



GROWN IN



STATE CANNABIS FACT SHEETS

August 2022

LEGALIZATION DATES

- Cannabis was decriminalized in **2011** through the legislature.
- Medical Marijuana was legalized in **2012**, also through the legislature.
- Gov. Ned Lamont signed adult use legalization law on **June 21, 2021**. Law went into effect **July 1, 2021**.
- Adult-use sales were expected to begin **October, 2022**, but as of **August**, only 1 provisional cultivation license had been issued.

TYPES OF LICENSES

- **Medical**
 - Producer - Can grow for medical use. Existing license holders can apply for expanded license to also grow for the adult use market.
 - Dispensary - Can sell to medical patients. Can apply for hybrid retailer license.
- **Adult Use**
 - Cultivator - Can grow for medical and adult-use. Restricted to social equity applicants and includes a \$3 million fee.
 - Micro-cultivator - Can grow for medical and adult-use with up to 10,000 sq/f of canopy
 - Product Manufacturer
 - Food and Beverage Manufacturer
 - Product Packager
 - Retailer - Can only sell adult use cannabis.
 - Hybrid Retailer - Can sell both medical and adult use cannabis customers
 - Delivery Service - Can deliver cannabis from a retailer or dispensary directly to adult use customers or medical patients.
 - Transporter - Can deliver cannabis between establishments, labs, or research programs.

LICENSING LAWS & RULES

- Adults may possess up to **1.5 ounces** of cannabis. They may keep up to **5 oz.** in their home, the trunk of their car or locked in a glove box.
- The state created a limited number of non-cultivation licenses in the first round of open applications. A second round of licensing is expected in **late 2022**, with subsequent rounds taking place as needed.
- With the exception of cultivation licenses, all adult use license types are subject to a lottery. Aspiring license holders can submit an unlimited number of applications, provided they pay the fee for each one.
- Investors can serve as backers for up to **two** separate social equity applicants.

RECENT LEGAL RULINGS AND RULE CHANGES

- Connecticut's adult use preliminary regulations go into effect, **October 2021**.
- Gifting events were banned and cannabis advertising was limited after Gov. Ned Lamont signed [HB 5329](#) into effect.
- A state legislative committee gave final approval for the state to increase its testing limit for mold in cannabis to **100,000** colony-forming units per gram, along with a zero-tolerance for aspergillus bacteria. Previously, that limit was **10,000 cfu/g**.
- The Social Equity Council [voted on May 3](#) to remove the requirements that financial backers of social equity applicants submit three years of tax returns.

TAXES COLLECTED

- **6.35%** sales tax
- **3%** municipal sales tax
- **10-15%** tax based on THC content



SOCIAL EQUITY RULES

- Social equity applicants will have preference for the first round of licenses.
- Cultivation licenses are exclusively available to social equity applicants.
- Availability for all other adult use license types are split evenly between social equity and general applicants. Applicants are subjected to a lottery, first for social equity. Lottery winners must then be confirmed for social equity status before the Department of Consumer Protection issues provisional licenses. Applicants who do not win the social equity lottery or are deemed ineligible will then be entered into a subsequent lottery as a general applicant.
- Social equity applicants must live in one of **200** census tracts identified by the state as having been disproportionately affected by the war on drugs. They must also have made no more in household income than **300%** of the state's median household income average over three years.
- At least **65%** of the business must be owned and controlled by individuals that qualify as social equity applicants in order for the whole company to obtain that status.

DELIVERY ALLOWED?

- Yes

TRAINING REQUIREMENTS

- None.

RETAIL SALES TOTALS

- Connecticut does not collect or report medical sales data.
- Adult Use sales have not begun, as of **July, 2022**.

LEADING ADVOCACY ORGANIZATIONS

- [CT Cannabis Chamber of Commerce](#)
- [Connecticut NORML](#)
- [Alliance for Social Equity](#)

NUMBER OF LICENSED FACILITIES AS OF JULY 2022

- Medical dispensaries – **18**
- Medical producers – **4**
- Adult Use Cultivation – **16** licenses were approved by the state's Social Equity Council on **July 12**. They must still go through Dept. of Consumer Protection for final approval.

MEDICAL PATIENTS AS OF JULY 2022

- **51,089**



SOURCES

[*Department of Consumer Protection Adult-Use Cannabis Program*](#)

[*Department of Consumer Protection Medical Marijuana Program*](#)

[*Adult use enacting law, June 2021*](#)

[*Medical marijuana enacting law*](#)



LEGALIZATION DATES

- Medical use and sales legalized in **August 2013**, took effect on **Jan. 1, 2014**.
- Adult-use passed the legislature and signed into law **June 25, 2019**. Legalized consumption and sale starting **Jan. 1, 2020**.

TYPES OF LICENSES

- Cultivation centers
- Craft growers
- Infusers
- Transporting organizations
- Dispensing organizations

LICENSING RULES & LAWS

- Limitations on ownership
 - No person or entity shall own portions of more than 3 cultivation centers.
 - No person or entity shall own portions of more than 10 dispensing organizations.
 - No craft grower licenses for owners of cultivation centers.
 - No person or entity shall own more than 3 craft grower licenses.
- Social equity applicants receive a **50%** discount on application fees
- License applicants with a social equity component shall receive extra points in license award contests
- Licenses are awarded through an elaborate point system, but if there are ties in points awarded, they are awarded by lot. Regulators have not announced plans for an additional round of licenses.
- Regulators have authority to award **five** medical dispensary licenses and **46** more craft grow licenses at any time.
- After numerous court delays, **185** adult use dispensary licenses were awarded on **July 22, 2022**.
- Also after court delays, **64** craft grow and **53** infuser licenses were awarded in **June 2022**.
- Each cultivation center license canopy is unlimited for medical, but limited to **210,000 square feet** for adult use.
- Craft grow canopy is limited to **5,000 square feet** for adult use. Up to three craft grow licenses may co-locate.

TAXES COLLECTED

- **7%** of sale from cultivator to dispensary
- Purchaser excise tax
 - 10% for cannabis with a THC level at or below 35%
 - 20% for cannabis infused products
 - 25% for cannabis with a THC level above 35%
 - Not applied to medical cannabis
- Municipalities may charge up to **3%** gross sale tax at dispensaries
- Counties may charge up to **3.75%** gross sale tax at dispensaries



SOCIAL EQUITY RULES

- Applicants who meet social equity criteria receive a **50%** discount on application fees.
- Social equity applicants can also receive a state-sponsored loan for operations.
- License applicants that meet social equity criteria receive additional points on the scoring system for license awards.
- A social equity applicant is an Illinois resident that meets one of the following criteria:
 - Applicants with at least 51% ownership and control by one or more individuals who have resided for at least 5 of the preceding 10 years in a disproportionately impacted area.
 - Applicants with at least 51% ownership and control by one or more individuals who have been arrested for, convicted of, or adjudged to be a ward of the juvenile court for any offense that is eligible for expungement under this Act or member of an impacted family;
 - For applicants with a minimum of 10 full-time employees, an applicant with at least 51% of current employees who:
 - Currently reside in a disproportionately impacted area; or
 - Have been arrested for, convicted of, or adjudged to be a ward of the juvenile court for any offense that is eligible for expungement under this Act or member of an impacted family.



DELIVERY ALLOWED?

- No.

TRAINING REQUIREMENTS

- Dispensary workers are required to annually receive “dispensary agent training” certification by a state accredited “Responsible Vendor Training” organization. The training must be no less than **two hours**.
- Applications for Responsible Vendor Training” accreditation were accepted between **August 1-15, 2021**, and will not be accepted again until **August 1-15, 2023**. (The application period is always the first half of August during odd years.)
- Dispensary owners are also required to undergo dispensary agent training.

