

The Cannabis Barometer

Annual Review 2025





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The draft bill prepared by the Ministry of Health to amend the Medical Cannabis Act is based on a generalized suspicion of misuse that is not supported by scientific evidence or real-world data. Even advocates of progressive cannabis regulation have adopted this framing without critically examining its underlying assumptions. This is particularly striking given that, for decades, established medical practice has relied on clearly defined criteria to assess medication misuse—criteria that focus primarily on health outcomes, harm, quality of life, and substance dependence among affected patients.

Viewed through this widely accepted medical lens, the increase in privately issued medical cannabis prescriptions does not indicate misuse. Rather, it is easily explained by the fact that patients in Germany are intentionally turning to a now-simplified prescription process to access a medication that reliably improves their quality of life.

In fact, the more relevant question is whether medical cannabis, given its comparatively mild side-effect profile, should be considered far more often by general practitioners and specialists as a treatment option, particularly before prescribing narcotics. The harm caused by dependence on other medications in Germany is substantial. Contrary to the stigma surrounding medical cannabis, its side effects are nowhere near as severe as those associated with commonly prescribed narcotics. Moreover, there is no evidence (based on recognized clinical standards) of misuse of medical cannabis beyond the observable increase in import volumes and private prescriptions. That increase, however, does not equate to overuse or abuse by either patients or physicians.

Nor has cannabis telemedicine led to a significant rise in the overall number of cannabis users. This is unsurprising, as a growing body of research shows that many patients were already self-medicating without medical supervision despite having legitimate indications. These individuals have now transitioned to legal, regulated, and safe access. The Medical Cannabis Act has also not resulted in an increase in the number of patients using cannabis on a daily basis. Likewise, there is no evidence indicating a rise in cannabis-related hospitalizations or mental health disorders following the removal of cannabis from the list of controlled substances.

In short, when misuse is defined according to standards recognized by the medical community, it cannot be substantiated in the case of medical cannabis. Rather than posing a risk to public health, medical cannabis has demonstrated clear benefits by offering an alternative to opioids and other potentially dangerous medications. Under closer scrutiny, the Federal Ministry of Health's argument therefore collapses entirely. Indeed, in its current form, the proposed changes are more likely to encourage misuse than to prevent it.

