

# Cannabis Consumers Choose Infused Pre Rolls

## Infused Pre Rolls Reshape California's Cannabis Market

The California cannabis market has always been at the forefront of innovation in the U.S. marijuana industry. In recent months, that innovation has been led by a surge in popularity for infused pre-rolls, which are rapidly outpacing traditional options and redefining consumer preferences.

### Market Overview: A Shift in Consumption Habits

From December 1, 2024, to February 28, 2025, the California cannabis market generated a total of \$1.1 billion in sales, representing a slight decline of 0.5% compared to the previous quarter. Despite the dip in overall revenue, one product category has shown remarkable growth: infused pre-rolls.

During this period, pre-rolls alone accounted for \$178.1 million in sales, with infused varieties capturing a commanding 66.3% of that total. In contrast, traditional pre-rolls now represent only 33.7% of the category and experienced a 2.5% drop in unit sales.

The shift illustrates a broader trend within cannabis consumption: customers are increasingly seeking potency, convenience, and novelty, all of which infused products deliver.

### Understanding Infused Pre-Rolls

Infused pre-rolls are made by combining cannabis flower with concentrates or extracts, such as hash, kief, live resin, or diamonds. This blend significantly increases potency and introduces new flavor and aroma profiles, making the product more appealing to seasoned consumers.

In a market where concentrate subcategories proliferate at a rapid pace, combining flower with extracts gives brands room to create differentiated offerings. These hybrids of traditional and high-potency cannabis are capturing the imagination—and wallets—of California's cannabis consumers.

### Market Leaders: Jeeter Dominates the Field

Among the brands riding the wave of infused pre-roll popularity, Jeeter stands at the forefront. The Desert Hot Springs-based company leads the pre-roll category in California with \$26.7 million in sales, commanding a 15% market share.

Following Jeeter are:

- Stiiizy: \$18.7 million in sales (10.5% market share)
- Sluggers Hit: \$7.8 million (4.4%)
- Kingpin: \$7.1 million (4%)
- Presidential RX: \$6.4 million (3.5%)

Jeeter's dominance stems not only from its consistent product quality but also from its strategic brand positioning and innovation. The company has invested heavily in R&D, spending over two years refining its infusion process before rolling out the final product after rigorous testing.

## **The Role of Innovation in a Competitive Market**

California remains the most competitive cannabis market in the U.S., drawing both legacy operators and new entrants. For brands like Jeeter, standing out means more than delivering potent products—it requires creative marketing, storytelling, and consumer engagement.

One recent example includes Jeeter's collaboration with pop culture icons Jay and Silent Bob to celebrate National Donut Day. The campaign launched a humorous short film and a themed product called Bluntman's Chronic, a slow-burning, hole-infused pre-roll. These efforts help the brand build emotional connections with consumers beyond just THC content.

Jeeter's approach to innovation focuses on intuition and creativity rather than being driven solely by data. This mindset has helped the company avoid what it refers to as "analysis paralysis," enabling it to move quickly and confidently in an evolving market.

## **Packaging Trends: The Rise of Mini-Joints**

Another trend fueling infused pre-roll sales is the five-pack of half-gram mini-joints, which has emerged as a favorite among consumers. These smaller, more portable products offer a combination of value, convenience, and consistent dosing, making them ideal for both regular and casual users.

The appeal lies in the ease of consumption. Consumers can enjoy a quick session without committing to a full gram, while the five-pack format means fewer trips to the dispensary.

The industry is also moving away from the "bigger is better" mentality that once dominated cannabis marketing. Today's consumers value discretion and efficiency, making mini-joints a natural fit for modern lifestyles.

## **Pricing and Consistency**

While price remains a factor in consumer decision-making, consistency plays an even more critical role. Jeeter's infused pre-rolls average \$12.57 per gram, slightly higher than Stiiizy's \$11.52 per gram. But consumers are often willing to pay a premium for a predictable experience.

Consistency means that when a customer returns to purchase the same product weeks later, they get the same effects, flavor, and burn quality as before. This is an area where large brands tend to have an advantage due to better quality control and manufacturing processes.

Smaller or craft brands often struggle to maintain this level of consistency, which can hinder customer loyalty. As the infused pre-roll category becomes more crowded, brand reliability will likely determine long-term success.

## **Expanding Influence Beyond California**

While California leads the charge in infused pre-roll innovation, other states are starting to follow suit. According to industry insiders, Michigan is rapidly catching up in terms of product quality, consumer education, and brand sophistication.

As more states open up recreational markets and adjust regulations, the success of infused pre-rolls in California could serve as a blueprint for national trends. Brands that have already invested in product development and brand equity in California may find themselves well-positioned to expand into other regions.

## **A Product Category with Momentum**

Infused pre-rolls are no longer a niche or novelty item—they have become a core product category in California's cannabis market. Their rapid rise signals a shift in how consumers approach cannabis: not just for relaxation or medical relief, but also for flavor, experience, and convenience.

As technology improves and product offerings expand, the category is expected to evolve even further. Innovations in extraction methods, infusion techniques, and packaging will likely drive continued growth.

For cannabis companies aiming to compete in California and beyond investing in infused pre-rolls may no longer be optional. It's a strategic necessity.

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