MONTHLY RETAIL SALES TOTALS

- Adult Use - **\$135.66 million** in **July 2022**

LEADING CANNABIS ADVOCACY ORGANIZATIONS

- [Cannabis Business Association of Illinois](#)
- [Chicago NORML](#)
- [Illinois Craft Cannabis Association](#)
- [Illinois Independent Craft Growers Association](#)
- [Social Equity Empowerment Network](#)

NUMBER OF LICENSED FACILITIES AS OF JULY 2022

- Medical – **55** dispensaries, **21** cultivation
- Recreational – **110** dispensaries, **21** cultivation, **54** infuser, **189** transporter
- **88** craft grow licenses.

SOURCES

[*Briefing on passed 2019 adult-use law*](#)

[*Illinois adult-use law*](#)

[*Medical cannabis law*](#)

[*Cannabis social equity rules pg 10096*](#)

[*Cannabis taxes*](#)

[*Illinois Department of Agriculture – Cultivation, transport, processing – Adult Use / Medical*](#)

[*Illinois Department of Financial and Professional Regulation – Dispensaries*](#)

MEDICAL PATIENTS AS OF JUNE 30, 2022

- **221,098** registered patients
- **135,649** active patients

RECENT LEGAL RULINGS

- A federal case is pending on whether or not residency requirements are allowed for license applicants.
- A state case is underway on whether to award dozens of additional adult use dispensary licenses for alleged errors in the application process.



LEGALIZATION DATES

- Cannabis possession was decriminalized, in small amounts, through the legislature in **1976**.
- Medical marijuana was legalized, via ballot initiative, on **Nov. 2, 1999**.
- Cannabis possession was decriminalized up to **2.5 oz.** through the legislature on **May 1, 2009**.
- Portland and South Portland legalized adult use in **2013** and **2014**, respectively.
- Maine legalized adult use through ballot a 2106 measure.
- Gov. Paul LePage vetoed a **2017** bill to tax cannabis sales, but the veto was overturned on **May 2, 2018**.
- Adult retail was allowed to start selling on **Oct. 9, 2020**.

TYPES OF LICENSES

- Medical Marijuana Treatment Center (MTC) – a vertically integrated facility.
- Marijuana cultivator
 - Tier 1: Maximum 30 mature plants. No more than 500 sq. feet of plant canopy
 - Tier 2: Max 2,000 sq. feet of plant canopy
 - Tier 3: Max 7,000 sq. feet of plant canopy
 - Tier 4: Max 20,000 sq. feet of plant canopy
 - Nursery cultivation: No more than 1,000 sq. feet of plant canopy. May cultivate immature plants to sell to other companies, may only grow mature plants for seeding.
- Testing facility
 - May test cannabis for itself, another licensee, a personal user, a medical patient, or caregiver.
 - Stakeholders of a facility may not be a caregiver or have any interest in a dispensary.
- Marijuana product manufacturing facility
 - May purchase and transport marijuana and/or concentrates from other entities.
 - May sell and transport to retail stores.
 - May not sell directly to customers.

- Marijuana store
 - May sell marijuana, marijuana products, immature plants and seedlings to consumers.
 - No delivery, no drive thrus, no online sales, no vending machines (with marijuana products)
- Sample collector
 - Can collect samples from marijuana establishments to transport for testing.



LICENSING LAWS & RULES

- Marijuana stores may not sell online, through an automated dispenser or vending machine.
- Stores may not have a drive thru.
- Stores cannot sell mature plants, but they can sell immature plants and seedlings.
- Active licenses must be renewed annually.
- License applicants must be a Maine resident, except testing facilities. State announced it would not enforce this rule for adult use on **May 11, 2020**.
- No state employees or law enforcement or correctional officers may apply
- Adults may possess up to **2.5 oz.** of marijuana or **5 grams** of concentrate.
- Residents may possess three mature plants, **12** immature plants and unlimited seedlings. No limits for medical patients or registered caretakers.



RECENT LEGAL RULINGS & RULE CHANGES

- In, *NPG v. Maine Department of Administrative and Financial Services*, a federal circuit court found in **2021** that the medical license residency requirement was unconstitutional. That case is still under appeal.
- The legislature passed three bills in **May, 2022** updating cannabis regulation in the state. They all went into effect without the governor's signature.
- **LD 1957** - Officially changes "marijuana" to "cannabis" in all future laws and regulation, as well as in the name of what is now called the Office of Cannabis Policy. The law also removed hiring restrictions for prospective cannabis workers with past cannabis-related convictions.
- **LD 1827** – Allows adult use delivery and curbside pickup
- **LD 1928** - It increases the legislature's oversight of new medical cannabis regulations from OCP. The department is also no longer able to require seed tracking or lab testing for medical cannabis.

TAXES COLLECTED

- Medical sales tax – **5.5%**
- Adult use excise Tax – **10%**

SOCIAL EQUITY RULES

- None.

DELIVERY ALLOWED

- Medical dispensaries and caregivers may deliver.
- Regulations allowing adult use delivery are pending, now that the legislature legalized it.

TRAINING REQUIREMENTS

- None

MONTHLY RETAIL SALES TOTALS FOR JUNE 2022

- **\$13.4 million**

LEADING ADVOCACY ORGANIZATIONS

- [Maine Cannabis Industry Association](#)
- [Maine Growers Alliance](#)
- [Maine Cannabis Coalition](#)
- [Medical Marijuana Caregivers of Maine](#)
- [Maine Craft Cannabis Association](#)

NUMBER OF LICENSED FACILITIES AS OF AUGUST 2022

- Medical
 - Dispensaries – 39
- Recreational
 - Stores – 259
 - Cultivation – 181
 - Manufacturing – 119
 - Testing Lab – 5

MEDICAL PATIENTS

- **105,143** medical patients as of **December 2021** (the latest date publicly available)
- **2,705** registered caregivers as of **August 2022**



SOURCES

[*Adult use rules and statutes*](#)

[*Medical rules and statutes*](#)

[*Medical open data*](#)

[*Maine's Medical Program annual report for 2021*](#)

[*Maine Office of Marijuana Policy FAQ*](#)



LEGALIZATION DATES

- **April 14, 2014** Governor Martin O'Malley signed **two** cannabis bills into law, one created the state's medical cannabis program, while the other decriminalized personal possession of up to **10 grams** of flower.
- The medical cannabis bill created the Natalie M. LaPrade Medical Cannabis Commission, the agency that currently oversees the state's medical cannabis market.
- Voters will vote whether or not to legalize adult use cannabis in a **November 2022** referendum, after the legislature passed [HB 837](#).

TYPES OF LICENSES

- Grower - may cultivate cannabis in a commercial facility
- Processor - may manufacture cannabis products, such as concentrates, out of flower
- Dispensary - can sell to medical patients and caregivers
- Other MMCC Registration type:
 - Independent Testing Lab
 - Security Guard Agencies
 - Secure Transportation Companies
 - Waste Disposal Companies

LICENSING LAWS & RULES

- Medical patients may possess up to **120 grams** of cannabis flower or **36 grams** of infused products, which the state deems as a **30-month** supply. Non-medical patients may possess up to **10 grams** without facing more than a civil fine as a penalty.
- The Maryland Medical Cannabis Commission consists of **13** members who are all appointed by the governor and serve **4-year**, staggered terms.
- A grower, processor, or dispensary license is valid for **6 years** initially, and then for **4 year** terms with each renewal.
- An individual may own or control no more than **4** dispensaries and no more than **1** grow operation and **1** processor license.
- A license holder may only sell or transfer their license after they have spent at least **3 years** active in the market.

RECENT LEGAL RULINGS & RULE CHANGES

- **April 19, 2021** - Dispensaries were allowed to start selling edibles.
- **April 1, 2022** - Governor Larry Hogan allowed HB 0837 to go into effect without his signature, putting legalization on the **November 2022** ballot.
- **July 29, 2022** - The MMCC voted to reduce the fee for medical patient IDs from **\$50** to **\$25**, and for cards to expire after **6 years** instead of **3**.

TAXES COLLECTED

- No tax on medical cannabis.