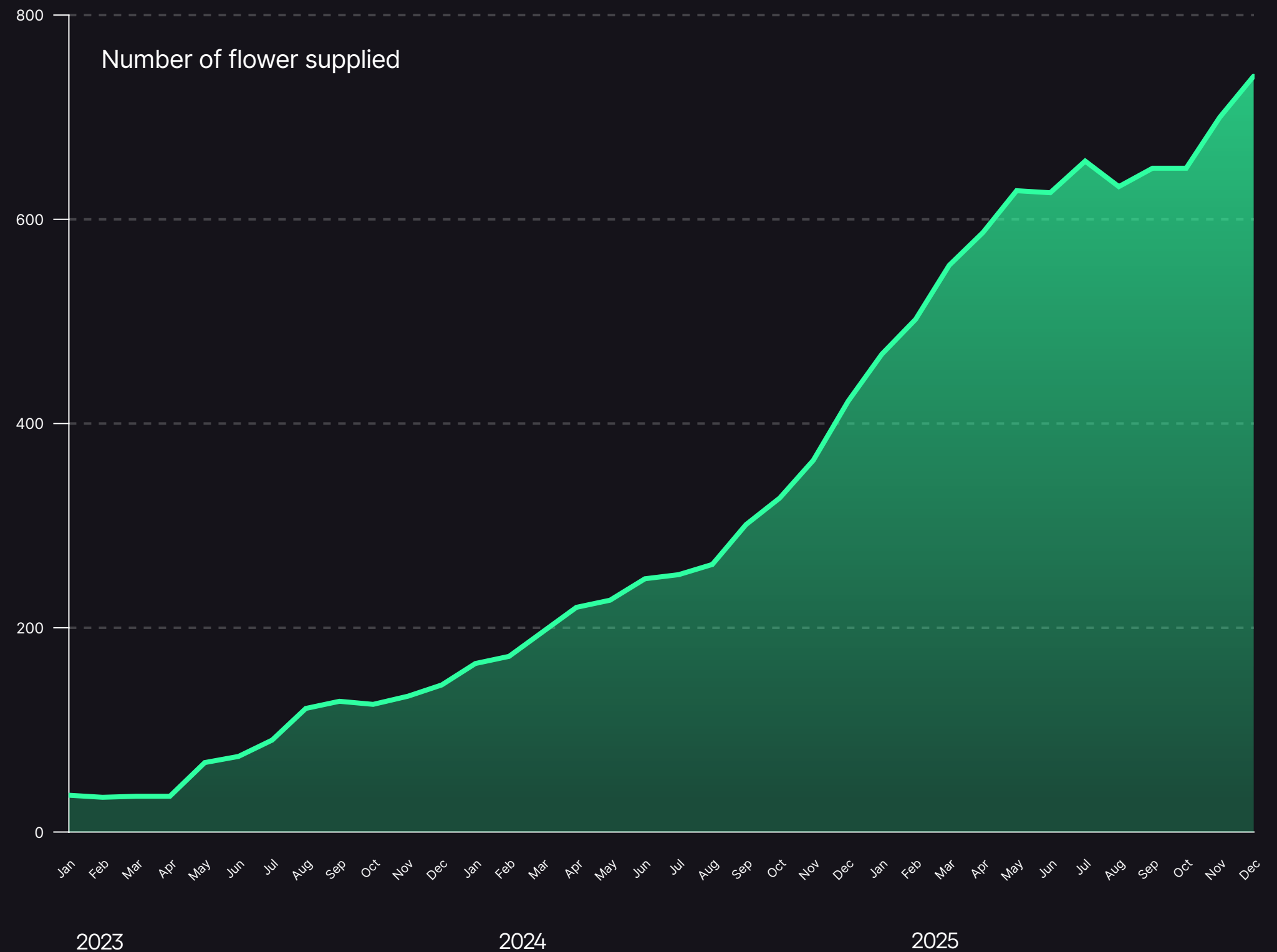
1

Number of Different Products

Regardless of the debates about amending the MedCanG and the associated uncertainties, more and more products have entered the German market. In the fourth quarter, over 720 products were available in Germany. At the beginning of the year, there were fewer than 470.

In the event of a mail-order ban, this product diversity would make reliable, nationwide supply significantly more difficult. After all, only about 250 pharmacies in Germany truly specialize in cannabis, and only a fraction of pharmacies stock more than 50 strains. Several hundred thousand cannabis patients would therefore have to accept long travel distances and waiting times just to obtain the specific strain prescribed by their physician from a local German pharmacy.

