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Executive Summary – December 2019 (Released February 2020)

BDS Analytics' has released the Cannabis Price Index (CPI) for December of 2019.

The one-of-a-kind CPI is a benchmark of retail sales pricing across cannabis products in select legalized U.S. markets. The index currently reports sales in Arizona, California, Colorado, Nevada and Oregon—state markets that generated more than 50 percent of the legalized U.S. sales in 2018. Underlying pricing data is the compilation of actual dispensary transactions captured by BDS Analytics' [GreenEdge® Retail Sales Tracking Platform](#).

The baseline of measurement represents the launch of adult-use sales in California in January of 2018. In order to standardize retail pricing data for Flower and Concentrates, all transactions are normalized to price per gram. For *Ingestibles*, *Topicals* and *Vape*, sales are converted to a price per unit measure.

BDS Analytics' CPI is unique in its ability to **index retail pricing across all product categories**, a significant insight considering the rapid market growth largely driven by branded products in all categories.

BDS Analytics' **CPI for December 2019 stands at 102.13**, representing a less than one percent increase from the trailing month. Compared to December 2018, average retail prices have decreased less than one percent. Year-to-date average retail prices have decreased slightly more than one percent.

The index score is positive for *Pre-rolled Joints* and *Topicals*, indicating an increase of the average retail price of these product categories relative to January 2019. The remaining product categories including *Flower*, *Vape*, *Ingestibles* and *Dabbles*

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