OHIO CANNABIS MARKET RESEARCH

The High Canopy Report

An Independent Analysis of Ohio’s Cannabis Production Ecosystem

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The High Canopy Report is an ongoing research project that will publish periodic structural analyses of regulated cannabis markets, currently exploring the Ohio Market.

Introduction

The Ohio cannabis market appears fragmented at the surface — dozens of brands competing for shelf space across dispensaries statewide.

However, when structured at the operator and license level, a different pattern emerges.

This report is built on a reconciled dataset of 73 operators, 68 licensed production entities (the legal infrastructure behind brands), and 130+ active brands, mapping how brands are produced, licensed, and distributed across the state. By separating brand identity from operational control, the analysis reveals how market presence is actually constructed.

Rather than functioning as independent competitors, many brands are connected through shared production infrastructure, licensing relationships, or vertically integrated operations.

As a result, what appears to be a broad and competitive brand landscape is, in practice, a more concentrated system shaped by a smaller group of operators controlling access to production and distribution.

Analyst Highlight

The Ohio cannabis market is often discussed in terms of brands and retail menus.

But when viewed through licensing relationships and production infrastructure, the market begins to look less like a collection of individual brands and more like a network of operators supporting multiple brand programs.

Mapping these relationships helps clarify how the market actually functions, and in doing so can expand the range of options consumers recognize when evaluating products across the ever-evolving market.

Methodology

This report presents a structured view of the Ohio cannabis production ecosystem by mapping relationships across operators, licenses, and consumer brands.

The dataset was compiled from publicly available sources, including:

- Ohio Division of Cannabis Control license records
- corporate operator disclosures
- brand ownership disclosures
- dispensary menu observations
- industry reporting

All visualizations and operator-level analyses are derived from the High Canopy dataset unless otherwise noted.

The dataset organizes the market into a relational framework:

Operator → License Entity → Brand

This structure reflects how production authority flows through licensed entities rather than brands themselves.

Additional attributes capture:

- cultivation tiers
- processing relationships
- brand program structure
- national vs. Ohio-based operators

Together, these relationships allow the report to visualize how consumer brands connect to the operators and licenses legally authorized to produce cannabis in Ohio.

All data in this report is sourced from publicly available regulatory records, operator disclosures, and market observations. No proprietary or confidential information was used. All interpretations reflect independent analysis by High Canopy Research.

Primary Data Sources

The dataset used in this report was compiled from publicly available regulatory records, operator disclosures, and retail menu observations.

Primary data sources include:

Ohio Division of Cannabis Control
https://com.ohio.gov/divisions-and-programs/cannabis-control

Ohio cannabis licensee records
https://com.ohio.gov/divisions-and-programs/cannabis-control/licensees

Retail menu observations across licensed Ohio dispensaries using menu platforms including Dutchie, Leafly, Weedmaps., and brand presence and packaging.[1]

Corporate operator disclosures and brand ownership statements.

Publicly available industry reporting and market analysis.

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[1] MJBizDaily — Ohio issues dual-use licenses for adult-use rollout

https://mjbizdaily.com/news/ohio-issues-10-dual-licenses-for-pending-launch-of-adult-use-marijuana-sales/

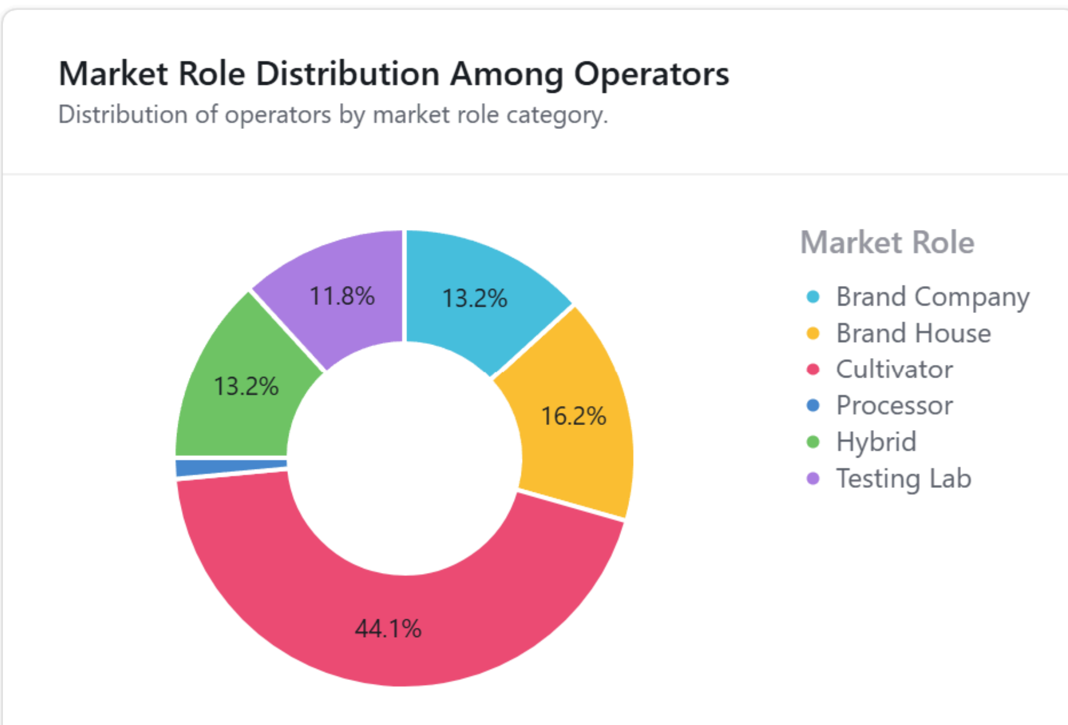
Market Size

Ohio's regulated cannabis market has expanded rapidly since the launch of adult-use sales in 2024, surpassing $1 billion in annual revenue within its first full year.
Market projections suggest the state could approach $2 billion in annual sales, supported by a population of nearly 12 million residents and an established medical cannabis infrastructure.

Market size, however, does not fully explain how the Ohio cannabis ecosystem operates.

Within the current dataset, the market includes **73 operators and more than 130 consumer-facing brands**, but participation in brand production is uneven. Only **41 operators are actively associated with brand portfolios**, while the remaining operators participate primarily through licensing, cultivation, processing, or other infrastructure roles.

This distinction highlights a structural divide between **market participation and brand creation**.



Market Insight

The top 10 operators account for approximately **41% of all brands**, while the majority of operators are associated with only one or two brands.

