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The Cannabis Barometer – Potential Consequences of Restricted Telemedicine Access

A Survey of 2,571 cannabis patients.





Dr. Julian Wichmann, M.D.

Co-Founder, CEO of Bloomwell GmbH, and specialist physician



In a representative survey of over 1,000 cannabis users in August 2024, 94.4% indicated at least one health or medical reason for using cannabis, even though the overwhelming majority were obtaining it illicitly at the time. Given the current political debate, which is shaped by blanket suspicions of misuse and devoid of factual evidence, these numbers – along with a recent survey of more than 2,500 cannabis patients – shed new light on the issue.

Since August 2024, hundreds of thousands of patients have likely transitioned from the illicit market – with all its risks – to legal, digitally accessible, physician-supervised cannabis therapy using pharmaceutically pure preparations.

Respondents in the latest survey conducted by Bloomwell yet again voiced significant concerns about illicit products. However, the majority said that if digital access were restricted –

as currently proposed by some politicians – they would have no alternative except to return to obtaining their cannabis from illicit sources.

Ironically, the allegations of misuse relate to prescription medication, where limiting digital access would have only negative consequences – for patients, the economy, the justice system, the state, and public health.

At the same time, we see consistent, widespread misuse of numerous other prescription drugs with high dependency potential and serious side effects – but there is currently no comparable evidence that pharmacy-grade medical cannabis poses the same risks. From a medical perspective, a re-criminalization of hundreds of thousands of cannabis patients must be avoided at all costs.



