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The Cannabis-Barometer – 2024 Medical Cannabis Market Trends in Germany

Foreword by **Dr. Julian Wichmann**

MD, Co-Founder and Specialist at Bloomwell GmbH



Most people in Germany who consume cannabis do so for health-related or specific medical reasons. Accessible cannabis therapy offers significant public health benefits. Thanks to digital platforms, patients now have reliable, physician-supervised, and straightforward access to medical cannabis that is manufactured and processed according to pharmaceutical standards. Concern about severe adverse effects have proven to be unfounded.

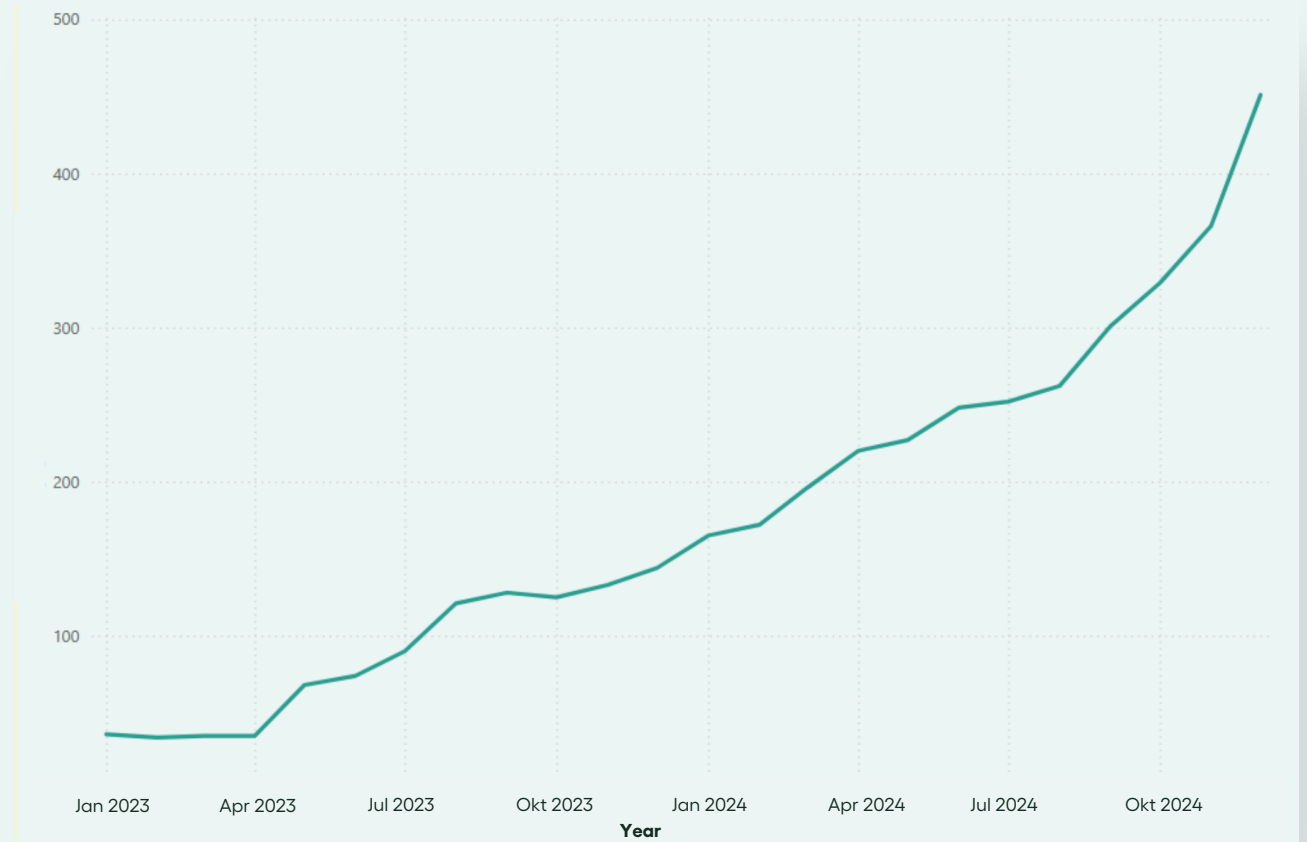
On the contrary, medical cannabis has significantly milder side effects compared to many other medications used to treat common conditions such as sleep disorders, chronic pain, and/or migraines. The plant also serves as a viable alternative when other treatments are unavailable or ineffective, such as for sleep disorders.