At the upper end, several operators manage portfolios of **6 to 12 or more brands**, forming a visible cluster of high-output entities. In contrast, most operators maintain limited brand presence, often tied to a single product line or partnership.

This distribution reveals a clear structure:

- A small group of operators maintain large, multi-brand portfolios
- A broad base of operators participate with limited brand presence
- A subset of brands remain structurally ambiguous or not directly tied to clearly identifiable production entities

Ohio Cannabis

By the Numbers

A structural snapshot of Ohio's cannabis ecosystem, highlighting operator scale, brand portfolios, and market composition. Each circle represents an operator and the number of consumer brands associated with that operator in Ohio.

Brand count alone overstates market diversity. Beneath the surface, brand activity is concentrated among a smaller group of operators who control a meaningful share of production and portfolio presence.

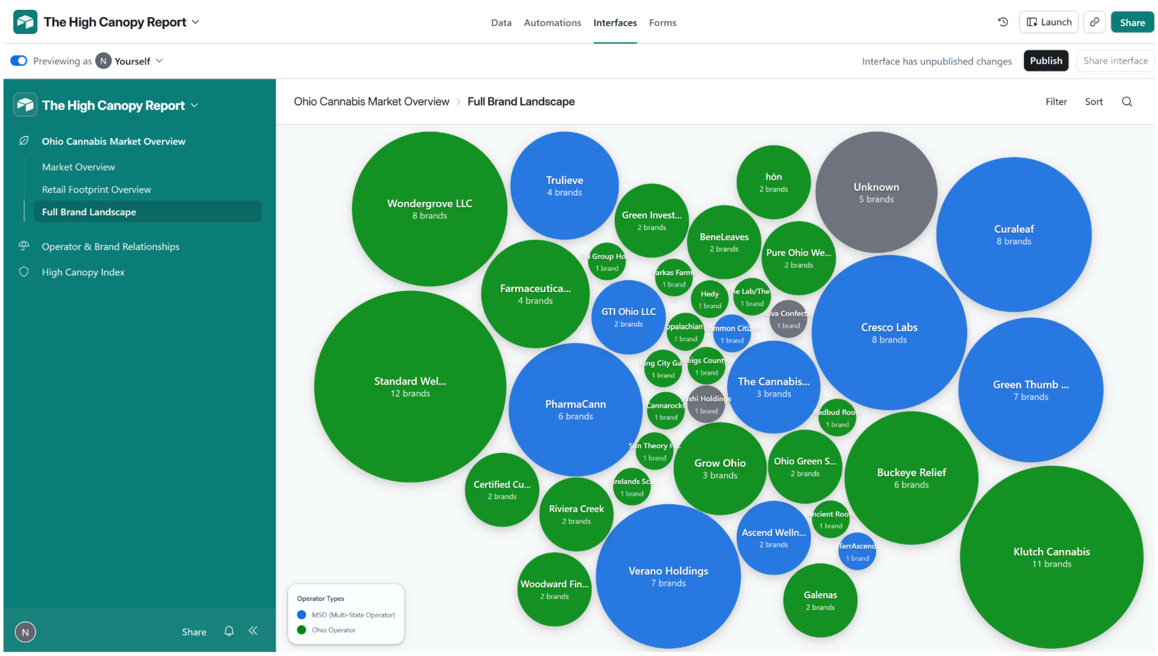


Image: source: *The High Canopy Report: Ohio Cannabis Brand Landscape*

This map, while ever evolving, is available in an interactive format on The High Canopy Report website.

Market Insight

Only 38 licensed operators actively produce consumer-facing brands. While many operators hold licenses, just over half currently operate brand portfolios, with others participating through cultivation, processing, licensing partnerships, or third-party manufacturing.

These figures represent the current working dataset for The High Canopy Report and will continue evolving as additional relationships are verified.

Beyond production infrastructure, Ohio's cannabis market also includes a fixed number of licensed retail operators.

Under the state's regulatory framework[2], 204 dispensary licenses have been authorized statewide through the Ohio Division of Cannabis Control.[3] These licenses represent the full allocation of retail locations currently permitted under Ohio's cannabis program.

Because retail licenses are capped, access to dispensary infrastructure represents one of the most valuable positions within the supply chain.

Recent regulatory updates introduce pathways for program expansion and updated revenue allocation structures, while maintaining elements of social equity.

Some operators participating in Ohio's market control multiple stages of the industry, including:

- cultivation
- processing
- retail dispensaries

When these layers are combined, operators are able to grow cannabis, manufacture finished products, and distribute those products directly through their own retail locations.

Within a market where both production licenses and retail licenses are limited, these vertically integrated operators can exert significant influence across the broader ecosystem of brands appearing on dispensary shelves.

[2] Ohio Division of Cannabis Control, licensing records and adult-use regulatory updates (2024–2025).

[3] Ohio Ohio Division of Cannabis Control., https://com.ohio.gov/wps/wcm/connect/gov/2db02238-3101-4845-b999-a64ce6f0887c/DCC_Update_By_The_Numbers.pdf?MOD=AJPERES&CONVERT_TO=url&CACHEID=ROOTWORKSPACE.Z18_JQGCH4S04P41206HNUKVF31000-2db02238-3101-4845-b999-a64ce6f0887c-pq78IWX

