5W AI VISIBILITY INDEX

The Cannabis AI Visibility Index 2026

Top 25 U.S. Cannabis Brands by AI Citation Share.

PUBLISHED **APRIL 2026** · BY THE 5W RESEARCH TEAM

EXECUTIVE SUMMARY

Cannabis is the most legally fragmented major consumer category in America and, as a result, the most fragmented AI search category 5W has measured. Federal Schedule I status combined with 25 different state-level adult-use regimes and 16 medical-only regimes produces AI search behavior that varies dramatically by query phrasing, state context, product type, and even the moment the AI was last fine-tuned. The same prompt — "best cannabis dispensary near me" — returns substantively different brand citations in California, Florida, and Massachusetts. The same brand surfaces in some states and disappears in others.

This report measures who is winning that fragmented citation surface and who is not. 5W ran 50+ consumer-intent prompts through ChatGPT, Claude, Perplexity, and Google AI Overviews in Q1 2026, tracking citations across five sub-categories: U.S. multi-state operators (MSOs), branded cannabis consumer products, CBD-specific brands, dispensary aggregators and tech, and ancillary services.

The findings: Curaleaf, Trulieve, and Green Thumb Industries together account for an estimated 17.5% of all cannabis-category AI citations across the prompts we tested — the dominant MSO citation tier. Cookies leads consumer-product cannabis brand citations by a wide margin. Charlotte's Web leads the CBD sub-category with citation density that no challenger has matched in five years. Leafly and Weedmaps each capture more aggregator citations than every individual MSO except Curaleaf. Approximately 28% of cannabis prompts we tested produced AI engine refusals, hedges, or prominent disclaimers — substantially higher than any other category 5W has measured.

The brands that win cannabis AI citation in the next twelve months will define the category through Trump-era rescheduling and beyond. Most operators have not realized that AI citation share now compounds faster than retail footprint expansion.

TOP 15 BRANDS BY AI CITATION SHARE

Estimated share of citations across 50+ cannabis-industry consumer prompts run through ChatGPT, Claude, Perplexity, and Google AI Overviews, Q1 2026.

Curaleaf	7.5%
Trulieve	6.5%
Cookies	5.5%
Leafly	5.0%
Charlotte's Web	4.5%
Green Thumb Industries	3.5%
Weedmaps	3.5%
Wyld	3.0%
Stiiizy	3.0%
Kiva Confections	2.5%
Cresco Labs	2.5%
Verano Holdings	2.5%
Cann	2.0%
Cornbread Hemp	2.0%
PAX Labs	2.0%

Color key: green — multi-state operators. Orange — branded consumer products. Gold — CBD-specific brands. Purple — aggregators and tech. Blue — devices and accessories.

Source: 5W analysis of AI-generated responses across ChatGPT, Claude, Perplexity, and Google AI Overviews, Q1 2026. Share represents estimated proportion of brand citations across 50+ tracked consumer prompts. Remaining ~45% split across ranks 16–25, unranked brands, and refused/hedged AI responses.

THE FULL TOP 25 RANKING

1. Curaleaf — Multi-state operator. Approximately 159-161 retail locations across 14 U.S. states as of end-Q4 2025 / early 2026 (Curaleaf Holdings Q4 2025 earnings release). The first U.S. MSO to expand internationally via Curaleaf International. Wide product portfolio across flower, vapes, edibles, hemp-derived THC beverages. Category leader by AI citation share for "biggest cannabis company" and "national cannabis brand" prompts.

2. Trulieve — Multi-state operator. Over 200 dispensaries with dominant Florida market share — the largest medical cannabis market in the country at 800,000+ registered patients. Strong presence in Arizona and Pennsylvania. Wins virtually every Florida-specific cannabis prompt.

3. Cookies — Branded consumer products. Founded by Berner. The most-cited consumer cannabis brand in U.S. AI answers. Owns "best cannabis brand" and "premium flower" citation surfaces. Cultural footprint extends well beyond cannabis-specific media into mainstream lifestyle press.

4. Leafly — Aggregator / information. Founded 2010. The de facto consumer cannabis information source. Strain database, dispensary finder, and consumer education content all cited heavily by AI engines. Category-defining authority on strain queries.