1

Out of Criminality

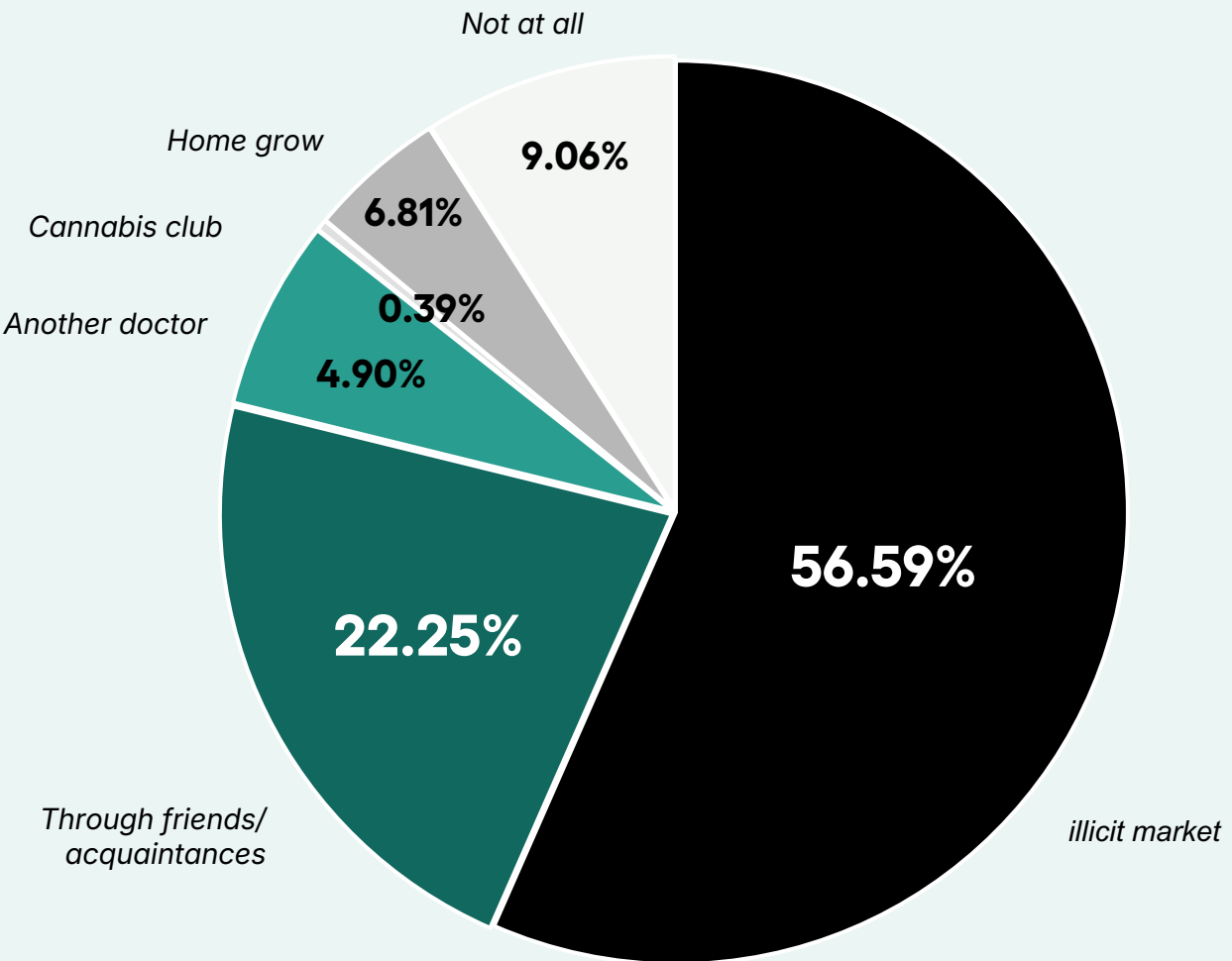
Ending Cannabis Criminalization

The low-barrier digital access to cannabis therapy has empowered patients in Germany to leave the illicit market and its safety risk behind and enter safe, physician-supervised treatment with strictly controlled products. About 57% reported that before starting digital therapy, they obtained cannabis primarily through illicit markets. Another 22% obtained it through friends and acquaintances – distribution that remains punishable under the current cannabis law.

Moreover, there is little evidence that members of licensed cannabis clubs, which are now permitted under Germany’s Cannabis Act, have switched to online therapy. Conversely, the survey confirms that general practitioners remain highly restrictive in prescribing cannabis, highlighting the urgent need for specialized digital platforms in Germany to ensure reliable and cost-efficient care.

Among the 9% of patients who previously had no access to cannabis, most are likely people with severe medical conditions for whom other medications failed or caused serious side effects – and who would otherwise have had little to no access to therapy.

HOW DO YOU ASSESS THE PRICES OF PHARMACY-GRADE MEDICAL CANNABIS COMPARED TO THE ILLICIT MARKET?





2

How do you assess the prices of pharmacy-grade medical cannabis compared to the illicit market?