1

Number of Cannabis Strains Dispensed

The number of cannabis strains dispensed by pharmacies in Germany has multiplied over the course of the year. This variety provides patients and doctors with a broad selection for personalized cannabis therapy. However, it also poses challenges to navigating the various options, particularly for doctors who are not yet well-versed in medical cannabis therapy.

Number of dispensed products



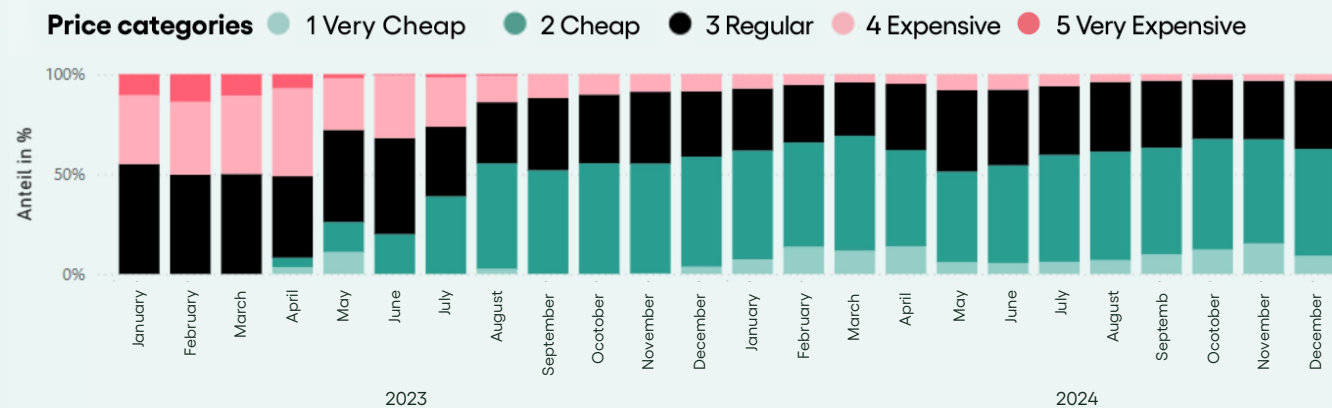
Number of different cannabis strains dispensed weekly by partner pharmacies (01/01/2023 to 12/31/2024).

2

Market Development: Cannabis Flower for Self- Paying Patients

Since June 2024, the proportion of medical cannabis flower categorized as ‘very affordable’ (<€6/g) and ‘affordable’ (€6–8.99/g) dispensed by pharmacies has steadily increased, indicating a sufficient supply. Only in April and May 2024 did the share of these lower-priced categories temporarily decline.

Price categories – Medical cannabis flower prescribed



- Very Affordable: Less than €6/g
- Affordable: €6–8.99/g
- Regular: €9–11.99/g
- Expensive: €12–14.99/g
- Very Expensive: More than €15/g