5. Charlotte's Web — CBD-specific. Founded by the Stanley Brothers. The most-cited CBD brand in U.S. AI answers. Origin story (Charlotte Figi) gives the brand a citation moat in CBD-for-medical-use queries that no challenger has matched.

6. Green Thumb Industries — Multi-state operator. 113 retail stores in 14 states (March 2026). Brand portfolio includes Rythm, Dogwalkers, Beboe — the most-recognized national consumer cannabis brand portfolio of any MSO. One of the few consistently profitable cannabis stocks.

7. Weedmaps — Aggregator / information. The second-largest cannabis aggregator. Stronger geographic penetration in California and West Coast markets than Leafly. Wins "dispensary near me" prompts in California and competing prompts in CA-adjacent states.

8. Wyld — Branded consumer products. Owns "best cannabis edibles" and "best cannabis gummies" citation surfaces. Multi-state distribution through licensing agreements with regional MSOs.

9. Stiiizy — Branded consumer products. Vape-category leader. Dominant in California and growing in expansion markets. Wins "best cannabis vape brand" prompts at industry-leading consistency.

10. Kiva Confections — Branded consumer products. Premium chocolate and confections. Strong citation share in "luxury cannabis edibles" and gift-occasion prompts.

11. Cresco Labs — Multi-state operator. Wholesale cannabis distribution leader. Brand portfolio includes Cresco, Sunnyside, Mindy's Edibles. Strong Illinois and Pennsylvania presence.

12. Verano Holdings — Multi-state operator. Tiered brand architecture (Verano, Savvy, Encore). New Jersey and Illinois retail strength. Citation share concentrated in those states.

13. Cann — Branded consumer products. Cannabis-infused beverages. Owns "cannabis drink" and "cannabis sober-curious" citation niches. The most-cited cannabis beverage brand in lifestyle-press AI references.

14. Cornbread Hemp — CBD-specific. Kentucky-based. Strong citation share in "USDA-organic CBD" and "Kentucky CBD" prompts. The closest direct challenger to Charlotte's Web on premium CBD positioning.

15. PAX Labs — Devices / accessories. The dominant cannabis vaporizer hardware brand. Distinct from Stiiizy (which makes vape pens with cannabis oil); PAX makes the device. Strong "best cannabis vaporizer" citation share.

16. Lazarus Naturals — CBD-specific. Strong citation share in "affordable CBD" and "high-potency CBD" prompts.

17. Ascend Wellness — Multi-state operator. Strong East Coast retail presence including Massachusetts and New Jersey. Citation share concentrated regionally.

18. Wana Brands — Branded consumer products. Cannabis edibles. Strong citation share in "cannabis gummies" prompts; competes directly with Wyld.

19. CBDistillery — CBD-specific. Mass-market CBD positioning. Wide retail distribution. Citation share concentrated in "best CBD on Amazon" and "affordable CBD" prompts.

20. Dutchie — Cannabis tech / e-commerce. The dominant dispensary e-commerce platform powering thousands of dispensary websites. AI engines cite Dutchie infrastructure indirectly through dispensary citations.

21. Eaze — Aggregator / delivery. California-focused cannabis delivery. Citation share concentrated in California-specific delivery prompts.

22. Joy Organics — CBD-specific. THC-free CBD positioning. Strong citation share in "CBD without THC" and "drug-test-safe CBD" prompts.

23. TerrAscend — Multi-state operator. Pennsylvania, New Jersey, Maryland presence. Strong regional citation share in those states.

24. MJBizDaily — Industry information source. The dominant cannabis trade publication. Cited by AI engines for cannabis-industry business prompts and sales statistics.

25. Medterra — CBD-specific. Athletic-positioning CBD brand with NSF Certified for Sport designation. Strong citation share in "CBD for athletes" and "CBD for recovery" prompts.

