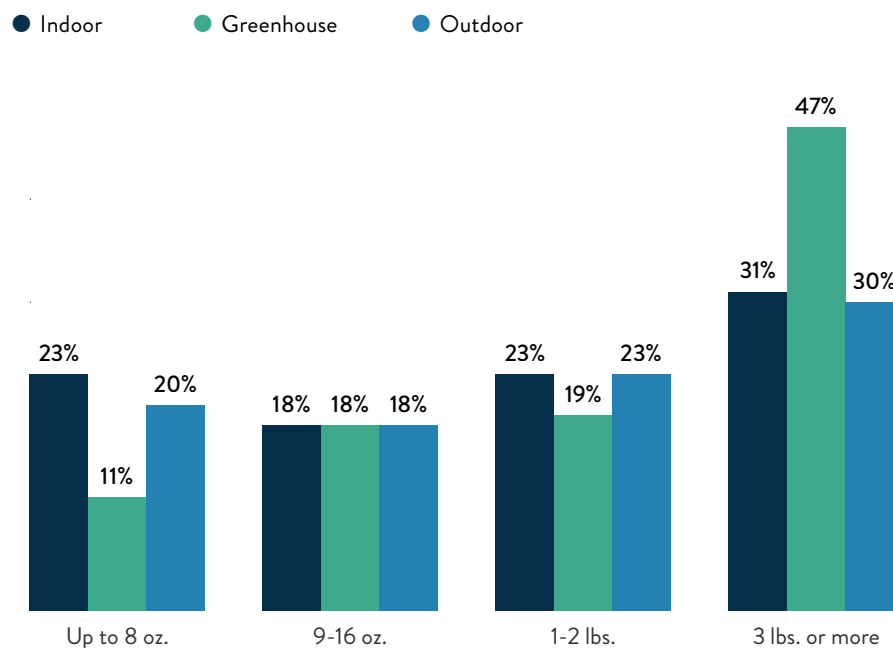
Outdoor growers were nearly three times more likely than indoor or greenhouse growers to only produce one harvest per year. That makes sense given that cannabis is naturally an annual, meaning it blooms once and then dies. More than half of both indoor and greenhouse growers produced three or more harvests per year.

Harvests per Year: By Grow Type



Indoor growers were more likely to report yielding half a pound or less, while greenhouse growers were significantly more likely to report yielding more than three pounds. Just under half (45%) of growers who have utilized a greenhouse environment said their grow was a commercial endeavor.

Dry Flower Yield: By Grow Type



A Happy Medium

AEROPONICS

A process whereby plants are grown in an air or mist environment without use of soil or an aggregated medium.



COCO

Derived from the coconut hull, coco holds water well and is relatively inexpensive. When treated properly, it can be reused.



DEEP-WATER CULTURE

Hydroponic solution involving suspending a plant above a well-oxygenated solution. The plants roots remain submerged in the solution.



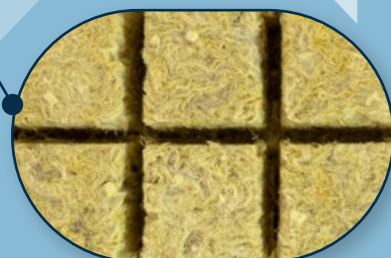
PERLITE

Siliceous mineral crushed and heated until it becomes a light, powdery substance which can be useful for increasing aeration and drainage.



ROCKWOOL

Comprised of basalt rock heated to high temperatures and then spun into fine fibers, Rockwool drains excess water quickly while facilitating oxygenation of a plant's roots. Rockwool's manufacturing process also renders it a sterile base, reducing the risk of the common contaminants and adulterants found in soil.



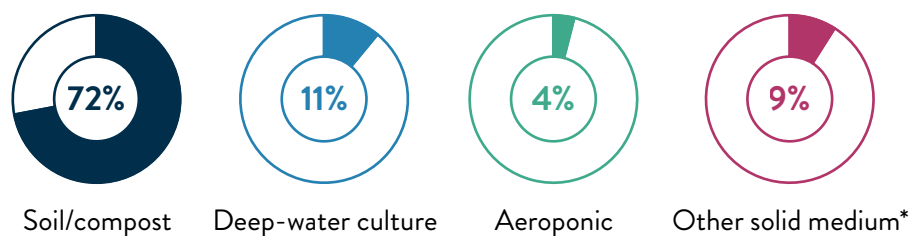
SOIL/COMPOST

Good old dirt is the most popular growing medium. While soil can present challenges due to lack of aeration, drainage, contamination, and water-holding capacity, the relative ease of use, comparative cost, and flexibility of soil can help facilitate a cost-effective grow.



