



December 16, 2020

The Honorable Larry Hogan
Governor
100 State Circle
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 on the Number of Medical Cannabis Providers, Amount of Medical Cannabis Sold, and Average Consumer Price, Pursuant to Health-General Article § 13-3305

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, 2020 through December 7, 2020. If you have questions, or require additional information, please contact Taylor Kasky, Director, Policy and Governmental Affairs, at (443) 915-5297.

Sincerely,

William C. Tilburg, JD, MPH
Executive Director

cc: Brian Lopez, Chair, Maryland Medical Cannabis Commission
Sarah Albert, 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 2020

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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, 2020 through December 7, 2020.

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. The second of the Program saw a similar level of growth, ending 2019 with 1,705 certifying providers. This growth continued in the past year, with the addition of 341 new certifying providers, for a total of 2,046 certifying providers. It is worth noting that during the 2020 legislative session the General Assembly passed HB 378/SB 304 – Natalie M. LaPrade Medical Cannabis Commission – Certifying Providers, which added physician assistants to the list of providers eligible to issue written certifications.

While physicians, which includes physician assistants, continue to be the largest single group of providers, the total number of providers increased across each provider group in 2020. A detailed breakdown on the total number of certifying providers registered with the Commission is included in Table 1 (below). Table 2 highlights the growth in the number of providers from 2017 to 2020.

Table 1. Certifying providers registered with the Commission (As of December 7, 2020)

Provider Group	Number of Providers Registered with the Commission
Physicians and Physician Assistants	982
Dentists	129
Nurse Practitioners and Certified Nurse Midwives	913
Podiatrists	22
Total	2,046

Table 2. Total certifying providers, by year

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

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 indirectly 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, 2020 - December 4, 2020) by transaction type (infused products, flower, or vape products), and dollar amount. During the reporting period, 4,216,622 infused products, 52,447 pounds of flower, and 1,833,145 vape products were sold to qualifying patients. The total gross revenue across all dispensaries was \$425,288,403.

Table 3. Amount sold, January 1, 2020 – December 4, 2020

	Infused Products Sold (each)	Flower Sold (lbs.)	Vape Products (each)	Total Dispensary Sales
Jan. 1, 2020 – Dec. 4, 2020	4,216,622	52,447	1,833,145	\$425,288,403
Jan. 1, 2019 – Dec. 31, 2019	2,486,443	34,171	986,437	\$255,010,258

Table 4. Amount sold, by year

2018	2019	2020 YTD
\$96,314,260	\$255,010,258	\$425,288,403

(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).

Table 5 shows the number of certified medical cannabis patients by qualifying medical condition issued as of December 7, 2020. As of December 7, 2020, the medical cannabis program has 121,994 certified patients suffering from 164,212 certifying medical conditions. The number of medical conditions exceeds the number of certified patients because many patients are certified to obtain medical cannabis for more than one medical condition.

The “other” category includes any medical condition that a certifying provider is registered with the Commission to treat that is (1) severe, (2) for which other medical treatments have been ineffective, and (3) 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.

Table 5. Number of Certified Patients by Medical Condition (As of December 7, 2020)

Medical Condition	Number of Certified Patients
PTSD	10,010
Wasting Syndrome	280
Seizures	1,216
Severe or Persistent Muscle Spasms	5,656
Cachexia	402
Severe Pain	14,043
Severe Nausea	3,873
Anorexia	1,753
Chronic Pain	77,480
Glaucoma	1,014
Other	48,485

(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 \$480 across all product types. The median consumer spend during the reporting period was \$360.

The average price of cannabis remained stable in 2020. The average cost of a gram of medical cannabis in a Maryland dispensary was \$10.88. This is the fourth lowest average cost across all medical cannabis jurisdictions. In addition, the average cost is more than \$3 less than the cost of illicit cannabis in Maryland (\$10.88 versus \$14.11).

Table 6. Average Consumer Price 2020 (partial data for December has been excluded)

Month	Average (Mean)	Median
January	\$446	\$295
February	\$419	\$293

March	\$465	\$340
April	\$493	\$364
May	\$521	\$385
June	\$496	\$365
July	\$500	\$368
August	\$493	\$365
September	\$479	\$353
October	\$488	\$360
November	\$463	\$344

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 and providers slowed in 2020, which is typical across medical cannabis jurisdictions. Chronic and severe pain remains the most common qualifying medical condition, making up one-half of all qualifying conditions. This is consistent with general medical diagnosis and treatment trends, where chronic or severe pain is the most common diagnosis for medications.¹

The number of licensed medical cannabis dispensaries increased from 85 to 94 over the past 12 months. Over the same period dispensary gross revenue increased by nearly 70 percent, as did the amount of product sold. The average consumer amount spent per month remained relatively stable throughout 2020, and the average cost of medical cannabis in Maryland remained 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.

¹ U.S. Centers for Disease Control and Prevention, *Prevalence of Chronic Pain and High-Impact Chronic Pain Among Adults – United States, 2016*, Morbidity and Mortality Weekly Report, September 14, 2018, 67(36):1001-1006.