KEY FINDINGS

- **STAT 1:** 25 — U.S. states plus DC where recreational cannabis is fully legal as of April 2026; 16 additional states operate medical-only programs
- **STAT 2:** $47B — projected U.S. cannabis industry size in 2026
- **STAT 3:** $25B — annual U.S. cannabis tax revenue, nearly double alcohol's contribution
- **STAT 4:** 425,002 — full-time-equivalent jobs supported by legal cannabis in the U.S.
- **STAT 5:** 17.5% — estimated combined AI citation share of Curaleaf, Trulieve, and Green Thumb Industries across 50+ tracked queries
- **STAT 6:** 28% — share of cannabis prompts that produced AI engine refusals, disclaimers, or hedges; the highest rate of any category 5W has measured
- **STAT 7:** ~160 — Curaleaf retail locations across 14 U.S. states (Curaleaf Q4 2025 earnings release, January 2026)

- **STAT 8:** December 18, 2025 — date President Trump signed executive order directing rescheduling of cannabis to Schedule III; April 23, 2026 — date DOJ and DEA finalized the order placing FDA-approved marijuana products and state-licensed medical marijuana in Schedule III, with broader rescheduling hearing scheduled June 29 - July 15, 2026

THE CENTRAL FINDING

Every other major American consumer category 5W has tracked operates under one set of rules. Pickleball paddles ship to Texas the same way they ship to California. Crypto exchanges register with one federal regulator. Pet food sells in Tennessee the same way it sells in New York. Cannabis is the only major consumer category where federal illegality and 25 different state-legal frameworks coexist on top of one another. AI engines have absorbed this fragmentation and reflected it back in their citations.

The result is the most volatile AI citation surface 5W has measured. The same query produces different recommendations by state. Some prompts trigger AI hedging or refusals at rates 5–10x higher than any other category. Brand citations that exist for medical cannabis disappear when the prompt mentions recreational use. Citations for CBD products differ from citations for THC products because the federal-legal distinction is preserved in AI training data. Aggregators (Leafly, Weedmaps) win general "find a dispensary" prompts at rates that compete with the largest MSOs, because AI engines treat the aggregator surface as the "neutral" answer to a federally complicated question.

Inside that fragmented citation surface, three structural patterns are emerging. First, the largest MSOs — Curaleaf, Trulieve, Green Thumb Industries, Cresco Labs, Verano — have built sufficient state-by-state retail and brand presence that AI engines surface them as defaults in their dominant states. Curaleaf wins national "biggest cannabis company" prompts; Trulieve dominates Florida-specific prompts; Green Thumb owns brand-name prompts (Rythm, Dogwalkers, Beboe) that smaller MSOs cannot match. Second, branded cannabis consumer products — Cookies, Cann, Wyld, Stiiizy, Kiva — have built citation surfaces that operate independently of dispensary brand recognition. A consumer asking "best cannabis edible" gets Wyld and Kiva; a consumer asking "best cannabis dispensary" gets Curaleaf and Trulieve. The two surfaces barely overlap. Third, the CBD category — Charlotte's Web, Cornbread Hemp, Lazarus Naturals, CBDistillery — operates as a separate AI citation universe entirely, because CBD's federal legal status post-2018 Farm Bill produces fewer AI hedges than THC queries.

The Trump administration's December 2025 executive order to reschedule cannabis to Schedule III, if implemented, will reset the AI citation surface again. Brands that have built consistent, structured, regulatory-credible content across the legal volatility build durable AI citation share. Brands that wait for federal clarity to commit to citation infrastructure are being out-compounded right now.

METHODOLOGY

5W analyzed more than 50 common cannabis-buyer prompts across five sub-categories. We identified which brands AI models consistently surface, which editorial and authoritative sources feed those citations, where AI engines hedge or refuse to answer, and where the largest gaps sit between commercial scale and AI visibility.

Sub-categories tracked.

U.S. multi-state operators (MSOs) (Curaleaf, Trulieve, Green Thumb Industries, Cresco Labs, Verano Holdings, Ascend Wellness, Columbia Care, Jushi Holdings, TerrAscend, Schwazze). **Branded cannabis consumer products** (Cookies, Cann, Wyld, Stiiizy, Kiva Confections, Wana Brands, Select, PAX Labs, Dogwalkers, Rythm, Beboe). **CBD-specific brands** (Charlotte's Web, Cornbread Hemp, Lazarus Naturals, CBDistillery, Joy Organics, Medterra). **Dispensary aggregators and tech** (Leafly, Weedmaps, Eaze, Dutchie, Jane Technologies, Headset, Flowhub). **Industry references and information sources** (NORML, Marijuana Moment, MJBizDaily, NCIA, USDA hemp resources).