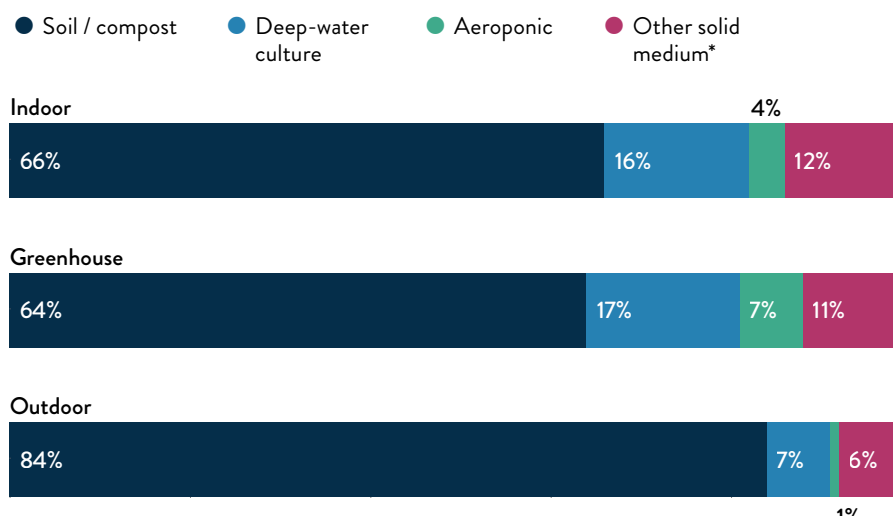
Regardless of grow type, growers utilize a variety of different grow mediums. Soil is the most popular medium, followed by deep-water culture and other solid media.

Grow Medium Used



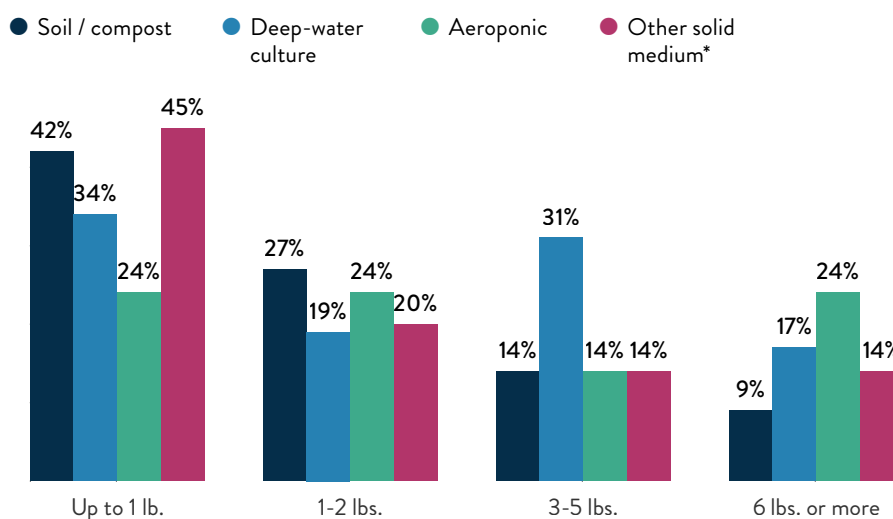
Outdoor growers were far more likely to utilize soil/compost compared to indoor or greenhouse growers who were more likely to use deep-water culture or a solid medium. Compared to the two other groups, greenhouse growers were also more likely to use aerponics.