Trend



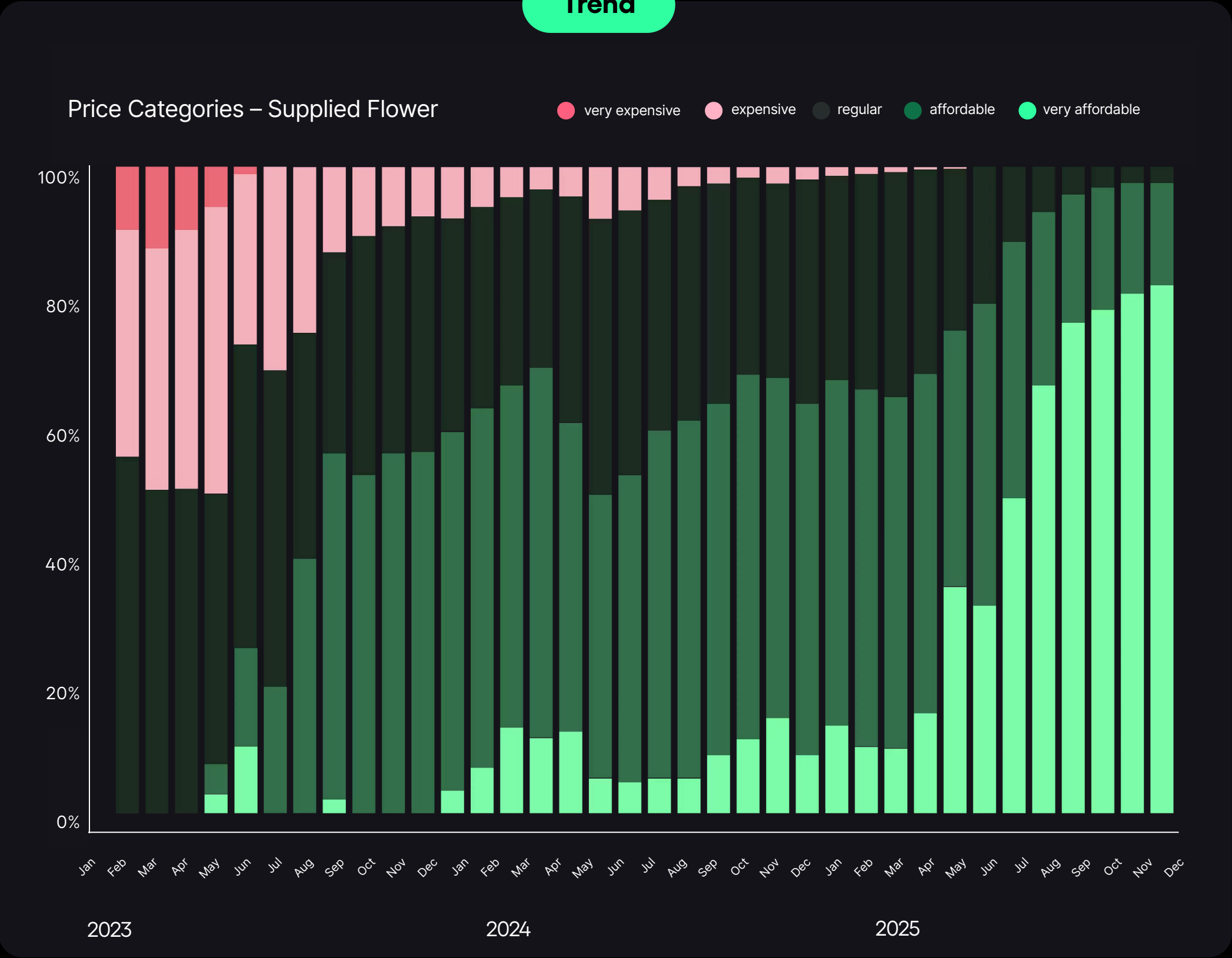
2

The Share of ‘Very Inexpensive’ Flower Rises to Nearly 80 Percent

In less than two years, flower categorized by consumers as being ‘very expensive’ and ‘expensive’, priced at twelve euros per gram or more, have completely disappeared from pharmacy shelves. ‘Very inexpensive’ flower priced below six Euros per gram now account for almost 80 percent of the market. At the beginning of the year, their share was just over 14 percent. Digital access has thus become so efficient that total treatment costs for patients generally amount to only 30 to 50 euros per month. This development has also contributed to increased acceptance of cannabis therapy among patients.

- < 6.00 €/g (very inexpensive)
- > = 6,00 bis < 9,00 €/g (inexpensive)
- > = 9,00 bis < 12,00 €/g (Regulär)
- > = 12,00 bis < 15,00 €/g (expensive)
- > = 15,00 €/g (very expensive)