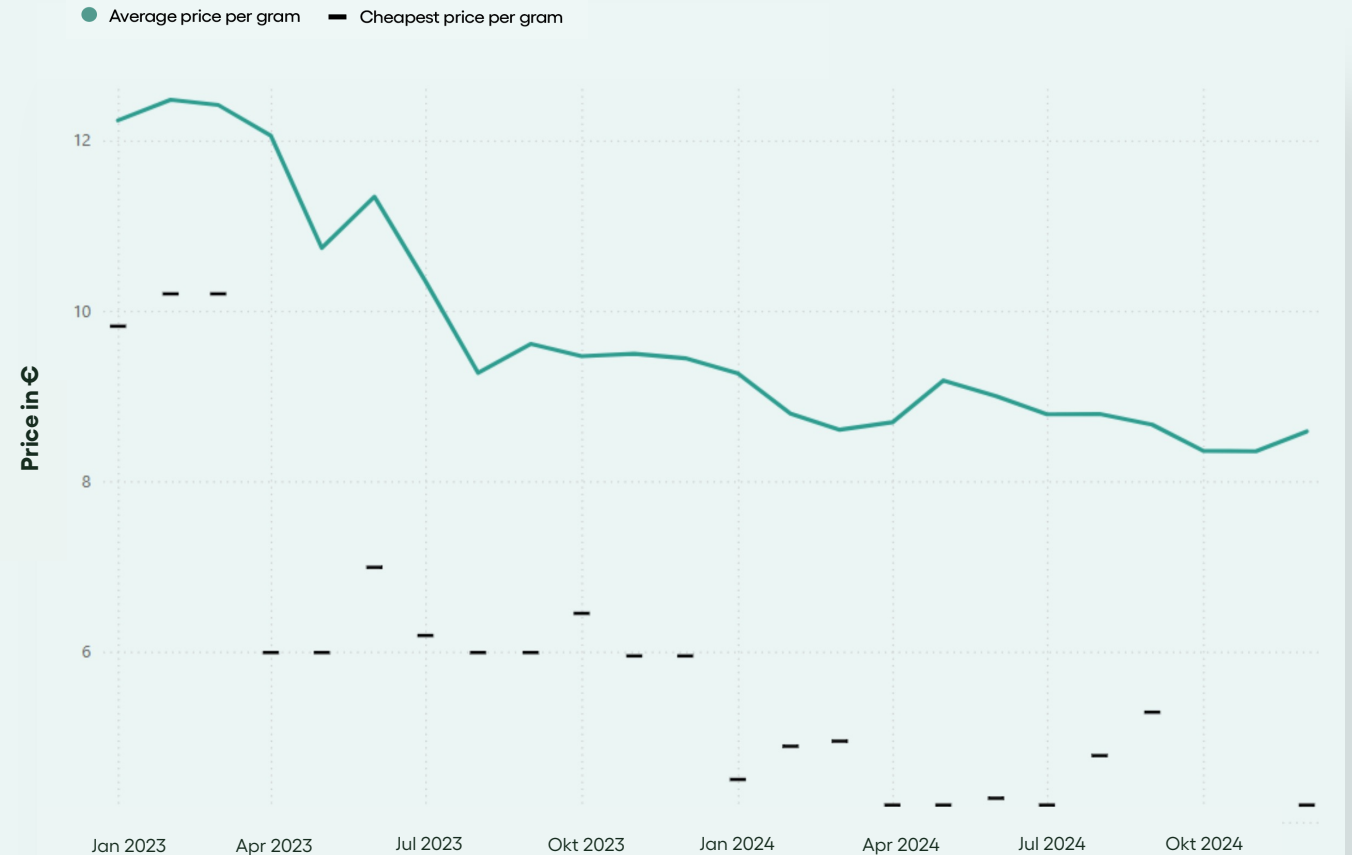
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Average Price and Lowest Price

The development of the current average price for medical cannabis indicates that importers were well-prepared for the increase in patient numbers starting April 1, 2024, when reclassification of medical cannabis as a non-narcotic went into effect.

After a brief price rise in April, the average price of all dispensed medical cannabis flowers steadily declined, reaching a new low of €8.35 per gram in November 2024, compared to € 9.27 in January. In October of last year, a strain of medical cannabis flower was prescribed for the first time at €3.99 per gram, the lowest price of the year.