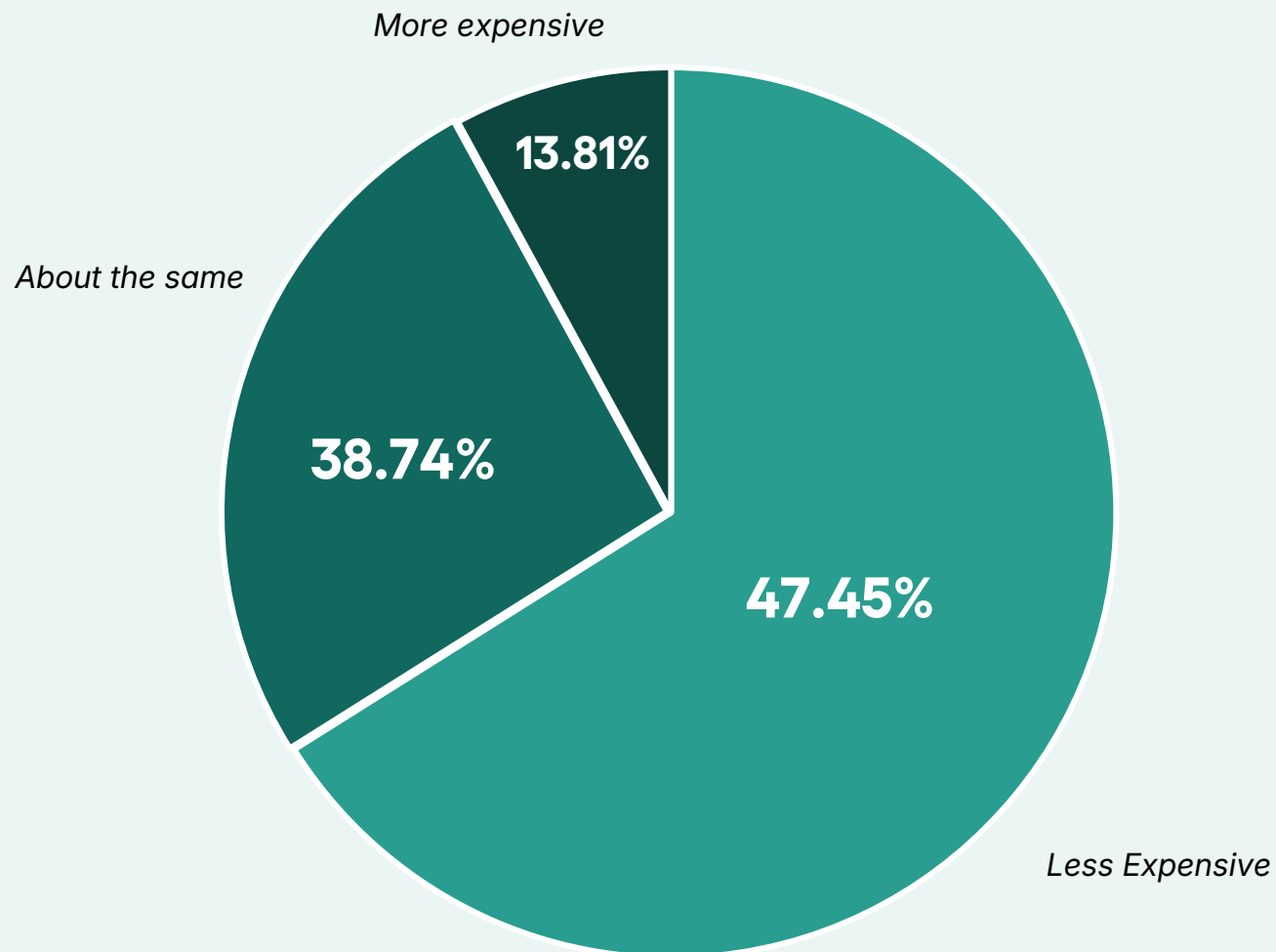
Price as a Central Factor

Patient feedback confirms what market data shows: the majority consider pharmacy-sourced, controlled medical cannabis to be more affordable – or at least not more expensive – than the illicit market.

Affordable access is essential not only to enable more affluent individuals to pay out of pocket, but also to help as many patients as possible access safe treatment. How do you assess the prices of pharmacy-grade medical cannabis compared to the illicit market?