Trend



3

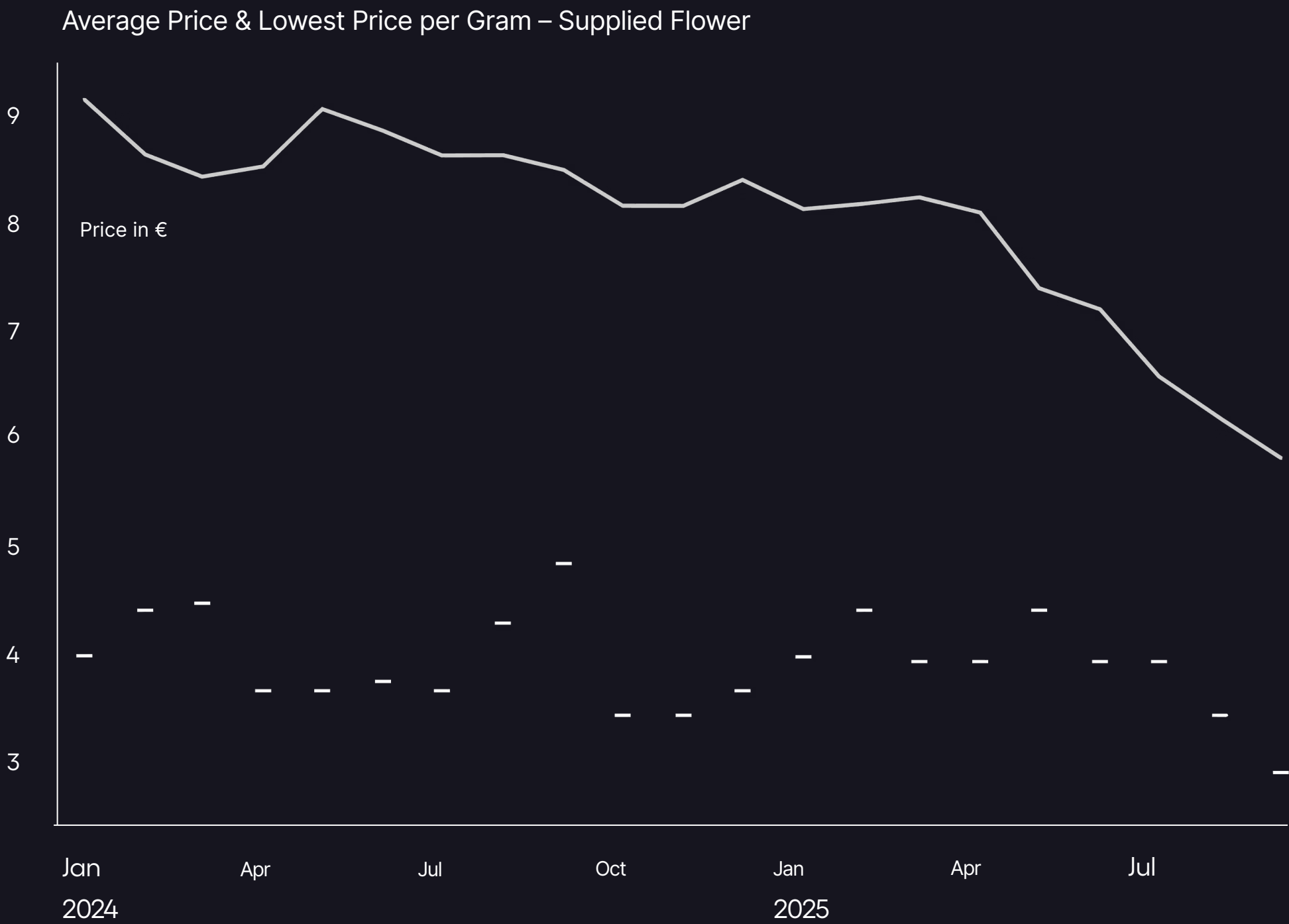
Price Reductions Are Reaching Patients

Over the course of 2025, the average price fell from over eight euros to €5.23. Importers, wholesalers, and pharmacies are therefore passing on falling prices to patients, who, as self-paying patients, ultimately benefit from affordable access to therapy without placing additional burdens on statutory health insurance funds.

This is particularly significant given that pharmacies may charge statutory health insurers up to €19.04 per gram when costs are covered, in addition to costs charged by the treating physician. This comparison further shows how effective and reliable telemedical care with medical cannabis has become—and that digitization of the healthcare system benefits patients in particular.

A study by the [Institute of Policy Evaluation](#) concludes that without cannabis telemedicine and mail-order delivery by specialized pharmacies, additional costs of €2.9 billion per year could arise for statutory health insurance.