Grow Medium: By Grow Type



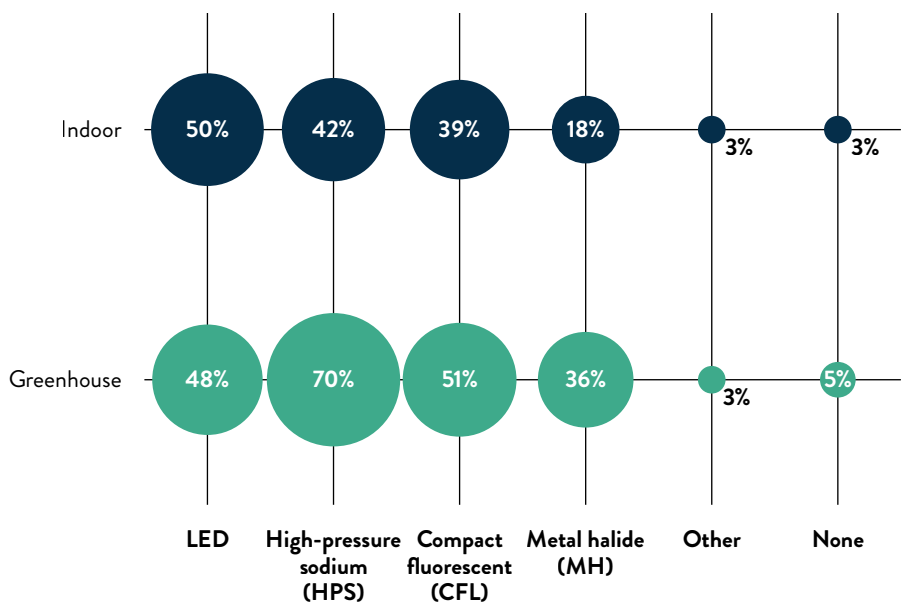
Three-quarters (74%) of growers utilizing soil/compost report producing less than 2 lbs. of dried flower per harvest. Aeroponic grows are more likely to claim they are producing in excess of 6 lbs. of dried flower per harvest.

Pounds of Dried Flower per Harvest: By Grow Medium



*Other: perlite, rockwool, coco, etc.

Lights Used: By Grow Type

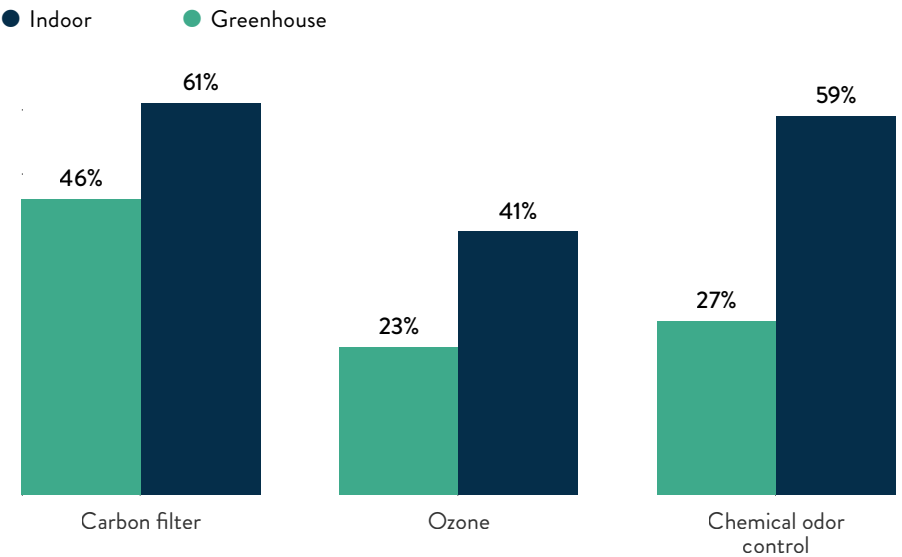


While outdoor growers do not necessarily need to concern themselves with providing their crop with additional lighting, indoor and greenhouse growers do need to factor what sort of artificial light they want to utilize in their cost-benefit calculations.

Indoor and greenhouse growers utilize a variety of different kinds of lights. Half of indoor growers have used LEDs, while 4 in 10 have also used HPS or CFLs. Greenhouse growers were more likely to have used HPS than other types of lights, and were more likely than indoor growers to have used tried most forms of artificial light.

Another element that outdoor growers can rely on Mother Nature to mitigate is the odor caused by their grows.

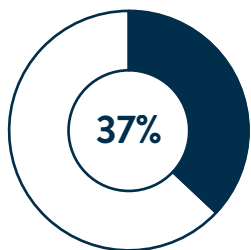
Ways Used to Control Odor



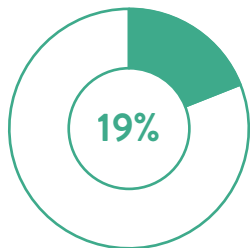
Indoor growers were more likely to use carbon filters, while greenhouse growers were more likely to use chemical odor control and ozone.

Indoor growers were nearly twice as likely as greenhouse growers to claim that they do not do anything to manage the odor associated with their grow. That may be due, in part, to indoor growers cultivating a smaller number of plants at one time when compared to greenhouse growers.