These low costs are a prerequisite for enabling many patients to transition from the illicit market to legal cannabis therapy and prevent them from returning to illicit structures.

MEDICAL CANNABIS FROM THE PHARMACY COMPARED TO THE ILLICIT MARKET



n=2.571



3

What would be your main alternative without digital access to medical cannabis?

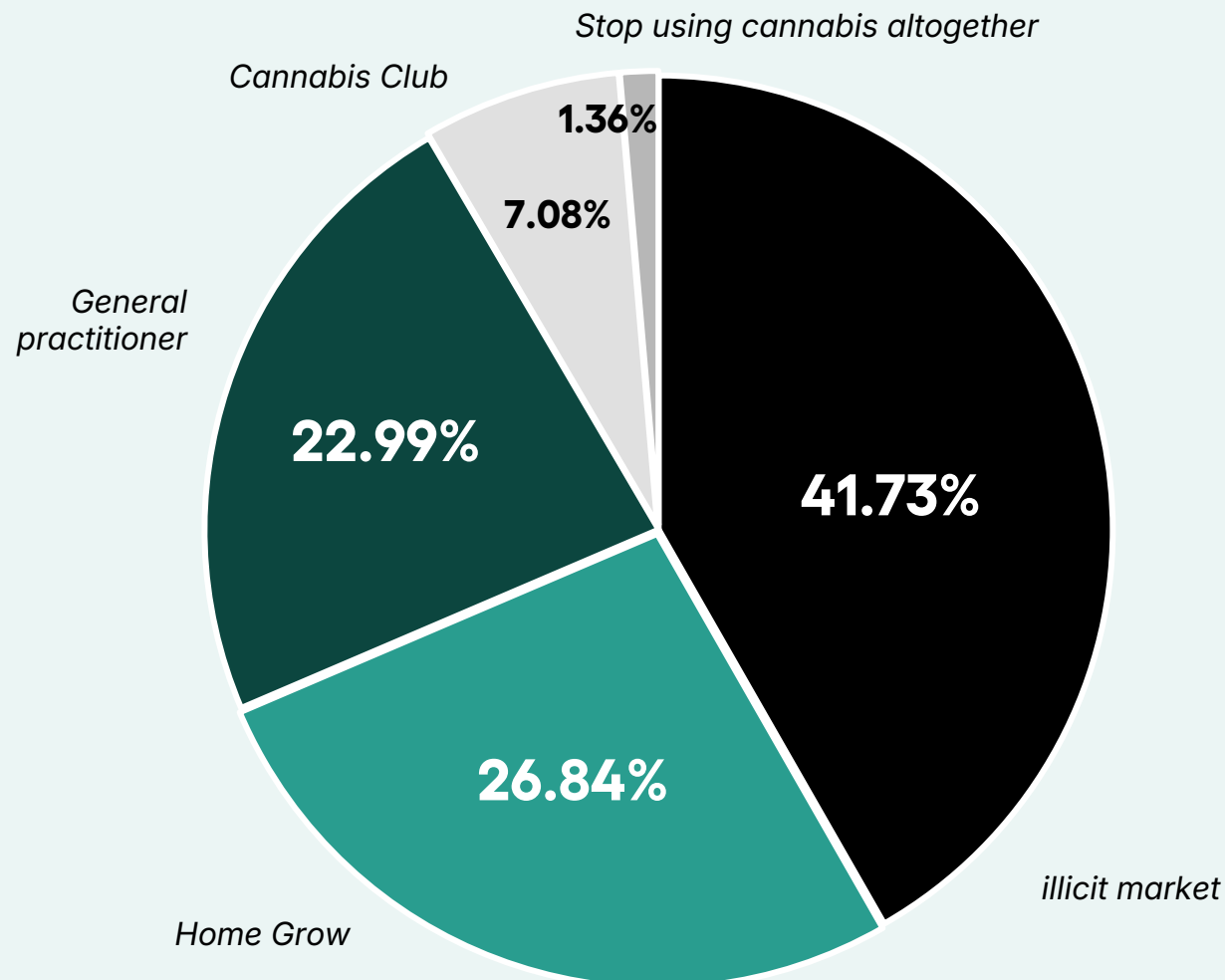
Restriction Equals De Facto Re-Criminalization of Patients

Over 40% of patients reported that without digital access, they would be pushed back into the illicit market. Only 7% would consider joining a legal cannabis club.