Trend

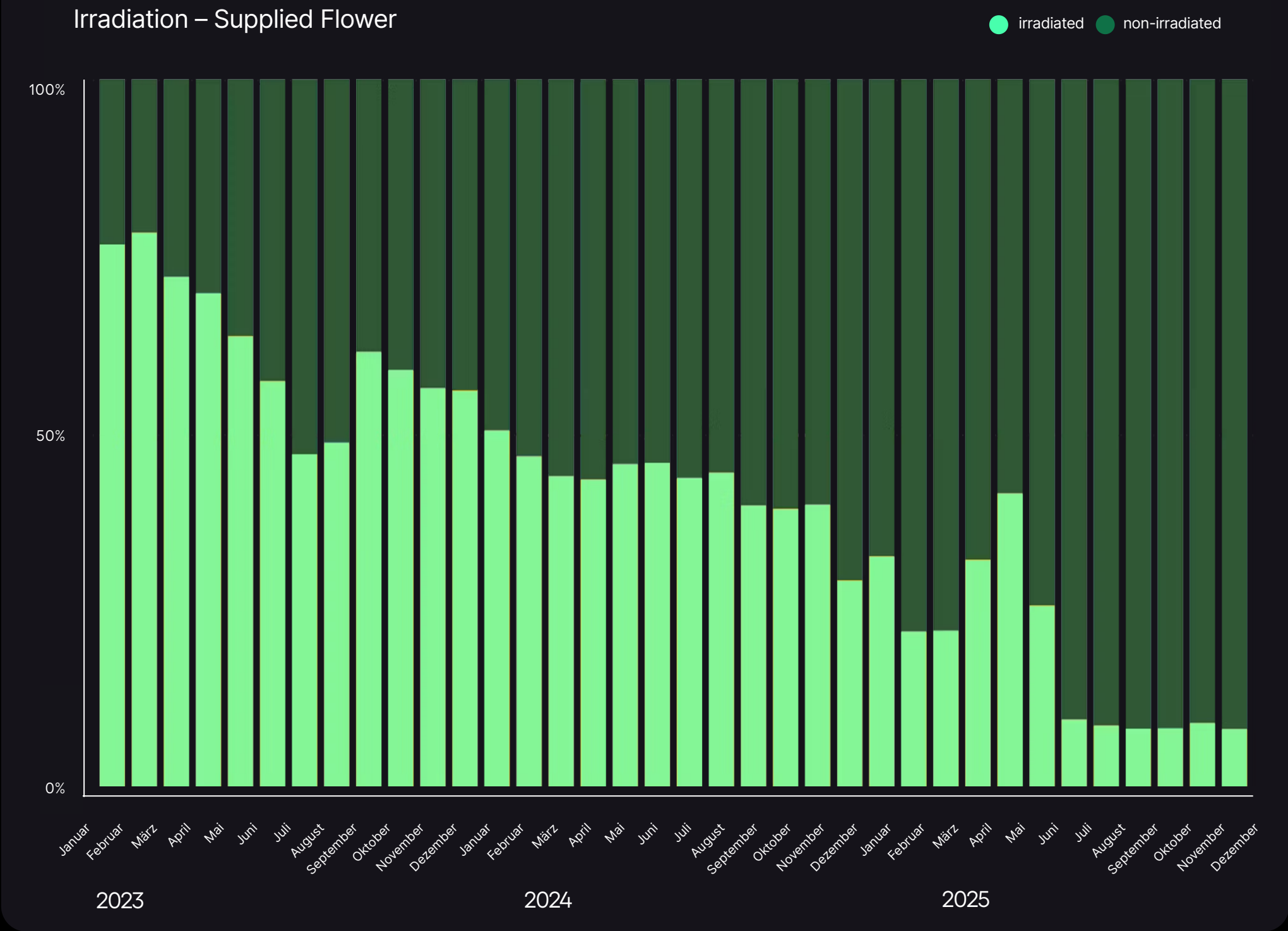


4

Preference for Non-Irradiated Flower Continues

In the second half of 2025, patients preferred non-irradiated flower. From July to December, their share was around 90 percent.