I do not do anything to manage odor



Indoor



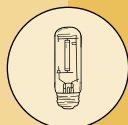
Greenhouse

Lights, Cannabis, Action



LED

Light-emitting diodes are semiconductors that emit light when current flows through them. They have many advantages over light sources, including lower power consumption, longer lifetime, and smaller size.



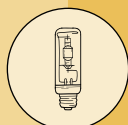
HPS

High-pressure sodium lamps utilize high-intensity discharge to produce light. They offer a good light spectrum and give off a fair bit of radiant heat, which can help simulate a warm climate. They may also be cheaper than other alternatives.



CFL

Compact-fluorescent lights rely on gas reactions inside their tubes to produce light. They use less electricity than traditional light bulbs. They also have a long life, radiate limited heat, and have low operating costs. CFLs contain a small amount of mercury.

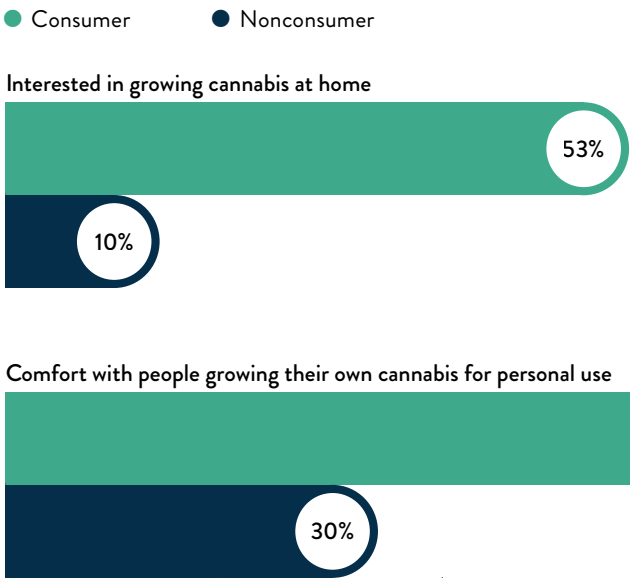


MH

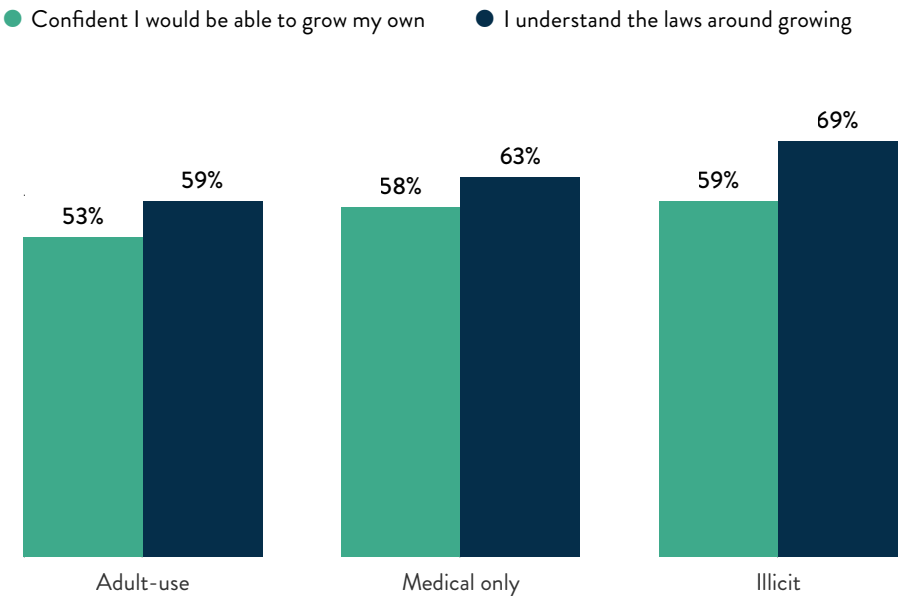
Metal halide lamps produce light via an electric arc through a gaseous mixture of vaporized mercury and metal halides. While they have a long warm-up period and a shorter life span, they produce high-quality light while being energy-efficient and radiating limited heat.

But What Will the Neighbors Think?

