



December 20, 2021

The Honorable Larry Hogan
Governor
State of Maryland
Annapolis, MD 21401-1991

The Honorable William "Bill" Ferguson
President of the Senate
H-107 State House
Annapolis, MD 21401-1991

The Honorable Adrienne A. Jones
Speaker of the House
H-101 State House
Annapolis, MD 21401-1991

Re: Report required by Health-General Article § 13-3305 (MSAR # 11601)

Dear Governor Hogan, President Ferguson, and Speaker Jones:

Pursuant to Health-General Article, §13-3305, Annotated Code of Maryland, the Maryland Medical Cannabis Commission (the "Commission") respectfully submits this legislative report to the Governor and the Maryland General Assembly on the number of medical providers certifying medical cannabis patients, the amount of medical cannabis sold, and the average consumer price paid for medical cannabis.

This report provides patient, provider, and sales data for the period from January 1, 2021 through December 10, 2021. If you have questions, or require additional information, please contact Taylor Kasky, Director, Policy and Governmental Affairs, at (443) 915-5297.

Sincerely,

A handwritten signature in blue ink that reads "William C. Tilburg". The signature is written in a cursive style and is followed by a long, horizontal, sweeping underline.

William C. Tilburg, JD, MPH
Executive Director

cc: Brian Lopez, Chair, Maryland Medical Cannabis Commission
Sarah Albert, Mandated Reports Specialist, Department of Legislative Services (5 copies)

**Report on the Number of Medical Cannabis Providers, Amount of Medical Cannabis Sold,
and Average Consumer Price**

Submitted by the Maryland Medical Cannabis Commission

December 2021

Report on the Number of Medical Cannabis Providers, Amount of Medical Cannabis Sold, and Average Consumer Price

December 2021

I. Introduction

Health-General Article, §13-3305 requires the Maryland Medical Cannabis Commission (the “Commission”) to submit a report on or before January 1 each year on: (1) Providers certified under this subtitle; and (2) The amount sold, by condition treated, and average consumer price for medical cannabis products provided in accordance with this subtitle. This report satisfies these requirements.

Under Health-General Article, Title 13, Subtitle 33, a “certifying provider” is an individual who is statutorily authorized to provide a written certification to patients to lawfully obtain medical cannabis. Specifically, Health-General Article, §13-3301(d), authorizes any individual who (1) is in good standing as a licensed physician, dentist, podiatrist, nurse practitioner, a certified nurse midwife, or a licensed physician assistant with an active delegation agree with a primary supervising physician who is a certifying provider, (2) has a State controlled dangerous substances registration, and (3) is registered with the Commission to issue written certifications for qualifying patients to obtain medical cannabis. The total number of providers across each profession who registered with the Commission to issue written certifications for medical cannabis is included in Section II below.

Section III of the report details the amount of medical cannabis sold, conditions for which qualifying patients have been certified to obtain medical cannabis, and average consumer price paid for medical cannabis for the period from January 1, 2021, through November 30, 2021.

II. Certifying Providers

The Maryland Medical Cannabis Program (the “Program”) became operational on December 1, 2017. In the first year of the Program, the total number of certifying providers increased from 606 to 1,228. Subsequent years saw similar levels of growth, ending 2020 with 2,046 certifying providers. Year-to-date, provider numbers have decreased to 1,511 for 2021. In February of 2021 the Commission transitioned to OneStop, the State’s centralized system for all licensing and registration. As a result of the transition, all registrants were required to retrieve their records within the new system to remain registered with the Commission. The decrease in registered certifying providers is likely due to providers deciding not to remain registered with the Commission. There is no indication that the decrease in provider numbers has impacted patients or their ability to access medical cannabis.

Table 1. Total certifying providers, by year

2017	2018	2019	2020	2021
606	1,228	1,705	2,046	1,511

Physicians (and physician assistants) and advanced practice nurses make up more than 90 percent of registered providers, a trend consistent with past years. A detailed breakdown on the total number of certifying providers registered with the Commission is included in Table 2 (below).

Table 2. Certifying providers registered with the Commission (As of December 7, 2021)

Provider Group	Number of Providers Registered with the Commission
Physicians and Physician Assistants	614
Dentists	79
Nurse Practitioners and Certified Nurse Midwives	798
Podiatrists	20
Total	1,511

III. Amount Sold, Patient Conditions, and Average Consumer Price

(a) Amount Sold

The Code of Maryland Regulations (COMAR) 10.62.30 authorizes licensed medical cannabis dispensaries to distribute medical cannabis to qualifying patients. Medical cannabis means “all parts of any plant of the genus cannabis, whether or not growing, including: (i) the seeds of the plant; (ii) the resin extracted from the plant; (iii) any compound, manufacture, salt, derivative, mixture, or preparation of the plant, its seeds, or resin including tetrahydrocannabinol (THC) and all other naturally produced cannabinol derivatives, whether produced directly or directly by extraction.” For retail sales, medical cannabis is placed into one of three categories: (1) flower, (2) infused products, and (3) vape products. The seed-to-sale tracking system (METRC) that medical dispensaries use to report sales data, categorizes all transactions using these terms.

