



PIONEERS IN NATURAL HIGHS

# EUROPEAN CANNABIS CULTURE REPORT

*Data-Driven Insights from 6 Million Seeds Across 25 Countries*

**2024 – 2025 Edition**

Research commissioned by Zamnesia

# 1. About This Research

Zamnesia, one of Europe’s leading cannabis seed retailers, commissioned this research to map how cannabis seed preferences differ across the continent. This is the first study of its kind based on real transaction data rather than surveys or estimates – providing an unprecedented, data-driven picture of European cannabis culture.

The dataset covers over 6 million individual cannabis seeds across 1.9 million packages, spanning 25 European countries from January 2024 through December 2025. Data was sourced from multiple European seed retailers including Zamnesia, anonymised and aggregated to protect individual privacy.

With cannabis legalisation expanding across Europe – most notably Germany’s landmark legalisation in April 2024 – there has been no public, data-driven picture of what European consumers actually buy. This report fills that gap, revealing dramatic differences in strain preferences, growing culture, consumption methods, and market dynamics across the continent.

The report covers seed preferences by country, genetic trends, consumer behaviour patterns, seasonal buying cycles, consumption and cultivation culture, and emerging strain categories. Detailed per-country analyses and complete datasets are provided in the appendices.

**6,046,287**

Individual seeds

**25**

Countries

**500+**

Unique strains

**2 years**

Data period

## 2. Methodology

The following section outlines the dataset, statistical reliability, and known limitations of this study.

### Dataset overview

Parameter	Value
Data source	Anonymised transaction data from multiple European seed retailers, commissioned by Zamnesia
Total product lines	4,147,465
Individual cannabis seeds	6,046,287
Seed packages	1,896,819
Average seeds per package	3.2
Research period	January 2024 – December 2025
Countries covered	25
Unique strains	500+
Product categories	15 main categories (18,948 products)

### Statistical reliability by market

Country	Orders	Reliability
Germany	403,058	Very high
France	265,944	Very high
Belgium	66,112	High
Netherlands	50,253	High
Italy	49,839	High
United Kingdom	47,231	High
Spain	45,996	High
Austria	31,406	High

### Limitations

- Data represents online purchases only (physical retail not included)
- Online retail perspective – purchasing patterns may differ from physical retail
- Smaller markets have limited sample sizes (threshold: 100 orders)
- Data aggregated across retailers; individual retailer market share not disclosed
- B2B orders and test orders have been excluded

## 3. Executive Summary

This comprehensive analysis of European cannabis seed purchasing behaviour reveals dramatic differences in cannabis culture across the continent. Based on over 6 million seeds, we identify clear regional patterns, the impact of German legalisation, and emerging trends that fundamentally reshape how we understand European cannabis culture.

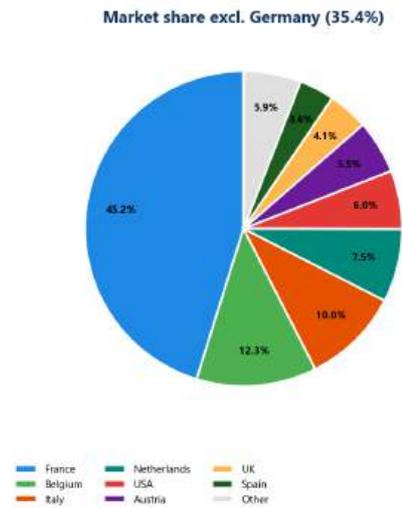
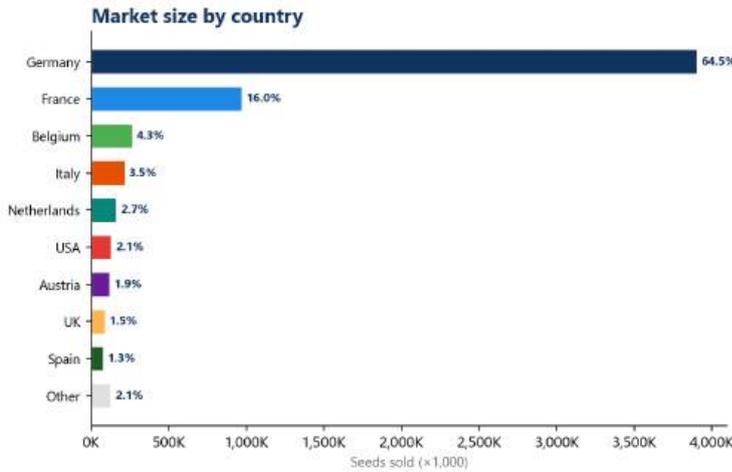
### Key findings

- **German dominance** – 64.6% of all seeds shipped to Germany; legalisation created Europe’s largest home-grow market.
- **France = #2** – A distant second at 16.0% (969K seeds), France is Europe’s silent cannabis giant.
- **The autoflower myth debunked** – 53% of all seeds are autoflower, chosen equally by beginners and experienced growers (59.1% vs 56.4%).
- **Germany effect** – All 8 German neighbours grew (+20% to +117%) while Germany itself declined (-18.4%) post-legalisation.
- **F1 hybrid revolution** – F1 genetics surged from 7.66% to 31.33% market share (+226.6%) – the largest genetic shift in years.
- **Gelato = #1 parent** – 57,274 offspring seeds trace back to Gelato, making it the most commercially influential strain in Europe.
- **CBD declining** – CBD seeds fell -40.2% year-on-year; THC-dominant genetics remain the norm at 97.9%.
- **Finland = most experienced** – 44.3% returning customers and experience score 65.9 – the most loyal, knowledgeable grower base in Europe.
- **Three consumption cultures** – Southern Europe = joint culture, Central Europe = vaporizer culture, UK = glass/pipe culture.
- **Indoor vs outdoor divide** – Italy/Netherlands prefer compact plants (indoor stealth), Spain prefers tall (outdoor). Height correlates with legal climate.
- **Dessert wave** – Gelato, Cake, Sherbet, and Cookies families dominate growth charts, replacing 1990s–2000s classics.
- **California conquers Europe** – 12 brand-new West Coast strains entered from zero to achieve 5,000+ seeds each.

# 4. The European Cannabis Seed Market

*Which countries buy the most cannabis seeds? How does the genetic distribution differ across Europe?*

## 4.1 Market size by country

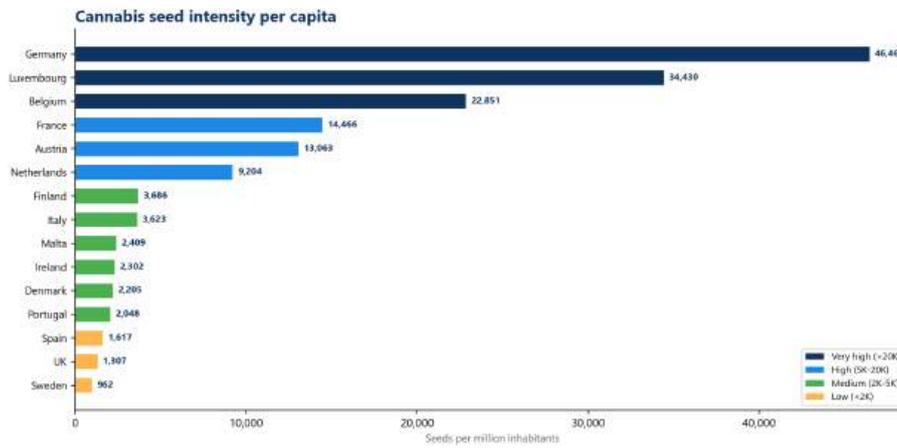


#	Country	Seeds	Share	Avg/package
1	Germany	3,902,679	64.6%	3.1
2	France	969,169	16.0%	3.3
3	Belgium	262,790	4.3%	3.3
4	Italy	213,830	3.5%	3.8
5	Netherlands	161,070	2.7%	3.4
6	Austria	117,566	1.9%	3.3
7	United Kingdom	87,847	1.5%	4.3
8	Spain	76,668	1.3%	4.1
9	Luxembourg	22,380	0.37%	3.1
10	Portugal	21,187	0.35%	3.9
11	Finland	20,277	0.34%	3.4
12	Denmark	12,886	0.21%	3.6
13	Ireland	11,512	0.19%	3.2
14	Sweden	10,028	0.17%	3.5
15	Greece	9,267	0.15%	3.9

**CONCLUSION**

Germany's dominance is unprecedented – nearly two-thirds of all European cannabis seeds are shipped to Germany, a direct consequence of the April 2024 legalisation that created the continent's largest home-grow market. France at 16% is a distant but significant second. Together, just two countries account for over 80% of the European market. The remaining 23 countries share less than 20% of total volume.

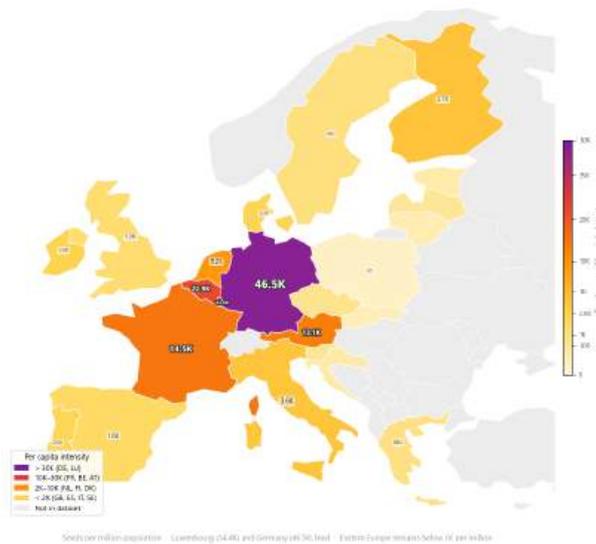
**Per capita analysis**



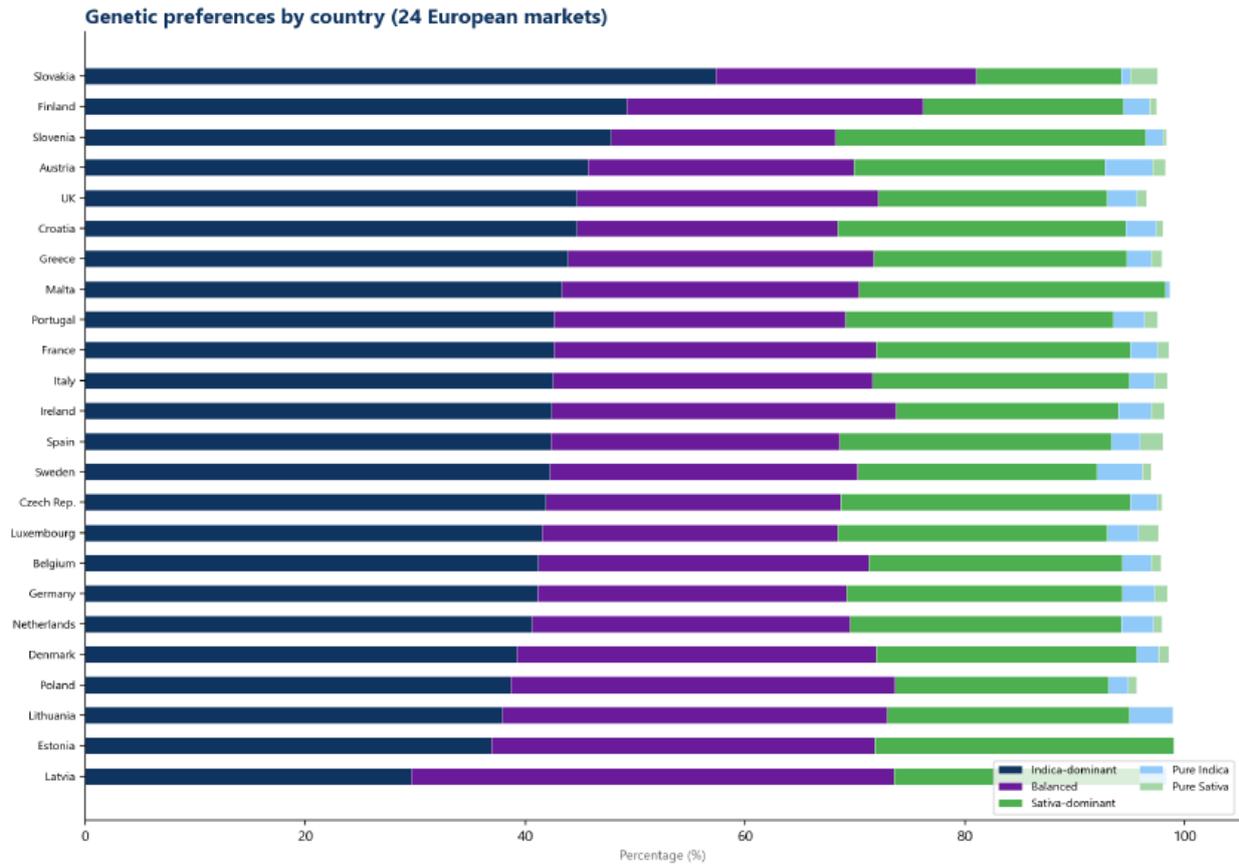
**KEY INSIGHT**

*The Netherlands paradox: Despite its reputation as the "coffeeshop capital", the Netherlands ranks only 6th per capita (9,204 seeds per million inhabitants). Dutch consumers buy cannabis locally at coffeeshops – reducing the need for home growing. Luxembourg leads per capita at 34,430 seeds/M, followed by Germany at 46,460 seeds/M.*

Cannabis Seed Intensity: Seeds per Million Inhabitants



## 4.2 Indica / Sativa / Hybrid Distribution



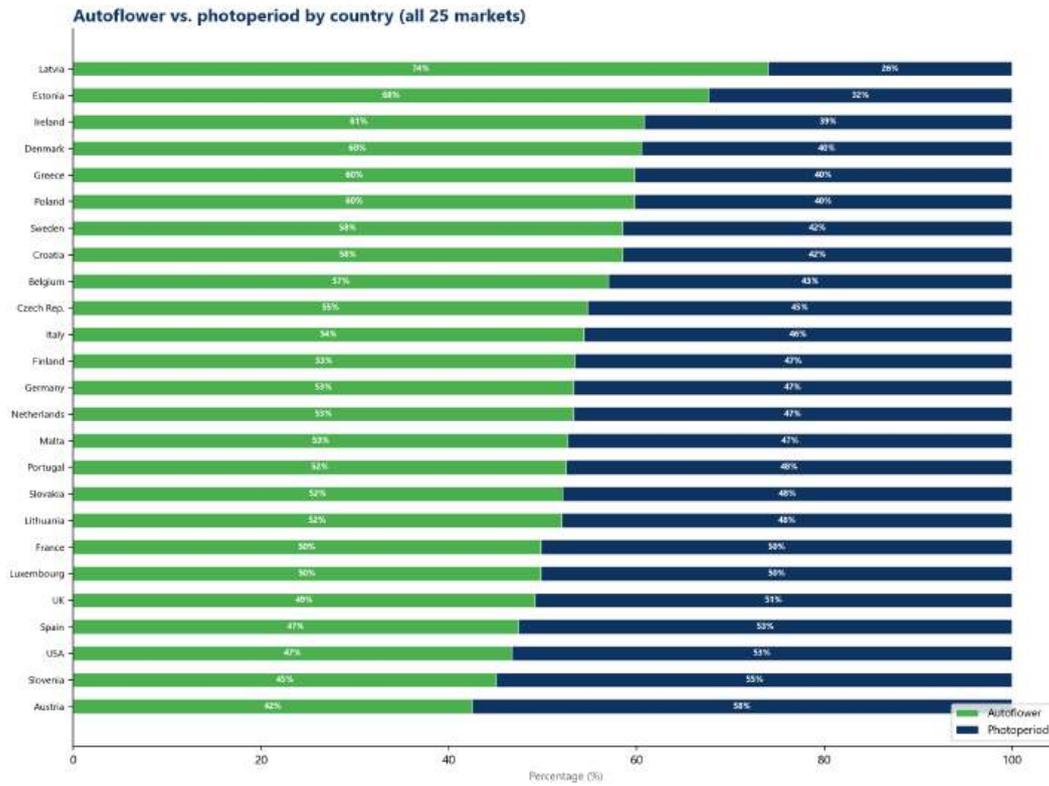
Country	Indica-dom.	Sativa-dom.	Balanced	Pure Indica	Pure Sativa
Germany	41.1%	25.1%	28.1%	2.9%	1.2%
France	42.6%	23.1%	29.3%	2.5%	1.0%
Italy	42.5%	23.3%	29.1%	2.3%	1.2%
Netherlands	40.6%	24.7%	28.9%	2.9%	0.8%
Austria	45.7%	22.8%	24.2%	4.3%	1.2%
Spain	42.3%	24.7%	26.3%	2.6%	2.1%

Full 24-country European genetics breakdown available in Appendix C.