SOCIAL EQUITY RULES

- Bonus criteria points are awarded to license applicants that are at least **51%** owned by disadvantaged equity applicants.
- State regulation defines disadvantaged equity applicants as those who have a net worth less than **\$1,713,333** and are African American, Hispanic, Native American, Asian or a woman of any race.
- Applicants must also qualify as minor enterprises, which means at least **51%** of the company is owned and controlled by the qualifying social equity candidate.

DELIVERY ALLOWED

- Medical dispensaries may deliver

TRAINING REQUIREMENTS

- None

LEADING ADVOCACY ORGANIZATIONS

- [Maryland Medical Dispensary Association](#)
- [Maryland Wholesale Medical Cannabis Trade Association](#)
- [Cannabis Patient Advocacy Association](#)



NUMBER OF LICENSED FACILITIES AS OF JUNE 1, 2022

- Dispensaries - **103**
- Growers - **18**
- Processors - **19**
- Independent Testing Labs - **4**

MEDICAL PATIENTS

- There are **158,078** registered patients as of **August 2022**.

REVENUE

- Dispensaries reported **\$42,037,435** in sales in July 2022.



SOURCES

[*Medical Cannabis Statutory Provisions Updated May 2021*](#)

[*Cannabis Regulations*](#)

[*About the Maryland Medical Cannabis Commission*](#)

[*MMCC Data Reports*](#)

[*MMCC Industry Reports*](#)



LEGALIZATION DATES

- Cannabis was decriminalized in **Nov. 5, 2008** ballot initiative.
- Medical marijuana was legalized, via ballot initiative, in **Nov. 2012**. The law took effect **Jan. 1, 2013**.
- Recreational was legalized, via ballot initiative again, in **Nov. 2016**. Following delays in writing regulations, Gov. Charlie Baker pushed back the start time for retail licenses to **July 2018**.

TYPES OF LICENSES

- Medical Marijuana Treatment Center (MTC) – Self-contained, vertically-integrated facilities. May deliver to patients and caregivers with state approval. No person or entity may obtain more than **3** licenses. An MTC license holder can hold licenses for non-medical Marijuana Entities (ME), but they are limited to a total of **100,000 sq ft** in cultivation canopy space.
- Marijuana cultivator – May cultivate, process and package marijuana and transport to other MEs, but not consumers. No person or entity can obtain more than **3** licenses. Cultivators have **11** tiers based on canopy size.
 - Tier 1 – <5,000 sq. feet
 - Tier 2 – 5,000 to 10,000 sq. feet
 - Tier 3 and up, in increments of 10,000 sq. feet
- Craft marijuana cooperative – May cultivate onsite or next door. Can also manufacture and process. Can only sell to retailers. Limited to **1** license.
- Marijuana product manufacturer – Cannot sell to consumers directly. No person or entity can obtain more than **3** licenses.
- Marijuana adult-use retailer – Can purchase and transport from other marijuana entities and resell to other entities or consumers. No person or entity can obtain more than **3** licenses. May be colocated with a medical dispensary.
- Existing licensee transporter – A marijuana entity can get an additional license to transport, but not delivery to consumers. No person or entity can obtain more than **3** licenses.
- Third-party transporter – May transport between marijuana entities while holding no other licenses. No person or entity can obtain more than **3** licenses.
- Marijuana research facility – May cultivate and acquire marijuana. May not sell marijuana to anyone or entity. No person or entity can obtain more than **3** licenses.
- Independent Testing Lab (ITL) – May test marijuana products. Must be accredited to the most current International Organization for Standardization. Must not be tied financially to any other marijuana entity. No person or entity can obtain more than **3** licenses.

- Standards Testing Laboratory – Would otherwise qualify to be ITL, but instead performs blind tests to verify results from ITL at the request of the commission. No person or entity can obtain more than **3** licenses.
- Microbusiness – Intended for smaller, local businesses, these are colocated with a Tier 1 cultivator (<5,000 sq/ft) and/or product manufacturer limited to purchase of **2,000 lbs** of marijuana from other entities per year. License holders may not have any control on other entities other than a social consumption establishment (lounge). May apply for delivery endorsement. No person or entity can obtain more than **3** licenses.
- Delivery-Courier – Can deliver to consumers, must have an individual agreement with each dispensary. No person or entity can obtain more than **3** licenses. Only available for Social Equity or Economic Empowerment applications for first three years.
- Wholesale Delivery – Can deliver to customers and can obtain wholesale cannabis, but must have a proper warehouse facility to store it. No more than **3** licenses per person or entity. Only available for Social Equity or Economic Empowerment applications for first **3** years.
- Social consumption establishment – Entities can sell marijuana or marijuana products for on-site consumption. Applications will be made available once the **6** pilot communities have been selected. Consumption sites will only be available to Economic Empowerment or Social Equity applicants for the first **two years** following the issuance of the first license. No person or entity can obtain more than **3** licenses. SE applicants get a discount on license fees.



LICENSING LAWS & RULES

- A single entity can have **9** licenses. No more than **3** cultivation, **3** manufacturing, **3** retail or delivery
- Only social equity or economic empowerment applicants will be considered for delivery licenses for **3** years after the first license is granted, which occurred **April 5, 2022**.
- Licenses must be renewed annually.
- License applications must list all entities with **10%** ownership or more.
- Medical dispensaries are legally called “provisioning centers”, recreational dispensaries are called “retailers”.
- Marijuana Entities (non-medical) must apply for a license for a single operation at a single location.



MA CANNABIS BUSINESS FACTS

- Medical Treatment Centers apply to cultivate, process, produce and dispense under a single license with up to **2** locations for all operations.
- All adults (medical patients and recreational) can grow up to **6** plants for personal use or up to **12** plants for **2 or more** adults.

RECENT LEGAL RULINGS & RULE CHANGES

- Regulators removed recommendation that municipalities prioritize approval for social equity applicants, **November 2021**.
- Governor Charlie Baker signed Senate Bill S. 3096 into law on **Aug. 1, 2022**, while also vetoing a section that would have allowed pediatric cannabis patients to receive medicine in school. The law allows social consumption laws. It would also grant state Cannabis Control Commission the authority to approve or deny Host Community Agreements between operators and municipalities. Meanwhile, municipalities will be required to consider equity when granting local approval. Finally, the bill would divert **10%** of the state's **10.75%** excise tax to create a loan fund for social equity and economic empowerment applicants.

TAXES COLLECTED

- State Sales Tax – **6.25%**
- State Retail Excise Tax – **10.75%**
- Optional Local Excise – up to **3%**
- No tax on Medical Marijuana.

SOCIAL EQUITY RULES

- Applicants are eligible for the Social Equity Program (SEP) if they demonstrate they meet at least **one** of the following criteria:
- 1 Income that does not exceed **400%** of Area Median Income and Residency in an Area of Disproportionate Impact, as defined by the Commission, for at least five of the past **ten years**;
 - 2 Residency in Massachusetts for at least the past **12 months** and a conviction or continuance without a finding for an offense under M.G.L. c. 94C or an equivalent conviction in other jurisdictions;
 - 3 Residency in Massachusetts for at least the past **12 months** and proof that the SEP applicant was either married to or the child of an individual convicted or continuance without a finding for a M.G.L. c. 94C offense or an equivalent conviction in other jurisdictions;

SOURCES

Recreational Regulation - [935 CMR 500.000: Adult Use of Marijuana](#)

Medical Regulation - [935 CMR 501.000: Medical Use of Marijuana](#)

[MA Cannabis Control Commission data portal](#)

[State license tracker](#)

- 4 Any individual listed as an owner on the original certification of an Economic Empowerment Priority Applicant who satisfies **one or more** the following criteria:

- Lived for five of the preceding ten years in an Area of Disproportionate Impact, as determined by the Commission;
- Experience in one or more previous positions where the primary population served were disproportionately impacted, or where primary responsibilities included economic education, resource provision or empowerment to disproportionately impacted individuals or communities;
- Black, African American, Hispanic or Latino descent; or
- Other significant articulable demonstration of past experience in or business practices that promote economic empowerment in Areas of Disproportionate Impact.