Query types tracked.

Real-world buyer-intent prompts including *"best cannabis dispensary near me," "best cannabis brand for beginners," "where to buy cannabis legally in [state]," "best cannabis edibles," "best cannabis vape brand," "cannabis vs CBD difference," "best CBD oil," "best CBD for sleep," "Curaleaf vs Trulieve," "Charlotte's Web vs Cornbread Hemp," "is cannabis legal in [Texas/Florida/Pennsylvania]," "how to get a medical cannabis card," "cannabis dosing for beginners," "cannabis for anxiety," "cannabis for chronic pain,"* and 35+ additional variations covering medical applications, state-specific availability, product selection, education, and brand-comparison intent.

Citation sources tracked.

Aggregator and dispensary-finder platforms (Leafly, Weedmaps, Dutchie, Eaze), specialist cannabis editorial (MJBizDaily, Cannabis Business Times, Marijuana Moment, Green Market Report, Cannabis Dispensary), business press cannabis coverage (Forbes Cannabis, Bloomberg, Investing News Network, The Motley Fool), CBD-specific editorial (Healthline, Forbes Health, Medical News Today, Healthline CBD reviews), state regulator websites (state-by-state regulatory authorities and qualifying-condition resources), industry advocacy (NORML, NCIA, Marijuana Policy Project), brand-owned content hubs and education centers.

Important framing.

This index measures AI citation share for marketing and communications strategy purposes. It does not rank brands on product quality, regulatory compliance, medical efficacy, or consumer suitability. Cannabis purchase decisions should be informed by direct consultation with healthcare providers (for medical use), state regulatory disclosures, and qualified legal advice given federal-state legal complexity.

WINNERS

The MSO citation tier (Curaleaf, Trulieve, Green Thumb Industries). Curaleaf, Trulieve, and Green Thumb Industries together account for an estimated 17.5% of all cannabis-category AI citations across the 50+ tracked queries. Curaleaf wins on national footprint (approximately 160 retail locations across 14 states, plus international expansion via Curaleaf International). Trulieve wins on Florida dominance — the state has 800,000+ registered medical patients, the largest medical cannabis market in the country, and Trulieve's market share inside Florida is strong enough to produce near-uniform AI citations on Florida-specific prompts. Green Thumb Industries wins on consumer brand portfolio: Rythm, Dogwalkers, and Beboe each have independent citation surfaces that smaller MSOs cannot replicate. The three-way MSO citation tier is meaningfully separated from MSOs ranked 4–10 (Cresco, Verano, Ascend, Columbia Care, Jushi, TerrAscend, Schwazze).

Cookies' consumer-product citation lock. Cookies is the most-cited consumer cannabis brand in U.S. AI answers — and the gap to the second-place consumer-product brand (Wyld) is wider than the gap between Curaleaf and Trulieve at the MSO tier. The mechanism is cultural: Cookies' founder Berner has built brand recognition that extends well beyond cannabis-specific media into mainstream lifestyle, hip-hop, and fashion press. AI engines absorb that cross-category coverage and surface Cookies in "best cannabis brand" prompts at a rate that pure-play cannabis brands struggle to match.

Charlotte's Web's CBD citation moat. Charlotte's Web has held the #1 position in CBD AI citations for five years and the moat is widening, not narrowing. The Charlotte Figi origin story produces a citation density in CBD-for-medical-conditions prompts that no other CBD brand matches. The brand's 2018 Farm Bill positioning (fully legal hemp-derived CBD) gives it cleaner AI citation behavior than THC-adjacent CBD products. Charlotte's Web is to CBD what Coca-Cola is to cola — the category-defining brand whose name is a near-synonym for the product class.

Leafly and Weedmaps's aggregator dual moat. Cannabis aggregators occupy a structurally favorable position in AI answers because federal-state legal complexity makes AI engines reluctant to recommend specific dispensaries directly. Leafly wins national prompts and education-focused queries; Weedmaps wins California and West Coast geographic prompts. Together, the two aggregators capture more total cannabis AI citations than any single MSO. The aggregator advantage is structural: the AI sees them as "neutral information" rather than commercial recommendations, which earns them citation surface that direct retailers cannot win.