Non-grower Attitudes Towards Homegrow



Non-grower Beliefs Regarding Homegrow

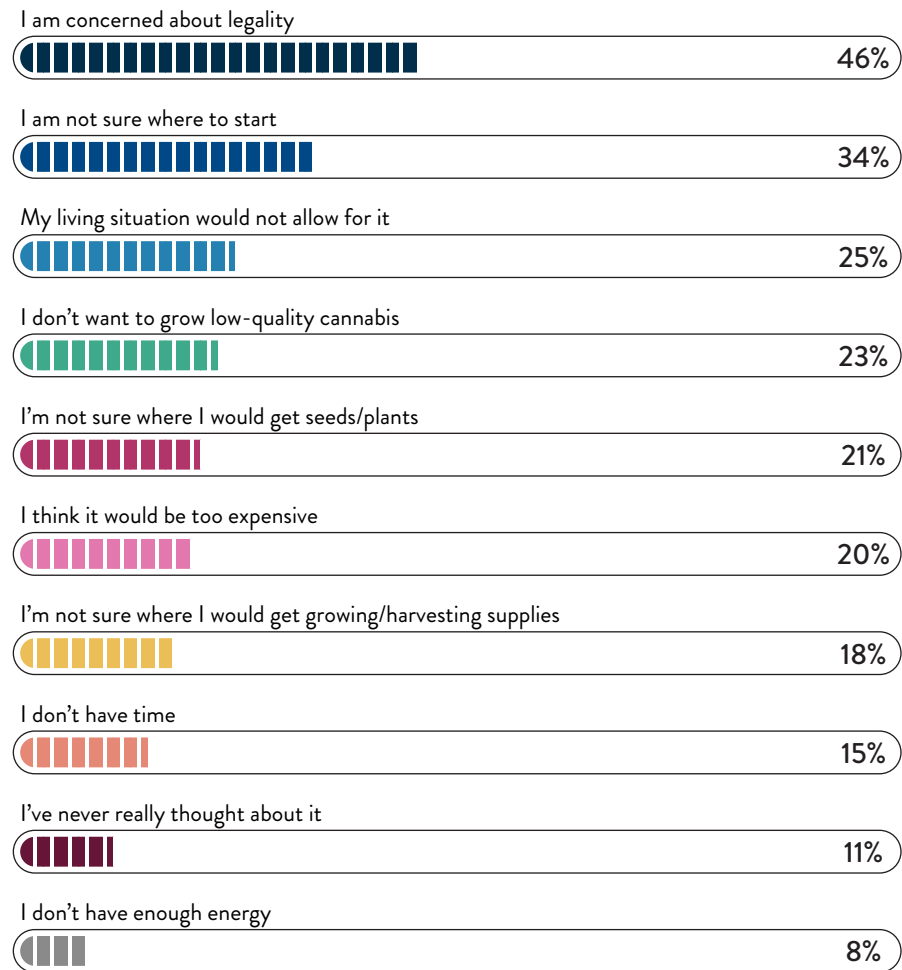


Cannabis consumers are far more open to the idea of growing their own cannabis than are non-consumers. Younger consumers are more likely to express confidence around the subject of homegrowing when compared to consumers older than 55.

Cannabis consumers in illicit markets are more confident that they understand the laws around growing cannabis than are their adult-use and medical-only counterparts. Even in markets where consumption has been legalized, homegrowing can remain an illicit activity. Where it is allowed, rules pertaining to the number of plants that an individual or household is allowed to grow—which vary from state to state—are all significantly more complicated than is the blanket illegality found in illicit markets.

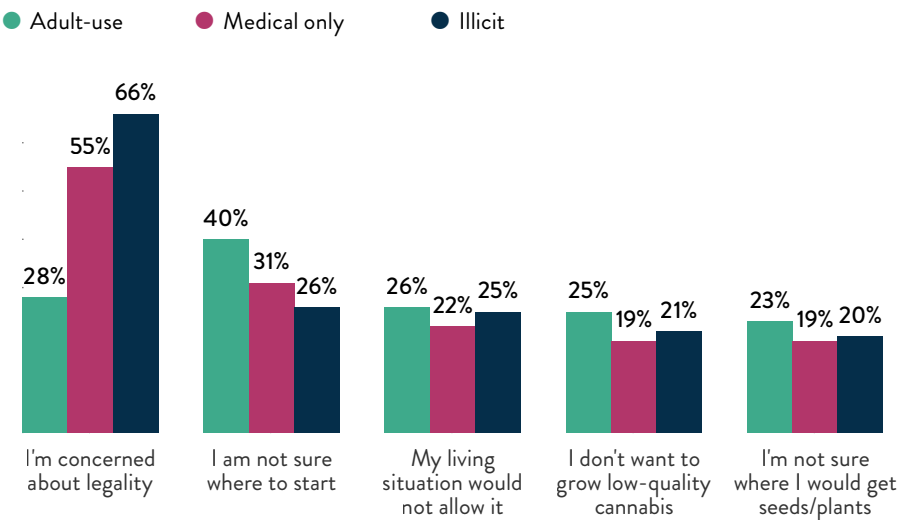
When asked why they have not yet engaged in homegrowing, consumers primarily cite concerns related to legality and practicality. Four in 10 consumers in adult-use markets say they don't know where to start.