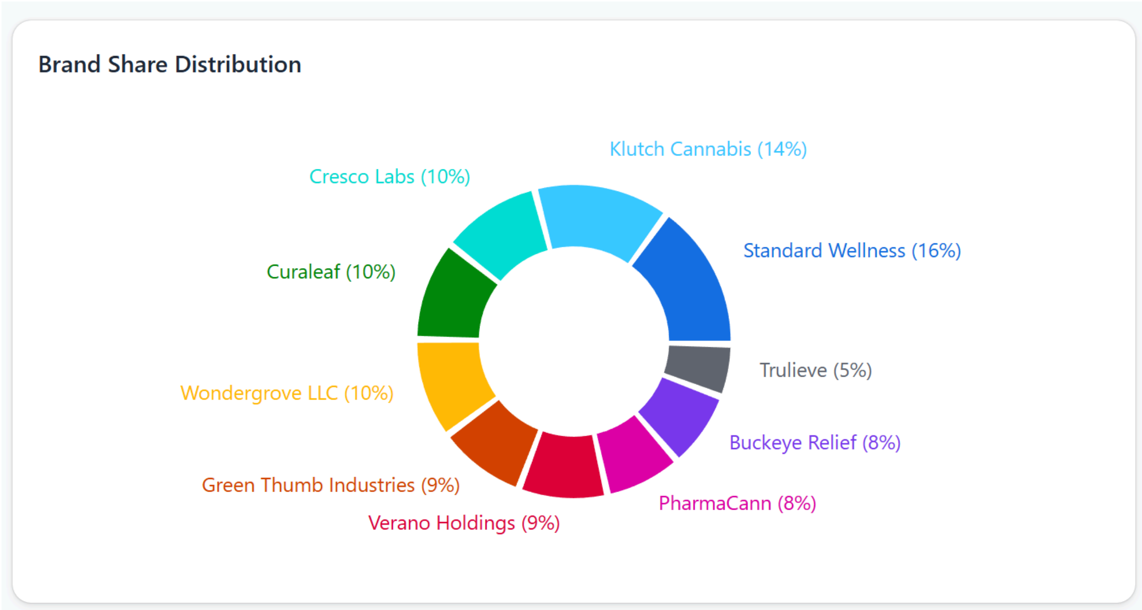


Image: source: *The High Canopy Report: Brand Share Distribution*

> The leading operators collectively represent a meaningful share of total brands in the dataset, highlighting the concentration of brand production within a relatively small group of producers.

At the same time, the number of consumer-facing brands has expanded far faster than the number of operators legally authorized to produce cannabis.

Licensing System

When Ohio legalized adult-use cannabis in 2023, the state did not immediately create an entirely new licensing ecosystem.

Instead, regulators allowed many existing medical cannabis license holders to convert to dual-use licenses[4], enabling them to serve both medical and adult-use markets.

This approach allowed adult-use sales to launch more quickly by relying on an already-established production and retail infrastructure.

Under the dual-use system:

- existing cultivators could supply both markets
- existing processors could manufacture products for both markets
- existing dispensaries could sell to both medical patients and adult-use consumers

Because these licenses were issued to operators already operating in the medical program, the initial adult-use market began with a relatively small number of incumbent operators.

This structure has several downstream effects on market dynamics. Within the current dataset, 73 operators support approximately 135 consumer-facing brands, reinforcing how a relatively small group of incumbents underpin a much larger visible brand ecosystem.

[4] MJBizDaily, https://mjbizdaily.com/news/ohio-issues-10-dual-licenses-for-pending-launch-of-adult-use-marijuana-sales/

Brand Structure & Supply Chain

Ohio's cannabis regulatory system separates brand identity from production authority.

Consumer brands are the names customers recognize on dispensary menus. They represent product lines, marketing identities, and positioning within the retail market. However, brands themselves are not the legal entities authorized to grow or manufacture cannabis.

In practice, the Ohio cannabis supply chain follows a structured path:

Operator → License Entity → Processor → Cultivator → Brand

Operators control licenses. Licensed entities hold production authority. Processors manufacture finished goods, and cultivators produce the underlying biomass. Brands are layered onto this infrastructure to bring products to market.

Because of this structure, multiple brands may originate from the same cultivation or processing system. Brand identity expands independently from production capacity, allowing the number of consumer-facing brands to grow faster than the number of operators producing them.

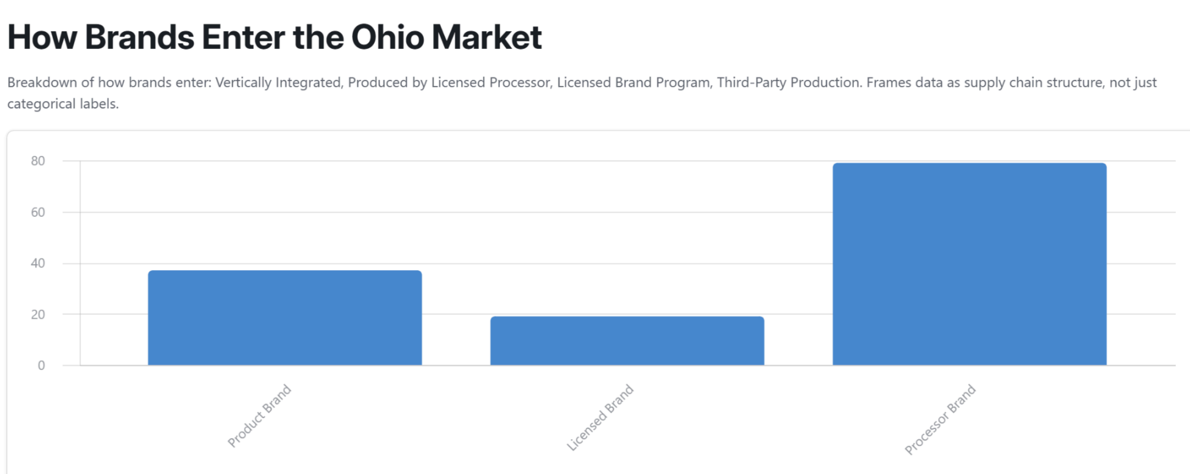
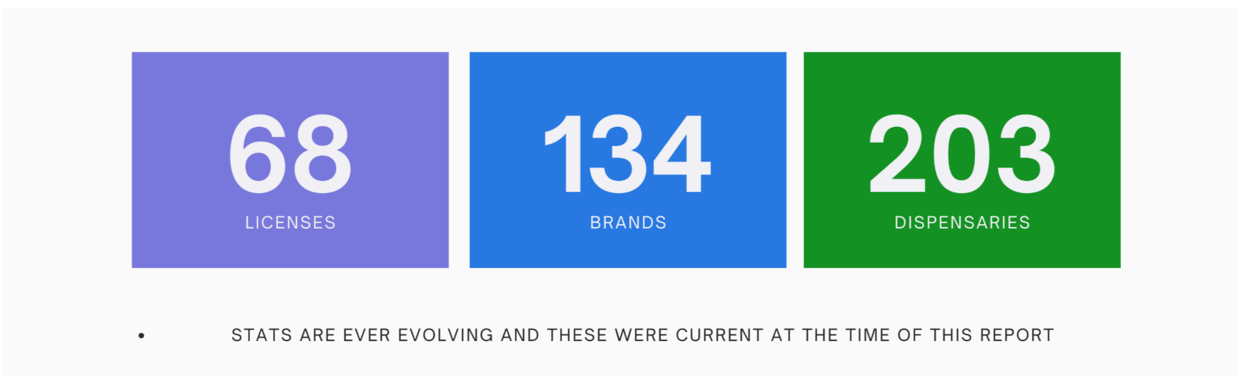


Image: source: *The High Canopy Report: How Brands Enter the Ohio Market.*

Market Reality: National Operators vs Ohio Independent operators

Ohio's cannabis market includes both multi-state operators (MSOs) and Ohio-based operators.