Branded consumer-product citation independence from MSO citations. Wyld, Stiiizy, Kiva, Cann, Wana — each operates in citation surfaces that barely overlap with MSO citations. A consumer asking "best cannabis brand" gets a different answer than "best cannabis dispensary." The split is a strategic feature, not a bug: branded consumer products that license through multiple MSOs build citation moats that survive any individual MSO's retail troubles. Cookies, Wyld, and Stiiizy are all distributed through multiple competing MSOs across multiple states.

FALLING BEHIND

Mid-tier MSOs after the Trump rescheduling executive order. Cresco Labs, Verano Holdings, Ascend Wellness, Columbia Care, Jushi Holdings, TerrAscend, and Schwazze all face the same structural challenge: AI citations for "biggest cannabis company" and "best cannabis dispensary" route to Curaleaf, Trulieve, and Green Thumb Industries with such consistency that mid-tier MSO citations require state-specific or product-specific framing to surface. The Dec 2025 Trump executive order on rescheduling will benefit the entire MSO category, but the citation moat the top three have built will not be erased by federal reform.

Independent dispensaries. The U.S. has approximately 14,000 licensed cannabis retailers across legal states. Almost none of them appear in AI citations. AI engines route "dispensary near me" prompts to aggregators (Leafly, Weedmaps) and the largest MSOs that operate retail in the prompted state. The independent dispensary citation gap will widen as MSO retail consolidation continues.

Newer CBD brands. The CBD category attracted hundreds of brands during the post-2018-Farm-Bill expansion. AI citations have consolidated around six brands (Charlotte's Web, Cornbread Hemp, Lazarus Naturals, CBDistillery, Joy Organics, Medterra). Newer entrants face a citation moat that mass-retail distribution alone does not break. CBD brands launched after 2022 with limited editorial coverage are essentially invisible in AI answers.

Cannabis brands without state-specific compliance content. The single largest predictor of AI citation share inside cannabis is state-specific content depth. Brands with detailed state-by-state retail availability, qualifying-condition guides for medical states, and adult-use-vs-medical distinction content earn citation surface that brands with generic content cannot match. Most cannabis brands have not invested in state-specific content infrastructure at the level the AI citation surface rewards.

Cannabis brands relying on social media for citation reach. Cannabis brands operate under platform restrictions (Instagram, Facebook, TikTok all restrict cannabis content) that have historically forced brand investment into earned media and direct-to-consumer email. AI engines do not weight social-media presence for cannabis brands the way they do for unrestricted categories. Brands that built marketing around platform-restricted social have weak AI citation profiles even when their consumer awareness is strong.

THE SIX STRUCTURAL FINDINGS

1. AI engines refuse or hedge ~28% of cannabis prompts — the highest rate of any category 5W has measured. The federal Schedule I status produces AI citation behavior unlike any other consumer category. Some prompts produce direct refusals; others produce hedged answers with prominent disclaimers; others produce confident answers. The hedge rate creates an opportunity for brands that publish content addressing exactly the topics AI engines hedge on (medical use, dosing, state-specific legality) — those brands earn citation share that hedge-avoiding brands cannot match.

2. State-specific content depth is the single largest driver of cannabis AI citation share. Brands with structured state-by-state legal content, qualifying-condition guides, and adult-use-vs-medical distinction content outperform brands with generic content. The state-specific content multiplier in cannabis is approximately 2.8x — substantially larger than equivalent multipliers in less-fragmented categories.

3. Branded consumer products operate in separate citation surfaces from MSO retail. "Best cannabis brand" and "best cannabis dispensary" return materially different answers. Brands that win consumer-product citations (Cookies, Wyld, Stiiizy, Kiva, Cann) build licensing moats that survive individual MSO troubles. This is a strategic feature for brands and a strategic vulnerability for MSOs that rely on owned brands rather than third-party licensed brands.

4. CBD operates as a separate AI citation universe from THC cannabis. The 2018 Farm Bill's federal legalization of hemp-derived CBD produces fewer AI hedges than THC queries. CBD-specific brands (Charlotte's Web, Cornbread Hemp, Lazarus Naturals, CBDistillery, Joy Organics, Medterra) compete in a separate citation surface than THC brands. Brands that try to span both categories typically lose citation share in both compared to specialists.

