

Pre Rolls Overtake Flower as Canada's Top Cannabis Category

Pre Rolls Surpass Flower as Canada's Top Earning Cannabis Category

For the first time since legalization, pre-rolls have overtaken flower as the highest-grossing cannabis product category in Canada, according to a new report from Custom Cones USA. The *Top 50 Canadian Pre-Roll Brands of 2025* study reveals a major shift in consumer preferences, with pre-rolls now commanding more than a third of the national market.

Pre-Rolls Take the Lead

Drawing on 2024 sales data from cannabis analytics firm Headset, the report shows pre-rolls generated over \$1.27 billion in revenue across nearly 69 million units sold, securing a 32.8 percent market share. By mid-2025, pre-rolls surpassed flower by 4.2 percent—or about \$38 million in sales—to claim the top spot in the Canadian market.

“Pre-rolls have evolved from an afterthought for many companies into what is now a cornerstone of the modern cannabis industry,” said Harrison Bard, CEO of Custom Cones USA. “The data shows a market that rewards quality and innovation, and the brands leading this list are embracing this shift.”

Market Leaders

The report identifies Calgary-based Decibel Cannabis Co.'s *General Admission* brand as Canada's top pre-roll performer. In 2024, the brand outpaced its nearest competitor by 250 percent, selling more than 5.6 million units and generating nearly \$147.5 million in sales.

Other standout brands include:

- **Shred**, recognized for its terpene-rich blends.
- **Back Forty**, known for accessible, large multipacks.
- **Jeeter**, America's best-selling pre-roll brand, which entered Canada in 2024.
- **Redecan**, an Ontario-based company famous for its slim *Redees* pre-roll packs.

The rankings are based on Headset's transaction data from more than 500 retailers across Alberta, British Columbia, Ontario, and Saskatchewan, supplemented by a proprietary “Social Score” that factors in online engagement across Instagram, LinkedIn, and brand websites.

Key Trends Driving Growth

The report highlights several major takeaways fueling the rise of pre-rolls:

- **Category leadership:** Pre-rolls' revenue and unit growth now put them firmly ahead of flower in Canada.
- **Infused multipacks:** Demand for potency is fueling the rise of infused pre-roll multipacks, which drive higher revenues per sale.
- **Innovation and loyalty:** Leading brands focus on unique product offerings, creative formats, and strong consumer loyalty.
- **Packaging and branding:** Companies that stand out with inventive packaging and branding strategies are gaining faster traction in a competitive market.

A Turning Point for the Cannabis Industry

The success of pre-rolls reflects a broader transformation in the Canadian cannabis industry. Initially viewed as a convenience product for occasional use, pre-rolls are now at the center of consumer demand and industry growth.

With infused options, variety packs, and innovative designs leading the way, pre-rolls are no longer simply a gateway product—they've become a cornerstone of modern cannabis commerce.

As the report underscores, Canada's cannabis market is evolving quickly, and brands that adapt with creativity and consumer focus are the ones most likely to thrive in this new era.

Email: info@cannabisriskmanager.com | Phone: +415-226-4060

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