DELIVERY ALLOWED

- Yes. Courier licenses allow delivery from affiliated dispensaries.
- Delivery licenses allow wholesale storage of cannabis products for resale directly to consumers.
- Microbusiness license holders can obtain a delivery endorsement.
- Medical dispensaries can deliver to customers with "state endorsement."

TRAINING REQUIREMENTS

- From 935 CMR 500.105(2): "All Marijuana Entity agents must receive a minimum of **8 hours** of annual training tailored to the position. Minimum of **four hours** will be Responsible Vendor Training."

RETAIL SALES TOTALS IN JUNE 2022

- **\$122.5 million**

LEADING ADVOCACY ORGANIZATIONS

- [MassCann](#)
- [Massachusetts Cannabis Business Association](#)
- [Massachusetts Patient Advocacy Alliance](#)
- [Massachusetts Growers Advocacy Council](#)

NUMBER OF LICENSED FACILITIES AS OF JULY 2022

- | | |
|--|--|
| • Medical | • Recreational |
| - Cultivation – 45 | - Dispensaries – 228 |
| - Dispensaries – 89 | - Courier – 8 |
| - Manufacturing – 37 | - Delivery – 3 |
| - Independent Testing Lab – 2 | - Cultivation – 85 |
| - Transportation (w/existing lic.) – 2 | - Manufacturing – 72 |
| | - Independent Testing Lab – 10 |
| | - Transportation (w/existing lic.) – 3 |
| | - Transportation (3rd party) – 4 |
| | - Microbusiness – 6 |

MEDICAL PATIENTS

- **96,203** certified active patients as of **July 14, 2022**

LEGALIZATION DATES

- Medically legalized in **Nov. 2008** referendum. About **75-100** dispensaries were already operating but were struck down in a **2013** court ruling. Medical sales were legalized in **2016** by legislation.
- Recreationally legalized in **Nov. 2018** referendum. Legalized **Dec. 6, 2018**, dispensaries **Dec. 1, 2019**.

TYPES OF LICENSES

- Michigan manages medical cannabis and recreational cannabis as **two** separate systems with **two** separate license groups.
- Medical cannabis licenses
 - Grower - Class A, up to 500 marihuana plants; Class B, up to 1,000 marihuana plants; Class C, up to 1,500 marihuana plants. Cannot be a registered primary caregiver.
 - Processor - Cannot be a registered primary caregiver, but until Dec. 31, 2021, must have **two** years experience as a primary caregiver.
 - Provisioning center
 - Secure transporter
 - Safety compliance center
- Recreational cannabis licenses
 - Marihuana retailer (Official state spelling is with “h”, not “j”)
 - Marihuana safety compliance facility – conducts tests for contaminants and to find levels of THC, THC-A, CBD, and CBD-A. All cultivation batches must be tested.
 - Marihuana secure transporter – must be used for transfer of plants between growers, processors and retailers.
 - Marihuana processor
 - Marihuana microbusiness – can cultivate up to 150 plants, process and package them, can sell them or transfer them to other retailers, must operate in one location. Cannot accept plants from other cultivators.
 - Class A microbusiness, with up to 500 plants
 - Marijuana grower - Class A, up to 100 marihuana plants; Class B, up to 500 marihuana plants; Class C, up to 2,000 marihuana plants.
 - Licensees may “stack” multiple Class C licenses for a single location.
 - Excess marihuana grower - for an entity with 5 or more Class C licenses, who wants to grow more.
 - Marihuana event organizer
 - Temporary marihuana event
 - Designated consumption establishment

LICENSING LAWS & RULES

- **2018** law created Marihuana Regulatory Agency for oversight of both medical and recreational cannabis.
- No limits on any licenses.
- Licenses must be renewed annually.
- License applications must list all entities with **5%** ownership or more.
- Medical dispensaries are legally called “provisioning centers”, recreational dispensaries are called “retailers”.
- Municipalities must pass an opt-in ordinance before considering facilities in their boundaries.
- Medical and recreational licensing follows identical processes and is effectively three-steps: First, state prequalification with a background check on all applicants. Second, municipality approval of location. Third, state license qualification and approval.
- Patients and caregivers can grow up to **12** plants. Previously, those plants could be sold to provisioning centers, but were phased out by **October 1, 2020**.



TAXES COLLECTED

- Standard state sales tax of **6%**.
- Medical cannabis has additional **3%** excise tax on provisioning center sales.
- Recreational cannabis sales has an additional **10%** excise tax on top of standard sales tax.
- Municipalities may charge an annual fee up to **\$5,000** of all licensees.

SOCIAL EQUITY RULES

- Reduced fees for license applications in communities with high marijuana-related arrests, over **30%** poverty rate.
- List of eligible communities
- Residency in eligible community gets **25%** fee reduction, assistance with completing applications and resources for developing plan.
- Marijuana-related conviction provides up to **40%** additional fee reduction.



- Primary caregiver between **2008** and **2017** gets additional **10%** fee reduction.
- Individuals need to hold majority ownership to qualify.

DELIVERY ALLOWED?

- Yes.

TRAINING REQUIREMENTS

- From Marihuana Employees Rules, Rule 2: - (d) Train employees and have an employee training manual that includes, but is not limited to, employee safety procedures, employee guidelines, security protocol, and educational training, including, but not limited to, marihuana product information, dosage and purchasing limits if applicable, and educational materials. Copies of these items must be maintained and made available to the agency upon request.
- (e) A licensee under the Michigan regulation and taxation of marihuana act shall, if applicable, include in the employee training manual a responsible operations plan. A responsible operations plan must include a detailed explanation of how employees will monitor and prevent over- intoxication, underage access to the establishment, the illegal sale or distribution of marihuana or marihuana products within the establishment, and any other potential criminal activity on the premises, as applicable. Copies of these items must be maintained and made available to the agency upon request.
- (f) Establish point of sale or transfer procedures for employees at marihuana sales locations performing any transfers or sales to marihuana customers. The point of sale or transfer procedures must include, but are not limited to, training in dosage, marihuana product information, health or educational materials, point of sale training, purchasing limits, cannabidiol (CBD) and tetrahydrocannabinol (THC) information, serving size, and consumption information, including any warnings. Copies of these items must be maintained and made available to the agency upon request.

MONTHLY RETAIL SALES TOTALS AS OF JUNE 2022

- Adult Use - **\$165.9 million**
- Medical - **\$21.49 million**

LEADING ADVOCACY ORGANIZATIONS

- Michigan Cannabis Industry Association
- Michigan Cannabis Manufacturers Association
- Michigan Caregivers Association
- Michigan NORML

NUMBER OF LICENSED FACILITIES AS OF JUNE 30, 2022

- Medical
 - Growers – 823
 - Provisioning Centers – 461
 - Processors – 141
 - Safety Compliance (Testing) – 22
 - Transportation – 23
- Recreational
 - Growers – 711
 - Retail – 526
 - Safety Compliance (Testing) – 19
 - Transportation – 24
 - Microbusiness – 14
 - Processor 152
 - Designated Consumption Establishment – 2
 - Marijuana Event Organizer - 41

MEDICAL PATIENTS AS OF JUNE 2022

- **218,526** registered patients
- **24,987** registered caregivers

RECENT LEGAL RULINGS & RULE CHANGES

- **April 8, 2020** – Regulators cut off medical cannabis caregiver sales to retail stores
- **April 30, 2020** – State Supreme Court rules municipalities can regulate growth of personal medical cannabis.
- **May 19, 2020** – State expands eligible communities for social equity assistance and increases fee reductions.
- **June 22, 2020** – CRA releases permanent rules.
- **October 11, 2021** – Delta-8 regulated by state.
- **June 21, 2022** – Regulators proposed ban deli style cannabis retail in favor of prepackaging.
- **July 5, 2022** – Detroit limits who can apply for adult use dispensaries licenses, resulting in numerous lawsuits against the city.