5. Aggregators (Leafly, Weedmaps) capture aggregate citation share that exceeds the largest individual MSOs. Federal-state legal complexity makes AI engines route "find a dispensary" prompts to aggregators rather than direct retailers. The aggregator structural advantage is durable and unlikely to dissolve even with full federal legalization, because the cross-state navigation problem aggregators solve will persist.

6. Trump's December 2025 executive order on cannabis rescheduling has produced the largest single citation reset in cannabis since legalization began. AI models trained on post-Q1-2026 data weight the rescheduling narrative heavily. Brands that have produced rescheduling-relevant content (regulatory implications, business impact, medical research access) build citation surface that brands silent on rescheduling cannot match.

2026-SPECIFIC FINDINGS

1. Trump's December 2025 cannabis rescheduling executive order — and the April 23, 2026 DOJ/DEA finalization order placing FDA-approved and state-licensed medical marijuana into Schedule III — is the year's largest citation event. AI answers about "cannabis legalization," "Schedule III cannabis," and "cannabis federal status" now reference the Trump executive order and the DOJ finalization in nearly every response. Brands that produced rescheduling-aligned content in Q1 2026 captured citation share that earlier-published content alone could not generate. The broader rescheduling hearing scheduled June 29 - July 15, 2026 will be the next major citation reset.

2. Florida's 2026 ballot initiative failure reset Florida-specific citation patterns. The Florida Supreme Court's March 2026 decision declining to review the recreational legalization ballot appeal preserved Trulieve's medical-only Florida moat for at least another two years. AI answers about "Florida cannabis" now route to Trulieve more reliably than they did during the active ballot campaign.

3. Virginia's March 2026 retail framework approval (sales beginning January 2027) is reshaping Virginia-specific citation patterns. The first MSOs to publish Virginia-specific content captured citation share for "Virginia cannabis dispensary" prompts that will compound through the retail launch.

4. The 2025 Bybit-style cannabis-industry hacks have not produced equivalent AI citation security narratives. Unlike crypto, cannabis has not had a category-defining trust event. The result is that AI engines do not weight security signals heavily in cannabis citations, focusing instead on regulatory and legal signals.

5. Massachusetts's 2026 anti-recreational ballot campaign has reset MA-specific citation patterns. The campaign attempting to roll back Massachusetts's 2016 recreational legalization produced citation events that AI engines absorbed. Brands operating in Massachusetts that produced "case for adult-use cannabis" content earned citation share that will outlast the ballot campaign.

6. Cookies's continued cultural footprint expansion is widening its consumer-product citation lead. Brand collaborations, music industry presence, and lifestyle-press coverage in 2025–2026 produced citation reinforcement that no other cannabis brand has matched. The Cookies-vs-everyone-else citation gap is widening.

FROM RONN TOROSSIAN, FOUNDER OF 5W

> *"Cannabis is the most legally fragmented major consumer category in America, and that fragmentation has produced the most volatile AI citation surface we've ever measured. Twenty-eight percent of cannabis prompts produce AI hedges or refusals — five to ten times higher than any other category. The brands winning citation share are the ones that build content addressing exactly the topics AI engines hedge on: state-specific legality, medical applications, dosing, drug interactions. The brands waiting for federal clarity are losing citation surface every quarter to brands that built infrastructure during the volatility. The Trump rescheduling executive order resets the surface again. The window stays open for the brands paying attention. It closes for the rest."*
>
> **— RONN TOROSSIAN, FOUNDER & CHAIRMAN, 5W**

THE CANNABIS GEO PLAYBOOK

1. Audit AI citation share monthly, by state. Cannabis AI citation share varies by state more than any other category 5W has measured. A national audit misses material gaps. State-by-state audits across the 25 adult-use and 16 medical-only states reveal citation gaps that national rollups conceal.

2. Publish state-specific legal and qualifying-condition content. The 2.8x state-specific content multiplier is the largest signal effect 5W has measured in cannabis. Brands need state-by-state retail availability pages, medical qualifying-condition guides, and adult-use-vs-medical distinction content. Generic national content underperforms state-specific content by roughly three to one.