Why Consumers Do Not Grow

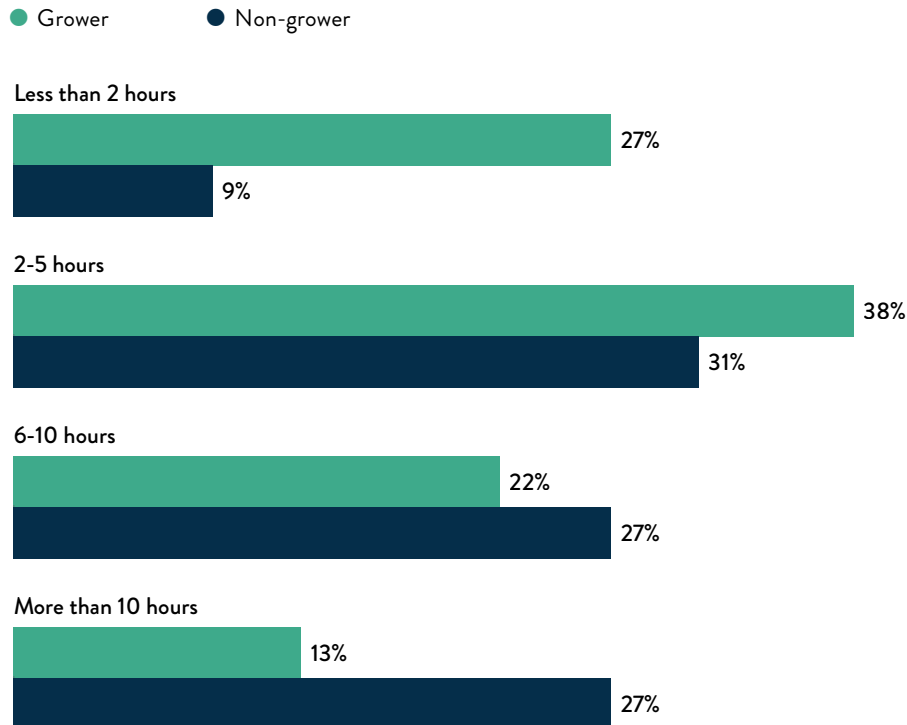


Older consumers and those living in illicit markets are most concerned with legality. Younger consumers are more likely to cite concerns about getting started, growing quality flower, limitations of their current living situation, and time commitment.

Primary Concerns About Homegrowing: By Market Type

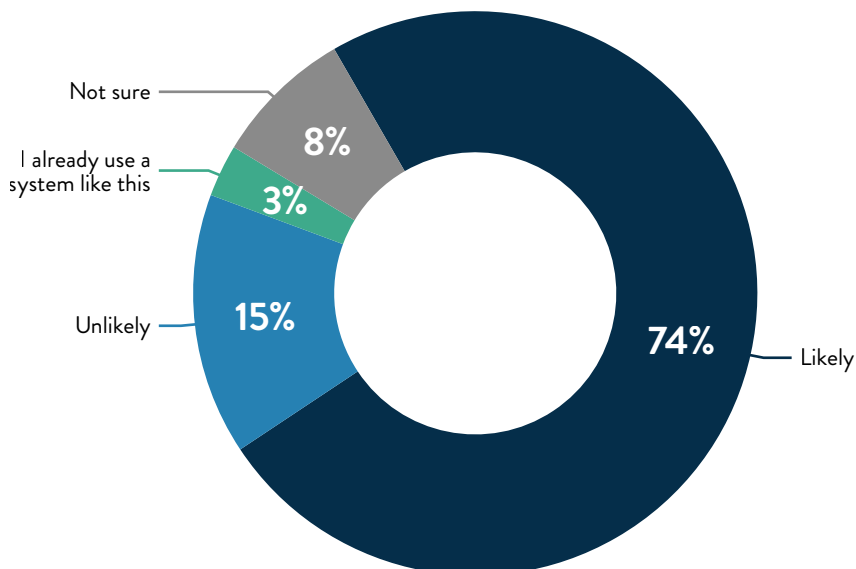


Non-grower Expected Time/Week Commitment vs. Grower Reported Hours



More than half (54%) of consumers say that they expected homegrowing to require a commitment of more than six hours a week, but only 34% of home-growers report spending that much time weekly.