### CONCLUSION

Eastern Europe leans heavily towards indica-dominant genetics (Slovakia 57.3%), likely driven by preferences for faster-flowering, more compact varieties suited to discreet indoor growing in restrictive legal environments. Latvia stands out with the highest share of balanced hybrids (43.9%), while Spain shows the highest pure sativa share in the EU at 2.1% – consistent with its outdoor growing culture. By comparison, the USA has 7.1% pure sativa, linked to heritage strains like Panama Red and Colombian Gold.

### 4.3 Autoflower vs. Photoperiod



Country	Autoflower %	Photoperiod %	Total seeds
Belgium	57.0%	43.0%	103,933
Italy	54.4%	45.6%	133,495
Germany	53.3%	46.7%	2,863,381
France	49.8%	50.2%	22,297
UK	49.2%	50.8%	48,996
Netherlands	53.3%	46.7%	114,873
Spain	47.4%	52.6%	26,065
Austria	42.5%	57.5%	76,529

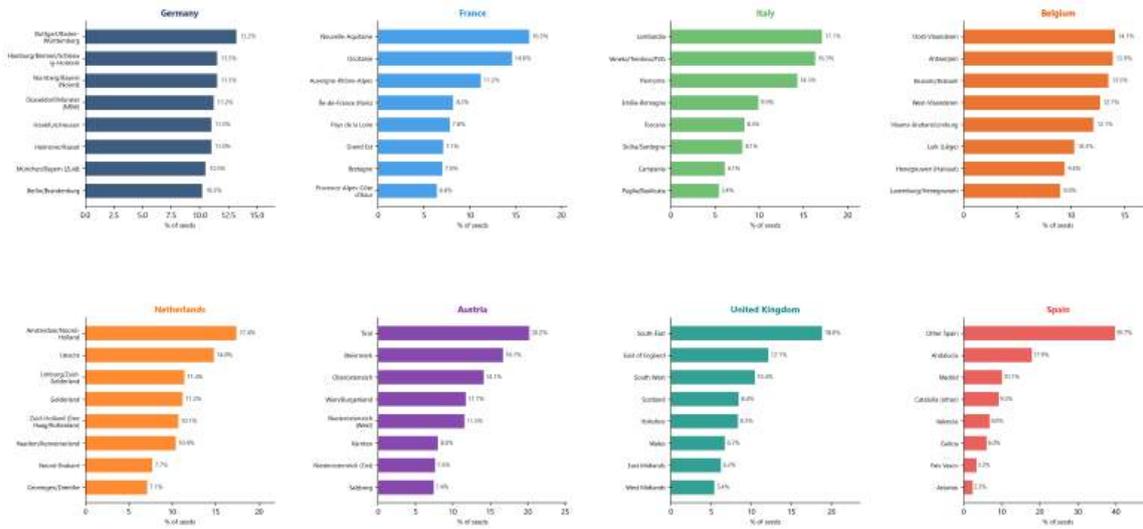
Full 24-country European autoflower data available in Appendix D.

#### CONCLUSION

Baltic states lead autoflower adoption (Latvia 74%, Estonia 68%) – driven by short summers and indoor necessity. Austria has the lowest autoflower percentage among major markets (42.5%), followed by the UK (49.2%) and France (49.8%). The autoflower/photoperiod split closely tracks latitude: northern markets with shorter growing seasons favour autoflowers, while southern and alpine markets with outdoor potential favour photoperiod varieties.

## 4.4 Regional Differences

Regional Seed Distribution by Country (2024–2025)



Region	Countries	Orders/100K	Autoflower	Intensity
DACH	DE, AT	454.8	56.1%	Very high
Benelux	BE, NL, LU	382.8	57.4%	High
Mediterranean	ES, IT, PT, GR, MT	80.6	57.0%	Medium
UK & IE	GB, IE	71.9	55.5%	Medium
Scandinavian	DK, FI, SE, EE, LV, LT	48.7	58.4%	Low-med
Eastern EU	PL, CZ, SK, SI, HR	8.0	54.7%	Low

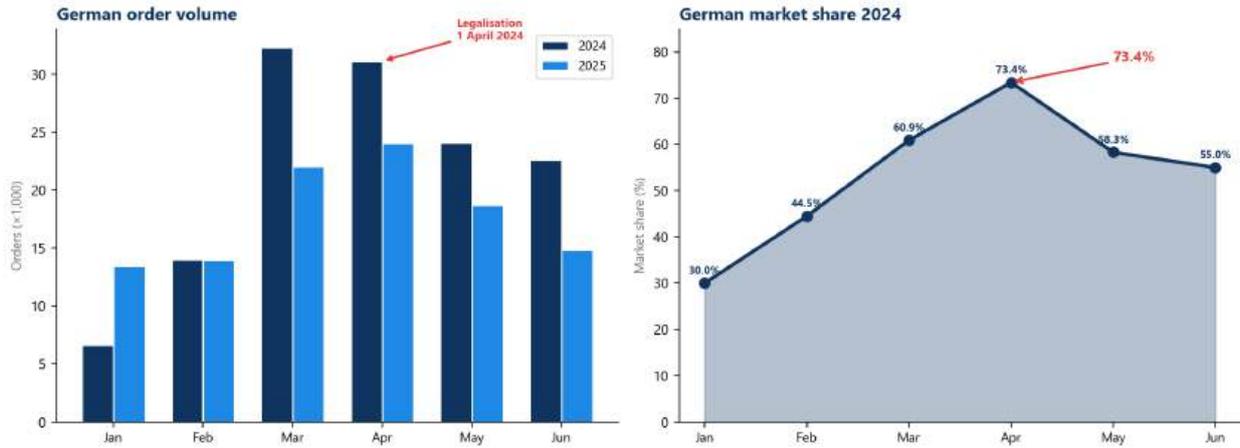
### CONCLUSION

The DACH region (Germany + Austria) dominates with 454.8 orders per 100K inhabitants – nearly 6x higher than Mediterranean countries and an extraordinary 57x higher than Eastern Europe. This intensity gap reveals that European cannabis culture is not a single market but a patchwork of vastly different adoption levels, largely driven by legal frameworks. The Benelux region follows as the second most active, suggesting a corridor of cannabis culture from the Rhine to the North Sea.

# 5. The Germany Effect

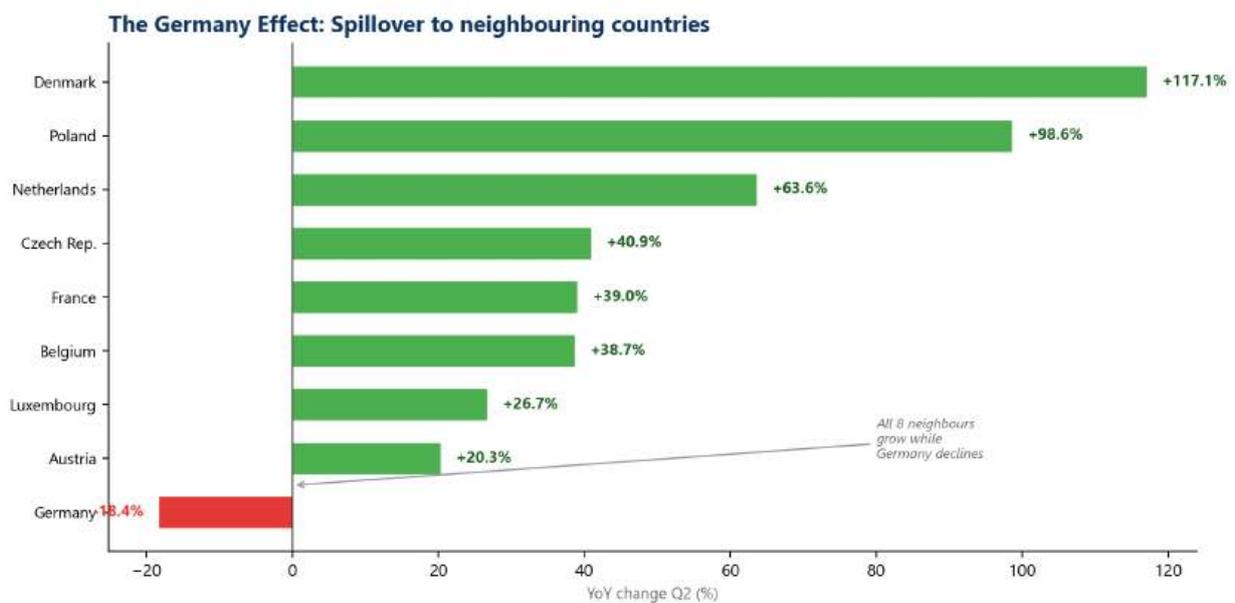
*How has German legalisation (April 2024) influenced purchasing behaviour across Europe?*

## 5.1 Legalisation impact



On 1 April 2024, German cannabis legalisation came into effect. In March–April 2024, Germany represented 73.4% of all European seed orders – a massive stockpiling effect as consumers prepared for legal home growing. After the rush, German online volume dropped by -26.3% (Q2 2025 vs Q2 2024) as consumers shifted to local retail channels.

## 5.2 Spillover to neighbouring countries



**KEY INSIGHT**

*The "cannabis awareness spillover effect": all 8 German neighbours grew (+20% to +117%) while Germany itself declined (-18.4%). Legalisation in one country creates awareness and demand in surrounding countries – crucial data for European policymakers.*

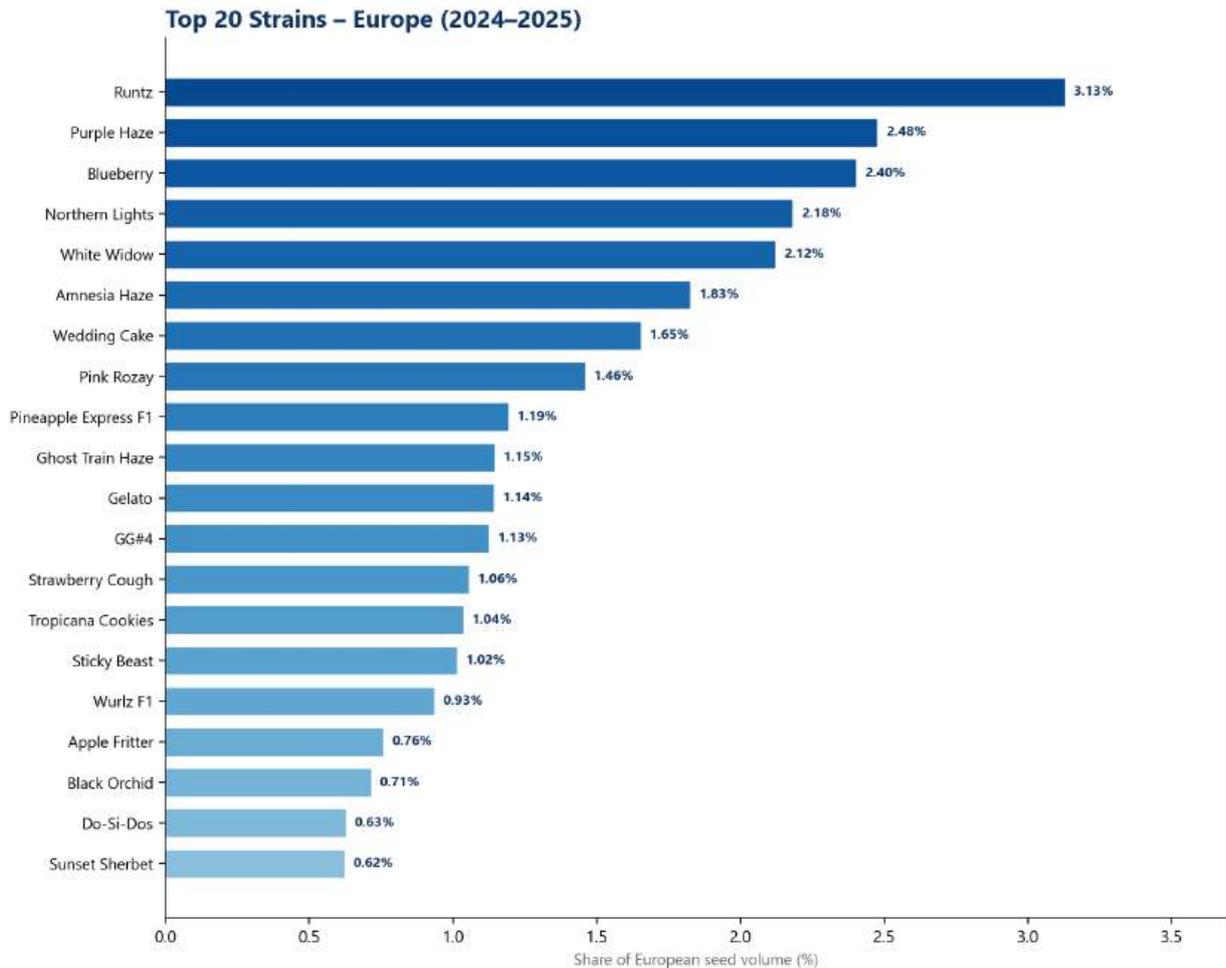
**CONCLUSION**

The Germany Effect provides a real-world case study for the "legalisation domino theory." When one major EU country legalises, the impact extends far beyond its borders. Austria's +117% surge is the most dramatic example – shared language and media drove awareness. Belgium (+42%), the Netherlands (+30%), and France (+20%) also saw significant growth. This pattern suggests that future legalisation in any major EU market will create similar ripple effects across neighbouring countries. For the broader European cannabis market, German legalisation was not a single event but the start of a continental shift.

## 6. Strain Preferences Across Europe

*What are the most popular strains per country? Which strains are uniquely popular in specific markets?*

### 6.1 Top strains & signature strains



Runtz dominates as the #1 strain across virtually all European markets, capturing over 3% of total seed volume in Germany, France, Italy, Spain, and the Netherlands alike. Its rise reflects the power of social media-driven hype and the broader dessert genetics wave that has reshaped consumer preferences since 2023. Behind Runtz, a cluster of legacy strains – Purple Haze, Blueberry, Northern Lights, and White Widow – still commands significant market share, demonstrating that established genetics retain deep loyalty even as newer varieties surge. Finland is the sole exception to Runtz dominance: Northern Lights and Blueberry hold the #1 and #2 positions, driven by the country’s short growing season and strong preference for cold-climate autoflower varieties. The top 20 strains together account for roughly 30–35% of total seed volume, indicating a highly fragmented market where over 500 unique strains compete for the remaining two-thirds.