This further illustrates that digital therapy does not compete with the emerging non-profit cultivation associations, which primarily serve recreational users.

About 23% would consider consulting a general practitioner. However, it's questionable whether enough doctors will gain the necessary expertise in the coming months to support these patients – especially considering the German healthcare system is operating at capacity, and many physicians are still uninformed about the medical and wellness application of cannabis for easing a wide range of patient symptoms.

WHAT WOULD BE YOUR MAIN ALTERNATIVE WITHOUT DIGITAL ACCESS TO MEDICAL CANNABIS?



n=2.571



4

The Illicit Market Poses Risks to Patients

Patients overwhelmingly believe that pharmacy-grade, controlled cannabis is significantly safer than unregulated products from illicit markets.

Three-quarters believe illicit cannabis poses higher health risks and is more likely to be contaminated.

82% feel overall more comfortable with regulated, medical-grade products from pharmacies.

Pharmacy cannabis poses a lower risk of being contaminated

83.04%

Pharmacy cannabis is less contaminated

76.43%

Pharmacy cannabis has fewer side effects

59.94%

Illicit cannabis poses more health risks

73.82%

I feel more comfortable with medical cannabis from the pharmacy

82.92%

0 20 40 60 80 100



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B

Trends in Cannabis Flower – Q2 2025



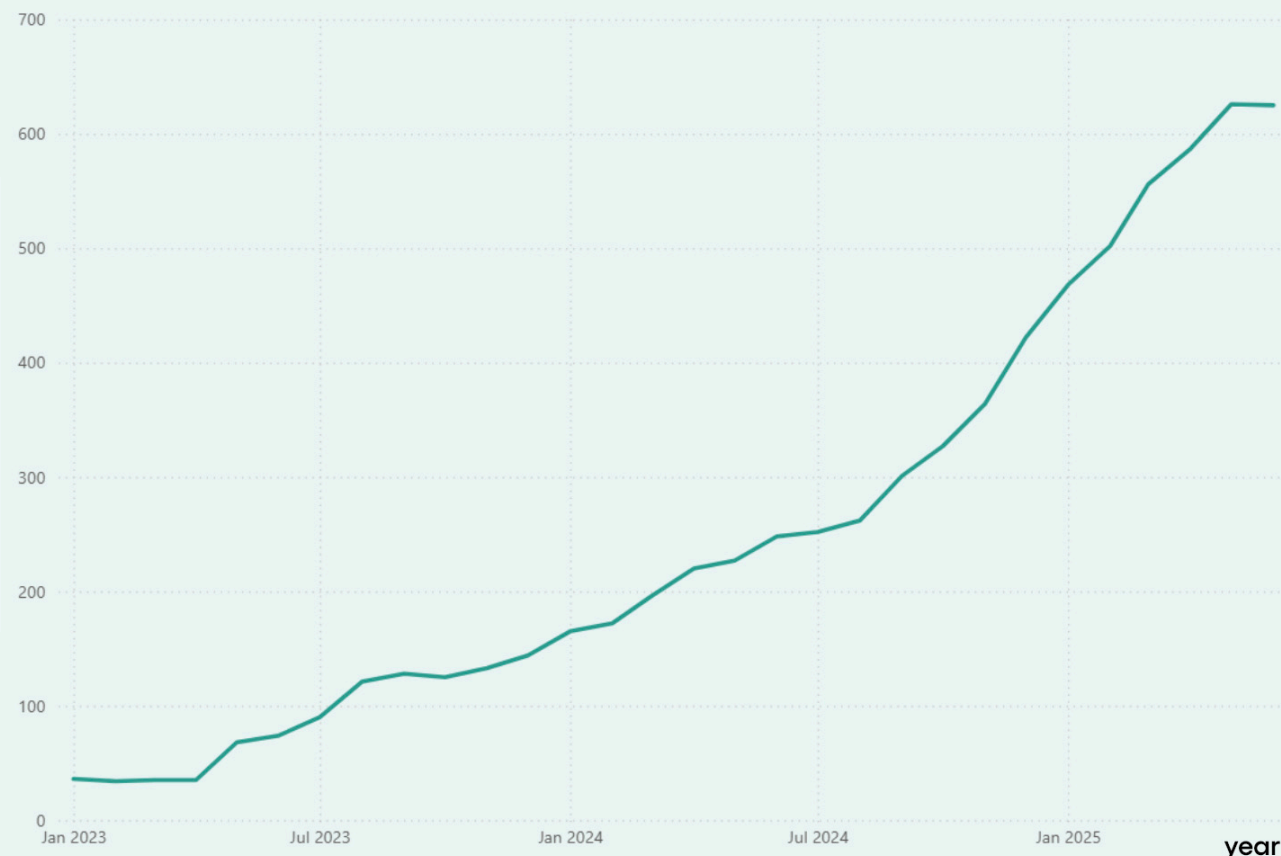


1

Over 600 Different Products Available

There are now more than 600 different cannabis products available on Germany's licensed medical cannabis market. An increasing number of manufacturers are entering the German market. For doctors unfamiliar with medical cannabis as a treatment for patients, this overwhelming variety increases hesitation. They must choose the right product for each patient's individual condition and adjust treatment based on patient feedback. This product variety may also be one reason why general practitioners and outpatient specialists still rarely prescribe medical cannabis.

NUMBER OF DISPENSED FLOWER



2

Share of Very Inexpensive Cannabis Flower Rose Sharply in Q2

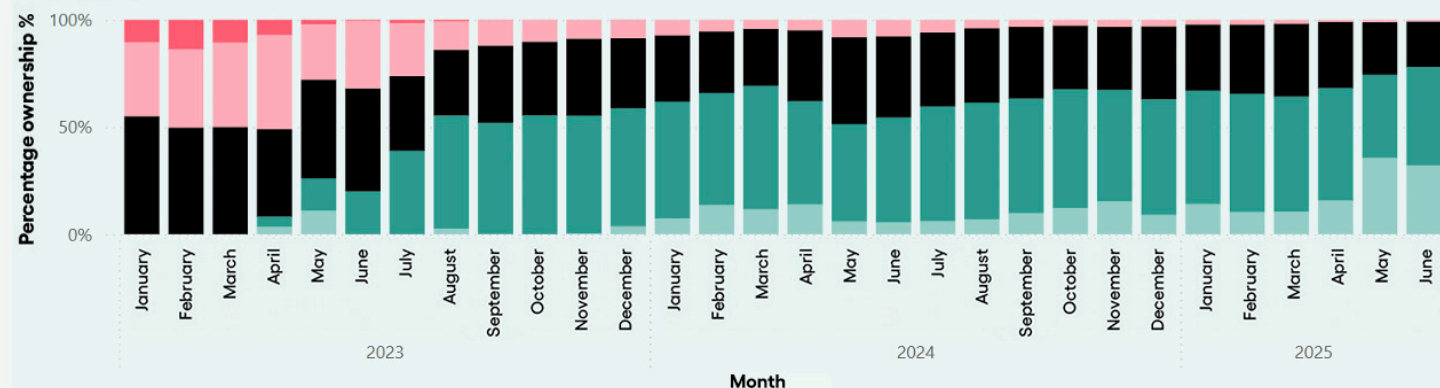
In Q2, very low-cost flower (max. €6) saw a sharp rise – from just over 10% in March to around 35% in May.

In contrast, “regular” flower (€9–12) fell to about 21% in June (from over 24% in May).

The share of expensive flower (over €12) has become negligible.

PRICE CATEGORIES – MEDICAL CANNABIS FLOWER PRESCRIBED

Price categories 1 Very Cheap 2 Cheap 3 Regular 4 Expensive 5 Very Expensive



< 6.00 € (Very Inexpensive)

> = 6,00 to < 9,00 € (Inexpensive)

> = 9,00 to < 12,00 € (Average)

> = 6,00 to < 9,00 € (Expensive)

> = 15,00 € to < 9,00 € (Very Expensive)