MSOs operate licensed cannabis businesses across multiple regulated markets in the United States.



Data: source: The High Canopy Report v420.26

Examples with presence in Ohio include:

- Trulieve
- Green Thumb Industries
- Cresco Labs
- Curaleaf Holdings

These operators typically operate vertically integrated businesses including cultivation, processing, brands, and retail dispensaries.

Ohio also includes several operators that originated within the state's cannabis market.

Examples include:

- Klutch Cannabis
- Buckeye Relief
- Riviera Creek
- Standard Wellness
- Woodward Fine Cannabis

These operators contribute significantly to Ohio's cultivation and product manufacturing ecosystem.

Retail & Vertical Integration

Ohio's cannabis market includes a limited number of licensed dispensaries authorized to sell products directly to consumers.

Retail licenses in Ohio are issued by the state and capped at a fixed number of locations. Most of these licenses have already been awarded, which means new entrants face significant barriers to obtaining retail access.

Because retail licenses are limited, operators that control dispensaries gain direct access to consumer shelf space while also supplying products into the broader market.

When those same operators also hold cultivation or processing licenses, they effectively control multiple layers of the cannabis supply chain.

In regulated markets, this structure is commonly referred to as vertical integration, and it can significantly increase an operator's influence over product distribution and brand visibility.

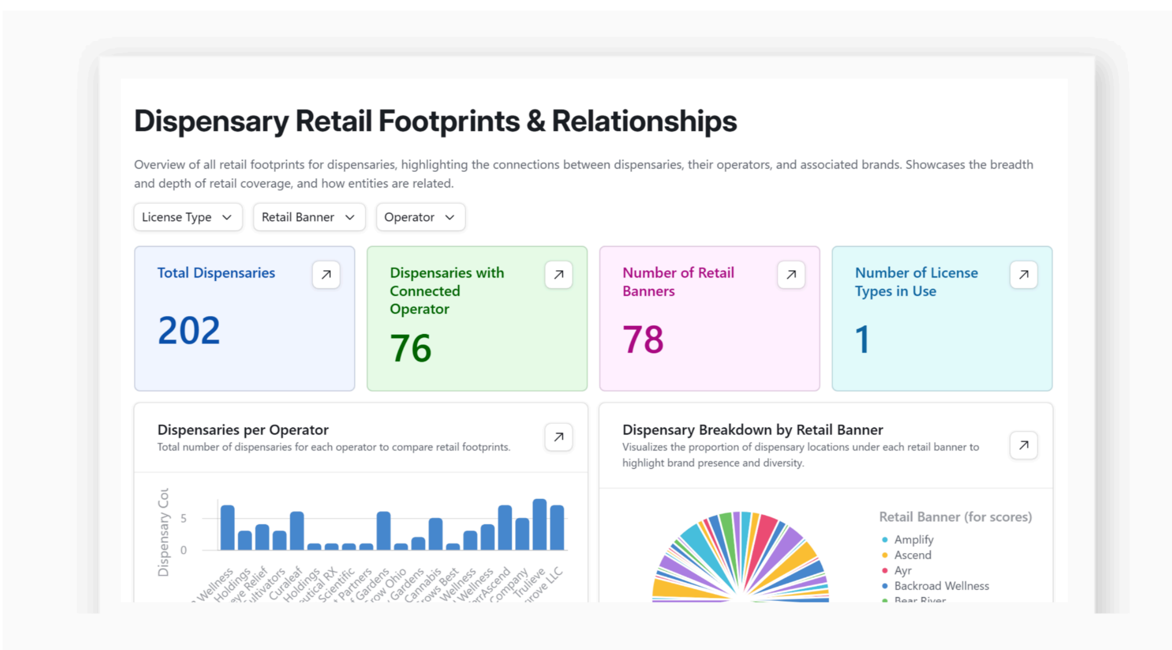


Image: source: *The High Canopy Report: Dispensary Retail Footprints & Relationships Sample*

Some operators participating in Ohio's market control multiple stages of the industry, including:

- cultivation
- processing
- retail dispensaries

Several operators participating in Ohio's cannabis market hold licenses across multiple stages of the supply chain, including cultivation, processing, and dual-use retail dispensaries.

Examples include operators such as:

- Klutch Cannabis
- Curaleaf Holdings
- Cresco Labs
- Verano Holdings
- Ascend Wellness Holdings

Through vertical integration, these operators are able to maintain direct access to retail shelf space while also distributing products through other dispensaries across the state.

Because dispensary licenses are limited, control of retail infrastructure can significantly increase an operator's market influence.

Understanding which operators operate across multiple layers of the supply chain is therefore an important component of analyzing Ohio's cannabis market structure.

Brand Infrastructure

A closer examination of the dataset reveals a structural pattern not immediately visible from dispensary menus.

Brand identity and production operate at different layers of the market. While brands appear distinct at the retail level, many are supported by shared cultivation and processing infrastructure.

Within the Ohio market, multiple brands frequently trace back to the same operator or production ecosystem. These relationships form brand infrastructure networks—clusters of brands supported by the same underlying capabilities.

From a consumer perspective, these brands may appear unrelated. From a production standpoint, they may share cultivation facilities, processing infrastructure, extraction methods, and distribution pathways.

This structure allows operators to expand brand presence without a proportional increase in production capacity, reinforcing how market growth often occurs within existing infrastructure rather than through entirely new entrants.