## Signature strains by country

By comparing each country's strain share to the European average, we identify "signature strains" – varieties that are disproportionately popular in a specific market. A ratio of 5x means a strain is five times more popular in that country than its European average.

Country	Signature strain	Ratio	Explanation
Finland	Blueberry Autoflower	38.7x	Nordic cold-climate autoflower dominance
Finland	Gelato Autoflower	26.5x	Autoflower versions strongly preferred
UK	Permanent Marker Auto	17.2x	UK early-adopter for exotic genetics
Finland	Quick Caramel XL	7.8x	Fast-flowering XL variety for short Nordic summers
Austria	LSD	5.6x	Psychedelic-era genetics uniquely popular in DACH
Austria	Biscotti	3.7x	Exotic genetics rank #4 – highest in Europe
Italy	Wedding Cake	3.5x	Dessert genetics rank highest in Southern Europe
UK	Blue Cheese	3.4x	Iconic British strain – Cheese genetics originated in UK
Spain	Passion Fruitz	3.3x	Tropical fruit genetics thrive in cannabis clubs
France	Critical Kush	2.7x	French Critical heritage meets Kush genetics
France	Bruce Banner 3	2.6x	Strongest presence of any market in Europe
Italy	Special Queen 1	2.5x	Budget classic disproportionately popular in South
Netherlands	Super Silver Haze	2.4x	Cannabis Cup legend – coffeeshop classic
Spain	Critical	2.1x	Spanish outdoor heritage – Critical genetics roots
Netherlands	Amnesia Haze	1.6x	Coffeeshop heritage – highest share in Europe
Germany	Purple Haze	1.5x	Legacy strain remains #2 in the largest market
Belgium	Ghost Train Haze	1.5x	Strongest sativa-haze presence in Benelux

### CONCLUSION

Each European country has developed its own "strain identity" driven by climate, culture, and legal context. Autoflower variants are the strongest market differentiators – Finland and the UK show 17–39x overrepresentation of specific autoflower strains. This is not a generic "autoflower preference" but strain-specific: Finnish growers want Blueberry Auto specifically, not just any autoflower. Austria stands out with LSD (5.6x) and Biscotti (#4) – a uniquely exotic strain profile in the DACH region. The Netherlands' Amnesia Haze as #2 strain confirms the enduring coffeeshop heritage, while Spain's Critical preference reflects its deep outdoor growing tradition. Even Germany, whose sheer volume defines the European average, retains Purple Haze as a distinctively strong #2 strain. The fragmentation means there is no single European cannabis market – there are 24 distinct ones, each with unique strain preferences.

## 6.2 Top 5 strains by country

The top 20 strains typically account for 30–40% of a country’s total seed volume, indicating a highly fragmented market with 900–2,000 unique strains sold per country. Full top 20 rankings and per-country charts are available in Appendix F.

Germany		
#	Strain	Share
1	Runtz	3.13%
2	Purple Haze	2.74%
3	Blueberry	2.60%
4	Northern Lights	2.35%
5	White Widow	2.12%

France		
#	Strain	Share
1	Runtz	3.41%
2	White Widow	2.48%
3	Purple Haze	1.85%
4	Critical	1.85%
5	Northern Lights	1.82%

Belgium		
#	Strain	Share
1	Runtz	2.91%
2	White Widow	2.12%
3	Blueberry	2.01%
4	Amnesia Haze	1.92%
5	Northern Lights	1.87%

Italy		
#	Strain	Share
1	Runtz	3.11%
2	Blueberry	1.92%
3	Purple Haze	1.83%
4	Wedding Cake	1.76%
5	GG#4	1.48%

Netherlands		
#	Strain	Share
1	Runtz	3.15%
2	Amnesia Haze	2.91%
3	White Widow	2.31%
4	Blueberry	2.15%
5	Purple Haze	2.14%

Austria		
#	Strain	Share
1	Runtz	2.37%
2	Purple Haze	1.93%
3	Blueberry	1.87%
4	Biscotti	1.73%
5	Northern Lights	1.53%

United Kingdom		
#	Strain	Share
1	Runtz	2.28%
2	Northern Lights	1.79%
3	Blueberry	1.78%
4	Wedding Cake	1.44%
5	Perm. Marker	1.37%

Spain		
#	Strain	Share
1	Runtz	3.22%
2	Blueberry	2.56%
3	Amnesia Haze	2.07%
4	White Widow	1.78%
5	Purple Haze	1.77%

Finland		
#	Strain	Share
1	Northern Lights	2.58%
2	Blueberry	2.51%
3	Quick Caramel XL	2.39%
4	Blueberry Auto	1.68%
5	Grizzly Glue	1.52%

### CONCLUSION

Three distinct market archetypes emerge from strain rankings: (1) European mainstream (Runtz-led, dessert genetics dominating – DE, FR, BE, IT, NL), (2) climate-adapted markets (Finland with Northern Lights and Blueberry leading instead of Runtz), and (3) the UK as an early-adopter gateway where new exotic strains (Permanent Marker at #5) appear before gaining continental traction. The Netherlands is the only market where Amnesia Haze (#2) rivals Runtz, reflecting Amsterdam coffeeshop heritage. Austria’s Biscotti at #4 is unique in Europe. Strain introduction may be most effective when targeted at the UK market first, followed by continental rollout.

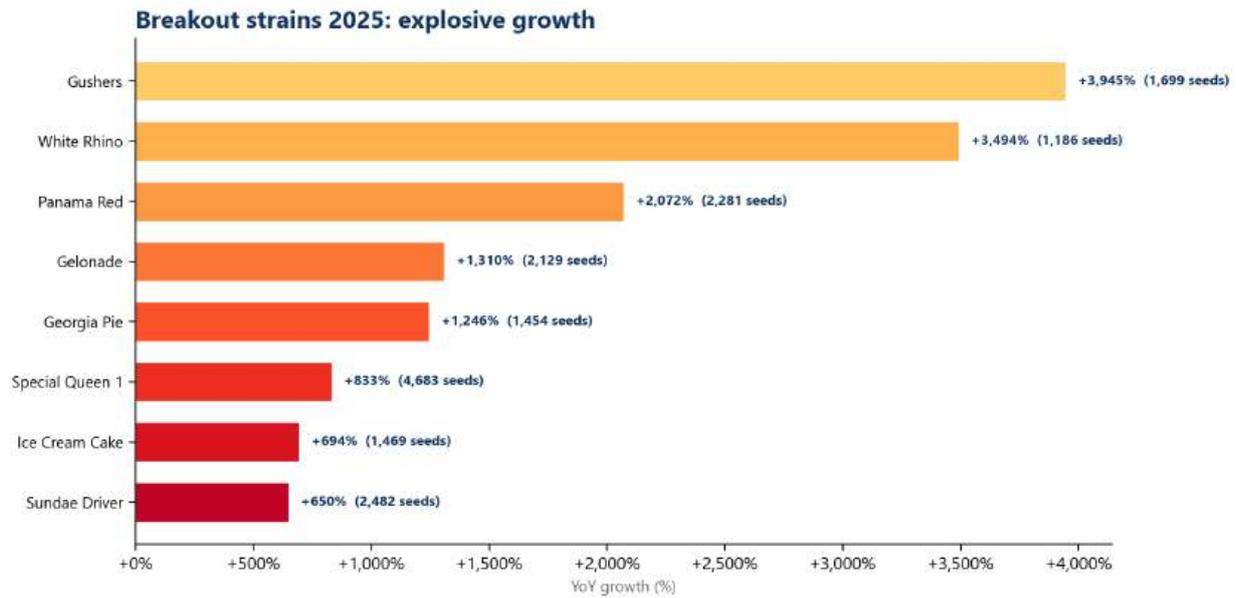
## 6.3 THC vs. CBD preferences

Country	Avg THC	High-THC (>20%)	CBD share	THC share
Greece	21.0%	57.1%	0.40%	99.60%
Luxembourg	20.8%	57.1%	1.73%	98.27%
Italy	20.7%	56.8%	1.22%	98.78%
UK	20.7%	55.5%	1.48%	98.52%
Austria	20.7%	55.4%	1.82%	98.18%
Finland	20.5%	53.8%	1.82%	98.18%
Czech Republic	20.4%	55.3%	1.79%	98.21%
Portugal	20.4%	52.5%	1.47%	98.53%
Belgium	20.4%	53.8%	1.92%	98.08%
France	20.4%	52.0%	1.71%	98.29%
Sweden	20.4%	52.5%	1.84%	98.16%
Netherlands	20.4%	53.7%	2.24%	97.76%
Germany	20.2%	51.3%	2.13%	97.87%
Denmark	20.2%	52.5%	2.68%	97.32%
Ireland	20.2%	52.5%	1.37%	98.63%
Spain	19.9%	52.5%	3.22%	96.78%

### CONCLUSION

The expected "wellness shift" toward CBD is not happening in the seed market. CBD seeds declined -40.2% year-on-year, and THC-dominant genetics remain the overwhelming norm at 97.9%. Spain is the sole exception with 4.2% CBD share – likely driven by its cannabis club culture and outdoor growing tradition. Denmark's 3.9% CBD share hints at a Scandinavian wellness corridor. Greece represents the most THC-focused market (99.25%), confirming that European growers remain overwhelmingly potency-oriented.

## 6.4 Trending strains 2025



#	Strain	2025 share	Category
1	Passion Fruitz	0.28%	Fruity Hybrid
2	Rainbow Sherbet	0.26%	Dessert Genetics
3	Ghost Train Haze	0.26%	Sativa-dominant
4	Lemon Cherry Gelato	0.18%	Exotic Hybrid
5	Black Diamond	0.17%	Dark phenotype
6	Grease Monkey	0.15%	Heavy Indica
7	Black Runtz	0.13%	Dark Runtz
8	White Truffle	0.12%	Exotic Genetics

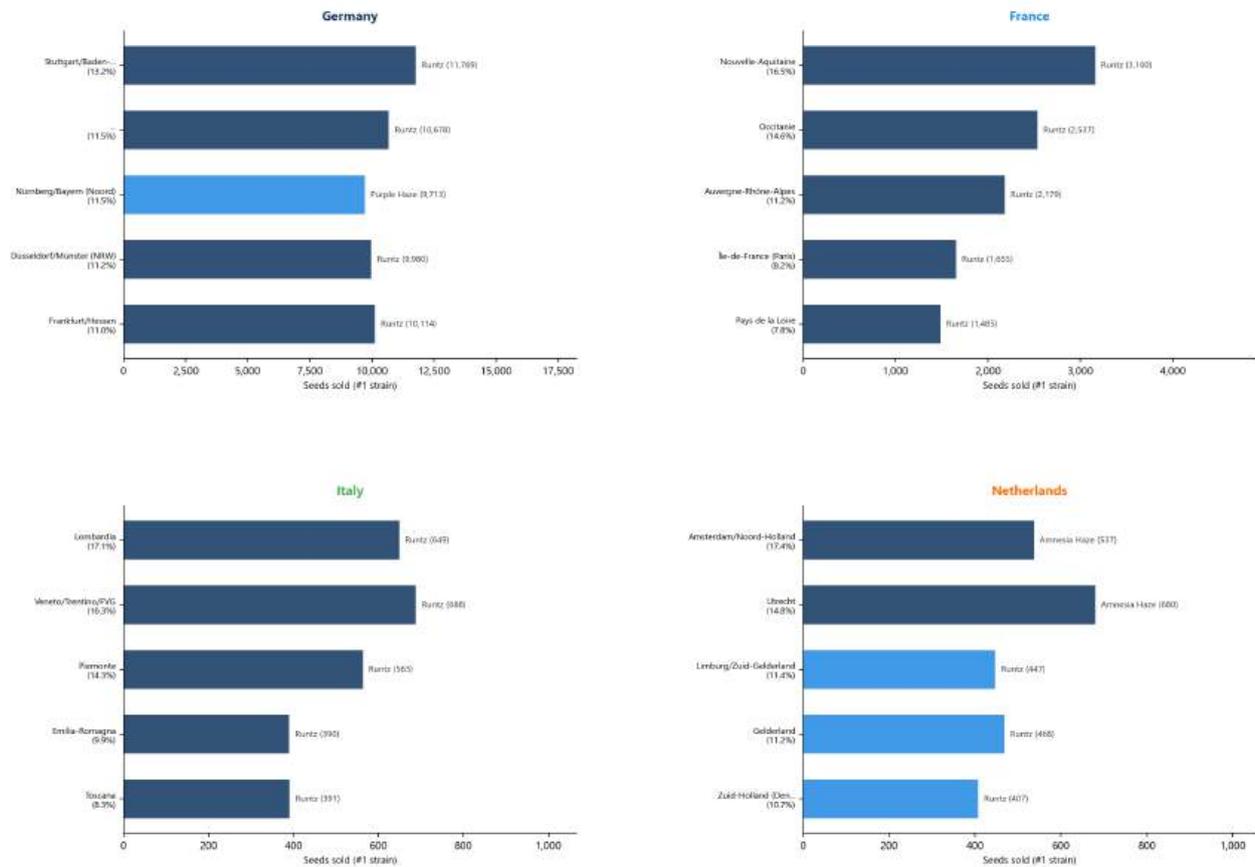
Established strains showing the fastest growth include Gelonade (+1,310%), Georgia Pie (+1,246%), Lemon Cherry Cookies (+719%), and Ice Cream Cake (+694%). Meanwhile, classic strains are in significant decline: Amnesia Haze (-53%), Cheese (-72%), Blueberry (-48%), and Critical Kush (-74%).

### CONCLUSION

A generational shift is underway. 1990s–2000s classics (Amnesia Haze, Cheese, Blueberry, Critical Kush) are being replaced by dessert/candy genetics from the 2020s. The "Gelato dynasty" is the most influential, spawning Biscotti, Jealousy, and Runtz as offspring. Dark phenotypes (Black Diamond, Black Runtz) represent an emerging aesthetic trend at +145.5% YoY. European breeders face competitive pressure from California craft genetics that entered from zero to achieve bestseller status within a single year.