SOURCES

Recreational Law - Michigan Regulation And Taxation of Marihuana Act of 2018

Medical Law - Michigan Medical Marihuana Act of 2008

Medical Law - Medical Marihuana Facilities Act And Marihuana Tracking Act of 2016

CRA Rules, Bulletins, and Regulations page



LEGALIZATION DATES

- On **Nov. 6, 2018**, Missouri voters approved medical use with Amendment 2. The law went into effect in **December 2018**.
- In **November 2022**, the state will hold a referendum on "Amendment 3" to legalize adult use cannabis consumption and sales. If passed, all existing medical licenses will receive adult use licenses as well.

TYPES OF LICENSES

- Medical dispensaries – Limited to **24** in each of the state's 8 Congressional districts.
- Manufacturing
- Testing
- Transportation
- Cultivation – Indoor Cultivation Facilities are limited to **30,000 square feet** of canopy space. Outdoor Cultivation Facilities are limited to **2,800** flowering plants. May stack up to **three** licenses in one location.

LICENSING RULES & LAWS

- Missouri's Department of Health and Senior Services (DHSS) is responsible for issuing licenses to qualified patients and all facilities serving the medical cannabis space, including dispensaries.
- Licenses are good for three years.
- The DHSS awarded **192** dispensary and **60** cultivation licenses in **January 2020** through an application scoring process. Regulators have not announced plans to release more licenses.
- Licenses were originally required to have **51%** Missouri resident ownership, but that law was vacated in **October 2021**.
- Patients and caregivers with ID cards from DHSS can purchase medical marijuana from a state-licensed dispensary or have it delivered.
- Municipalities have no right to opt-out of cannabis licenses, but license holders must go through a zoning process.
- If a license is revoked by the state, it goes to the next highest scorer in the application process.
- Patients may grow up to **6** plants. Caregivers may grow **6** plants per patient, up to **2** patients and for the caregiver for a total of **18** plants.

SOCIAL EQUITY

- There are no social equity provisions in Missouri.

TAXES COLLECTED

- **4%** sales tax on medical marijuana
- Sales tax revenue to be distributed to veteran healthcare services, job training, and housing assistance.

DELIVERY ALLOWED?

- Yes.

TRAINING REQUIREMENTS

- Holders of all license types are required to provide security training and training on use of facility security systems.



MONTHLY RETAIL SALES TOTALS

- **\$30.94 million** for **June 2022**.

LEADING CANNABIS ADVOCACY ORGANIZATIONS

- [Greater St. Louis NORML](#)
- [Missouri Medical Cannabis Trade Association](#)

NUMBER OF LICENSED FACILITIES AS OF JULY 2022

- Medical dispensaries – **204** licensed, **191** operating
- Manufacturing – **84** licensed, **72** operating
- Testing – **10** licensed, **8** operating
- Transportation – **28** licensed, **23** operating
- Cultivation – **63** licensed, **50** operating

MEDICAL PATIENTS

- **188,440** patients as of **July 1, 2022**.

RECENT LEGAL RULINGS

- Over **600** failed license applicants filed objections with the state's Administrative Hearing Commission. Hearings began in **June 2021**.
- Residency ownership requirement overturned in **December 2021**.
- The effort to put adult use legalization on the November ballot appears to be short by **2,000-3,000** signatures with about a week remaining before the **Aug. 9 2022** deadline.
- The state legislature [passed a bill](#) in May requiring the state to disclose ownership information for medical cannabis businesses.
- A state appeals court [tossed out a lawsuit](#) against the state's cap on available licenses.
- The state Supreme Court [ruled on Feb. 8, 2022](#) that the state must allow rejected license applicants to access other applications in order to compare scores.



SOURCES

[DHSS Medical Marijuana Website](#)
[State Constitution Amendment XIV](#)
[Medical Marijuana Rules](#)





LEGALIZATION DATES

- Medical Marijuana was legalized by the legislature in **2013**.
- The State House passed adult use legalization in **2014**, but it died in the Senate.
- Cannabis was decriminalized in **July, 2017** through the legislature.
- Several legislative efforts to legalize adult use failed during the **2022** legislative session, including one that would create a state monopoly for adult use dispensaries, one that would have put legalization on the ballot and one that would have legalized home grow.
- Legalization will likely be back on the docket for **2023**.

TYPES OF LICENSES

- Alternative Treatment Center - a vertically-integrated medical cannabis dispensary and cultivation facility.

LICENSING LAWS & RULES

- Adult use currently prohibited

TAXES COLLECTED

- None

SOCIAL EQUITY RULES

- None

DELIVERY ALLOWED

- Caregivers can deliver, but only **19** in the state are registered for more than **1** patient.

TRAINING REQUIREMENTS

- None.

RETAIL SALES TOTALS

- New Hampshire does not report sales data.

SOURCES

[NH Therapeutic Cannabis Program 2020 annual report \(2021 has not been published\)](#)

[NH Therapeutic Cannabis Program](#)

[Enabling medical cannabis statute](#)

LEADING ADVOCACY ORGANIZATIONS

- [New Hampshire Cannabis Association](#)
- [New Hampshire Coalition for Common Sense Marijuana Policy](#)

NUMBER OF LICENSED FACILITIES AS OF DECEMBER 2021

- Medical dispensaries (Alternative Treatment Centers) – **7**

MEDICAL PATIENTS (DATA HAS NOT BEEN UPDATED SINCE MAY 2021)

- Registered patients (Data Has Not Been Updated Since **May 2021**) – **11,948**
- Designated caregivers – **582**

RECENT LEGAL RULINGS & RULE CHANGES

- As of **July, 2022**, caregiver applicants no longer need to submit to a background check.



LEGALIZATION DATE

- The Compassionate Use Medical Marijuana Act was enacted in **January 2010**.
- In **July 2019** the Jake Honig Compassionate Use Medical Cannabis Act expanded access to medical cannabis, created the cannabis regulatory commission, increased the number of licenses, and the amount that could be purchased at one time.
- In **November 2020**, adult-use was legalized by referendum, **67-33%**.
- In **February 2021** Gov. Phil Murphy signed the The Cannabis Regulatory, Enforcement Assistance, and Marketplace Modernization (CREAMM) Act creating the Cannabis Regulatory Commission. The CRC is empowered to develop rules for the number of licenses, how they are distributed, and to develop and administer an application process.

TYPES OF LICENSES

- Medical
 - Alternative Treatment Centers – vertically-integrated facilities, originally limited to six non-profit license holders. The non-profits do not need to be recognized as such by the IRS. Licensees may not have more than **three** dispensary locations. These facilities will be allowed to sell adult-use cannabis as well as medical.
- Adult Use
 - Class 1 cultivator – multiple tiers
 - Microbusiness – up to **2,500** square feet of canopy, and up to **1,000** plants
 - Tier I – **10,000** square feet
 - Tier II – **10,000** to **25,000** square feet
 - Tier III – **25,000** to **50,000** square feet
 - Tier IV – **50,000** to **75,000** square feet
 - Tier V – **75,000** to **100,000** square feet
 - Tier VI – **100,000** to **150,000** square feet
 - Expanded ATC Cultivator: premises up to **150,000** square feet
 - Class 2 manufacturer – Two tiers, divided at **10,000** square feet.
 - Class 3 wholesaler – Store, sell or otherwise transfer, recreational use cannabis items between cannabis cultivators, wholesalers, or retailers.