Trend

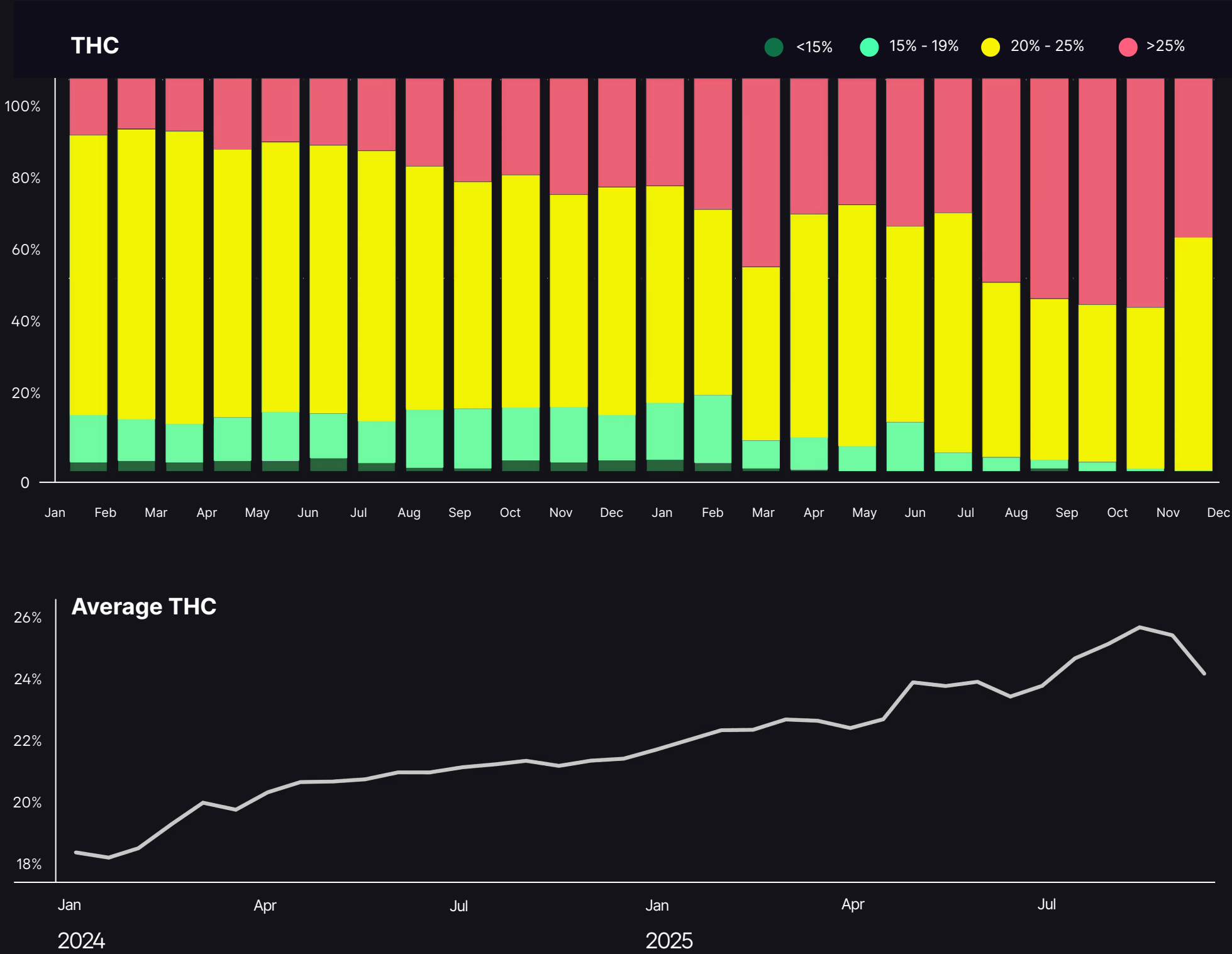


5

THC Content

In October and November 2025, the trend initially continued, with about half of dispensed flower containing more than 25 percent THC. In December, however, flower with THC content between 20 and 25 percent increased. This is also reflected in the average THC content, which fell significantly in December. Overall, the picture shows that patients have settled on THC levels of 20 percent or higher.