Would you use an automated system?



Growers favor reducing their time commitments. They overwhelmingly approve of using an automated system. That suggests how as automated homegrow solutions become more widespread and cost competitive, homegrowers will increasingly gravitate to such solutions to streamline their grows.

Key Takeaways

The legal cannabis market is growing quickly, creating an expanding opportunity for homegrowing.

The recent dramatic expansion of legal cannabis in the U.S. is, in parallel, expanding the opportunity for home cultivation as legalization lowers resistance to participation in this market. Currently, homegrower participation rates are higher in fully legal markets than in medical or still illicit markets, which suggests that, over the next decade, as more states transition to full adult-use, more adults will take up homegrowing for the first time. State regulations (and specifically, the allowance of homegrowing) will be critical to new state markets. As the stigma around cannabis recedes, we expect more states to permit home cultivation in their regulatory framework.

Homegrowers represent the socio-economic spectrum of society.

More than half (56%) of homegrowers earn over \$50,000 per year, and a quarter of homegrowers earn more than \$100,000 per year. That underscores two points: 1) Income alone is not a good indicator for a consumer's likelihood to become a homegrower; and 2) while part of the market may be cost-conscious, there is a significant opportunity to serve more affluent consumers with premium homegrow products.

By a conservative estimate, spending for homegrowing will reach nearly \$3.7 billion by 2030.

Several factors will shape the outlook for retail spending on homegrow supplies: the speed at which states adopt full adult-use programs, regulations for homegrowing in each market (including plant limits where permitted), and innovations making homegrowing more accessible and risk/fail-proof, especially for beginner growers. However, even with a conservative estimate of 38% growth between 2022 and 2030, homegrow retail spending will approach \$4 billion by 2030.

With homegrowers estimated to produce up to 11 million pounds of cannabis in 2022 alone, the market could yield more than 13 times the flower volume of Colorado's legal market.

In 2020 (the most recent year for available data), Colorado produced 816,000 lbs. of dry flower, generating \$2.2 billion in legal sales. The scale of the homegrow market's output underscores the important additive role that residential cultivation plays in the national cannabis supply, supplementing both commercial legal and illicit producers.

The DEA's recent decision to treat marijuana seeds as hemp could significantly open up the market for homegrow genetics.

In April 2022, the DEA announced that it would stop treating marijuana seeds as a controlled substance, stating, “marihuana seed that has a delta-9-tetrahydrocannabinol concentration of not more than 0.3 percent on a dry weight basis meets the definition of ‘hemp’ and thus is not controlled under the [Controlled Substances Act]”. This significant policy shift potentially opens up the market for national seed distribution, increasing the breadth of genetics available to homegrowers, and making it possible for homegrowers to produce strains that are not widely commercially available.

Legalization is an important catalyst for consumers becoming homegrowers.

Not only were homegrowers nearly twice as likely to live in adult-use markets than illicit markets (7% vs 4%), the majority of homegrowers (56%) had been growing for less than three years, correlating to the recent expansion of legal markets that permit personal cultivation. If this trend continues apace, the homegrow market will continue to experience sustained growth through the end of the decade as the U.S. transitions towards an increasing count of fully legal and regulated state markets.

Even as the product landscape quickly diversifies, flower remains king.

Consumer preferences are evolving quickly as value-added products improve in quality and become more widely available in legal markets. However, flower remains the leading product category and will maintain its healthy lead for the foreseeable future. This will be important for the homegrow market as it ensures that homegrown flower will continue to be an attractive option for hobbyists even as newer non-combustion products become available in their home markets.

The majority of homegrowers are married and have children, challenging the stereotype that homegrowers are young, male and single.

With nearly two-thirds of homegrowers either married or in a relationship, and nearly half having children under the age of 18, homegrowers are far more likely to be people with families, rather than single childless adults. As the homegrow sector works to expand, showing that cannabis can be safely and responsibly grown at home—even in homes with young children—should be an important part of the messaging. Marketing that portrays middle-class families with cannabis growing in their homes is one way to show family-oriented consumers how cannabis can be grown in a non-disruptive way at home.