- Class 4 distributor – Transport cannabis items in bulk between cannabis cultivators, manufacturers, or retailers.
- Class 5 retailer
- Class 6 delivery
- Conditional license – Begin building out operations for the cultivation, manufacture, dispensing, wholesale, distribution, or delivery of recreational use cannabis while working towards license requirements.
- Testing Laboratory



LICENSING LAWS & RULES

- Applications for Class 1 cultivators, Class 2 manufacturers and testing laboratories were begun to be accepted on **December 15, 2021**.
- Application acceptance for Class 5 Retailers will begin on **March 15, 2022**.
- Until **Feb. 22, 2023**, only **37** cultivator licenses will be issued, except microbusinesses.
- There is no deadline for applications and they will be accepted on a rolling basis, but will be reviewed by a priority, where social equity and diversely-owned businesses come first.
- For **two years**, an individual may own only **one** of each type of adult-use license.
- For **two years**, an individual may own a cultivator, manufacturer, retailer, and delivery. But then not wholesale or distributor.
- For **two years**, an individual may own a wholesale and distributor license, but then not cultivator, manufacturer, retailer, or delivery licenses.
- ATCs must sign labor peace agreements.
- **10%** of licenses should go to microbusinesses, which must be **100%** New Jersey residents, and located in the municipality where a majority of the owners reside.
- Municipalities may limit the number of licenses allowed in their jurisdictions.



RECENT LEGAL RULINGS & RULE CHANGES

- Since the original **August 2021** deadline for municipalities to opt out of the cannabis market, **36** have voted to opt back in.
- **78** municipalities now allow adult use retail and another **50** allow non-retail cannabis licenses. In addition **12** municipalities only allow medical cannabis.
- Adult use sales officially began in the state on **April 21, 2022**.
- The state stopped collecting sales tax on medical cannabis on **July 1, 2022**.
- In **August 2022**, The Cannabis Regulatory Commission announced a public comment period for updated rules. Comments are accepted until **September 30, 2022**.

TAXES COLLECTED

- Medical - none
- Adult-use taxes are ramped up over time, as follows:
 - 33% of average retail price per ounce for first nine months of legal sales. Then,
 - \$10 per ounce if average retail price per ounce is above \$350
 - \$30 per ounce if average retail price per ounce is between \$250 and \$350
 - \$40 per ounce if average retail price per ounce is between \$200 and \$250
 - \$60 per ounce if average retail price per ounce is below \$200
- For adult-use, municipalities may charge up to **2%** of the receipts from each sale by a cannabis cultivator; **2%** of the receipts from each sale by a cannabis manufacturer; **1%** from each sale by a cannabis wholesaler; and **2%** of receipts from each sale by a cannabis retailer.

SOCIAL EQUITY RULES

- CREAMM establishes an Office of Minority, Disabled Veterans, and Women Cannabis Business Development.
- CREAMM establishes a goal of **30%** of licenses going to minority, women's, and disabled veterans' businesses, and **25%** of licenses going to residents of Impact Zones.

DELIVERY ALLOWED

- Yes.
- Municipalities may ban delivery to its own residents, but may not ban delivery operators from traveling through the municipality.

TRAINING REQUIREMENTS

- License holders and their employees must complete at least **8 hours** of training each year that is tailored to the specific cannabis job and includes training about federal and state cannabis law, security and emergency procedures and proper privacy protocols.

RETAIL SALES TOTALS

- In its first full quarter of adult use sales, Q2 of **2022**, New Jersey regulators reported **\$59,262,014** of medical sales and **\$79,698,831** of adult use sales.

LEADING ADVOCACY ORGANIZATIONS

- New Jersey CannaBusiness Association
- New Jersey Cannabis Industry Association
- New Jersey Cannabis Trade Association

NUMBER OF LICENSED FACILITIES AS OF AUGUST 2022

- **9** medical only dispensaries (Alternative Treatment Centers)
- **17** adult use and medical dispensaries
- **4** testing labs
- Up to **37** cultivators, until **February 22, 2023**
- No stated limit of other license types.

MEDICAL PATIENTS

- **127,708** patients as of **August 2, 2022**.
- Up to **two** caregivers per patient are allowed. Caregivers may only purchase cannabis on behalf of the patient.



SOURCES

The Jake Honig Compassionate Use Medical Cannabis Act

The adult-use law, the Cannabis Regulatory, Enforcement Assistance, and Marketplace Modernization (CREAMM) Act

CRC's summary of initial adult-use rules, August 19, 2021.

Rules and regulations

License application process rules

LEGALIZATION DATE

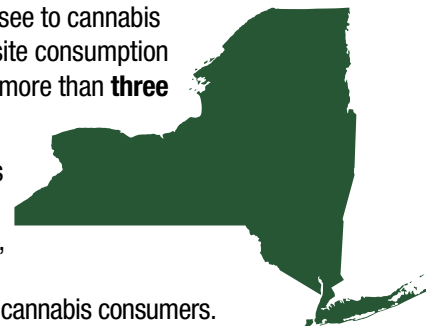
- Medical legalization, the Compassionate Care Act (CCA), was signed into law in **July 2014**.
- Adult-use legalization, the Marijuana Regulation and Taxation Act (MRTA), was signed into law **March 2021**. This law supersedes the CCA.
- MRTA established the Cannabis Control Board (CCB), which will determine the number of licenses, applications, license distribution, and many other license details through regulation.
- The CCB oversees the Office of Cannabis Management (OCM) which staffs CCB and manages regulatory oversight
- Adult-use sales have not yet been legalized, and are undergoing a regulatory process with the Cannabis Control Board.

TYPES OF LICENSES

- Adult-use Cultivator – Limited to owning one license. Up to **43,560 square feet** of canopy is allowed for outdoors grows, while **25,000** is allowed for greenhouses. Cultivators may grow in both areas as long as greenhouse grows are limited to **20,000 square feet**, and outdoor grows do not exceed **30,000**. Limited to existing hemp licensees.
- Adult-use Nursery – Produces only clones, immature plants, seeds, and other agricultural products. May be combined with a cultivator license.
- Adult-use Processor – May be combined with cultivator and distributor licenses. Limited to only one per owner.
- Adult-use Distributor – May not be combined with retail license. Limited to **one** per owner.
- Adult-use Cooperative – Allows acquisition, possession, cultivation, processing, but not ownership of retail. May be controlled through a cooperative operating agreement. No person may own more than one cooperative license.
- Adult-use Microbusiness – May act as a cannabis producer for the cultivation of cannabis, a cannabis processor, a cannabis distributor, and retailer for their own products. May not have interest in any other license type.
- Adult-use Retail Dispensary
 - No person may own more than three retail dispensary licenses
- Adult-use On-site Consumption – Authorizes the acquisition, possession, and sale of cannabis from the licensed premises of

the on-site consumption licensee to cannabis consumers for use at the on-site consumption location. No person may own more than **three** on-site consumption licenses.

- Adult-use Delivery – Authorizes the delivery of cannabis and cannabis products by licensees, independent of another adult-use cannabis license, to cannabis consumers. Delivery licenses may not have a total of more than **25** individuals, or the equivalent thereof, providing full-time paid delivery services to cannabis consumers per week under **one** license. No person may own more than **one** delivery license.



LICENSING LAWS & RULES

- Medical cannabis can be grown, processed and sold by Registered Organizations.
- Other than Registered Organizations, state law does not allow vertical integration. An entity may either own cultivation and processing facilities, dispensaries, or delivery. But no more than **one** of the tiers.
- Registered Organizations, created by the Compassionate Care Act, may operate
 - One cultivation site and manufacturing facility
 - Four medical cannabis facilities
 - Once adult-use regulations are approved, three adult-use retail locations, all of which may be co-located with medical dispensaries.
 - Registered Organization owners may not have interest in any other facilities in New York State.

RECENT LEGAL RULINGS & RULE CHANGES

- **April, 2022**, the Office of Cannabis Management updated its rules allowing home grow. Individuals may possess up to **3** mature and **3** immature plants in their home. Each household is allowed no more than **6** mature and **6** immature plants, even if more than **two** adults live there.
- Municipalities had until **Dec. 31, 2021** to opt out of allowing either adult retail or consumption lounges. Out of the state's **1,520** municipalities, **764** opted out of adult use retail and **883** opted out of consumption sites.