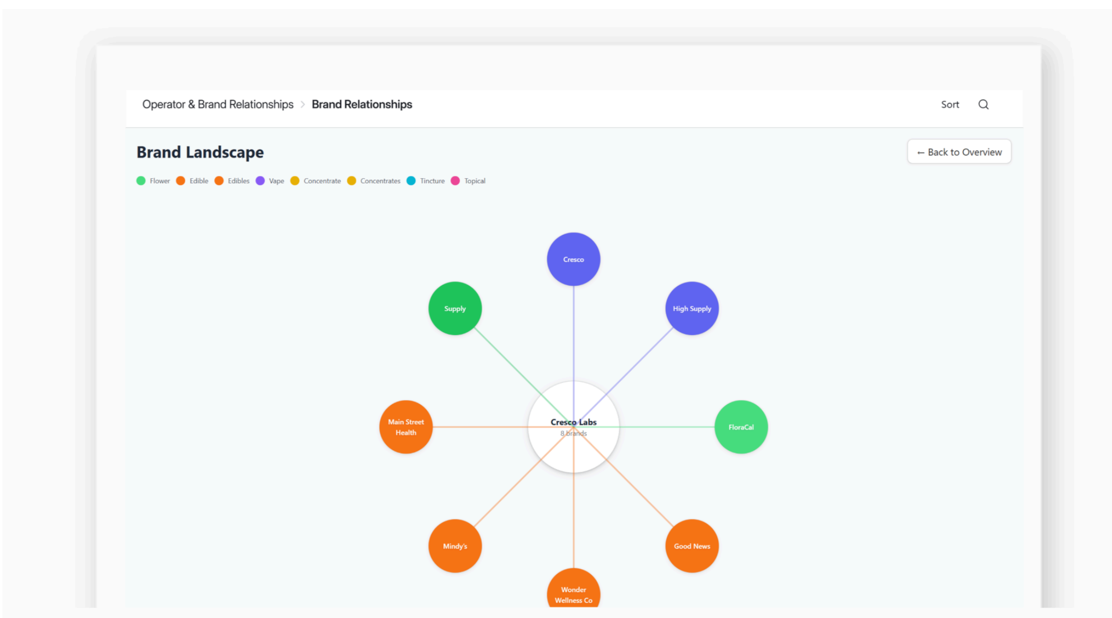


Image: source: *The High Canopy Report: Sample Expanded Brand Landspace, Klutch Cannabis.*

Analyst Insight

Brand counts alone can be misleading when evaluating market competition. Many seemingly independent brands ultimately originate from the same cultivation and processing infrastructure.

To better understand how these relationships operate in practice, it is helpful to examine several operator portfolios directly.

Market Expansion Strategy

Ohio’s rollout of adult-use cannabis differs from several other U.S. markets.

Some states issued hundreds of new licenses immediately after legalization.

Ohio instead chose to expand existing operators first, allowing the medical program infrastructure to transition into the adult-use market before opening additional licenses.

This approach tends to produce several structural outcomes:

- stronger influence from incumbent operators
- slower market fragmentation
- a smaller number of production hubs supporting many brands

In the early phases of market development, this structure often concentrates production within a limited number of cultivation and processing facilities.

For analysts studying the market, this makes the relationship between operators, licenses, and brands especially important to understand.

That relationship is exactly what the High Canopy dataset is designed to map. Examining several operator portfolios helps illustrate how these brand ecosystems function in practice.

Operator Ecosystems

Examining individual operators reveals how brand infrastructure networks take shape within the Ohio cannabis market.

Many licensed operators maintain **multiple consumer brands**, each designed to serve a different segment of the market. These brands may target specific product categories, price tiers, or consumer preferences while still relying on the same underlying production infrastructure.

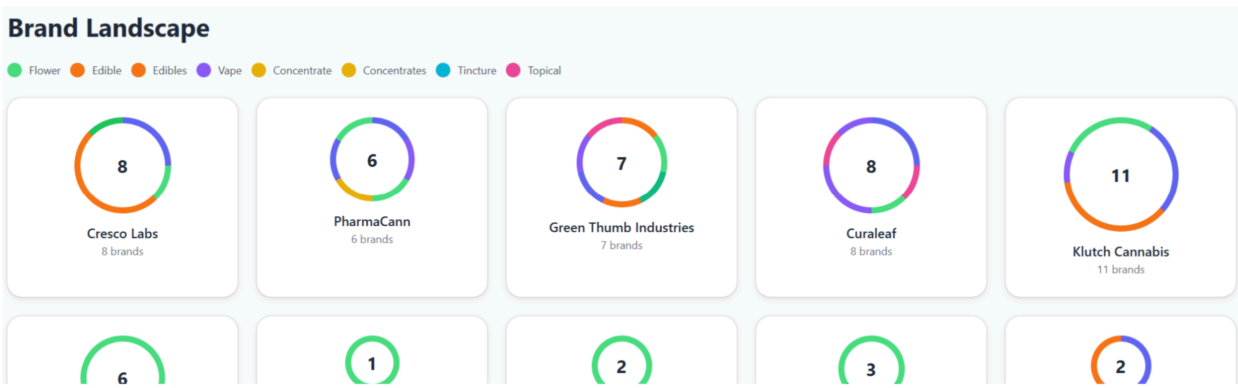


Image: source: *The High Canopy Report: Sample Brand Landscape*

Several examples illustrate how these ecosystems function.

Green Thumb Industries (GTI)

Green Thumb Industries operates one of the most recognizable brand portfolios in the cannabis industry.

Brands associated with GTI in Ohio include:

- Rhythm
- Dogwalkers
- Incredibles
- Beboe

Each brand targets a distinct segment of the market, while cultivation, processing, and product manufacturing occur within the broader GTI production ecosystem.

Cresco Labs

Cresco Labs also maintains a diversified brand portfolio designed to capture multiple product categories and consumer segments.

Brands associated with Cresco include:

- Cresco
- High Supply
- Good News
- Wonder Wellness

Through this multi-brand approach, Cresco can distribute products across flower, vape, and edible categories under distinct consumer identities.

Curaleaf

Curaleaf similarly operates several brands across the national cannabis market.

Brands appearing within the Curaleaf ecosystem include:

- Curaleaf
- Select
- Grassroots

Each brand occupies a slightly different market position while relying on shared cultivation and processing capabilities.

These examples illustrate how operators build **brand ecosystems** that extend beyond a single consumer identity.

Market Insight

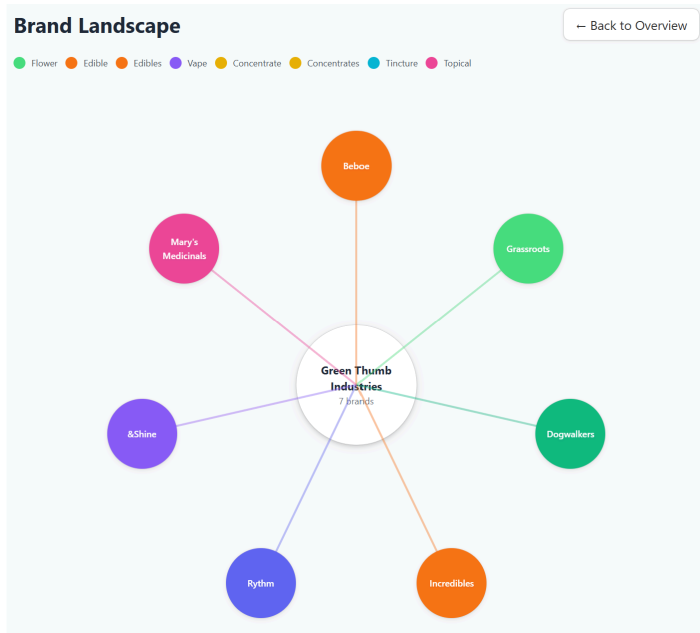
Large cannabis operators frequently maintain multiple brands in order to compete across different product categories, price tiers, and consumer demographics.