Almost half (45%) of homegrowers rely on their harvests as their primary sourcing for product, but more than one-third (37%) only consume their own homegrown cannabis.

Affirming that the homegrow market is primarily a hobbyists market, nearly two-thirds (63%) of homegrowers use cannabis from sources other than their own harvests. Notably, those who rely primarily on their own products do so because they lack access to alternative products. However, even as access increases, some growers continue to rely on their own supplies, favoring the quality and genetics they are able to produce relative to what is available on the market.

Homegrowers are far more likely to be wellness-oriented than are non-homegrowing consumers.

Not only do homegrowers consume cannabis at significantly higher rates than non-growers, they are far less likely to say that they use cannabis for relaxation, and far more likely to say that they use cannabis to improve their overall wellness. The wellness orientation of homegrowers should be an important messaging point, especially since nearly 40% reported that they grow at home because they don't want to have to worry about the quality or contamination of what they consume.

Most consumers grow cannabis for the passion of it, but costs and convenience are also important drivers.

Nearly three-quarters (73%) of consumers grow say they grow cannabis because they enjoy it, but approximately half also report growing because it's cheaper than buying on the open market (53%), and more convenient than getting it from other sources (48%). Notably, only 13% say they grow because they can make money off what they produce.

Cannabis consumers who have a “green thumb” should be a primary target for the homegrow market.

Homegrowers were twice as likely to have outdoor fruit and vegetable gardens than non-growers, and significantly more likely to grow plants inside their homes. The orientation to gardening, and pleasure derived from tending to plants should be part of the focused messaging to get non-grower consumers interested in homegrowing. However, given that producing high-quality cannabis can often be more challenging compared to common fruits and vegetables, prospective homegrowers should be educated on why growing cannabis is different from other plants.

Homegrowers turn to a variety of sources to learn how to grow cannabis, but few have used professional programs.

Approximately half of homegrowers learned how to grow from online resources (49%), friends and family member (47%), or are self-taught (47%), respectively. Comparatively, only one-fifth learned from a professional course (18%) and one-tenth from an academic degree (8%). The diffusion of sources to learn about cannabis suggests that homegrowers will turn to any reliable source that can help them improve the performance of their grows, creating opportunities for new, well-compiled training guides to capture a share of the home-grow education market.

Cannabis consumers are significantly more likely to be interested in growing cannabis than non growers.

While non-consumers are a larger percentage of the overall population, only 10% are potentially interested in growing cannabis compared to 53% of consumers. Furthermore, the primary reason why consumers in illicit markets do not grow is their concern about the legality of homegrowing, indicating that as state laws change and homegrowing becomes legal in more parts of the county, this key barrier to resistance will fall.

About New Frontier Data

NEW FRONTIER DATA is the premier data, analytics, and technology firm specializing in the global cannabis industry, delivering solutions that enable investors, operators, advertisers, brands, researchers, and policymakers to assess, understand, engage, and transact with the cannabis industry and its consumers. New Frontier Data's global reach and reputation is evidenced by research and analysis citations in more than 85 countries. Founded in 2014, New Frontier Data is headquartered in Washington, D.C., with presence in Europe, Latin America, and Africa.

Mission

New Frontier Data's mission is to inform policy and commercial activity for the global legal cannabis industry. We maintain a neutral position on the merits of cannabis legalization through comprehensive and transparent data analysis and projections that shape industry trends, dynamics, demand and opportunity drivers.

Core Values

- Honesty
- Respect
- Understanding

Vision

To be the nexus of data for the global cannabis industry.

Commitment to Our Clients

The trusted one-stop shop for cannabis business intelligence, New Frontier Data provides individuals and organizations operating, researching, or investing in the cannabis industry with unparalleled access to actionable industry intelligence and insight, helping them leverage the power of big data to succeed in a fast-paced and dynamic market. We are committed to the highest standards and most rigorous protocols in data collection, analysis, and reporting, protecting all IP and sources, as we continue to improve transparency into the global cannabis industry.

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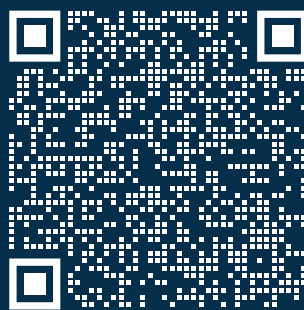


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