Table 3 below shows the amount of medical cannabis sold during the third year of the Program (January 1, 2021 - November 30, 2021) by transaction type (infused products, flower, or vape products), and dollar amount. During the reporting period, 5,344,684 infused products, 63,090 pounds of flower, and 2,304,801 vape products were sold to qualifying patients. The total gross

revenue across all dispensaries is projected to be approximately \$575,000,000 for 2021. This projected amount would represent a more than 20 percent increase compared to 2020.

Table 3. Medical cannabis and medical cannabis products sold, by year

	Infused Products Sold (each)	Flower Sold (lbs.)	Vape Products (each)
Jan.1, 2021 – Nov. 30, 2021	5,344,684	78,697	2,304,801
Jan. 1, 2020 – Dec. 4, 2020	4,216,622	52,447	1,833,145
Jan. 1, 2019 – Dec. 31, 2019	2,486,443	34,171	986,437

Table 4. Amount sold, by year

2018	2019	2020	2021 (projected)
\$96,314,260	\$255,010,258	\$468,591,353	\$575,000,000

(b) Patient Conditions

Health-General Article, §13-3304(d) encourages the Commission to accept provider applications to treat patients with medical cannabis for the following medical conditions: (1) cachexia, (2) anorexia, (3) wasting syndrome, (4) severe pain, (5) chronic pain, (6) severe nausea (7) seizures, (8) severe or persistent muscle spasms, and (9) a chronic or debilitating disease or medical condition that results in a patient being admitted into hospice or receiving palliative care. The Commission is also authorized to approve applications that include “any other condition that is severe and for which other medical treatments have been ineffective if the symptoms reasonably can be expected to be relieved by the medical use of cannabis.” Health-General Article §13-3304(e). Pursuant to this authority, in 2015 the Commission added glaucoma and post-traumatic stress disorder (PTSD) to the list of qualifying medical conditions through its regulations. COMAR 10.62.03.01B(3). As of December 14, 2021, the medical cannabis program has 146,836 certified patients.

Table 5 shows the number of certified medical cannabis patients by qualifying medical condition issued as of December 14, 2021. As of December 14, 2021, the medical cannabis program has 146,836 certified patients.

The “other” category includes any medical condition that a certifying provider is registered with the Commission to treat: (1) that is severe, (2) for which other medical treatments have been ineffective, and (3) if the symptoms can reasonably be expected to be relieved by the medical use of cannabis. Certifying providers must include the medical conditions for which they will certify a patient at the time the provider registers with the Commission. The “two or more conditions”

category represents the number of certified patients who are being treated for two or more qualifying conditions. Certifying providers must indicate the medical conditions for which they will certify a patient at the time the provider registers with the Commission.

Table 5. Number of Certified Patients by Medical Condition (As of December 14, 2021)

Medical Condition	Number of Certified Patients
Anorexia	211
Cachexia	30
Chronic Pain	59,631
Glaucoma	487
PTSD	5,282
Seizures	628
Severe Pain	974
Severe Nausea	638
Severe or Persistent Muscle Spasms	391
Wasting Syndrome	16
Other	35,531
Two or More Conditions	44,456

(c) Average Consumer Price

Health-General Article §13-3305(2) requires the Commission to report the average consumer price for medical cannabis products provided in accordance with this subtitle. The average consumer spend over the reporting period was \$448 across all product types, a 6.7% decrease from 2020 when the average spend was \$480. The median consumer spend during the reporting period was \$333, a 7.5% decrease from the 2020 median spend of \$360. The average price of cannabis remained stable in 2021. **The average cost of a gram of medical cannabis in a Maryland dispensary was \$10.53. This is a decrease from 2020, when the average price per gram was \$10.88.**

Table 6. Average Consumer Price, January - November 2021

Month	Average (Mean)	Median
January	\$487	\$361
February	\$442	\$333
March	\$497	\$367
April	\$486	\$361
May	\$477	\$354
June	\$452	\$335

July	\$387	\$290
August	\$440	\$323
September	\$421	\$312
October	\$427	\$315
November	\$408	\$304

IV. Conclusion

The Maryland Medical Cannabis Program became operational on December 1, 2017. In the first three years of operation, the Program grew significantly across all reporting areas. The rate of growth for patients slowed in 2021, which is typical across medical cannabis jurisdictions.

While the average consumer amount spent per month fluctuated throughout 2021, the cost of medical cannabis in Maryland decreased in 2021, remaining among the lowest in the country. The Commission will continue to provide updated data on providers, patients, qualifying conditions, and average consumer price on its website: mmcc.maryland.gov.