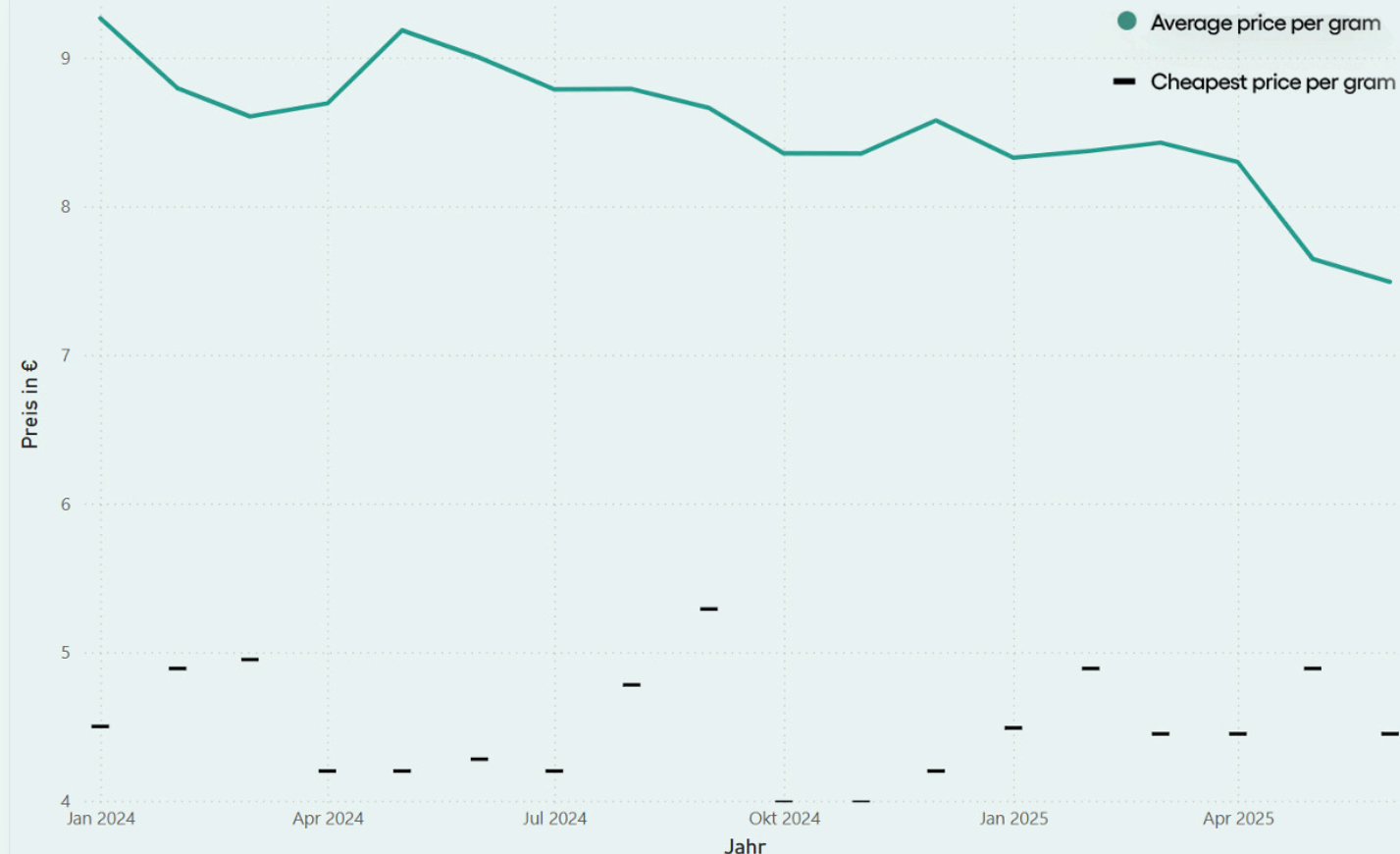


3

Continued Price Declines Point to Oversupply

Average prices continue to fall – now at **€7.49**, down from over €8 at the beginning of the year. This significant price drop in Q2 strongly suggests that Germany is approaching an oversupply of imported cannabis flower – if it hasn't already entered that phase. This current market dynamic particularly benefits cannabis patients.