- The state began accepting applications for adult use retail and adult use processors in **July, 2022**. The retail licenses are only available to applicants who have been harmed by cannabis prohibition, while the processor licenses are exclusively available to the **33** existing cannabinoid hemp processor license holders.
- The state recently announced that it sent cease and desist letters to **52** shops in the state that were allegedly improperly using the state's allowed practice of gifting cannabis to indirectly sell it. This marks an increased level of scrutiny for gray market operators.
- On **August 15**, regulators announced applications for Conditional Adult-Use Retail Dispensary licenses will open **August 24, 2022**.

TAXES COLLECTED

- Medical cannabis has a **7%** retail excise tax.
- Adult-use taxes include:
 - 9% retail excise tax;
 - Localities may impose up to 4% additional retail excise tax;
 - Edibles will be taxed at \$0.03 per mg of THC
 - Concentrates will be taxed at \$0.008 per mg of THC
 - Flower will be taxed at \$.005 per mg THC.

SOCIAL EQUITY RULES

- MRTA creates a Director of Social Equity who must issue an annual report on the status of cannabis and social equity.
- MRTA establishes a **50%** "goal" for distributing licenses to social equity applicants, which includes minorities, women, economically disadvantaged, and disabled veterans that are residents of New York State.

DELIVERY ALLOWED

- Yes. Medical operators are allowed to deliver and adult use operators may obtain a delivery license.

TRAINING REQUIREMENTS

- None for medical. Adult-use is under regulatory consideration.

RETAIL SALES TOTALS

- New York only reports annual excise tax collected on a fiscal year basis, with fiscal year ending **March 31**. For the fiscal year ending **March 31, 2021**, New York collected **\$8,411,022** of medical cannabis **7%** excise tax, which translates to **\$120,157,457.14** of sales.

LEADING ADVOCACY ORGANIZATIONS

- New York Medical Cannabis Industry Association
- New York Cannabis Growers and Processors Association
- New York City NORML
- Rochester NORML

NUMBER OF LICENSED FACILITIES AS OF JULY 14, 2022

- **10** Registered Medical Cannabis Organizations, each of which have **one** cultivation facility, **one** processor, and **four** medical dispensaries.
- Adult Use Conditional Cultivation - **223**

MEDICAL PATIENTS AS OF AUGUST 2022

- **124,374** registered patients.
- **3,780** registered practitioners.



SOURCES

[The Marijuana Regulation and Taxation Act of 2021](#)
[Cannabis Control Board meeting archives](#)
[Medical cannabis and other regulations](#)



LEGALIZATION DATES

- Gov. John Kasich signed House Bill 523 legalizing medical use in **June 2016**. Legal effective **Sept. 8, 2016**.
- Adult sale and use are not legal. Legalization will be on the ballot in **2023** as per a **May, 2022** court settlement.

TYPES OF LICENSES

- Cultivation – Level I cultivators are allowed an initial marijuana cultivation area up to **25,000 square feet**. Level II cultivators are allowed an initial marijuana cultivation area of **3,000 square feet**.
- Processor
- Testing – Testing laboratories include both universities and private labs.
- Dispensary

LICENSING RULES & LAWS

- The Board of Pharmacy licenses and regulates medical marijuana dispensaries, physician, patient and caregiver registration.
- The Department of Commerce oversees licensure of medical marijuana cultivators, processors, and laboratories that test medical marijuana.
- No person or entity may hold more than one cultivator provisional license or significantly influence or control the activities of more than **one** cultivator.

TAXES COLLECTED

- **5.75%** sales tax
- Municipalities may charge up to **2.25%** additional sales tax

SOCIAL EQUITY RULES

- A previous law requiring at least **15%** of licenses to be issued diverse entities was struck down in court on **Nov. 7, 2019**.

DELIVERY ALLOWED?

- No

TRAINING REQUIREMENTS

- None

MONTHLY RETAIL SALES TOTALS AS OF JULY, 2022

- **\$45.7 million** approx. (sales figures are provided weekly)

LEADING ADVOCACY ORGANIZATIONS

- NORML Appalachia of Ohio
- Ohio Medical Cannabis Industry Association
- Coalition to Regulate Marijuana Like Alcohol



NUMBER OF LICENSED FACILITIES AS OF AUGUST 2022

- Cultivation
- Level I provisional licenses – **6**, **17** operational
- Level II provisional licenses – **2**, **12** operational
- Processing – **4** provisional, **42** operational
- Testing – **5** provisional, **5** operational
- Dispensary – **73** provisional, **58** operational

MEDICAL PATIENTS AS OF JULY 25, 2022

- **285,621** registered patients
- **30,175** registered caregivers

RECENT LEGAL RULINGS & RULE CHANGES

- A court settlement between **three** state officials and activists pushed a proposed adult use legalization ballot measure to **2023**.
- On **May 23, 2022** the Board of Pharmacy awarded **72** new dispensary licenses, more than doubling the previous total of **57**.



SOURCES

Medical Marijuana Control Program

H.B. 523, legalization of Medical Cannabis

Ohio Regulations



LEGALIZATION DATES

- The Medical Marijuana Act was signed into law on **April 17, 2016**, and amended by Act 44 of **2021** on **June 30, 2021**. Licensed sales began in **February 2018**.

TYPES OF LICENSES

- Grower/Processor – Only **25** are allowed, a **26th** was created by court order
- Dispensary – Only **150** are allowed, but additional locations have been created by court orders
- Laboratory

LICENSING LAWS & RULES

- Pennsylvania does not allow sale of edibles.
- The legislature is considering adding more licenses as part of the **2023** state budget.

RECENT LEGAL RULINGS & RULE CHANGES

- A state recall of vape cartridges was rescinded in June 2022 after state courts found there was no scientific basis for the recall.

TAXES COLLECTED

- **5%** excise tax on grower/processor sales to dispensaries.

SOCIAL EQUITY RULES

- None.

DELIVERY ALLOWED

- Yes

TRAINING REQUIREMENTS

- All owners and employees must complete a **two hour** training course developed by the state.

LEADING ADVOCACY ORGANIZATIONS

- Pennsylvania Cannabis Coalition
- Philly NORML
- Pittsburgh NORML



NUMBER OF LICENSED FACILITIES

- Grower/Processors – **26/24** operational
- Dispensaries – **161**
- Laboratories – **6**

MEDICAL PATIENTS

- **1,068,111** patients have been certified as of **May 2022**, **414,446** active patients, as of **July 2022**.

REVENUE

- Monthly dispensary sales average over **\$120,000,000** per month as of **July 2022**.



SOURCES

Medical Marijuana Act

July 2022 Two Year Report



LEGALIZATION DATES

- Medical marijuana was first legalized in **2006**. The legislature passed it in **2005**, and then overrode a veto from Republican Gov. Don Carcieri.
- Gov. Dan McKee signed The Rhode Island Cannabis Act into law on **May 25, 2022**, legalizing adult use cannabis in the state, and creating the state's Cannabis Control Commission to oversee the market.

TYPES OF LICENSES

- Medical
 - Compassion centers (dispensaries)
 - Cooperative cultivations
- Adult Use
 - Hybrid Retailer
 - Hybrid Cultivation
 - Adult Use Retailer – state will create 24 licenses evenly split between 6 geographic parts of the state.
 - Independent Testing Labs
 - Cannabis Control Commission is expected to create more license types once it is in operation.

LICENSING LAWS & RULES

- Compassion centers are operated as not-for-profits.
- **Two** or more qualifying cardholders may cooperatively cultivate marijuana.
- The Cannabis Control Commission will be governed by a **3-person** board, who have yet to be officially seated as of **August 2022**.
- The governor nominates all three commissioners, but one must be selected from a short list provided by the House Speaker. The Senate confirms the commissioners, which is expected to happen during a fall session in **2022** at the earliest.
- All retailer licenses require a labor peace agreement.
- Adults 21 and older may possess up to an **ounce** of cannabis, and up to **10 ounces** in their home. They can also possess up to **5 grams** of concentrate at a time.
- Adults may gift up to **1 ounce** of cannabis to another adult, and they can cultivate up to **three** mature and **three** immature plants in their home.