This strategy allows a single operator to occupy multiple positions within the retail market simultaneously.

These operator portfolios are not accidental. They reflect a deliberate strategy used across the cannabis industry.

Portfolio Strategy

The presence of multiple brands within a single operator ecosystem is rarely accidental. Instead, it reflects a deliberate portfolio strategy widely used across regulated cannabis markets.



Operators use brand portfolios to segment products, differentiate pricing, and target distinct consumer audiences while relying on shared cultivation and manufacturing infrastructure.

Common portfolio patterns include, using **Green Thumb Industries (GTI)** expanded above as an example:

Image: source:
The High Canopy Report: Sample GTI Brand Landscape

Strategy	Example
Premium vs value tiers	Rythm vs &Shine
Category specialization	Dogwalkers pre-rolls
Lifestyle positioning	UB Good
Wellness products	Doctor Solomon's

Through this approach, a single operator can occupy multiple positions on dispensary menus while presenting distinct brand identities to consumers.

Product Segmentation

Different brands allow operators to specialize around particular product categories. One brand may focus on premium flower, while another targets edibles, concentrates, or vape products.

Price Tier Differentiation

Multi-brand portfolios allow operators to maintain distinct pricing strategies. Premium brands can coexist alongside value-oriented product lines without diluting the identity of either.

Consumer Positioning

Separate brands allow operators to connect with different consumer identities. Lifestyle-oriented brands, wellness-focused products, and recreational products can each exist under distinct brand identities.

Market Flexibility

Maintaining several brands provides operators with flexibility as markets evolve. operators can introduce new products, reposition offerings, or expand into additional segments without altering the identity of their core brands.

Within Ohio’s regulated market, these portfolio strategies allow operators to expand their retail presence while maintaining distinct consumer-facing identities across product categories.

Retail Observations

At the retail level, the Ohio cannabis market presents a wide range of brands, creating the impression of a highly competitive and diversified landscape.

However, retail visibility does not always correspond to independent production or ownership. Multiple brands available on dispensary shelves may originate from the same processing or cultivation infrastructure.

Because retail licenses are limited and production is centralized, the assortment seen by consumers is shaped by how operators structure portfolios and distribute products across the market.

Which means shelf variety is often curated through operator portfolios, not independent production.

Structural Observations

Dataset Overview

Brand diversity is visible. Production concentration is structural.

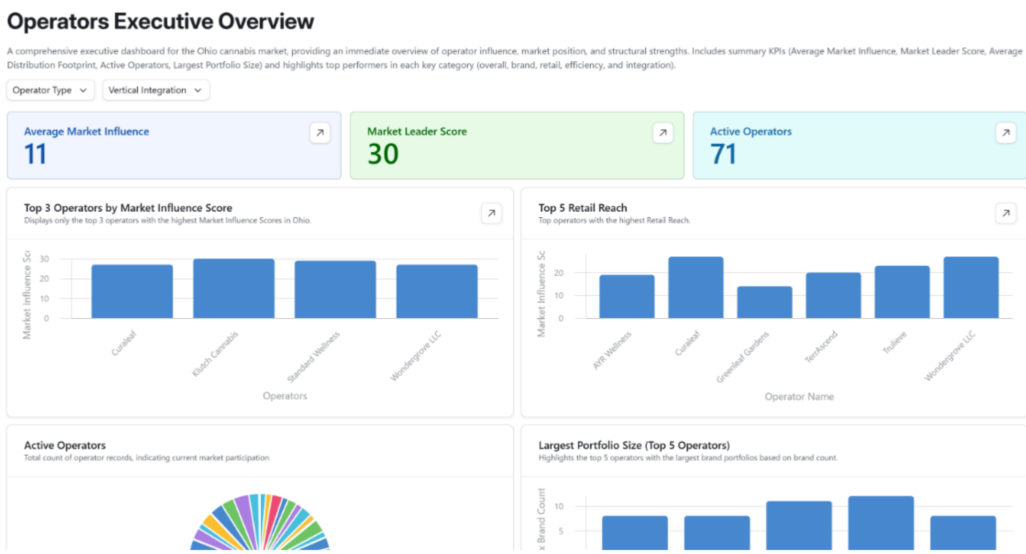


Image: source: *The High Canopy Report: Sample Operators Overview*

Within the current High Canopy dataset snapshot, the Ohio cannabis ecosystem includes **73 operators, 68 licensed entities, and approximately 135 consumer-facing brands** connected through production and licensing relationships.

While brand count suggests a highly diverse market, **brand identity and production authority operate at different layers of the system.**

Operators with access to licensed production infrastructure—particularly processing capacity—function as hubs. From these hubs, multiple brands extend outward as distinct consumer-facing identities.

Which means market competition is shaped more by access to production than by the number of brands on the shelf.

A small group of operators maintain large, multi-brand portfolios, while most participate with limited brand presence. As a result, brand growth reflects portfolio expansion within existing infrastructure, not a proportional increase in independent production.

The High Canopy Index: Operator Influence

To evaluate influence within this structure, a framework is required that reflects how operators participate across production, licensing, and brand development.

The High Canopy Index measures operator presence within Ohio's regulated market by focusing on structural participation rather than sales performance.

Instead of relying on revenue or market share, the Index evaluates how operators engage with core components of the ecosystem, including:

- Brand portfolio development
- Licensed production and processing relationships
- Vertical integration across cultivation, processing, and retail
- Participation in third-party or licensed brand production

These factors reflect how operators access and utilize infrastructure, shaping how brands are created, distributed, and maintained within the market.

By measuring these dimensions, the Index provides a view of operator influence based on structural positioning rather than consumer-facing visibility

Example Operator Profiles

A snapshot of how operator influence is reflected through structural participation across the Ohio market.