## 6.5 Regional strain variation

Top Strains by Region within Key Markets

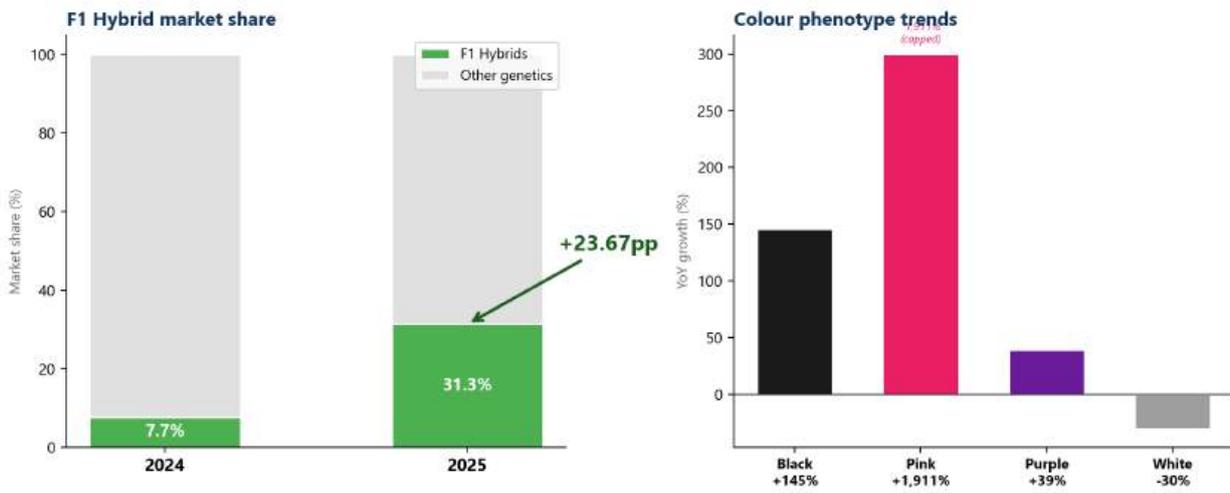


Country	Most overrepresented	Index	Most underrepresented	Index
Germany	Hannover/Kassel	1.59	Köln/Bonn (NRW)	0.79
France	Corse	2.60	Paris (Île-de-France)	0.44
Belgium	Luxemburg/Henegouwen	3.46	Vlaams-Brabant/Limburg	0.75
Italy	Piemonte	1.91	Campania	0.62
Netherlands	Haarlem/Kennemerland	2.42	Overijssel	0.29
Austria	Tirol	2.24	Wien/Burgenland	0.47
United Kingdom	Wales	1.46	London	0.38
Spain	Cataluña	1.84	Canarias	0.24

**CONCLUSION**

Home growing is a suburban and rural phenomenon across all European markets. Capital cities consistently underperform: Paris (index 0.44), London (0.38), Vienna (0.47), and Madrid (0.59) all purchase far fewer seeds than their population share predicts. The strongest cannabis cultures exist in mid-sized cities and rural regions – from Belgium’s Luxemburg province (3.46) to the Netherlands’ Haarlem area (2.42). Within most countries, strain preferences are nationally uniform (driven by social media), with genuine regional variation only in the UK (Wales, Scotland, North West each have unique profiles), Austria (Vienna’s Biscotti/LSD culture), and Spain (País Vasco’s Critical dominance). Detailed per-country regional charts are available in Appendix E.

**6.6 Genetic Lines & the F1 Revolution**



#	Parent strain	Offspring seeds	Notable offspring
1	Gelato	57,274	Runtz, Biscotti, Jealousy
2	Girl Scout Cookies	55,044	Wedding Cake, Sunset Sherbet
3	Ruderalis	54,870	All autoflower genetics
4	Haze	48,048	Purple Haze, Amnesia Haze
5	Zkittlez	38,566	Runtz, Black Runtz, White Runtz

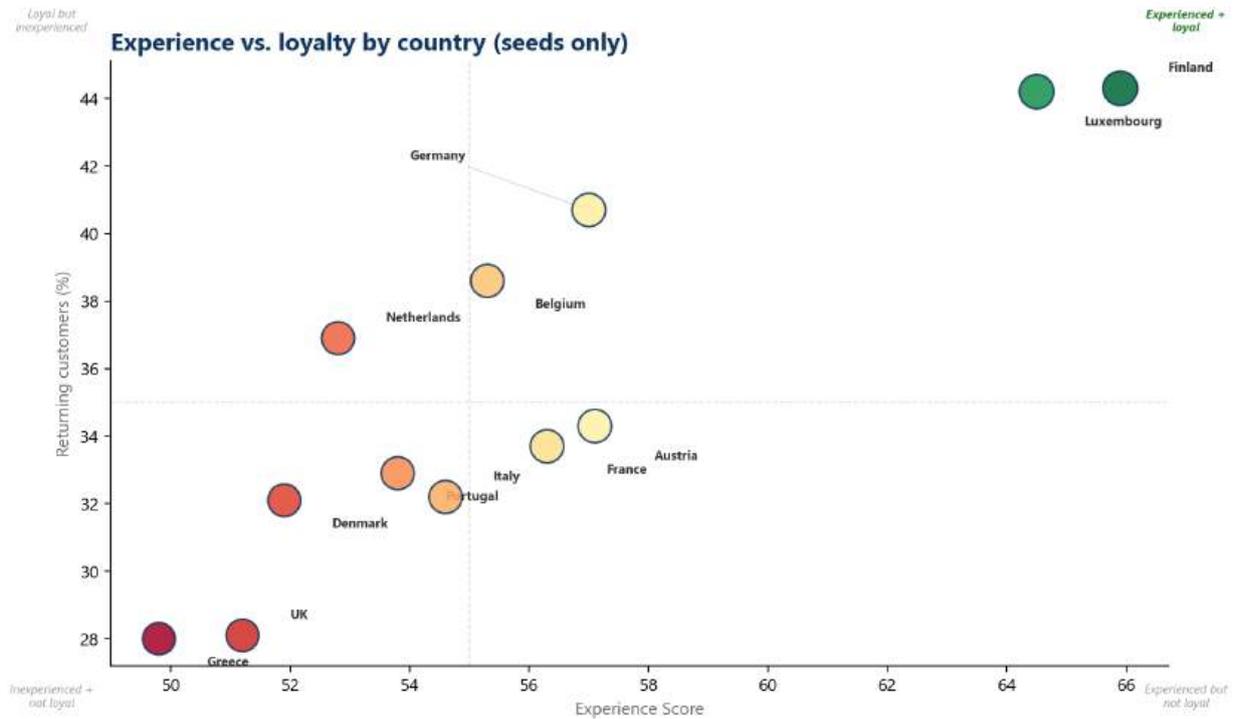
**CONCLUSION**

The F1 hybrid revolution (+226.6%, from 7.66% to 31.33% market share) is the single largest genetic shift in the dataset. Consumers are moving from choosing by strain name to choosing by genetic lineage. Gelato (57,274 offspring seeds) is the most commercially influential parent strain in European cannabis – its descendants (Runtz, Biscotti, Jealousy) collectively dominate sales charts across the continent. This parallels craft beer’s shift from brand loyalty to style and hop variety preference. For breeders, investing in established genetic lines (Gelato, GSC, Zkittlez) provides a more reliable path to market success than novel, unproven genetics.

# 7. Consumer Behaviour

How does consumer behaviour differ by country? Order size, loyalty, and experience level?

## 7.1 Order size & loyalty



#	Country	Seeds/order	Unique strains	Returning %	Type
1	Austria	4.4	3.0	34.3%	DACH seed collector
2	Germany	4.2	3.2	40.7%	Large + loyal
3	Luxembourg	3.9	3.2	44.2%	Loyal + experienced
4	Denmark	2.9	2.5	32.1%	Scandinavian average
5	Finland	2.8	2.4	44.3%	Most loyal customers
6	Belgium	2.6	2.4	38.6%	Benelux average
7	Italy	2.5	2.3	32.2%	Selective buyer
8	France	2.4	2.2	33.7%	Selective
9	Netherlands	2.3	2.1	36.9%	Consistent
10	United Kingdom	2.4	2.2	28.1%	Low loyalty
11	Spain	2.2	2.1	22.8%	Lowest loyalty

**CONCLUSION**

The DACH region dominates seed ordering volume: Austria (4.4 seeds/order) and Germany (4.2) lead Europe, reflecting legalisation-driven confidence to order larger quantities. Luxembourg combines high order size (3.9) with Europe's second-highest loyalty rate (44.2%), suggesting a dedicated grower community. Finland stands out with the highest returning customer rate (44.3%) despite modest order sizes – loyalty over volume. At the bottom, Spain (22.8% returning) and the UK (28.1%) show the lowest loyalty, indicating fragmented retail landscapes where customers shop around rather than building retailer relationships.

## 7.2 Experience Score

The Experience Score combines four metrics: regular seed preference (indicates willingness to grow from non-feminised seeds), return rate, grow supply purchases, and autoflower/photoperiod ratio. Higher scores indicate more knowledgeable, invested growers.

Country	Experience Score	Return rate	Grow supply %	Profile
Finland	65.9	44.3%	High	Expert grower
Luxembourg	64.5	44.2%	High	Dedicated community
Germany	57.0	40.7%	Medium	Serious grower
Austria	57.1	34.3%	Medium	DACH pattern
France	56.3	33.7%	Medium	Growing expertise
Belgium	55.8	37.2%	High	Invested grower
Netherlands	54.2	36.9%	High	Indoor specialist
Italy	52.4	32.2%	Low	Bulk buyer, low invest
United Kingdom	51.2	28.1%	Medium	Fragmented market
Greece	49.8	29.5%	Low	Emerging market

Finland's high score (65.9) is driven by both exceptional loyalty and significant grow supply investment, making Finnish customers the most "serious" growers in Europe. Luxembourg's similar score (64.5) comes from a smaller but equally dedicated community. The DACH region (Germany 57.0, Austria 57.1) clusters tightly, reflecting shared cannabis culture and media.

**CONCLUSION**

The Experience Score creates a maturity ladder for European cannabis markets. Northern and Benelux markets (Finland, Luxembourg, Belgium, Netherlands) cluster at the top, suggesting that restrictive legal environments paradoxically produce the most knowledgeable growers – necessity breeds expertise. The UK's low score (51.2) despite a strong cultural cannabis tradition likely reflects its fragmented market with many competing retailers, reducing loyalty to any single platform. Mediterranean markets cluster in the middle, and Greece at the bottom suggests an emerging market still building grower expertise.

## 7.3 The Autoflower Myth: Debunked

Common industry assumption: "Autoflowers are for beginners." Our data provides a definitive answer.

Customer type	Autoflower %
First-time buyers	59.1%
Returning customers	58.3%
Frequent buyers (5+ orders)	56.4%
Grow supply buyers	58.9%

### KEY INSIGHT

*Experienced growers buy autoflowers at nearly identical rates as beginners (59.1% vs 56.4%). The narrative is outdated. Exception: Germany is the ONLY market where experienced growers show a measurable preference for photoperiod varieties (-3.8%).*

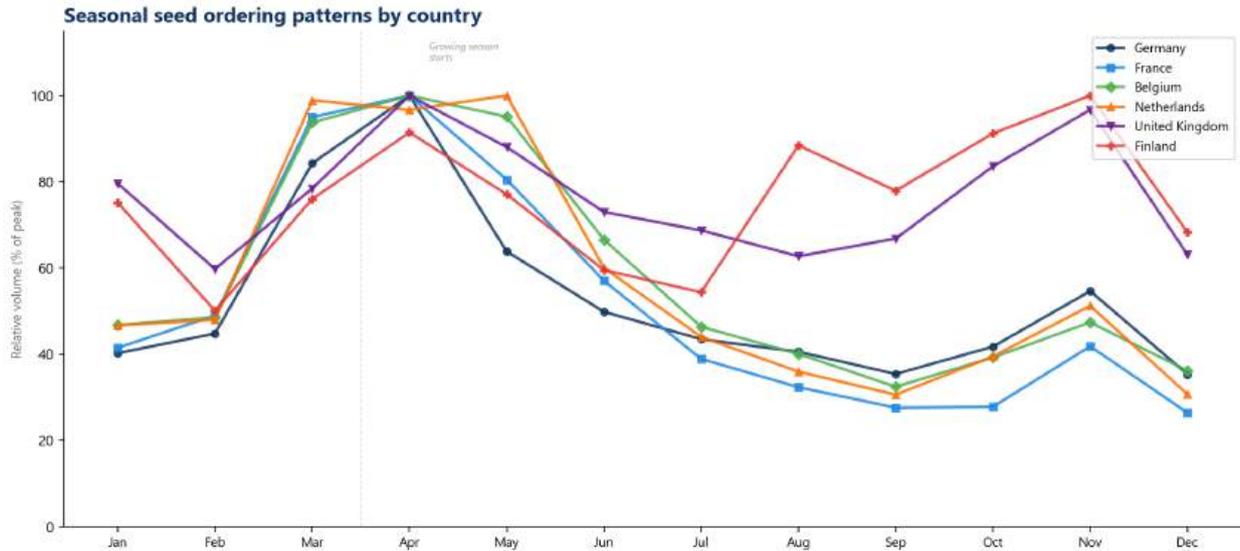
### CONCLUSION

This finding has significant practical implications. Marketing autoflowers as "beginner seeds" is not only inaccurate but potentially alienates the experienced grower segment. The 59.1% vs 56.4% spread is statistically negligible across hundreds of thousands of orders. Modern autoflower genetics have reached a quality threshold where the flowering-type choice is about convenience and growing conditions, not experience level. Germany's exception likely reflects its new legalisation allowing outdoor growing, where photoperiod strains thrive in long European summers.

## 8. Seasonal Patterns & Growth Trends

*When does the growing season start per country? Which European markets are growing or stabilising?*

### 8.1 Seasonal patterns



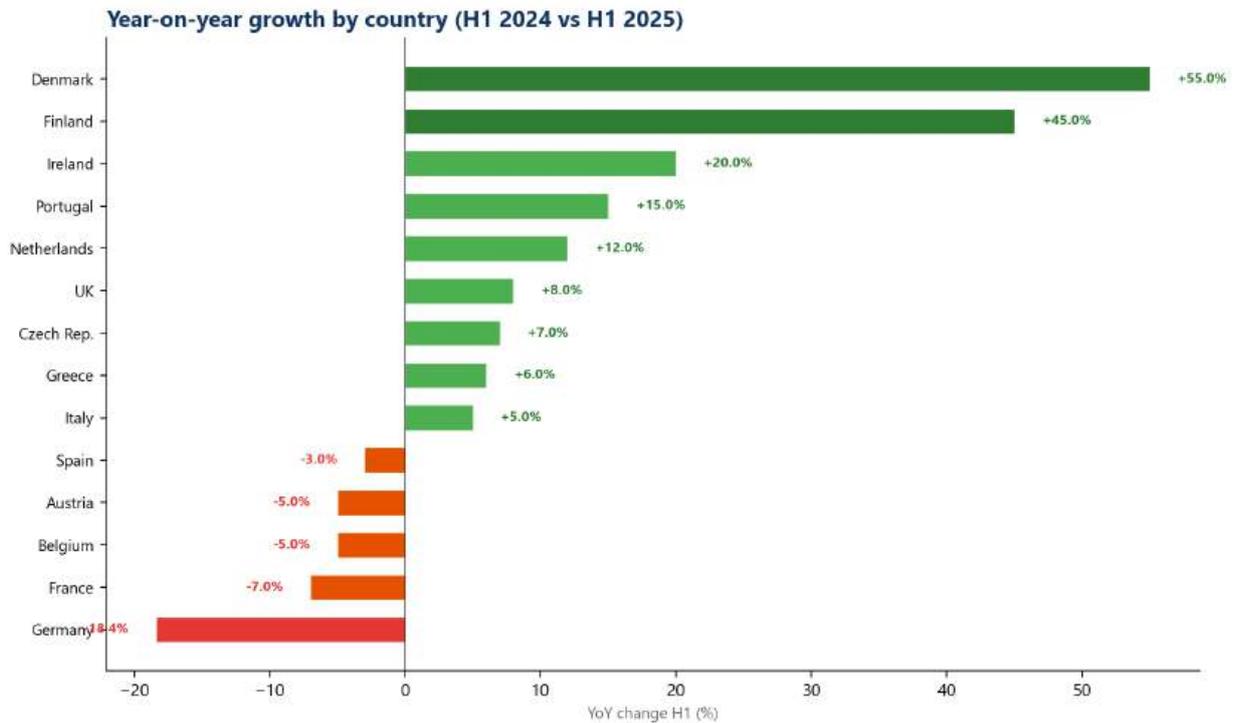
Country	Peak month	Season start	Jan→Feb growth	Feb→Mar growth
Germany	April	February	+180%	+183%
France	March	February	+74%	+83%
Belgium	March	February	+77%	+71%
Netherlands	March	February	+63%	+86%
UK	March	March	+3%	+50%
Finland	January	March	-43%	+53%

Finland stands out as the only market with a January peak – confirming its indoor-only growing culture where growers start cycles regardless of outdoor conditions. The UK shows a notable secondary November peak, suggesting a stronger indoor winter growing culture than continental Europe.