Average and Lowest Prices Per Gram – Dispensed Cannabis Flower



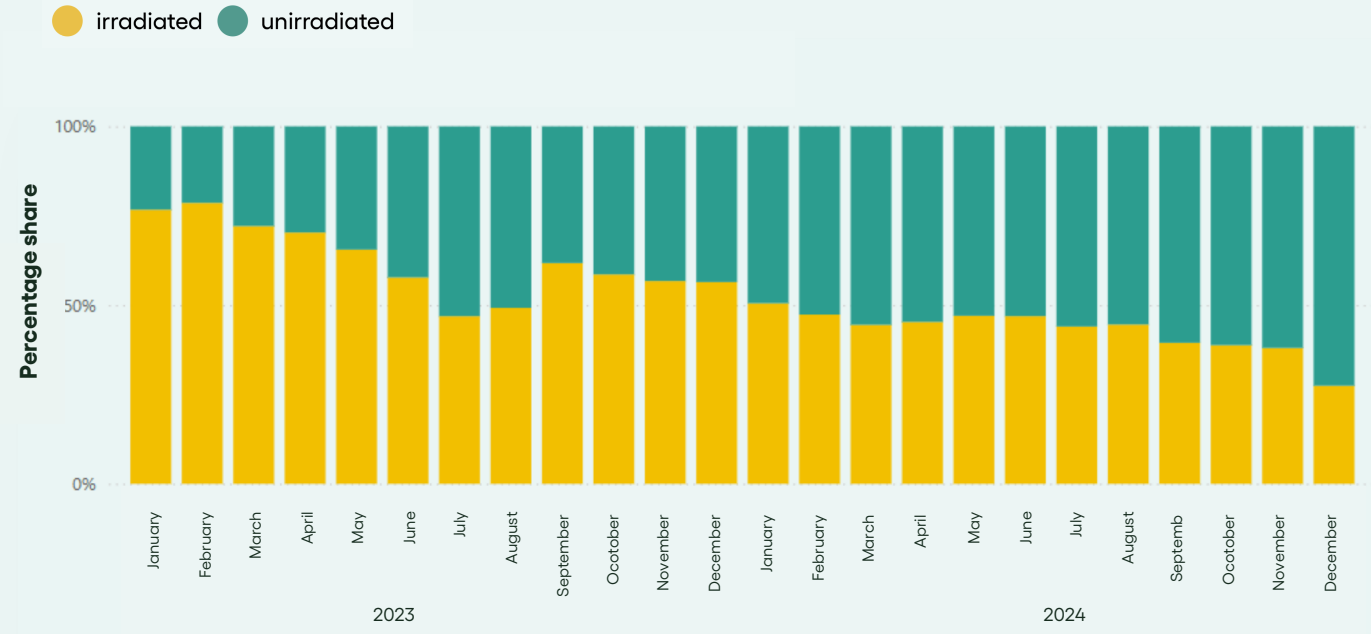
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Proportion of Non-Irradiated vs. Irradiated Cannabis Flowers

A clear trend is evident in the issuing of prescriptions of irradiated* versus non-irradiated medical cannabis flowers. In January, over 50% of prescribed flowers were irradiated; this figure dropped to 47% in February and further to 27% by December.

**Strict guidelines ensure that medical cannabis flowers are free from microbial contamination (e.g., mold or bacteria). Gamma irradiation is one method used to achieve this.*

Irradiated vs. Non-Irradiated Cannabis Flower Prescriptions



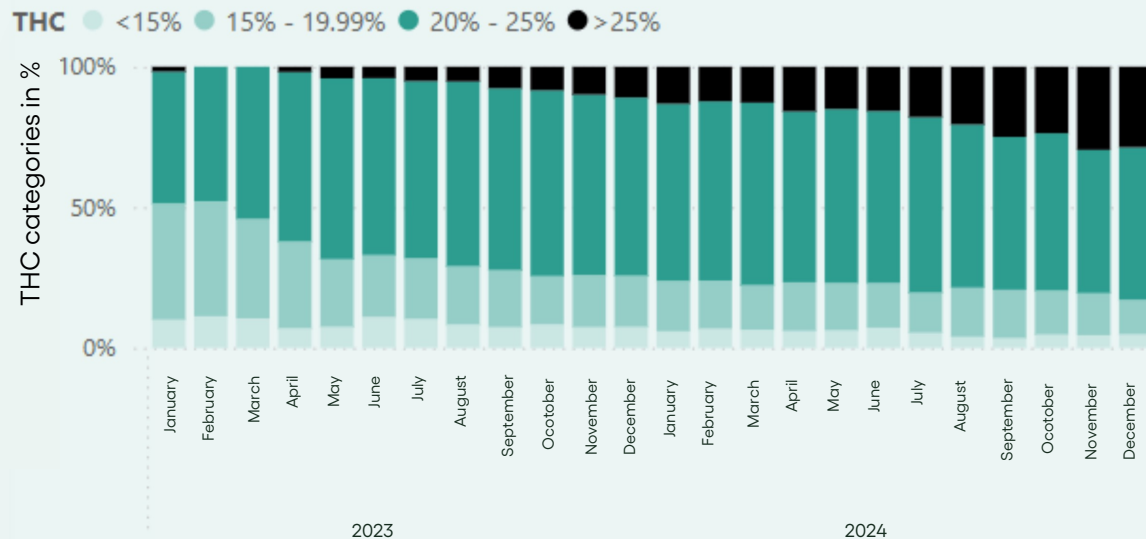
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Average THC Content and Proportion of THC Levels

