



December 31, 2019

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

The Honorable Thomas V. Mike Miller, Jr.
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 Miller, and Speaker Jones:

Pursuant to Health-General Article, §13-3305, Annotated Code of Maryland, the Natalie M. LaPrade 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 December 1, 2018 through December 12, 2019. If you have questions, or require additional information, please contact Will Tilburg, Executive Director, at (410) 487-8069 or william.tilburg@maryland.gov.

Sincerely,

A handwritten signature in blue ink, appearing to read 'William Tilburg', is placed over a blue horizontal line.

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 Natalie M. LaPrade Medical Cannabis Commission

December 2019

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I. Introduction

Health-General Article, §13-3305 requires the Natalie M. LaPrade 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(c), authorizes any individual who (1) is in good standing as a licensed physician, dentist, podiatrist, nurse practitioner, or a certified nurse midwife, (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 December 1, 2018 through December 12, 2019.

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 1,174. The second year of the program saw a similar level of growth, adding an additional 501, for a total of 1,675 certified providers. While physicians continue to be the largest single group of providers, the total number of providers increased significantly across each provider group in 2019. A detailed breakdown on the total number of certifying providers registered with the Commission is included in Table 1. Table 2 highlights the growth in the number of providers from 2017 to 2019.

Table 1. Certifying providers registered with the Commission (As of December 12, 2019)

Provider Group	Number of Providers Registered with the Commission
Physicians	901
Dentists	113
Nurse Practitioners or Certified Nurse Midwives	642
Podiatrists	19
Total	1,675

Table 2. Total certifying providers, by year

2017	2018	2019
606	1,174	1,675

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 (1) any product containing usable cannabis (the dried leaves and flowers of the cannabis plant, i.e. flower), (2) medical cannabis concentrate (a product derived from medical cannabis that is kief, hashish, bubble hash, oil, wax, or other product produced by extracting cannabinoids from the plant through the use of solvents, carbon dioxide or heat, screens, presses or steam distillation), and (3) medical cannabis-infused product (any oil, wax, ointment, salve, tincture, capsule, suppository, dermal patch, cartridge, or other product that has been processed so that the dried leaves and flowers are integrated into other material). COMAR 10.62.01.01B(22), (23) and (25). The seed-to-sale tracking system (METRC) medical dispensaries use to report sales data, categorizes all transactions using the terms flower and infused products. In 2019, the Commission expanded the categories to include “vape product,” which previously were included in the infused products category.

Table 3 shows the amount of medical cannabis sold during the second year of the Program (December 1, 2018 - December 9, 2019) by transaction type (flower, vape, or infused product), and dollar amount. During the reporting period, 2,326,553 infused products, 32,309 pounds of flower, and 922,761 vape products were sold to qualifying patients. The total gross revenue across all dispensaries was \$241,886,978.

Table 3. Amount sold, December 1, 2018 – December 9, 2019

	Infused Products Sold (each)	Flower Sold (lbs.)	Vape Products (each)	Total Dispensary Sales
Dec. 1, 2018 – Dec. 9, 2019	2,326,553	32,309	922,761	\$241,886,978

Table 4. Amount sold, by year

2018	2019	Difference
\$96,314,260	\$241,886,978	+\$145,572,718

(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, 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 between December 31, 2018 and December 12, 2019. As of December 12, 2019, the medical cannabis program has 90,120 certified patients suffering from 128,349 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

Medical Condition	Number of Certified Patients
PTSD	7,111
Wasting Syndrome	335
Seizures	1,121
Severe or persistent muscle spasms	5044
Cachexia	521
Severe Pain	13,154
Severe Nausea	3,595
Anorexia	1,753
Chronic Pain	63,020
Glaucoma	908
Other	31,787

(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 \$390.28 across all product types. The median consumer spend during the reporting period was \$291.13. Table 6 shows the average and median amounts paid by consumers per month.

Table 6. Average Consumer Price

Month	Average (Mean)	Median
January	\$379.48	\$270.00
February	\$368.45	\$260.00
March	\$401.60	\$286.20
April	\$389.95	\$281.25

May	\$411.75	\$296.00
June	\$406.98	\$293.25
July	\$421.98	\$303.98
August	\$427.41	\$310.00
September	\$399.64	\$289.00
October	\$414.45	\$296.60
November	\$409.66	\$297.25
December (Partial)	\$252.07	\$192.01

IV. Conclusion

The Maryland Medical Cannabis Program became operational on December 1, 2017. In the first two years of operation, the Program has seen immense growth across all reporting areas. The number of certifying providers has grown steadily and the number of certified patients nearly doubled during the current reporting period. Chronic and severe pain remains the most common qualifying medical condition, making up 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 71 to 85 over the past 12 months. Over the same period dispensary gross revenue nearly tripled, as did the amount of product sold. The average consumer amount spent per-month increased throughout 2019. This increase may be related, at least in part, to the scarcity of flower product during the latter half of 2019. 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.