#### CONCLUSION

Seasonal patterns directly map to climate and growing culture. The February–March surge across Western Europe marks outdoor season preparation. Finland’s January peak confirms it as Europe’s most indoor-oriented market – Finnish growers start their cycles regardless of outdoor conditions. Germany’s extreme +180%/+183% spike in 2024 reflects the legalisation rush superimposed on natural seasonality – separating these effects will be crucial for tracking the market’s long-term trajectory.

## 8.2 Year-on-year growth



Germany's -18.4% decline represents market normalisation after the legalisation rush, not a shrinking market. The Scandinavian bloc shows the strongest growth: Denmark (+55%) and Finland (+45%) are rapidly expanding markets driven by growing indoor cultivation communities. Ireland (+20%) and Portugal (+15%) suggest Southern and Atlantic European interest is rising. Austria's -5% decline mirrors Germany's normalisation pattern – the DACH region moved in lockstep, confirming the spillover theory works both ways.

### CONCLUSION

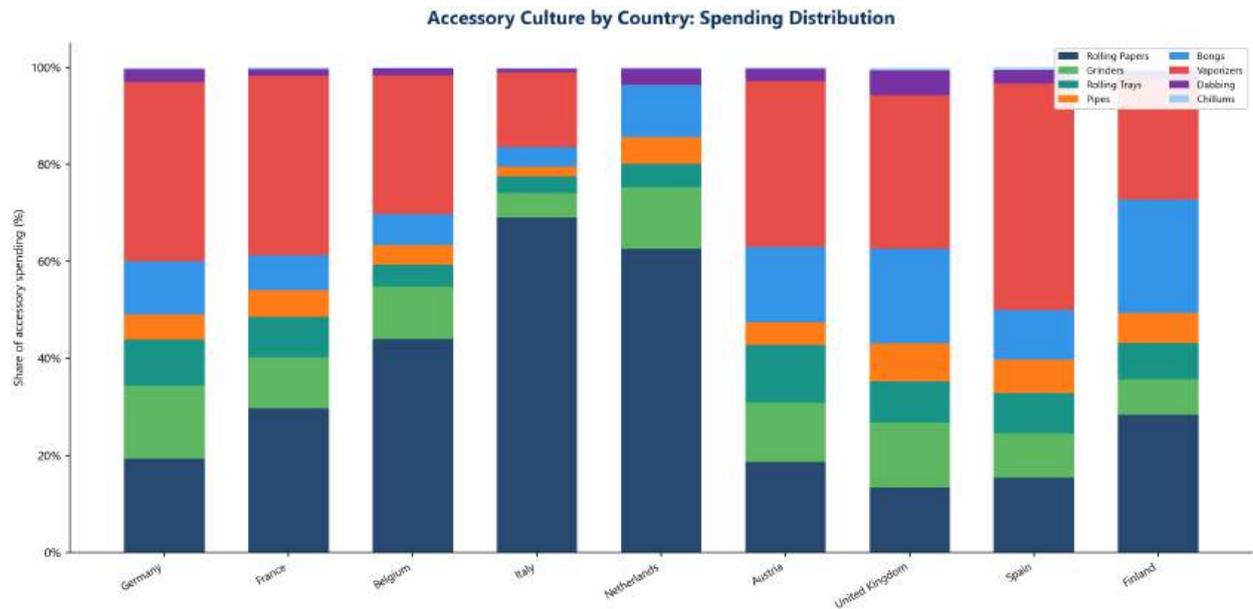
The post-legalisation normalisation pattern in Germany provides a template for what other European countries can expect if they legalise: an initial stockpiling surge, followed by a shift to local retail, resulting in a temporary online decline. The Scandinavian surge (+45–55%) is the most significant trend – these markets are growing from a small base but with exceptionally loyal customer segments. The Western European core (France, Belgium, Netherlands) shows mild contraction (-5–7%), likely reflecting market maturity rather than declining interest. Overall, the European cannabis seed market is redistributing rather than contracting.

# 9. Consumption & Cultivation Culture

*Beyond seeds: how does the product mix differ by country? By analysing spending shares across consumption accessories and cultivation equipment, we reveal three distinct cannabis lifestyles across Europe.*

## 9.1 Consumption culture by country

Consumption accessories – bongos, pipes, grinders, rolling papers, rolling trays, vaporizers, and dabbing equipment – reveal distinct national cannabis cultures. While rolling papers dominate by item count everywhere, measuring by spending share tells a fundamentally different story: higher-value items like vaporizers and bongos account for a much larger share of the accessory market than raw unit counts suggest.



Country	Rolling Papers	Grinders	Bongos	Vaporizers	Pipes	Rolling Trays	Dabbing
Germany	19.3%	15.1%	10.9%	36.9%	5.2%	9.5%	2.7%
France	29.7%	10.5%	7.1%	37.0%	5.6%	8.3%	1.4%
Belgium	44.0%	10.7%	6.4%	28.6%	4.0%	4.6%	1.5%
Italy	69.1%	5.0%	4.0%	15.5%	2.0%	3.4%	0.7%
Netherlands	62.6%	12.7%	10.8%	0.1%	5.5%	4.8%	3.2%
Austria	18.7%	12.2%	15.6%	34.1%	4.6%	11.9%	2.6%
United Kingdom	13.4%	13.4%	19.5%	31.6%	7.8%	8.5%	5.1%
Spain	15.4%	9.2%	10.1%	46.7%	7.0%	8.2%	2.8%
Finland	28.4%	7.3%	23.3%	24.7%	6.2%	7.5%	1.8%

## Three consumption cultures

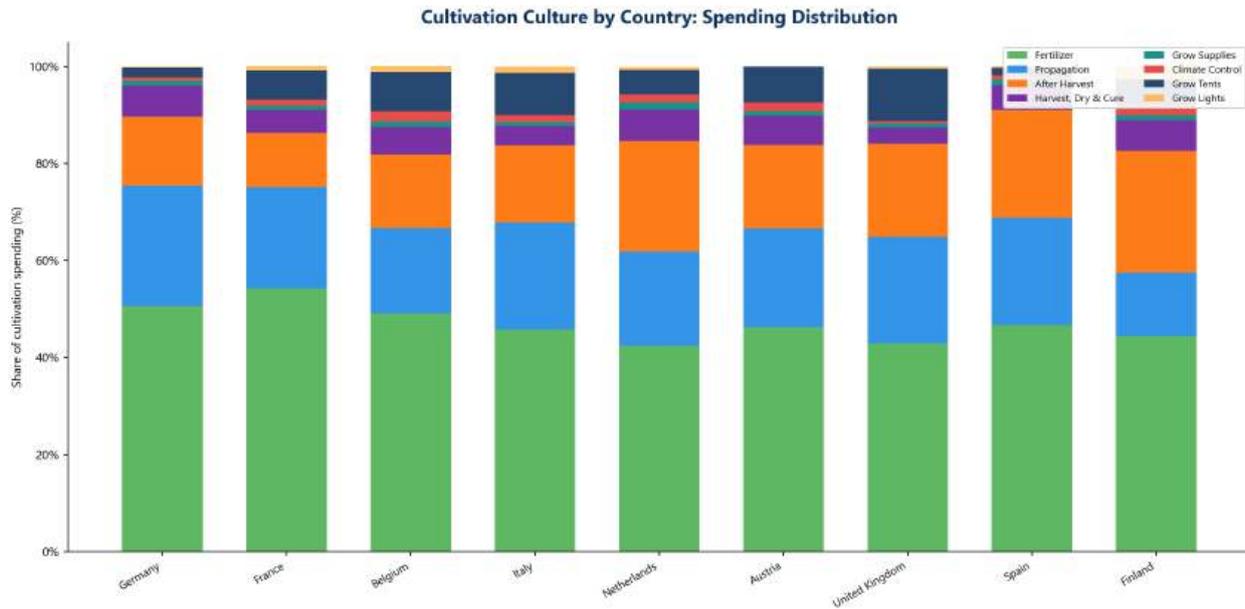
Country	Joint culture	Vaporizer	Glass / pipe	Dominant method
Italy	72.5%	15.5%	7.0%	Joint culture
Netherlands	67.4%	0.1%	19.8%	Joint culture
Belgium	48.6%	28.6%	12.1%	Joint culture
France	38.0%	37.0%	14.5%	Balanced (joint/vape)
Finland	36.0%	24.7%	32.1%	Multi-category
Spain	23.6%	46.7%	20.5%	Vaporizer culture
Germany	28.8%	36.9%	19.2%	Vaporizer culture
Austria	30.6%	34.1%	23.1%	Vaporizer culture
United Kingdom	22.0%	31.6%	33.0%	Glass/pipe culture

### CONCLUSION

Cannabis consumption culture in Europe splits into three distinct blocs. Southern/Benelux Europe (Italy, Netherlands, Belgium) remains rooted in joint culture – over two-thirds of their accessory spending goes to rolling papers and trays. Central Europe (Germany, Austria) and Spain have shifted toward vaporizers, reflecting a more health-conscious or tech-oriented consumer base. The UK represents a glass/pipe culture closer to American patterns than to its continental neighbours. France sits on an almost perfect 50/50 split between joint and vaporizer culture – the most balanced market in Europe. The Netherlands is notable for essentially zero vaporizer spending (0.1%), likely because Dutch consumers purchase vaporizers locally at coffeeshops.

## 9.2 Cultivation culture by country

Cultivation equipment – fertilizer, propagation supplies, post-harvest processing, grow tents, and climate control – indicates how seriously each market invests in the growing process. The chart below shows the spending distribution across cultivation categories for each country, revealing three distinct growing profiles across Europe.



Fertilizer dominates cultivation spending in every market, but its share varies significantly: France leads at 54.3%, reflecting a nutrient-focused growing culture, while the Netherlands allocates just 42.4% to fertilizer – the lowest in Europe. This is because Dutch growers invest disproportionately in post-harvest processing (22.7%), suggesting a mature community focused on output quality rather than simply growing plants. Finland stands out with Europe’s highest climate control spending (5.0%) and post-harvest investment (25.1%), both driven by the necessity of indoor cultivation in Nordic conditions. The UK leads in grow tent spending (10.8%), confirming that British growers are predominantly indoor cultivators operating in confined spaces.

Country	Fertilizer	Propagation	After Harvest	Grow Tents	Harvest/Dry	Climate
Germany	50.6%	24.9%	14.1%	2.0%	6.4%	1.0%
France	54.3%	20.8%	11.2%	6.0%	4.7%	2.2%
Belgium	49.1%	17.6%	15.1%	8.2%	5.7%	3.3%
Italy	45.8%	22.1%	15.8%	8.7%	4.0%	2.8%
Netherlands	42.4%	19.5%	22.7%	5.0%	6.5%	2.3%
Austria	46.2%	20.4%	17.2%	7.4%	6.0%	1.9%
United Kingdom	42.9%	22.0%	19.2%	10.8%	3.3%	1.0%
Spain	46.7%	22.1%	22.2%	1.6%	5.1%	1.2%
Finland	44.4%	13.1%	25.1%	5.1%	6.3%	5.0%

## CONCLUSION

Three cultivation archetypes emerge from the data. First, the "nutrient-focused" growers (Germany, France) who allocate over 50% of their cultivation budget to fertilizer and propagation – they invest heavily in the growing phase but less in processing the harvest. Second, the "quality-output" growers (Netherlands, Finland, Spain) who spend 25–30% on post-harvest processing and curing, indicating experienced communities focused on the end product. Third, the "infrastructure-heavy" growers (UK, Italy, Belgium) who invest more in grow tents and physical setup, reflecting indoor-necessity markets where the growing environment itself requires significant investment.

## Cultivation investment relative to seed purchases

Country	Cult/Seed ratio	Fertilizer share	Post-harvest share	Infrastructure share
Netherlands	19.3%	8.2%	5.7%	1.4%
Belgium	18.4%	9.0%	3.9%	2.1%
Spain	12.6%	5.9%	3.4%	0.4%
Austria	11.4%	5.3%	2.7%	1.0%
United Kingdom	11.3%	4.8%	2.6%	1.3%
Italy	11.2%	5.1%	2.2%	1.3%
Finland	10.0%	4.4%	3.1%	1.0%
France	9.7%	5.3%	1.6%	0.8%
Germany	7.8%	3.9%	1.6%	0.3%

### CONCLUSION

The Netherlands and Belgium are Europe's most grow-intensive markets relative to seed purchases: for every 100 seeds bought, Dutch and Belgian customers invest proportionally more in cultivation supplies than any other market. Germany presents a paradox: the #1 seed market by far, yet its cultivation-to-seed ratio (7.8%) is nearly half that of Belgium (18.4%). This strongly suggests German customers buy seeds internationally but source equipment through local grow shops. The "post-harvest" share (After Harvest + Harvest/Dry) reveals market maturity: Finland (31.4% combined), the Netherlands (29.2%), and Spain (27.3%) invest most heavily in processing and curing – indicating experienced grower communities focused on quality output.

## 10. Country Comparison

Which markets are similar, which are unique? Six clusters and two European outliers.

### 10.1 Six market clusters

#### DACH POWERHOUSES

Germany · Austria

Per capita	<b>46,460 &amp; 13,063 seeds/M</b>
Autoflower	<b>53–55%</b>
Experience	<b>57.0 &amp; 57.1 (near-identical)</b>
Driver	<b>Legalisation effect</b>

Germany and Austria display nearly identical consumer profiles despite different legal frameworks. Both markets share the same autoflower ratio (53–55%), the same experience scores (57.0 vs 57.1), and similar strain preferences – with Purple Haze and LSD ranking disproportionately high in both. Austria's +117% growth in 2024 directly mirrors German legalisation timing, confirming that shared language and media create a unified cannabis culture across the German-speaking region. Germany's subsequent -18.4% normalisation in 2025 shows the expected shift to local retail channels.

#### BENELUX GROWERS

Belgium · Netherlands · Luxembourg

Per capita	<b>9,204 – 34,430</b>
Fertilizer invest	<b>4.7–5.9% (top EU)</b>
Loyalty	<b>37–44% returning</b>
Autoflower	<b>53–57%</b>

The most grow-invested region in Europe. The Netherlands leads with a 19.3% cultivation-to-seed ratio, and Belgium follows at 18.4% – both roughly double the European average. These markets treat seed retailers as one-stop growing suppliers, purchasing fertilizer, propagation kits, and post-harvest equipment alongside seeds. Luxembourg punches far above its weight: 34,430 seeds per million population makes it the highest per-capita market in Europe, with the second-highest returning customer rate (44.2%) and 3.2 unique strains per order.