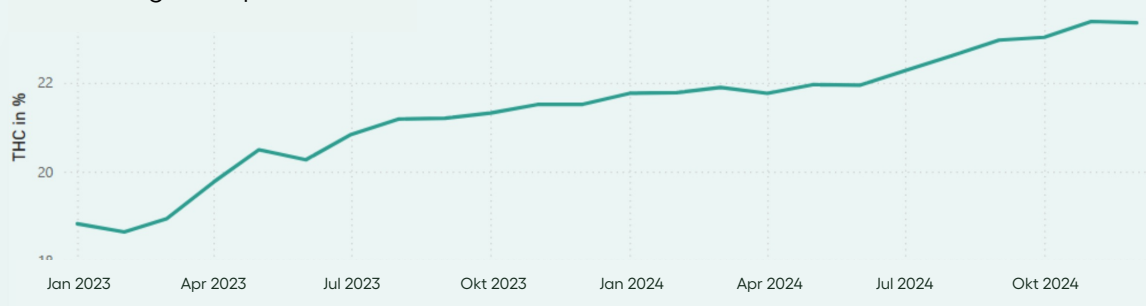
Over the year 2024, the share of medical cannabis flowers prescribed with a THC content above 25% has significantly increased. While high-THC strains were rarely prescribed in the first quarter of last year, their share rose to 29% in November and December.

This trend can be partly attributed to patients needing higher THC concentrations following their acclimatization phase, in order to achieve the same effect. Additionally, over half of all prescriptions still involve strains with 20–25% THC. The average THC content increased to 23.35% by year-end, compared to 21.77% in January.