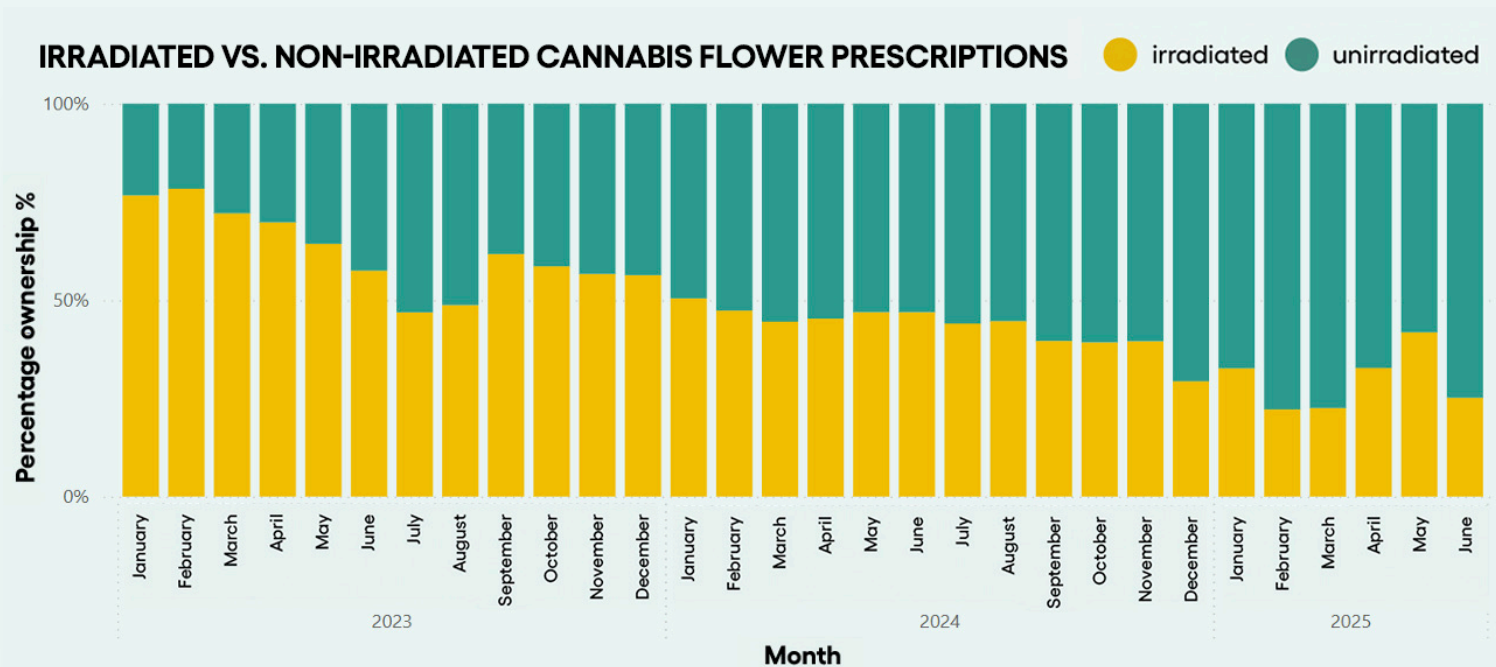
AVERAGE AND LOWEST PRICES FOR GRAM – DISPENSED CANNABIS FLOWER



4

Preference for Non-Irradiated Flower Continues

After a steep decline in irradiated products in Q1 2025, their share slightly increased in April and May. However, patients still overwhelmingly prefer non-irradiated cannabis.

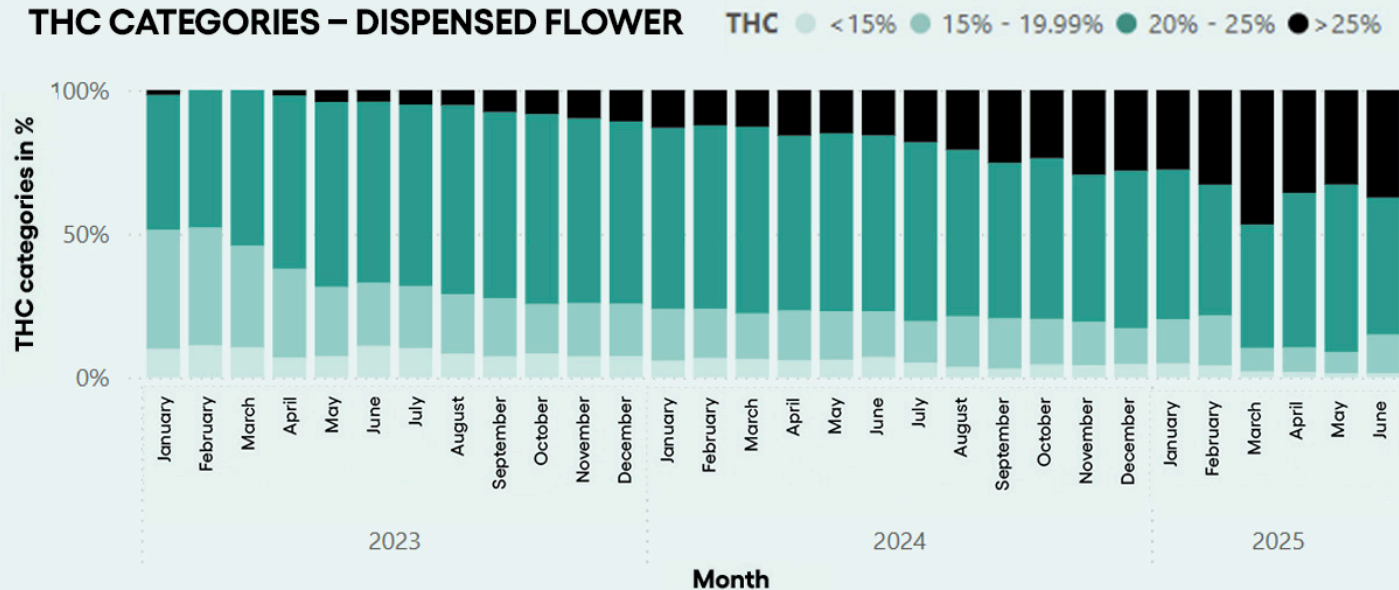


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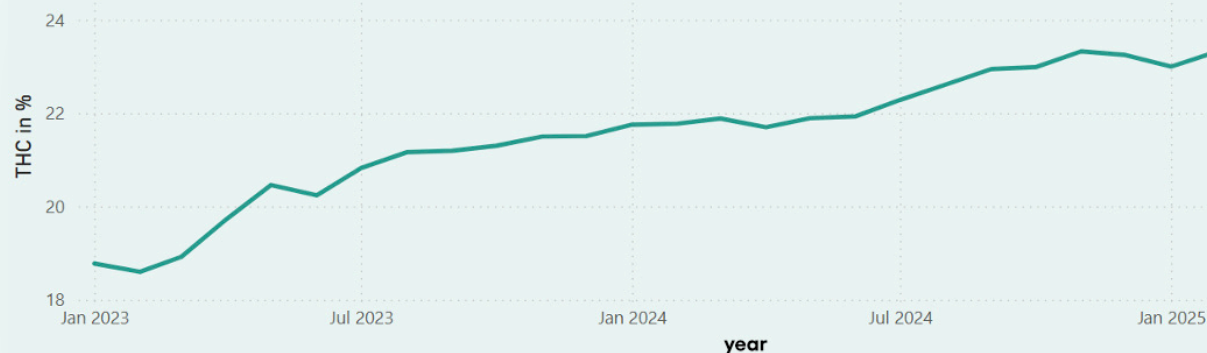
THC-Content Stabilizing