## MEDITERRANEAN OUTDOOR

Spain · Portugal · Greece

Climate	<b>Ideal outdoor conditions</b>
Spain CBD	<b>4.2% (highest in EU)</b>
Portugal sativa	<b>16.4% (2nd highest EU)</b>
Greece THC	<b>99.6% THC-only</b>

*Climate-blessed outdoor markets with surprisingly divergent philosophies. Spain stands out with Europe's highest CBD share (4.2%) and strongest vaporizer culture (46.7%), positioning it as the continent's wellness-oriented cannabis market. Portugal has the second-highest sativa preference (16.4%), likely reflecting outdoor growing traditions. Greece is Europe's most THC-focused market (99.6% THC-only seeds) with minimal grow investment – an emerging market still in its early phase. Spain's near-zero grow tent spending (1.6%) confirms its outdoor growing advantage.*

## SCANDINAVIAN BLOC

Finland · Sweden · Denmark

Finland loyalty	<b>44.3% (highest EU)</b>
Finland experience	<b>65.9 (highest EU)</b>
Denmark seeds/order	<b>2.9 seeds/order</b>
Autoflower	<b>58–60%</b>

*Indoor-necessity breeds expertise. Finland has Europe's highest experience score (65.9) and returning customer rate (44.3%), making Finnish growers the most knowledgeable and loyal segment in the European market. Their January ordering peak – unique in Europe – confirms year-round indoor growing cycles independent of outdoor seasons. Denmark's +55% year-on-year growth makes it the fastest-growing European market, while Sweden remains small but shows similar autoflower preferences (58–60%), suggesting a pan-Scandinavian indoor growing culture.*

## ATLANTIC BLOC

United Kingdom · Ireland

UK loyalty	<b>28.1% (lowest major EU)</b>
Ireland autoflower	<b>60.8% (highest non-Baltic)</b>
UK consumption	<b>Glass/pipe culture</b>
UK role	<b>Early-adopter gateway</b>

*The UK functions as Europe's early-adopter gateway for new exotic genetics – strains like Permanent Marker Auto achieve 17.2x overrepresentation here compared to the European average. However, the UK has the lowest returning customer rate among major markets (28.1%), reflecting a fragmented retail landscape where customers shop around. The UK's glass/pipe consumption culture (33% of accessory spending) is unique in Europe and closer to American patterns. Ireland's extreme autoflower adoption (60.8%) signals indoor-only growing under strict legal conditions.*

## EASTERN EUROPEAN BLOC

PL · CZ · SK · SI · HR

Market intensity	<b>8.0 orders/100K</b>
Indica preference	<b>Slovakia 57.3% (highest EU)</b>
Poland spillover	<b>+98.6% growth</b>
Legal framework	<b>Restrictive</b>

*The least developed cannabis seed market in Europe – 57x lower market intensity than DACH. Strict legal frameworks suppress open cannabis culture, but the data reveals an interesting profile: Slovakia has Europe’s highest indica preference (57.3%), suggesting indoor stealth growing in restrictive environments. Poland’s +98.6% year-on-year growth is the strongest spillover signal from German legalisation – geographic proximity and media exposure are driving rapid expansion. Czech Republic’s more liberal framework shows in its +7% steady growth and more diverse strain selection.*

## 10.2 Two European outliers

## ITALY – THE PARADOX MARKET

Italy

Seeds/order	<b>2.5 seeds/order</b>
Loyalty	<b>32.2% (below average)</b>
Compact plants	<b>37% (#1 EU)</b>
Rolling culture	<b>72.5% joint spending</b>

*Europe’s paradox: high accessory spending but modest seed orders (2.5/order) and below-average loyalty. Italian customers invest heavily in rolling papers and consumption accessories but rarely in growing equipment – consumers, not cultivators.*

## FRANCE – THE SILENT GIANT

France

Market share	<b>16.0% = 969K seeds</b>
Southern concentration	<b>45%+ from south</b>
Signature genetics	<b>Skunk, Critical</b>
Consumption culture	<b>Perfect 50/50 joint/vape</b>

*Europe’s #2 market but chronically underexposed. Southern France drives nearly half of all orders. Classic genetics persist alongside the dessert wave. The most balanced consumption culture on the continent.*

## 10.3 USA – A reference point

While not part of the European market, US purchases from European seed retailers provide a useful reference point. The US market is fundamentally different: heritage strains (Panama Red, Colombian Gold, Afghani) dominate instead of modern hybrids, autoflower adoption is the lowest (46.7%), outdoor tall plants dominate (45.9%), and a glass/pipe consumption culture (62.7%) sets it apart from European patterns entirely.

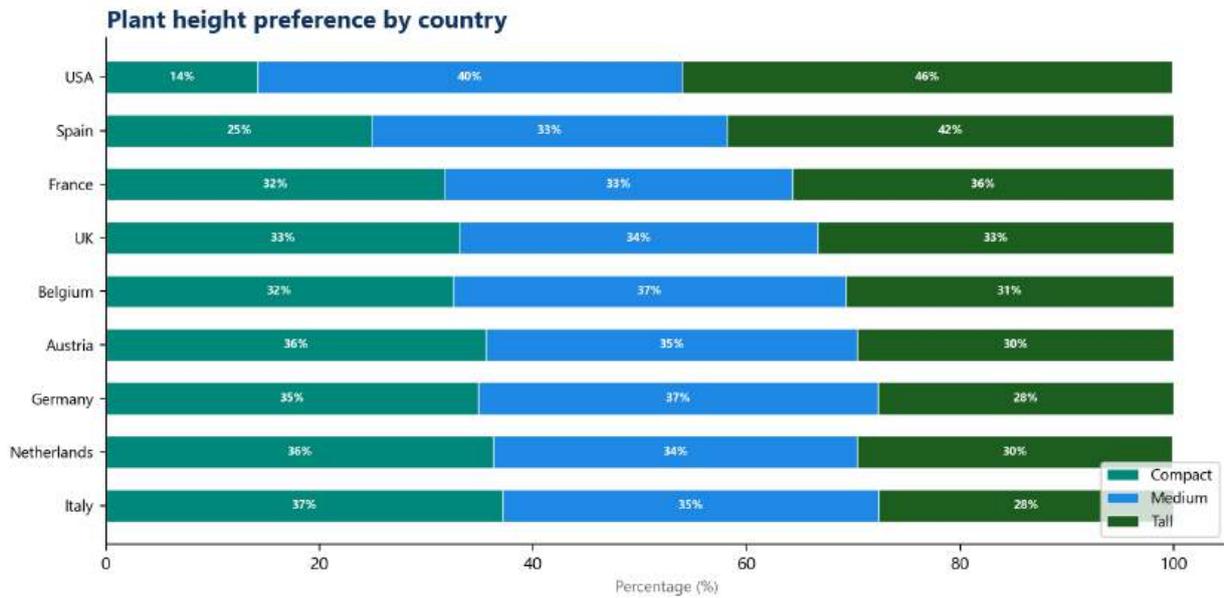
## 10.4 Most similar country pairs

#	Pair	Score	Key similarity
1	DE ↔ AT	94%	DACH language, identical experience scores
2	BE ↔ NL	91%	Benelux, high fertilizer, comparable loyalty
3	FI ↔ LU	88%	Highest loyalty, experienced growers
4	ES ↔ PT	85%	Iberian bloc, outdoor, sativa interest
5	SE ↔ IE	82%	Strict laws, high autoflower
6	DE ↔ BE	80%	Neighbours, comparable rates
7	IT ↔ GR	78%	Mediterranean, indica preference
8	FI ↔ DK	76%	Scandinavian, indoor focus
9	FR ↔ BE	75%	French-speaking, comparable patterns
10	GB ↔ IE	73%	English-speaking, grow equipment focus

# 11. Growing Culture Map: Indoor vs Outdoor

*Plant height preference reveals how people grow. Combined with equipment investment and autoflower adoption, we can map the indoor vs outdoor growing culture per country.*

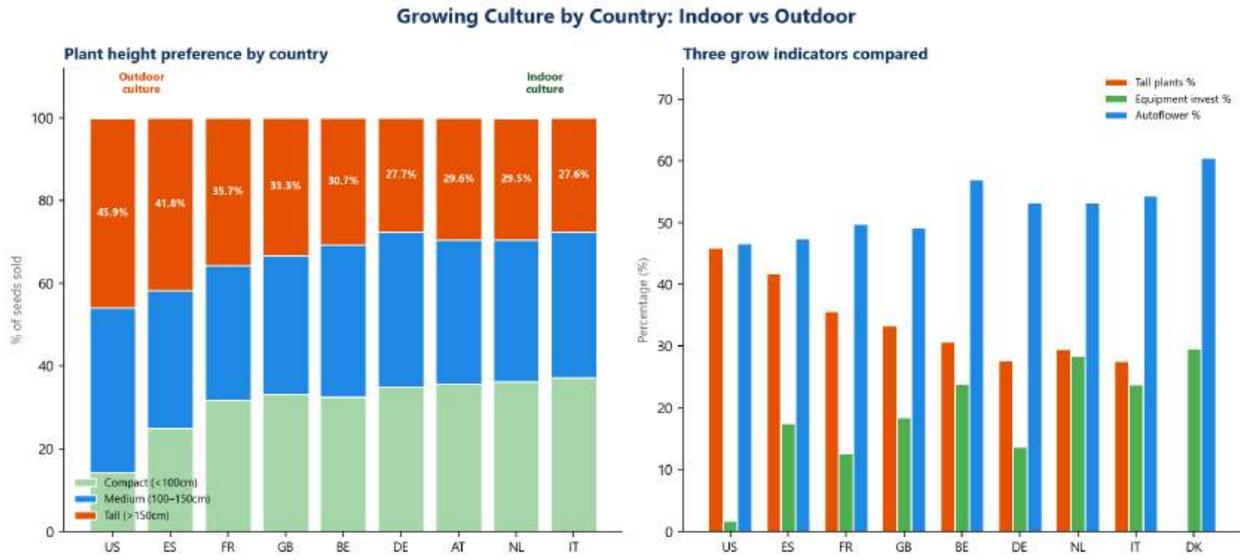
## 11.1 Plant height preferences



Country	Avg indoor	Avg outdoor	Ratio	Compact %	Medium %	Tall %
Spain	127.2 cm	198.1 cm	1.56	24.9%	33.3%	41.8%
France	123.9 cm	197.8 cm	1.60	31.7%	32.6%	35.7%
Belgium	121.8 cm	184.9 cm	1.52	32.5%	36.8%	30.7%
UK	121.8 cm	183.9 cm	1.51	33.1%	33.6%	33.3%
Austria	120.5 cm	181.5 cm	1.51	35.6%	34.8%	29.6%
Germany	120.4 cm	182.8 cm	1.52	34.9%	37.4%	27.7%
Netherlands	120.1 cm	179.3 cm	1.49	36.3%	34.1%	29.5%
Italy	119.4 cm	180.9 cm	1.52	37.2%	35.2%	27.6%

For comparison, the USA shows the most extreme tall-plant preference (45.9% tall, 132.7 cm indoor average) – confirming a predominantly outdoor growing culture.

## 11.2 Growing culture profiles



Country	Tall %	Compact %	Auto %	Equipment %	Profile
Spain	41.8%	24.9%	47.4%	17.5%	Outdoor-leaning
France	35.7%	31.7%	49.8%	12.6%	Balanced
UK	33.3%	33.1%	49.2%	18.5%	Balanced
Belgium	30.7%	32.5%	57.0%	23.9%	Indoor-leaning
Germany	27.7%	34.9%	53.3%	13.7%	Indoor-leaning
Austria	29.6%	35.6%	42.5%	16.9%	Indoor-leaning
Netherlands	29.5%	36.3%	53.3%	28.4%	Indoor culture
Italy	27.6%	37.2%	54.4%	23.8%	Indoor-dominant

## 11.3 Five growing culture profiles

Outdoor growers (Spain): 41.8% tall plants, Mediterranean climate ideal for sativa-dominant outdoor cultivation. Highest CBD adoption in Europe (4.2%) suggests wellness-oriented growers.

Indoor specialists (Netherlands, Italy, Denmark): The Netherlands leads with 36.3% compact and 28.4% equipment investment – decades of "gedoogbeleid" created sophisticated indoor expertise. Italy's 37.2% compact (highest) reflects indoor stealth growing under strict enforcement. Denmark's 60.5% autoflower rate and 29.6% equipment investment confirm Nordic indoor necessity.

Balanced markets (France, UK): France shows a near-perfect split (31.7% compact, 32.6% medium, 35.7% tall), mirroring the climate gradient from northern indoor to southern outdoor. The UK's perfect balance (33.1/33.6/33.3%) with high equipment investment (18.5%) suggests a sophisticated grower base using mixed methods.

## 11.4 The indoor-outdoor correlation

Metric	Indoor signal	Outdoor signal
Height preference	Compact (>35%)	Tall (>40%)
Equipment investment	High (>20%)	Low (<5%)
Autoflower adoption	High (>55%)	Low (<48%)
Growth ratio (out/in)	Low (<1.48)	High (>1.55)

### CONCLUSION

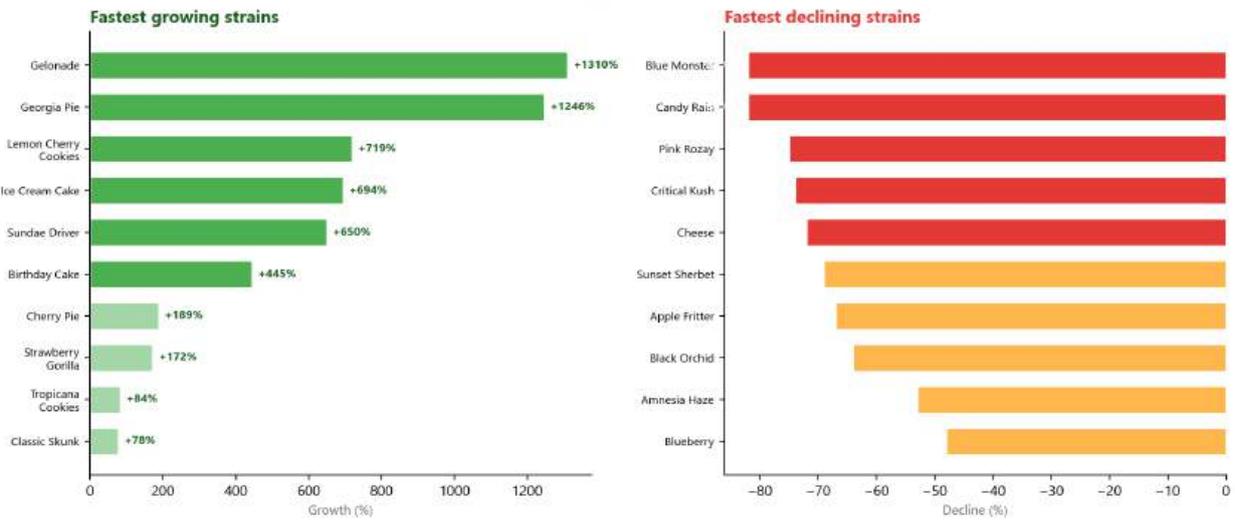
Height data is the strongest proxy for indoor vs outdoor culture. When cross-referenced with equipment investment and autoflower adoption, it creates a reliable "grow culture fingerprint" per country. The correlation with legal climate is striking: restrictive environments (Italy, Netherlands, Denmark) produce compact/indoor preferences, while permissive or outdoor-friendly environments (Spain) produce tall/outdoor preferences. France and the UK sit perfectly balanced, suggesting both indoor and outdoor communities coexist. This grow culture fingerprint has direct implications: seed breeders should develop compact autoflowers for NL/IT/DK markets, tall photoperiods for Spain, and balanced portfolios for FR/GB – one-size-fits-all genetics will underperform.