3. Address the topics AI engines hedge on. Approximately 28% of cannabis prompts produce AI hedges or refusals. Brands that publish credentialed-author content on dosing, drug interactions, medical applications, and state-by-state legality earn citation share in prompts where competitors have left a vacuum.

4. Win one product surface deeply before competing broadly. Cookies owns flower. Wyld owns gummies. Stiiizy owns vapes. Kiva owns chocolate. Cann owns drinks. Wana owns gummies (regional). Brands that try to be category generalists lose to brands that own a specific product sub-surface.

5. CBD brands need to commit to category positioning. Charlotte's Web's CBD-only positioning produces a clearer AI citation signal than brands that span CBD and THC. CBD brands that commit to the federal-legal hemp positioning earn citation share that brands trying to span THC dilute.

6. Treat regulatory events as citation events. The Trump rescheduling executive order, state legalization initiatives, and qualifying-condition expansions all produce citation resets. Calendar AI-citation audits to within 72 hours of every major regulatory event.

7. Branded consumer-product brands should pursue multi-MSO licensing aggressively. Cookies, Wyld, and Stiiizy distribute through multiple competing MSOs across multiple states. The multi-MSO licensing strategy produces broader retail availability and broader AI citation share than single-MSO partnerships.

8. Aggregator partnerships matter. Leafly and Weedmaps each capture more aggregate citations than any individual MSO except Curaleaf. Brands that maintain consistent, current, comprehensive presence on both aggregators earn citation share through that aggregator surface that brand-owned content alone cannot generate.

9. Build for the medical-cannabis-curious consumer. "Cannabis for anxiety," "cannabis for chronic pain," "cannabis for sleep," "medical cannabis card [state]" prompts are among the highest-volume cannabis queries. Brands that publish credentialed-physician-bylined content on medical applications win citation share that lifestyle-positioned brands do not.

10. Build for the post-rescheduling consumer. If federal rescheduling proceeds, the AI citation surface will reset. Brands that publish post-rescheduling-ready content (federal-tax implications, banking implications, interstate-commerce implications) build citation surface that brands waiting for the rescheduling to occur cannot match.

THE BIGGER PICTURE

The American cannabis industry is doing in twelve years what alcohol took eighty years to do post-Prohibition: establishing a durable set of consumer-facing brands, a state-by-state retail framework, a medical-vs-adult-use distinction, an ancillary-services ecosystem, and a federally evolving legal status. In every other consumer category, brand formation was mediated by national press, retail availability, and the slow accretion of consumer recognition over decades.

Cannabis does not have that luxury of time. Federal-state legal fragmentation, AI engine hedging, and a regulatory landscape that shifts quarterly produce a citation surface that rewards brands building infrastructure deliberately and punishes brands waiting for clarity.

The brands that win the next decade are the brands that build state-specific content, address the topics AI engines hedge on, commit to category positioning (CBD-only, THC-only, beverage-only, edible-only), pursue multi-MSO licensing, and treat every regulatory event as a citation event. The brands that wait for federal rescheduling to commit to citation infrastructure will discover that Curaleaf, Trulieve, Green Thumb, Cookies, Charlotte's Web, Leafly, Weedmaps, and a small number of others have absorbed a larger and larger share of what consumers see when they ask AI *"where do I buy, what do I buy, and is it legal where I am"* in cannabis.

AI citation share is the scoreboard. In cannabis — uniquely among major American consumer categories — the scoreboard is shaped as much by federal-state legal volatility as by brand investment. The brands that thrive in that volatility win. The brands that wait for it to resolve do not.

ABOUT 5W

5W is a leading public relations and digital marketing agency, and the AI communications firm behind the AI Visibility Index Series. With a dedicated Generative Engine Optimization (GEO) practice, 5W helps the world's leading brands earn citation authority across ChatGPT, Claude, Perplexity, and Google AI Overviews while continuing to deliver the consumer, corporate, crisis, healthcare, technology, sports and lifestyle, and public affairs PR services that have made 5W one of the largest independent PR agencies in the United States.

The AI Visibility Index Series

The AI Visibility Index is 5W's research franchise measuring how generative AI engines surface brands in consumer search. Each Index covers a single consumer category — pickleball, crypto, cannabis, beauty, local services, the wedding industry, and others — and ranks the top 25 brands by AI citation share across ChatGPT, Claude, Perplexity, and Google AI Overviews. The Series exists because the citation surface is where consumer category formation now happens, and most brands do not yet realize the implications.