THC Categories – Dispensed Flower



THC Average – Dispensed Flowers

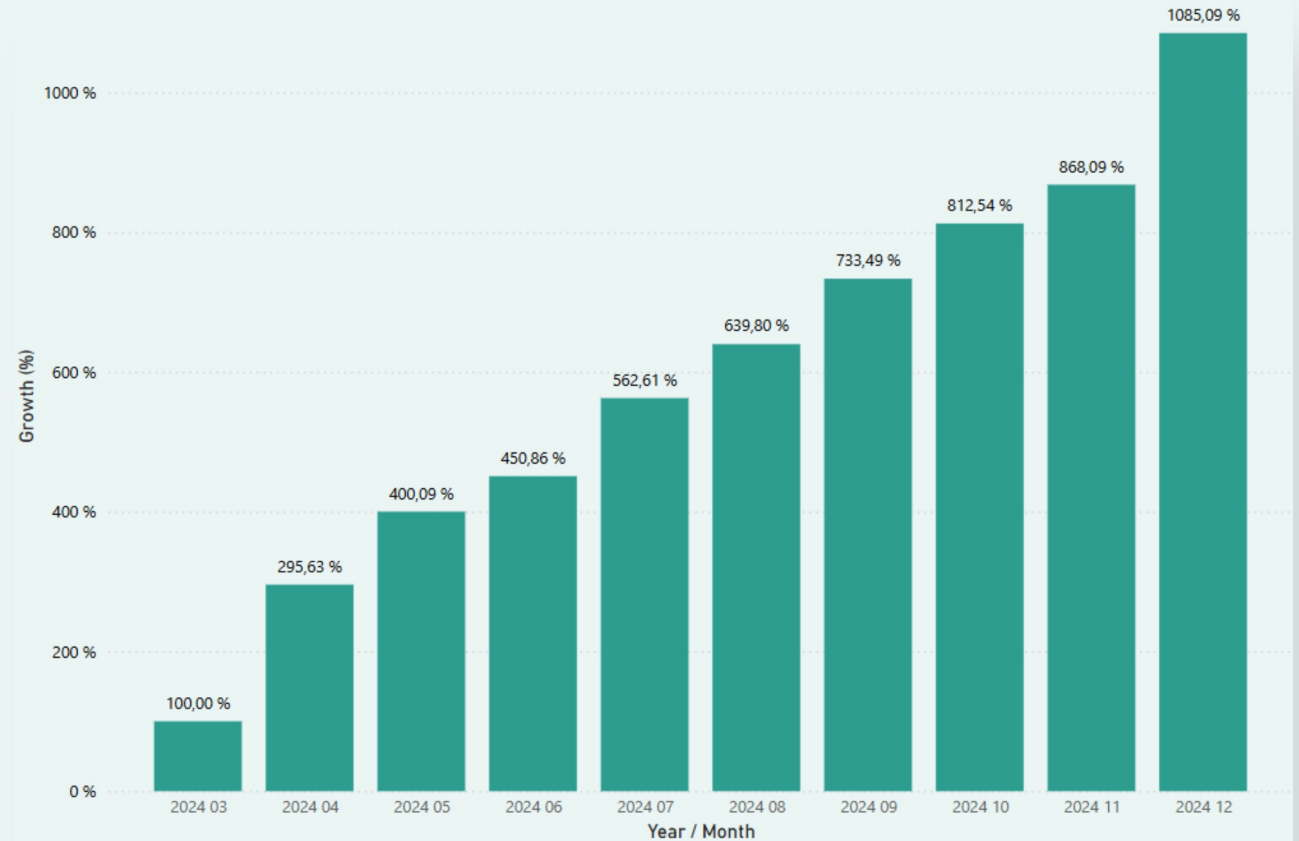


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Percentage Change in Prescription Numbers

Since the reclassification on April 1, 2024 the number of prescriptions received by pharmacies has increased rapidly. In December 2024, the number of prescriptions was more than 1,000 percent higher than in March 2024.

Relative Orders Growth with respect to March 2024 Orders





Closing remarks by **Niklas Kouparanis**

Co-Founder and CEO of Bloomwell Group GmbH



Bloomwell Group has the most comprehensive data pool on cannabis therapy in Europe, incomparable to any other organization. Few companies offer the same transparency. As digital pioneers and innovators, it's in our DNA to use our data to improve patient care.

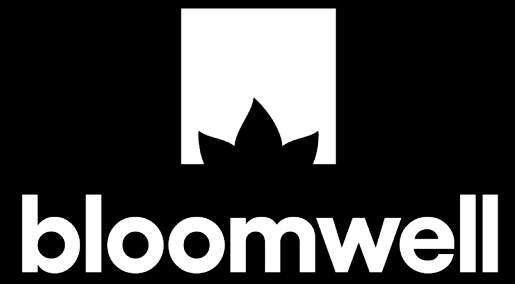
Medical cannabis therapy requires both medical expertise and political will. With this 2024 report, we aim to help rationalize the emotionally charged public debate. Patients in the 21st century deserve modern digital healthcare, but systemic resistance to change remains a challenge. Medical cannabis has shown what's possible online, and we are just beginning.

Methodology

This report analyzed prescriptions from January to December 2024, encompassing six-figure data points. The data included for December 2024 is a projection and may be subject to minor adjustments.



Based in Frankfurt, Bloomwell Group is Europe's leading platform for medical cannabis, measured by patient numbers, cooperating doctors, partner pharmacies, and wholesalers. Founded in 2020, it has become the central hub in a new cannabis ecosystem, encompassing the entire value chain (except for cultivation). Bloomwell is a pioneer in telemedicine, digital payment integration, and e-prescription solutions, advancing medical cannabis accessibility and reducing stigmas.



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