## 12. Emerging Strain Categories

*Beyond indica/sativa: which genetics are growing fastest? How is the transatlantic genetic divide shaping the European market?*

### 12.1 The Dessert/Candy Wave

Strain Trend Analysis: Winners & Losers



Strain	Growth	Category	Share 2025
Gelonade	+1,310%	Dessert / Citrus	0.04%
Georgia Pie	+1,246%	Dessert	0.02%
Lemon Cherry Cookies	+719%	Dessert / Citrus	0.02%
Ice Cream Cake	+694%	Dessert	0.02%
Sundae Driver	+650%	Dessert	0.04%
Birthday Cake	+445%	Dessert	0.01%
Cherry Pie	+189%	Dessert / Fruit	0.02%
Tropicana Cookies	+84%	Dessert / Citrus	0.10%

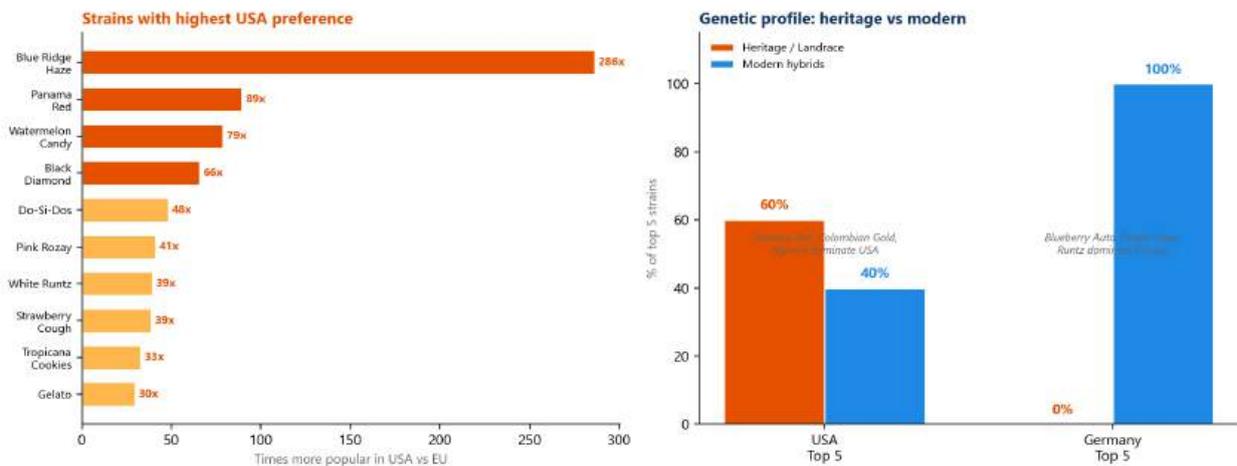
Classic strains in decline: Blue Monster (-82%), Candy Rain (-82%), Pink Rozay (-75%), Critical Kush (-74%), Cheese (-72%), Amnesia Haze (-53%), Blueberry (-48%).

**CONCLUSION**

The market is experiencing a generational shift. 1990s–2000s classics (Amnesia Haze, Blueberry, Cheese, Critical Kush) are giving way to 2020s dessert genetics – Gelato, Cake, Sherbet, and Cookies families now dominate growth charts across all European markets. This "dessert wave" reflects a consumer shift from potency-first to flavour-and-experience, paralleling trends in craft beer and specialty coffee. Breeders investing in dessert genetics are capturing the wave; those clinging to 2000s-era strains face accelerating decline.

## 12.2 Europe vs USA: Two genetic worlds

**USA vs Europe: Different Genetic Worlds**



Strain	USA vs EU ratio	Origin	Type
Blue Ridge Haze	286x more in USA	Appalachian	American heritage
Panama Red	89x more in USA	Panama	Landrace sativa
Watermelon Candy	79x more in USA	California	Modern exotic
Black Diamond	66x more in USA	N. California	California heritage
Do-Si-Dos	48x more in USA	Oregon/California	West Coast hybrid
Gelato	30x more in USA	San Francisco	California classic
Pineapple Express	25x more in USA	Hawaii/California	Pop culture classic

**CONCLUSION**

The transatlantic genetic divide is profound. US buyers purchasing from European retailers overwhelmingly favour heritage and landrace genetics – Panama Red, Colombian Gold, Afghani – strains with roots in the 1960s–1970s counterculture. European buyers favour modern hybrids (Runtz, Gelato, Purple Haze Auto). This divide means the US market is a poor predictor of European trends and vice versa. However, the flow of California craft genetics into Europe (see below) represents a one-way cultural export that is reshaping European strain preferences.

## 12.3 California genetics take Europe

A wave of brand-new strains entered the European market from zero, achieving significant volume in their first year. Nearly all originate from the California/West Coast craft scene:

Strain	Seeds sold	Origin	Genetic lineage
Passion Fruitz	6,088	California	Exotic fruit terpenes
Rainbow Sherbet	5,817	California	Sherbet/Gelato family
Ghost Train Haze	5,754	Colorado	Haze/OG cross
Lemon Cherry Gelato	4,002	California	Gelato family
Grease Monkey	3,286	California	GG4/Cookies cross
Black Runtz	2,906	California	Runtz family
White Truffle	2,542	California	Gorilla Butter
Permanent Marker	2,468	California	Biscotti lineage

### CONCLUSION

California's craft cannabis scene is now the primary source of new genetics entering Europe. The Gelato, Runtz, and Cookies families dominate new entrants. These strains achieved 2,000–6,000+ seeds from a standing start – demonstrating that European consumers are eager for West Coast genetics. European breeders face a competitive threat: if they don't accelerate crossing with West Coast genetic lines, they risk losing market share to imported varieties.

# 13. Conclusions & Key Discoveries

## Fifteen key discoveries

### 1. German dominance is unprecedented

With 64.6% of all European cannabis seeds, Germany's market share is unparalleled. The April 2024 legalisation created the continent's largest home-grow market overnight. After the initial stockpiling rush (73.4% of orders in March–April 2024), volume shifted to local retail – a normalisation pattern that future legalising countries should expect.

### 2. The legalisation spillover effect is real

All eight of Germany's neighbouring countries experienced growth (+20% to +117%) while Germany itself declined (-18.4%). This provides empirical evidence for the "legalisation domino theory" – when one major EU country legalises, surrounding markets experience increased demand driven by media coverage and cultural awareness.

### 3. The autoflower myth is debunked

There is no meaningful difference in autoflower adoption between first-time buyers (59.1%) and frequent buyers with 5+ orders (56.4%). The industry narrative that autoflowers are "beginner seeds" is empirically false. Modern autoflower genetics have reached a quality threshold where the choice is about growing conditions, not experience level.

### 4. Europe has three distinct consumption cultures

Southern/Benelux Europe (Italy, Netherlands, Belgium) is rooted in joint culture. Central Europe (Germany, Austria) and Spain have shifted toward vaporizers. The UK represents a glass/pipe culture closer to American than European patterns. These differences have direct implications for how cannabis products should be marketed across different regions.

### 5. Northern Europe produces the most experienced growers

Finland leads with 44.3% returning customers and an experience score of 65.9 – the highest in Europe. Restrictive legal environments and harsh climates paradoxically produce the most knowledgeable grower communities, as necessity breeds expertise and investment.

### 6. CBD seeds are declining, not growing

CBD seed sales fell -40.2% year-on-year, with THC-dominant genetics remaining the overwhelming norm at 97.9%. The anticipated "wellness shift" toward CBD is not materialising in the seed market. Spain (4.2%) and Denmark (3.9%) are the only notable exceptions.

### 7. Plant height reveals growing culture

Compact plant preferences (Italy 37.2%, Netherlands 36.3%) correlate strongly with restrictive legal environments and indoor

growing necessity. Tall plant preferences (Spain 41.8%) correlate with outdoor-friendly climates and more permissive frameworks. Height data is the strongest proxy for mapping indoor vs outdoor cannabis culture.

## 8. F1 hybrids are the future of cannabis genetics

F1 hybrid market share surged from 7.66% to 31.33% (+226.6%) – the single largest genetic shift in the dataset. This represents a fundamental change in how consumers choose cannabis: from strain name to genetic lineage, paralleling shifts seen in craft beer and wine.

## 9. The dessert wave is reshaping European genetics

Gelato, Cake, Sherbet, and Cookies families dominate growth charts while 1990s–2000s classics decline sharply (Amnesia Haze -53%, Cheese -72%, Blueberry -48%). This generational shift from potency-first to flavour-and-experience is the defining trend of 2024–2025.

## 10. California genetics are colonising Europe

Twelve brand-new strains from the California/West Coast craft scene entered from zero to achieve significant market penetration in their first year. Passion Fruit, Rainbow Sherbet, and Ghost Train Haze each became bestsellers from a standing start. European breeders face increasing competitive pressure from imported genetics.

## 11. The DACH region orders the most seeds per transaction

Austria (4.4 seeds/order) and Germany (4.2) lead Europe in order size, reflecting legalisation-driven confidence to buy larger quantities. At the other end, Spain (2.2) and the UK (2.4) show minimal order sizes combined with Europe's lowest returning customer rates – fragmented retail landscapes where customers shop around rather than building loyalty.

## 12. The Netherlands paradox: proximity does not equal adoption

Despite bordering Germany and having decades of coffeeshop culture, the Netherlands has one of Europe's lowest per-capita seed ordering rates (9,204 seeds/M pop). Dutch consumers purchase cannabis ready-to-consume at coffeeshops rather than growing at home. Yet the Netherlands has Europe's highest cultivation-to-seed investment ratio (19.3%) – the Dutch who do grow are Europe's most serious cultivators.

## 13. Scandinavia is the fastest-growing market bloc

Denmark (+55%) and Finland (+45%) show the strongest year-on-year growth among established European markets. Combined with Finland's industry-leading loyalty (44.3%) and experience scores (65.9), the Scandinavian bloc represents the highest-quality customer segment in Europe – small in volume but exceptional in engagement and retention.

## 14. Three cultivation archetypes define European growing

Nutrient-focused growers (Germany, France) allocate 50%+ to fertilizer and propagation. Quality-output growers (Netherlands, Finland, Spain) spend 25–30% on post-harvest processing. Infrastructure-heavy growers (UK, Italy, Belgium) invest disproportionately in grow tents and physical setup. These archetypes directly inform which cultivation products to stock per market.

## 15. Signature strains reveal deep cultural identity

Every European market has strains that perform 2–40x above the continental average. Finland’s Blueberry Autoflower (38.7x), the UK’s Permanent Marker Auto (17.2x), and Austria’s LSD (5.6x) are not random preferences but reflect climate, legal conditions, and cultural heritage. These signature strains are the strongest evidence that Europe is not one market but a mosaic of distinct cannabis cultures.

### Implications for the European cannabis market

**The legalisation domino effect:** Germany’s legalisation created ripple effects across all neighbouring markets. If other major EU countries (France, Italy, Spain) follow suit, each legalisation event will likely trigger similar awareness-driven growth in surrounding countries. Policymakers should anticipate cross-border effects when planning regulatory frameworks.

**The genetic revolution:** The simultaneous rise of F1 hybrids (+226.6%) and California craft genetics represents the most significant shift in European cannabis breeding in a decade. European breeders who do not adapt to the desert genetics wave and F1 hybrid demand risk losing market relevance.

**Market fragmentation:** Europe is not one cannabis market but 25+ distinct ones, each with unique strain identities, consumption methods, and growing cultures. Any strategy that treats "the European market" as monolithic will underperform. Country-specific approaches – from strain selection to consumption accessories – are essential.

**The autoflower re-evaluation:** With no meaningful experience-based difference in autoflower adoption, the entire industry needs to update its marketing and product categorisation. Autoflowers are a mainstream choice for all growers, not a beginner product.

**Indoor-outdoor mapping:** The grow culture fingerprint (height + auto% + equipment%) provides a reliable framework for understanding each country’s growing methods. This data can inform product development, strain breeding priorities, and accessory recommendations tailored to each market’s actual growing conditions.

# Appendices

## Appendix A: Complete country data (25 countries)

Code	Country	Seeds	Packages	Share	Per capita
DE	Germany	3,902,679	1,268,206	64.57%	46,460
FR	France	969,169	296,914	16.04%	14,466
BE	Belgium	262,790	80,200	4.35%	22,851
IT	Italy	213,830	56,497	3.54%	3,623
NL	Netherlands	161,070	46,755	2.67%	9,204
AT	Austria	117,566	35,159	1.95%	13,063
GB	United Kingdom	87,847	20,533	1.45%	1,307
ES	Spain	76,668	18,501	1.27%	1,617
LU	Luxembourg	22,380	7,159	0.37%	34,430
PT	Portugal	21,187	5,489	0.35%	2,048
FI	Finland	20,277	5,099	0.34%	3,686
DK	Denmark	12,886	3,002	0.21%	2,205
IE	Ireland	11,512	2,845	0.19%	2,302
SE	Sweden	10,028	2,529	0.17%	962
GR	Greece	9,267	2,270	0.15%	884
CZ	Czech Republic	7,068	1,551	0.12%	659
PL	Poland	2,474	549	0.04%	65
MT	Malta	1,265	307	0.02%	2,409
HR	Croatia	1,212	357	0.02%	299
SI	Slovenia	1,140	332	0.02%	544
LV	Latvia	923	198	0.02%	488
SK	Slovakia	756	227	0.01%	138
LT	Lithuania	538	151	0.01%	188
EE	Estonia	353	98	0.01%	261

## Appendix B: Classifications

Flowering types:

- Autoflower: flowers automatically regardless of light cycle, typically 8–10 weeks seed-to-harvest
- Feminised photoperiod: requires 12/12 light cycle change to initiate flowering, typically higher yields
- Regular: can be male or female, used by breeders for creating new crosses

THC classifications:

- Low: <15% THC

- Medium: 15–20% THC
- High: >20% THC

## Appendix C: Indica/Sativa/Hybrid distribution (25 countries)

Country	Indica-dom.	Sativa-dom.	Balanced	Pure Indica	Pure Sativa
Slovakia	57.3%	13.2%	23.7%	0.8%	2.5%
Finland	49.2%	18.2%	27.0%	2.4%	0.6%
Slovenia	47.8%	28.2%	20.4%	1.6%	0.3%
Austria	45.7%	22.8%	24.2%	4.3%	1.2%
UK	44.7%	20.8%	27.4%	2.7%	0.9%
Croatia	44.7%	26.2%	23.7%	2.8%	0.6%
Greece	43.9%	23.0%	27.8%	2.2%	1.0%
Malta	43.3%	27.9%	27.0%	0.4%	0.0%
Portugal	42.6%	24.4%	26.5%	2.8%	1.2%
France	42.6%	23.1%	29.3%	2.5%	1.0%
Italy	42.5%	23.3%	29.1%	2.3%	1.2%
Ireland	42.4%	20.2%	31.3%	3.0%	1.2%
Spain	42.3%	24.7%	26.3%	2.6%	2.1%
Sweden	42.2%	21.8%	28.0%	4.1%	0.8%
Czech Rep.	41.9%	26.3%	26.8%	2.5%	0.4%
Luxembourg	41.5%	24.5%	26.9%	2.9%	1.8%
Belgium	41.2%	23.1%	30.0%	2.6%	0.9%
Germany	41.1%	25.1%	28.1%	2.9%	1.2%
Netherlands	40.6%	24.7%	28.9%	2.9%	0.8%
Denmark	39.2%	23.7%	32.7%	2.0%	0.9%
Poland	38.7%	19.4%	34.9%	1.8%	0.8%
Lithuania	37.9%	22.0%	35.0%	4.0%	0.0%
Estonia	36.9%	27.2%	34.9%	0.0%	0.0%
Latvia	29.6%	22.4%	43.9%	2.4%	0.0%

## Appendix D: Autoflower vs Photoperiod (25 countries)

Country	Autoflower %	Photoperiod %	Total seeds
Latvia	74.0%	26.0%	415
Estonia	67.7%	32.3%	195
Ireland	60.8%	39.2%	5,962
Denmark	60.5%	39.5%	6,408
Greece	59.8%	40.2%	5,211
Poland	59.8%	40.2%	1,219
Sweden	58.5%	41.5%	6,158
Croatia	58.5%	41.5%	1,002