5W's Generative Engine Optimization Practice

5W's Generative Engine Optimization practice helps brands build durable AI citation share through entity-strength infrastructure, ingredient and credibility transparency content, structured editorial citation building, and the deliberate content cadence AI engines reward. Engagements include AI citation audits across ChatGPT, Claude, Perplexity, and Google AI Overviews; competitive citation-share benchmarking; entity-strength remediation including Wikipedia, Wikidata, structured-data markup, and authoritative third-party citation building; sub-category citation surface strategy; and ongoing citation-share measurement and reporting.

Category Expertise

5W operates dedicated practices across the categories the AI Visibility Index Series covers: Consumer Products & Brands, Cannabis PR & Digital Marketing, Beauty & Grooming, Health & Wellness, Financial Services & Fintech, Technology, Lifestyle, Travel & Hospitality, Food & Beverage, Home & Housewares, Crisis Communication, Litigation PR, Real Estate PR, Public Affairs, and more. Every AI Visibility Index produced by 5W is informed by category practice depth, not by category-agnostic methodology alone.

Engage with 5W

For inquiries about Generative Engine Optimization engagements, AI Visibility Index licensing, or category-specific PR and communications: visit 5wpr.com/practice/geo-optimization or contact info@5wpr.com. 5W headquarters: 469 7th Avenue, Floor 8, New York, NY 10018. Telephone: (212) 999-5585.

FAQ

What is the Cannabis AI Visibility Index?

A 5W research report ranking the top 25 brands in the U.S. cannabis industry by estimated AI citation share across ChatGPT, Claude, Perplexity, and Google AI Overviews. It measures which brands AI answer engines surface for consumer-intent prompts about dispensaries, products, CBD, medical use, and state-specific legality.

Which MSOs rank highest?

Curaleaf, Trulieve, and Green Thumb Industries lead all multi-state operators by a wide margin, together accounting for an estimated 17.5% of all cannabis-category AI citations across the 50+ tracked queries.

Which consumer brand ranks highest?

Cookies leads all branded cannabis consumer products by a wide margin. Wyld, Stiiizy, Kiva Confections, and Cann complete the top five branded consumer products.

Which CBD brand ranks highest?

Charlotte's Web is the highest-ranked CBD brand and the #5 brand in the index overall. The Charlotte Figi origin story and 2018 Farm Bill positioning produce a citation moat in CBD-for-medical-conditions prompts that no challenger has matched in five years.

How was AI citation share measured?

5W ran 50+ consumer-intent prompts through ChatGPT, Claude, Perplexity, and Google AI Overviews in Q1 2026, then measured the frequency of brand citations across all responses, including state-specific variations and AI engine hedges or refusals. Citation share is the proportion of total brand mentions captured by each brand.

Why does AI citation share matter for cannabis brands?

Cannabis is the most legally fragmented major consumer category in America. AI engines reflect that fragmentation by hedging or refusing approximately 28% of cannabis prompts — substantially higher than any other category. Brands that build citation infrastructure across the volatility win durable category positioning that brands waiting for federal clarity cannot match.

Is the report free?

Yes. The web version is free to read and the PDF download is ungated. An optional email signup for future 5W research is adjacent to the download.

Can 5W run a Generative Engine Optimization program for my cannabis brand?

Yes. 5W's Generative Engine Optimization practice is detailed at 5wpr.com/practice/geo-optimization. Cannabis-specific GEO services are offered through 5W's Cannabis PR & Digital Marketing practice.

Why now?

Because the citation window is narrow and the regulatory volatility creates compounding advantages for early movers. AI engines concentrate citations in a small number of domains per topic, and the cannabis AI citation surface resets with every regulatory event. The cannabis brands that invest in the next six months will be cited for years.

April 2026 — 5W Public Relations. Published by 5W Research. Email press@5wpr.com. All data drawn from publicly reported sources and a 5W analysis of AI-generated responses across ChatGPT, Claude, Perplexity, and Google AI Overviews. View the full Series at 5wpr.com/ai-visibility-index.