Trend



6

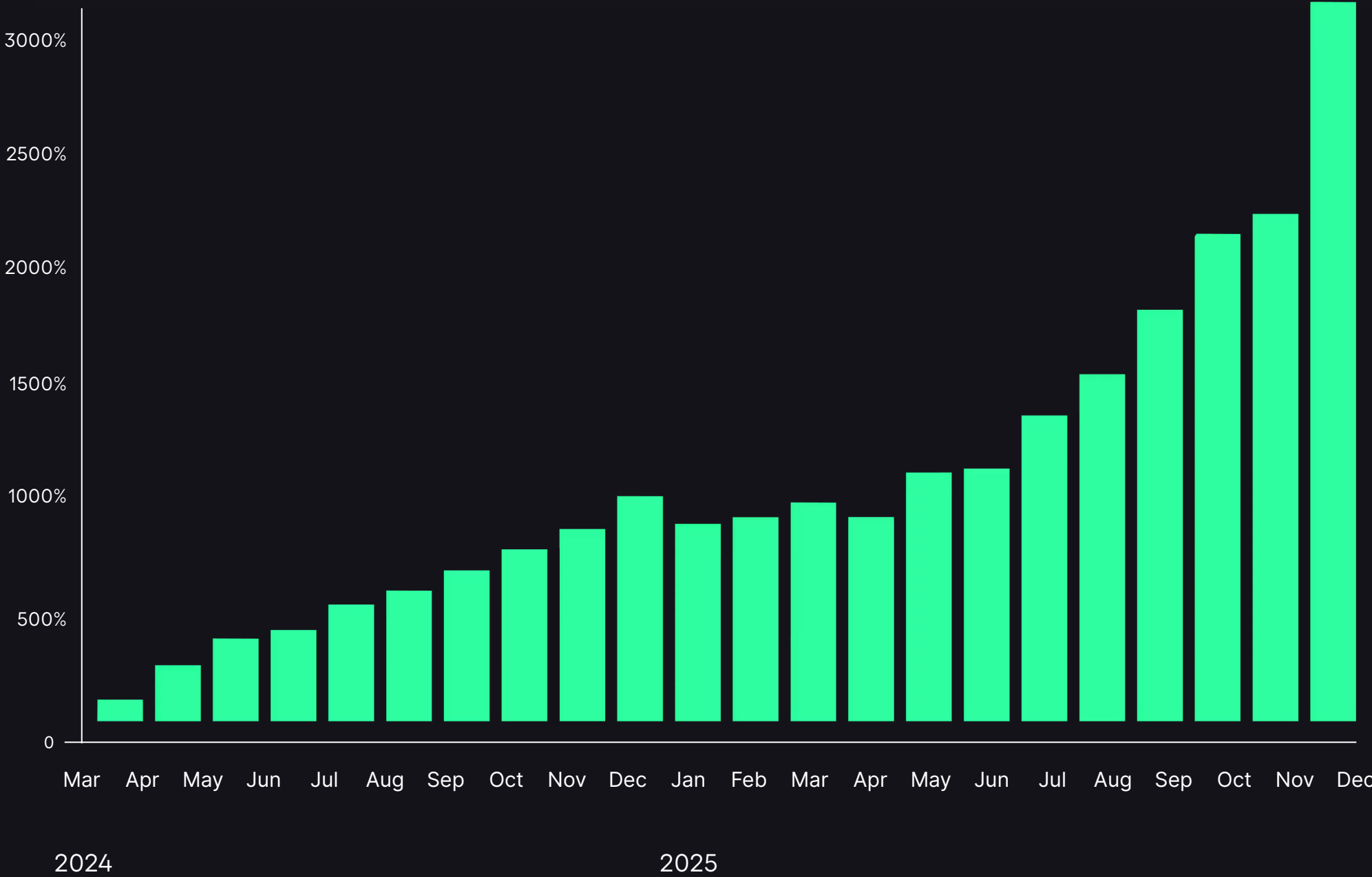
Number of Prescriptions Increases by More Than 3,300 Percent Compared with March 2024

In December, the number of prescriptions received reached an all-time high. Compared with March 2024—the last month before medical cannabis was removed from the BtMG and reclassified as a non-narcotic—the number of prescriptions issued increased by more than 3,300 percent.

If cannabis telemedicine were to be restricted, existing reluctance among general practitioners and specialists would leave hundreds of thousands of patients with little choice but to return to unlicensed sources. As a result, access to medically supervised treatment would become extremely difficult for patients with legitimate conditions that could be effectively treated with cannabis. Beyond this, given the prevalence of common chronic illnesses in Germany, millions more patients could benefit in the future from low-threshold, telemedical access to cannabis therapy—provided lawmakers continue to support the digitization of cannabis treatment.