Belgium	57.0%	43.0%	103,933
Czech Rep.	54.8%	45.2%	3,688
Italy	54.4%	45.6%	133,495
Finland	53.4%	46.6%	14,682
Germany	53.3%	46.7%	2,863,381
Netherlands	53.3%	46.7%	114,873
Malta	52.7%	47.3%	674
Portugal	52.5%	47.5%	10,150
Slovakia	52.1%	47.9%	363
Lithuania	52.0%	48.0%	277
France	49.8%	50.2%	22,297
Luxembourg	49.8%	50.2%	12,544
UK	49.2%	50.8%	48,996
Spain	47.4%	52.6%	26,065
Slovenia	45.1%	54.9%	1,042
Austria	42.5%	57.5%	76,529

## Appendix E: Regional analysis by country

### Germany – Regional breakdown

Region	Share (%)	Top 3 strains
Stuttgart/Baden-Württemberg	13.2%	Runtz, Purple Haze, Blueberry
Hamburg/Bremen/Schleswig-Holstein	11.5%	Runtz, Purple Haze, Blueberry
Nürnberg/Bayern (Noord)	11.5%	Purple Haze, Runtz, Blueberry
Düsseldorf/Münster (NRW)	11.2%	Runtz, Blueberry, Purple Haze
Frankfurt/Hessen	11.0%	Runtz, Blueberry, Purple Haze
Hannover/Kassel	11.0%	Runtz, Purple Haze, Blueberry
München/Bayern (Zuid)	10.5%	
Berlin/Brandenburg	10.2%	
Köln/Bonn (NRW)	9.9%	

### France – Regional breakdown

Region	Share (%)	Top 3 strains
Nouvelle-Aquitaine	16.5%	Runtz, White Widow, Northern Lights
Occitanie	14.6%	Runtz, White Widow, Critical
Auvergne-Rhône-Alpes	11.2%	Runtz, White Widow, Purple Haze
Île-de-France (Paris)	8.2%	Runtz, Critical, White Widow
Pays de la Loire	7.8%	Runtz, White Widow, Critical
Grand Est	7.1%	Runtz, White Widow, Critical
Bretagne	7.0%	
Provence-Alpes-Côte d'Azur	6.4%	
Bourgogne-Franche-Comté	5.8%	
Hauts-de-France	4.9%	
Normandie	4.4%	
Centre-Val de Loire	4.3%	
Corse	1.3%	
Other France	0.4%	
Outre-mer	0.1%	

### Belgium – Regional breakdown

Region	Share (%)	Top 3 strains
Oost-Vlaanderen	14.1%	Blueberry, Runtz, White Widow
Antwerpen	13.9%	Runtz, White Widow, Blueberry
Brussels/Brabant	13.5%	Runtz, Blueberry, Amnesia Haze
West-Vlaanderen	12.7%	Runtz, White Widow, Ghost Train Haze
Vlaams-Brabant/Limburg	12.1%	Purple Haze, Runtz, White Widow
Luik (Liège)	10.3%	Northern Lights, Amnesia Haze, Runtz
Henegouwen (Hainaut)	9.4%	
Luxemburg/Henegouwen	9.0%	
Namen (Namur)	5.1%	

## Italy – Regional breakdown

Region	Share (%)	Top 3 strains
Lombardia	17.1%	Runtz, Purple Haze, Blueberry
Veneto/Trentino/FVG	16.3%	Runtz, Wedding Cake, Purple Haze
Piemonte	14.3%	Runtz, Amnesia Haze, Northern Lights
Emilia-Romagna	9.9%	Runtz, Wedding Cake, Blueberry
Toscana	8.3%	Runtz, Purple Haze, Blueberry
Sicilia/Sardegna	8.1%	Runtz, Special Queen 1, Do-Si-Dos
Campania	6.1%	
Puglia/Basilicata	5.4%	
Marche/Abruzzo	5.3%	
Liguria	4.6%	
Calabria	3.0%	
Other Italy	1.7%	

## Netherlands – Regional breakdown

Region	Share (%)	Top 3 strains
Amsterdam/Noord-Holland	17.4%	Amnesia Haze, Runtz, White Widow
Utrecht	14.8%	Amnesia Haze, Runtz, White Widow
Limburg/Zuid-Gelderland	11.4%	Runtz, Amnesia Haze, Blueberry
Gelderland	11.2%	Runtz, Amnesia Haze, White Widow
Zuid-Holland (Den Haag/Rotterdam)	10.7%	Runtz, Amnesia Haze, Purple Haze
Haarlem/Kennemerland	10.4%	Blueberry, Runtz, Amnesia Haze
Noord-Brabant	7.7%	
Groningen/Drenthe	7.1%	
Friesland/Flevoland	4.4%	
Noord-Brabant (Zuid)	2.9%	

Overijssel 1.9%

## Austria – Regional breakdown

Region	Share (%)	Top 3 strains
Tirol	20.2%	Runtz, Northern Lights, Blueberry
Steiermark	16.7%	Critical, Blueberry, Purple Haze
Oberösterreich	14.1%	Runtz, Purple Haze, Blueberry
Wien/Burgenland	11.7%	Biscotti, LSD, OG Kush
Niederösterreich (West)	11.5%	Jack Herer, Sticky Beast, Runtz
Kärnten	8.0%	Pink Rozay, Do-Si-Dos, Swiss Dream CBD
Niederösterreich (Ost)	7.6%	
Salzburg	7.4%	
Burgenland	2.8%	

## United Kingdom – Regional breakdown

Region	Share (%)	Top 3 strains
South East	18.8%	Runtz, Blueberry, Wedding Cake
East of England	12.1%	Orion F1, Rollercoaster Haze, Runtz
South West	10.4%	Blueberry, Runtz, Sticky Beast
Scotland	8.4%	Northern Lights, Runtz, Permanent Marker
Yorkshire	8.3%	Green-O-Matic, Runtz, Permanent Marker
Wales	6.7%	Lava Cake, Biscotti, Bruce Banner 3
East Midlands	6.2%	
West Midlands	5.4%	
London	5.0%	
North West	4.7%	
Greater Manchester	3.8%	
Other UK	3.5%	
North East	3.5%	
Northern Ireland	2.2%	
Staffordshire	1.2%	

## Spain – Regional breakdown

Region	Share (%)	Top 3 strains
Other Spain	39.7%	Runtz, Blueberry, White Widow
Andalucía	17.9%	Amnesia Haze, Ultra Violet GMO, Runtz
Madrid	10.1%	Runtz, Tropicana Cookies, Amnesia Haze
Cataluña (other)	9.2%	Dynamite Diesel, Runtz, Black Runtz
Valencia	6.8%	Runtz, Pink Rozay, Blueberry
Galicia	6.0%	Blueberry, Runtz, Northern Lights
País Vasco	3.3%	
Asturias	2.3%	
Murcia	2.2%	
Aragón	1.5%	
Canarias	1.3%	

## Appendix F: Top 20 strains by country

The 20 most popular strains per country, ranked by seeds sold. Share (%) indicates the strain's proportion of total seeds in that country.

### Germany – Top 20 strains

#	Strain	Seeds sold	Share (%)
1	Runtz	88,819	3.13%
2	Purple Haze	77,766	2.74%
3	Blueberry	73,756	2.60%
4	Northern Lights	66,708	2.35%
5	White Widow	60,256	2.12%
6	Amnesia Haze	52,484	1.85%
7	Wedding Cake	48,214	1.70%
8	Pink Rozay	42,963	1.51%
9	Strawberry Cough	38,156	1.34%
10	Pineapple Express F1	35,237	1.24%
11	Ghost Train Haze	32,898	1.16%
12	GG#4	31,975	1.13%
13	Gelato	31,617	1.11%
14	Sticky Beast	30,748	1.08%
15	Tropicana Cookies	29,703	1.05%
16	Apple Fritter	27,204	0.96%
17	Wurlz F1	26,860	0.95%
18	Black Orchid	24,889	0.88%
19	Sunset Sherbet	24,777	0.87%
20	Do-Si-Dos	22,982	0.81%

### France – Top 20 strains

#	Strain	Seeds sold	Share (%)
1	Runtz	19,193	3.41%
2	White Widow	13,975	2.48%
3	Purple Haze	10,417	1.85%
4	Critical	10,415	1.85%
5	Northern Lights	10,267	1.82%
6	Blueberry	10,212	1.81%
7	Amnesia Haze	10,202	1.81%
8	Gelato	8,576	1.52%

9	Wedding Cake	8,473	1.50%
10	Pink Rozay	7,650	1.36%
11	Bruce Banner 3	6,808	1.21%
12	GG#4	6,647	1.18%
13	Critical Kush	6,254	1.11%
14	Tropicana Cookies	5,906	1.05%
15	Pineapple Express F1	5,570	0.99%
16	Ghost Train Haze	5,065	0.90%
17	Purple Punch	5,053	0.90%
18	Sticky Beast	4,965	0.88%
19	Biscotti	4,910	0.87%
20	Wurlz F1	4,832	0.86%

## Belgium – Top 20 strains

#	Strain	Seeds sold	Share (%)
1	Runtz	4,902	2.91%
2	White Widow	3,583	2.12%
3	Blueberry	3,386	2.01%
4	Amnesia Haze	3,247	1.92%
5	Northern Lights	3,159	1.87%
6	Purple Haze	2,976	1.76%
7	Ghost Train Haze	2,547	1.51%
8	Wedding Cake	2,519	1.49%
9	Pink Rozay	2,276	1.35%
10	Pineapple Express F1	2,013	1.19%
11	Wurlz F1	1,964	1.16%
12	Gelato	1,929	1.14%
13	GG#4	1,851	1.10%
14	Sticky Beast	1,731	1.03%
15	Strawberry Cough	1,556	0.92%
16	Apple Fritter	1,554	0.92%
17	Tropicana Cookies	1,532	0.91%
18	Black Orchid	1,508	0.89%
19	Critical	1,468	0.87%
20	Super Silver Haze	1,443	0.86%

## Italy – Top 20 strains

#	Strain	Seeds sold	Share (%)
1	Runtz	4,076	3.11%
2	Blueberry	2,513	1.92%
3	Purple Haze	2,394	1.83%
4	Wedding Cake	2,311	1.76%
5	GG#4	1,934	1.48%
6	Pink Rozay	1,831	1.40%
7	Gelato	1,828	1.39%
8	Northern Lights	1,729	1.32%
9	Tropicana Cookies	1,703	1.30%
10	Pineapple Express F1	1,682	1.28%
11	Amnesia Haze	1,605	1.22%
12	White Widow	1,574	1.20%
13	Ghost Train Haze	1,554	1.19%
14	Wurlz F1	1,469	1.12%
15	Biscotti	1,391	1.06%
16	Do-Si-Dos	1,315	1.00%
17	LSD	1,161	0.89%
18	Special Queen 1	1,093	0.83%
19	Rainbow Sherbet	1,066	0.81%
20	Black Orchid	1,050	0.80%

## Netherlands – Top 20 strains

#	Strain	Seeds sold	Share (%)
1	Runtz	3,580	3.15%
2	Amnesia Haze	3,311	2.91%
3	White Widow	2,629	2.31%
4	Blueberry	2,441	2.15%
5	Purple Haze	2,426	2.14%
6	Northern Lights	2,193	1.93%
7	Wedding Cake	2,004	1.76%
8	Ghost Train Haze	1,862	1.64%
9	Pink Rozay	1,377	1.21%
10	GG#4	1,376	1.21%
11	Wurlz F1	1,363	1.20%
12	Rainbow Sherbet	1,264	1.11%
13	Gelato	1,184	1.04%
14	Pineapple Express F1	1,159	1.02%

15	Sticky Beast	1,130	0.99%
16	Tropicana Cookies	1,125	0.99%
17	Strawberry Cough	953	0.84%
18	Super Silver Haze	929	0.82%
19	Special Queen 1	924	0.81%
20	Apple Fritter	923	0.81%

## Austria – Top 20 strains

#	Strain	Seeds sold	Share (%)
1	Runtz	1,781	2.37%
2	Purple Haze	1,454	1.93%
3	Blueberry	1,406	1.87%
4	Biscotti	1,300	1.73%
5	Northern Lights	1,148	1.53%
6	White Widow	1,122	1.49%
7	Wedding Cake	1,033	1.37%
8	LSD	988	1.31%
9	Pink Rozay	980	1.30%
10	Critical	941	1.25%
11	Pineapple Express F1	936	1.24%
12	Kalini Asia	856	1.14%
13	Sticky Beast	848	1.13%
14	Amnesia Haze	750	1.00%
15	Tropicana Cookies	732	0.97%
16	GG#4	732	0.97%
17	Ghost Train Haze	725	0.96%
18	Black Orchid	666	0.89%
19	Do-Si-Dos	665	0.88%
20	Strawberry Cough	639	0.85%

## United Kingdom – Top 20 strains

#	Strain	Seeds sold	Share (%)
1	Runtz	1,098	2.28%
2	Northern Lights	860	1.79%
3	Blueberry	859	1.78%
4	Wedding Cake	693	1.44%
5	Permanent Marker	661	1.37%
6	Purple Haze	629	1.31%
7	White Widow	602	1.25%
8	Pink Rozay	573	1.19%
9	Sticky Beast	553	1.15%
10	Biscotti	531	1.10%
11	Blue Cheese	505	1.05%
12	Ghost Train Haze	499	1.04%
13	Amnesia Haze	496	1.03%
14	Pineapple Express F1	492	1.02%
15	Bruce Banner 3	480	1.00%
16	Strawberry Cough	431	0.90%
17	Rainbow Sherbet	428	0.89%
18	Wurlz F1	423	0.88%
19	Apple Fritter	419	0.87%
20	Passion Fruitz	405	0.84%

## Spain – Top 20 strains

#	Strain	Seeds sold	Share (%)
1	Runtz	842	3.22%
2	Blueberry	669	2.56%
3	Amnesia Haze	542	2.07%
4	White Widow	466	1.78%
5	Purple Haze	463	1.77%
6	Pink Rozay	415	1.59%
7	Northern Lights	394	1.51%
8	Critical	382	1.46%
9	Tropicana Cookies	359	1.37%
10	Wedding Cake	339	1.30%
11	Gelato	306	1.17%
12	Black Orchid	299	1.14%
13	Rainbow Sherbet	295	1.13%
14	Passion Fruitz	272	1.04%

15	Ghost Train Haze	272	1.04%
16	GG#4	268	1.03%
17	Wurlz F1	264	1.01%
18	Sticky Beast	260	1.00%
19	Pineapple Express F1	259	0.99%
20	Strawberry Cough	255	0.98%

## Finland – Top 20 strains

#	Strain	Seeds sold	Share (%)
1	Northern Lights	374	2.58%
2	Blueberry	364	2.51%
3	Quick Caramel XL	346	2.39%
4	Blueberry Autoflower	243	1.68%
5	Grizzly Glue	220	1.52%
6	Special Queen 1	219	1.51%
7	Runtz	190	1.31%
8	White Widow	183	1.26%
9	Critical	170	1.17%
10	Biscotti	166	1.15%
11	Wedding Cake	161	1.11%
12	Gelato Autoflower	153	1.06%
13	Pineapple Express F1	149	1.03%
14	Kalini Asia	145	1.00%
15	Tropicana Cookies	145	1.00%
16	Kitsune Kush	144	0.99%
17	Sticky Beast	142	0.98%
18	Rainbow Sherbet	141	0.97%
19	Purple Punch	140	0.97%
20	Ghost Train Haze	139	0.96%

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Research commissioned by Zamnesia · Data from multiple European cannabis seed retailers

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This report is based on anonymised transaction data from multiple European seed retailers. Results represent online purchasing behaviour and may not be representative of the entire market. Individual retailer market share is not disclosed.