- The CCC is supposed to adopt rules by **Oct. 15, 2022** that would allow the state's existing medical dispensaries to apply for adult use hybrid licenses, which would then enable the sale of adult use cannabis by **Dec. 1, 2022**. As of **August**, it does not seem likely those deadlines will be met.

- The hybrid license include a **\$125,000** fee that goes into a loan fund for social equity applicants.
- Existing medical cultivation operators will be able to apply for a hybrid adult use license by **Aug. 1, 2022**, though it will likely be delayed given that the CCC has not been officially formed.
- All adult use companies must be at least **51%** owned by a Rhode Island resident(s).
- Once the CCC finalizes its regulations, a **two-year** moratorium on new cultivation licenses will begin, during which only existing medical operators will have access.



RECENT LEGAL RULINGS & RULE CHANGES

- **5** additional dispensary licenses were awarded in **November 2021** through a lottery. A **6th** license was awarded **April 29, 2022**, after the lottery was held up by a lawsuit from a competing applicant.
- The state's Department of Business Regulation began accepting applications for hybrid licenses from existing medical cultivators to begin growing for adult use on **August 1, 2022**.

TAXES COLLECTED

- **10%** retail excise tax
- **7%** sales tax
- **3%** local sales tax (as determined by the municipality)

SOCIAL EQUITY RULES

- In each of the state's **6** geographic zones, **4** retail licenses will be awarded. One of those **4** must be awarded to a social equity applicant and can only be transferred or sold to another social equity applicant.
- Additional social equity rules, including how **one** qualifies has yet to be determined.



DELIVERY ALLOWED

- Yes. To patients only.

TRAINING REQUIREMENTS

- None.

MONTHLY RETAIL SALES TOTALS FOR MAY 2022

- **\$6.1 million** (medical)

LEADING ADVOCACY ORGANIZATIONS

- [Rhode Island Cannabis Association](#) (dormant Facebook group)
- [Yes We Cannabis RI](#)

NUMBER OF LICENSED FACILITIES AS OF AUGUST 2022

- Compassion Centers – **4**
- Medical dispensaries – **9**
- Medical cultivation – **67**

MEDICAL PATIENTS AS OF MAY 2022

- **17,819** medical patients



SOURCES

[2020 Medical Marijuana Program annual report](#)

[Medical Marijuana Program Industry Overview report May 2022](#)

[Medical Marijuana Act](#)

[The Rhode Island Cannabis Act \(adult use legalization\)](#)



LEGALIZATION DATES

- Medical marijuana was legalized in **2004** through the legislature. Gov. Jim Douglas allowed it to go into effect without his signature.
- Marijuana was decriminalized through the legislature on **June 6, 2013**.
- Adult use was passed by the legislature on **January 22, 2018** when Gov. Phil Scott allowed it to go into effect without his signature. It took effect **July 1, 2018**.
- Adult use dispensaries are expected to open by **October 2022**.

TYPES OF LICENSES

- Medical Cannabis License – Vertically-integrated. Allows license holders to cultivate, process and sell medical cannabis.
- Adult Use
 - Indoor Cultivation
 - Tier 1 – Up to 1,000 sq/ft of canopy
 - Tier 2 – Up to 2,500 sq/ft of canopy
 - Tier 3 – Up to 5,000 sq/ft of canopy
 - Tier 4 – Up to 10,000 sq/ft of canopy
 - Tier 5 – Up to 15,000 sq/ft of canopy
 - Tier 6 – Up to 25,000 sq/ft of canopy
 - Outdoor Cultivation
 - Tier 1 – Up to 1,000 sq/ft of canopy, or 125 plants
 - Tier 2 – Up to 2,500 sq/ft of canopy, or 312 plants
 - Tier 3 – Up to 5,000 sq/ft of canopy, or 625 plants
 - Tier 4 – Up to 10,000 sq/ft of canopy, or 1,250 plants
 - Tier 5 – Up to 20,000 sq/ft of canopy, or 2,500 plants
 - Tier 6 – Up to 37,500 sq/ft of canopy, or 4,687 plants
- Mixed Cultivation
- Testing Lab
- Manufacturers
 - Tier 3 – May use all lawful methods of extraction and may purchase, process and sell cannabis products to other license holders.
 - Tier 2 – May only use water-based, food-based or heat/pressure-based extraction methods when processing cannabis. May also purchase and sell to other license holders.
 - Tier 1 – Limited to Tier 2 extraction methods, but must be a home occupancy business with no more than 1 employee.

- Wholesalers
- Retailers
- Integrated (medical/adult use)

LICENSING LAWS & RULES

- The Cannabis Control Board oversees the state's medical and adult use markets. The CCB approves all licenses and writes all of the state's cannabis regulation, which is then affirmed by the legislature.
- The Cannabis Control Board determines when it will accept license applications, but must do so for at least **30 days** in each calendar year. For Tier 1 and 2 cultivation (indoor and outdoor), the CCB must open a **30-day** window for applications by **Feb. 1** of each calendar year.
- License holders, excluding integrated licensees, may obtain no more than **one** of each type of license.
- Applicants for all license types, excluding testing labs, must submit a positive impact plan, which may include a commitment for hiring, livable wages, incubator or accelerator programs, or workforce re-entry training and mentorship. The applicant may also just make a contribution to the Cannabis Business Development Fund.
- Applicants may submit for an optional pre-qualification to assist in obtaining capital, real estate or municipal approval prior to actual licensure.
- Medical dispensaries are not required to use seed-to-sale tracking.



RECENT LEGAL RULINGS & RULE CHANGES

- The Cannabis Control Board began accepting cultivation license applications on **April 25, 2022**.
- The state's first cultivation license was awarded on **May 16, 2022**, and the state anticipates meeting the **October 1** deadline to issue the first retail license.



TAXES COLLECTED

- Adult use – **14%** cannabis excise tax, **6%** sales tax
- Medical – none

SOCIAL EQUITY RULES

- Criteria (Must meet at least **one**)
 - Member of BIPOC/minority race/ethnicity.
 - Have been convicted of a cannabis-related offense, or have a family member who has been convicted.
 - From a community disproportionately impacted by cannabis prohibition and can demonstrate how they were personally harmed.
- No previous residency required. Must currently reside in the state.
- Social Equity applicants are prioritized for license approval over general applicants, and they pay a reduced fee schedule, starting with no application and license fees in the first year, **25%** of renewal fee in second year, **50%** in the third, **75%** in the fourth. License holders will pay the full license renewal amount in their fifth year and beyond.
- Members from a disproportionately impacted community, but do not qualify as a social equity applicant, can still apply as an economic empowerment applicant.

DELIVERY ALLOWED

- Medical only.

TRAINING REQUIREMENTS

- None.

RETAIL SALES TOTALS

- Vermont does not gather or report cannabis sales data.

LEADING ADVOCACY ORGANIZATIONS

- [Vermont Growers Association](#)
- [Vermont Cannabis Trades Association](#)
- [Vermont Home Grown](#)

NUMBER OF LICENSED FACILITIES AS OF JULY 2022

- Medical dispensaries – **7**
- Adult Use Outdoor Cultivation – **77**
- Adult Use Indoor Cultivation – **21**
- Adult Use Mixed Cultivation – **20**
- Adult Use Retail - **0**
- Independent Testing Lab - **2**

MEDICAL PATIENTS AS OF JUNE 13, 2022

- **4,302** active medical patients



SOURCES

[Vermont Cannabis Control Board](#)

[Enacting Statutes and Regulations](#)

[CCB Rule 1: Licensing of Cannabis Establishment](#)