Trend

Relevant Order Quantity (in grams) – Growth Compared to Orders in March





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Digitization in Germany has clearly enabled highly effective medical care and a cost-efficient supply system for hundreds of thousands of cannabis patients. The sharp decline in the price per gram is a clear indicator of this success. Yet, despite the fact that Germany's healthcare system remains outdated and expensive in many areas, this successful digitization appears to be viewed with skepticism by the Federal Ministry of Health.

Otherwise, it is difficult to explain the double standard of once again exposing hundreds of thousands of patients to the risks of illegality while simultaneously invoking "health protection." According to current estimates, such a move would also generate billions of euros in additional costs for the healthcare system. Medical cannabis alone saves approximately €2.7 billion annually through reduced sick leave, while requiring in-person doctor visits to initiate cannabis therapy would cost statutory health insurers an estimated €2.9 billion per year.

It is also important to remember that the innovative, digital supply of medical cannabis was built by forward-looking companies based in Germany. Importers, wholesalers, and local pharmacies have invested substantial resources and created jobs over the past two years to ensure safe, uninterrupted patient care despite rapid growth. This modern, future-ready digital supply chain is now at risk, even though there is broad consensus within government that far-reaching digitization of the healthcare system is unavoidable.

Conservative policymakers should therefore move beyond outdated prejudices against a plant that has been used medicinally for thousands of years and approach this issue with reason and pragmatism. Instead of placing unnecessary new burdens on the healthcare system, they should ask what can be learned from Germany's successful model of digitized cannabis therapy to help address the system's most pressing challenges.

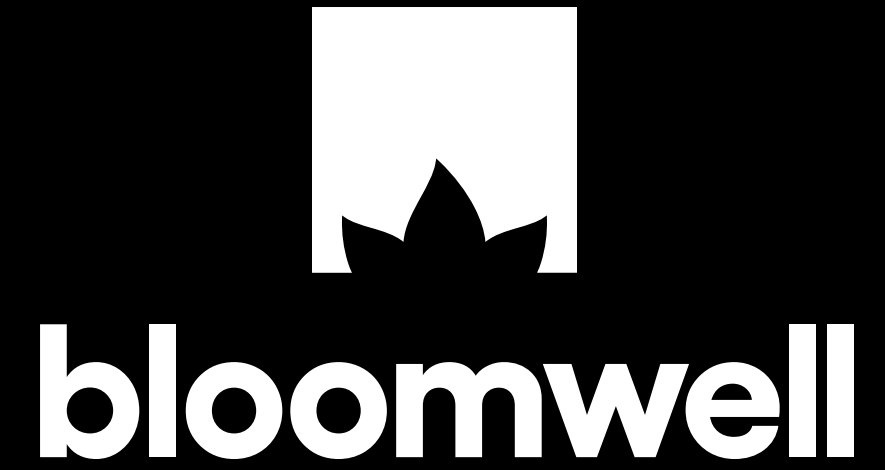
Methodology

For this report, prescriptions from January 2024 to December 2025, totaling in the six-digit range, were anonymized and analyzed.

The data for December 2025 are extrapolated and may differ slightly at a later date. All prescriptions were filled by self-paying patients via the Bloomwell online platform at German partner pharmacies.

About Bloomwell

Based in Frankfurt, the Bloomwell Group is one of Europe's leading medical cannabis companies. Founded in 2020, it has developed into a central hub within a new cannabis ecosystem that covers the entire value chain – excluding cultivation. Through innovation and the digitalization of the entire therapy process, the Bloomwell Group ensures effective and reliable access to medical cannabis for patients and contributes to the destigmatization of cannabis in medicine through data-driven research activities based on real-world data. The Bloomwell Group is a European pioneer in the development of telemedicine services, digital payment integrations, and tailored e-prescription solutions for medical cannabis. Today, it provides tens of thousands of cannabis patients, pharmacies, physicians, and wholesalers with a central digital infrastructure every month. Upon request, patients can receive an individual e-prescription via the Bloomwell platform, complete with a qualified remote signature by D-Trust, a company of the German Federal Printing Office (Bundesdruckerei).



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