Klutch Cannabis	Standard Wellness	Curaleaf
30	29	27
Hybrid	Cultivator	Brand House
Dominant MSO	Dominant MSO	Dominant MSO
Private	Private	Public
Ohio Operator	Ohio Operator	MSO (Multi-State Operat...
Ohio HQ	Ohio HQ	MSO Expansion

Structural Factors

The Index incorporates multiple indicators of operator presence, including:

- Number of consumer brands associated with an operator
- Cultivation capacity and production infrastructure
- Processing capabilities and manufacturing relationships
- Vertical integration across cultivation, processing, and retail
- Third-party brand production partnerships

These factors provide a composite view of how operators function within the licensed production system.

Interpreting Scores

Higher index scores indicate operators with broader influence across the supply chain, including those that maintain multiple brands, operate vertically integrated facilities, or function as production hubs for third-party brands.

Lower scores reflect more specialized roles, such as operators focused on a single product line or a single stage of the supply chain.

Because cannabis markets are dynamic, **index scores should be interpreted as a structural snapshot rather than a fixed ranking of company performance.**

A Structural vs Market Metrics

The High Canopy Index does not measure revenue, sales volume, or retail performance. It measures how operators are positioned within the licensed production system.

By focusing on infrastructure and licensing relationships, the Index highlights how a relatively small group of operators can support a disproportionately large share of consumer-facing brands.

Future Development

Future editions of The High Canopy Report will continue to expand the Index methodology, incorporating additional structural indicators that further define how operator influence takes shape within regulated cannabis markets.

Planned enhancements include deeper analysis of production relationships, evolving licensing pathways, and expanded visibility into how operators extend reach across brand portfolios and retail environments. As the dataset develops over time, the Index will also begin to reflect changes in market participation, allowing for more dynamic comparisons across operators and periods.

These additions are designed to strengthen the Index as an ongoing measurement framework—one that moves beyond static snapshots and toward a more complete view of how influence is built, maintained, and scaled within Ohio's cannabis ecosystem.

System Structure

Brand Distribution

The dataset supports network visualization of relationships between operators, license entities, and brands. However, many of those brands connect back to a smaller number of licensed operators.

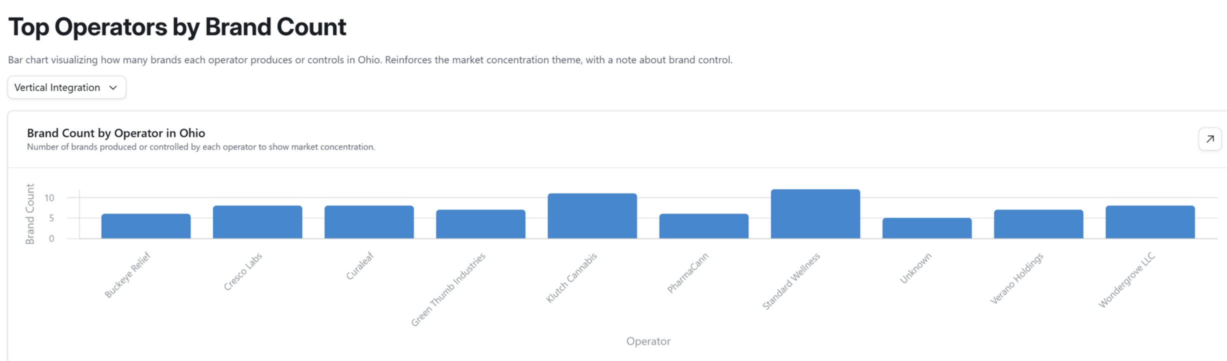


Image: source: *The High Canopy Report: Top Operators by Brand Count Sample*

This structure is common in regulated cannabis markets. Brands may exist as:

- Internal operator product lines
- Licensed national brand programs
- White-label product programs
- Equity or social impact initiatives

Because production authority is tied to licensed entities, a single processor may manufacture products across multiple brand identities. Operator influence is explored in more detail through the High Canopy Index.

Viewed at the system level, this results in a market where a relatively small number of operators are connected to a large share of the brand ecosystem.

Market Structure Visualization

The High Canopy dataset also supports network visualization of the Ohio cannabis ecosystem. The distribution of brands across operators illustrates the structure of the Ohio cannabis market at a system level.

A small number of operators are associated with a disproportionately large share of brands, forming a cluster of high-output entities. In contrast, most operators are linked to only one or two brands, creating a long tail of limited participation.

This pattern reflects a system where brand presence expands within existing operator networks rather than through a uniform increase in independent participants.

Viewing the market as a network rather than a list of brands reveals how a relatively small number of operators connect to a large portion of the overall ecosystem.

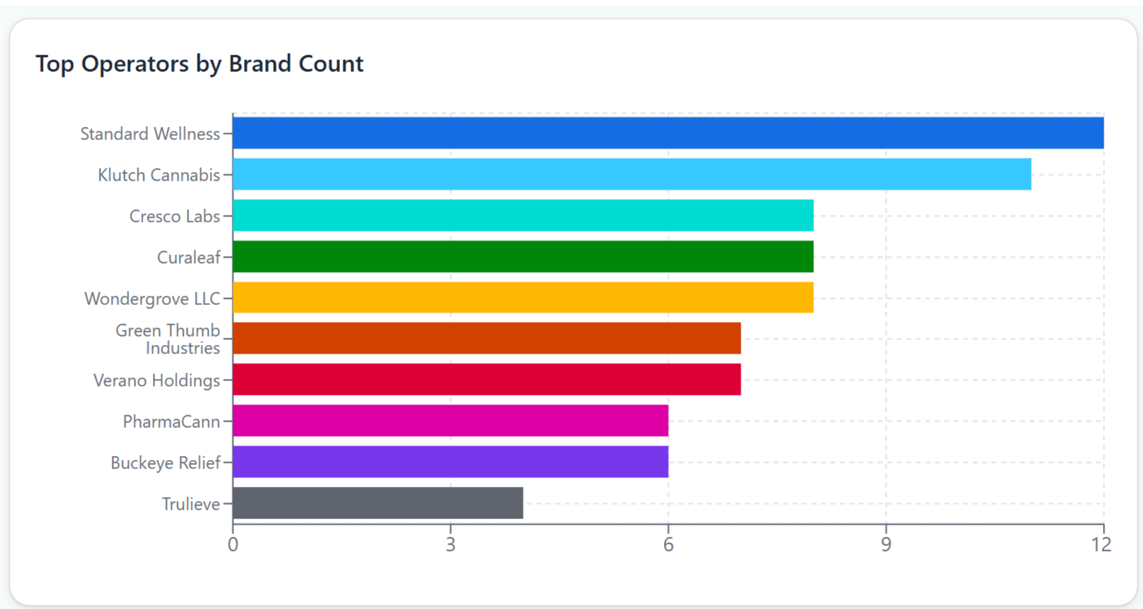


Image: source: *The High Canopy Report: Ohio Market Overview*

The five largest operator portfolios account for **nearly 40% of all brands represented in the Ohio market**, illustrating how brand ecosystems concentrate around a relatively small group of production operators.

These visualizations map relationships between:

- operators
- license entities

- brands

Viewing the market as a network rather than as isolated operators reveals how a relatively small number of operators connect to a large portion of the brand ecosystem.

Each connection represents a production or ownership relationship within the regulated supply chain.

This report introduces that structure at a high level.

- **The Field Guide** focuses on practical, on-the-floor insights for budtenders and retail teams
- **The Extended Report** provides interactive visualizations and deeper network analysis of operator relationships

Using this Report

Understanding how the Ohio cannabis market is structured changes how different participants interpret competition, growth, and opportunity.

Across the market, dynamics are shaped less by the number of visible brands and more by how production, licensing, and operator relationships are organized.

This report is designed to help each audience apply that structural lens in a practical way.

Framework in Practice

Budtenders

Often the first point of education for consumers, budtenders can use this report to better understand how products relate behind the scenes.

- Identify brand families across the shelf
- Explain similarities in product experience
- Make more informed, confidence-backed recommendations

Dispensary Operators

Retail buyers and store managers can use this report to evaluate assortment strategy more intentionally.

- Identify concentration within operator portfolios
- Avoid overrepresentation from a single production network
- Understand supply dependencies and sourcing patterns

Operators and Brand Teams

For operators and brand teams, the report provides a clearer view of how portfolios function within regulated markets.

- Analyze portfolio structure and segmentation strategy
- Evaluate competitive positioning within shared infrastructure
- Understand how brand expansion maps to production capacity

Analysts

This report offers a structural lens that goes beyond surface-level brand counts.

- Assess market concentration more accurately
- Evaluate operator influence across production and licensing layers
- Identify scalability based on infrastructure participation

Consumers

For consumers, the report adds context to how products are made and how brands relate to one another.

- Understand shared production across different brands
- Recognize patterns in product consistency and quality
- Look beyond branding to underlying sourcing and manufacturing

The Role of The High Canopy Report

The High Canopy Report is designed as a field guide to the production ecosystem behind cannabis brands in Ohio.

By mapping relationships between operators, licenses, and consumer brands, it provides a clearer view of how the market functions beneath the dispensary shelf.

What Comes Next

Future editions of *The High Canopy Report* will expand the dataset to capture additional layers of structure within the Ohio cannabis market, including:

- processor relationships
- cultivation tiers
- brand program types
- operator brand families
- expanded market influence scoring

As these elements are layered in, the report will move beyond mapping relationships to more clearly quantifying how influence is distributed across operators and production networks.

Ongoing analysis will explore questions such as:

- Which operators produce the most brands in Ohio?
- How much of the market is controlled by multi-state operators?
- To what extent are brands supported through third-party processor agreements?

Future development will also introduce more interactive and accessible formats, allowing this dataset to function not only as a report, but as a practical field guide for navigating the market in real time.

As Ohio's adult-use market continues to evolve, understanding these structural relationships will become increasingly important for operators, budtenders, and industry observers alike.

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Key Terms

A quick reference for how this report defines the Ohio cannabis market structure.

Operator

A company that controls or manages one or more cannabis licenses. Operators are the entities that ultimately direct production, manufacturing, and in some cases retail distribution.

License Entity

The legal entity that holds a state-issued cannabis license. This is the layer where production authority exists under Ohio law, not at the brand level.

Processor

A licensed facility that manufactures cannabis products such as vapes, edibles, concentrates, and infused goods. Processors often produce for multiple brands, including internal portfolios and third-party partnerships.

Cultivator

A licensed facility that grows cannabis flower and produces biomass used in manufacturing. Cultivators supply the raw material that feeds the rest of the production system.

Brand

A consumer-facing product line sold through dispensaries. Brands represent identity and positioning in the retail market, but do not hold production licenses themselves.

Production Infrastructure

The underlying system of licensed cultivators and processors that physically produce cannabis products. Multiple brands can operate within the same infrastructure.

Brand Portfolio

A group of brands managed by a single operator. Portfolios are often designed to target different product categories, price tiers, or consumer segments.

Vertical Integration

When an operator controls multiple stages of the supply chain, such as cultivation, processing, and retail. This structure increases control over production and distribution.

MSO (Multi-State Operator)

A company that operates licensed cannabis businesses across multiple states. These operators often bring established brand portfolios and scaled infrastructure into new markets.

Third-Party Production

When a brand is produced by a processor or cultivator that is not the brand owner. This allows brands to enter the market without owning production facilities.

Licensed Brand

A brand that operates in a market through a licensing agreement with a local operator, rather than direct ownership of production infrastructure.

Private Label / White Label

Products manufactured by a licensed processor and sold under a different brand name, often without a direct operational connection to the producing entity.

Continue the Analysis

This report maps how the Ohio cannabis market is structured.

What it doesn't do is stay still.

Move Beyond the Static View

Industry Intelligence + Access extends this report into a living system:

- Live dashboards tracking operator relationships and portfolio changes
- Ongoing updates as new brands, licenses, and production connections emerge
- Expanded Index views across operators, infrastructure, and market positioning
- Future report releases as the dataset evolves

This is where the market shifts from something you read... to something you can continuously interpret.

Get Full Industry Intelligence + Access

Ongoing access to live dashboards, new operator relationships, and future report releases.

[Get Full Access + Live Dashboard Updates]

About High Canopy Research

High Canopy Research publishes independent analysis intended to make complex cannabis production ecosystems easier to understand for industry professionals, retail teams, and market observers.

High Canopy Research is an independent cannabis market intelligence initiative focused on analyzing the structure of regulated cannabis markets. The project examines how operators, licenses, brands, and production infrastructure connect within state cannabis systems in order to better understand how cannabis supply chains function within modern regulatory frameworks.

The research behind The High Canopy Report is conducted by an independent analyst with professional experience spanning both the cannabis industry and data-driven market analysis. Drawing from experience within the cannabis retail sector alongside a background in marketing systems and market research across multiple industries, the work combines industry perspective with structured analysis of publicly available regulatory and operator data.