Average THC content remained just above 24% in Q1, with the share of high-THC flower (over 25%) remaining stable in recent months. This suggests that many physicians, together with their patients, have now successfully stabilized the therapy.

No further increase was observed, unlike in Q1.



THC Average – Dispensed Flowers



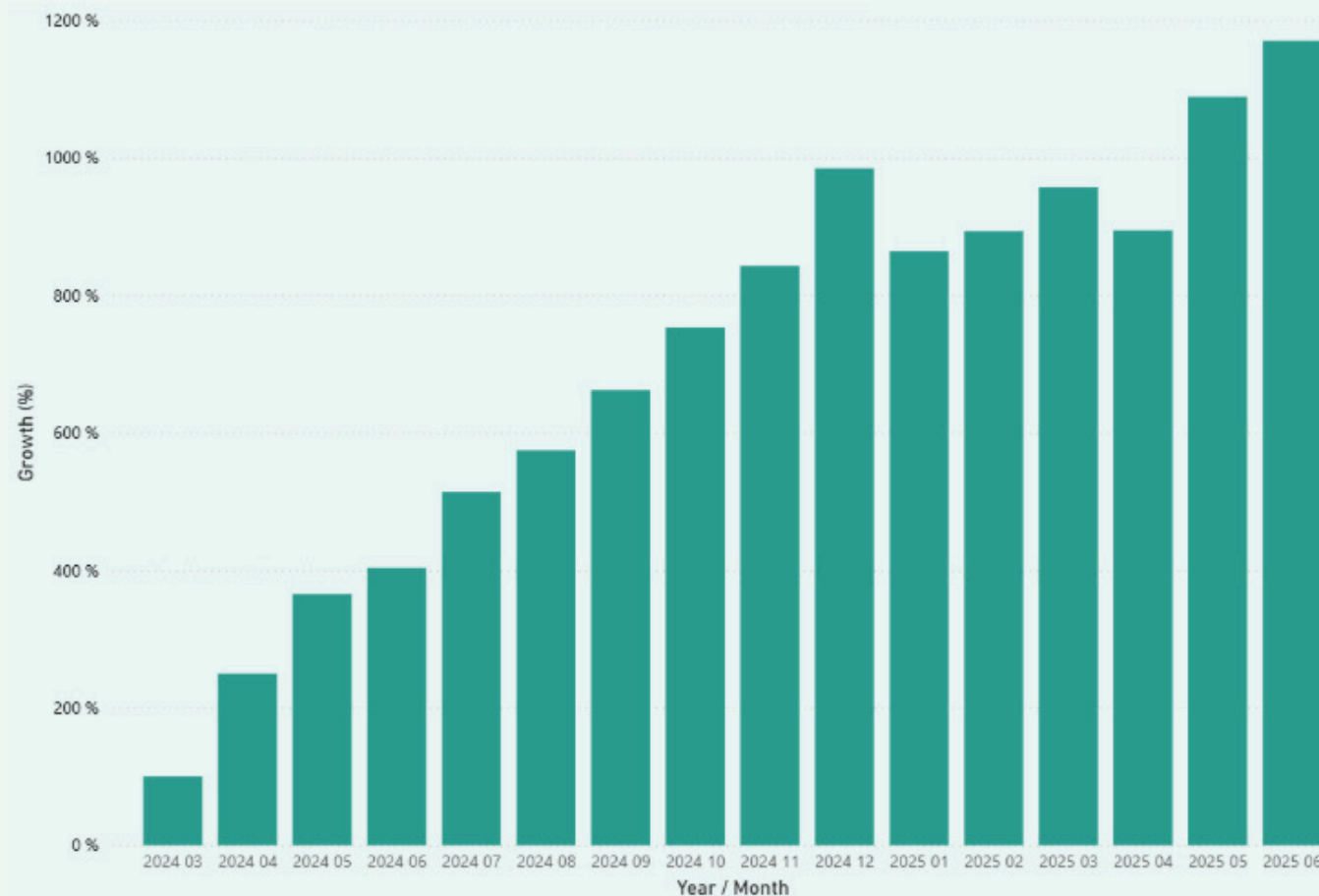


6

Increase in Amount of Prescriptions Filled (in Grams) Since March 2024

In May and June 2025, the number of prescriptions filled exceeded those from March 2024 – the final month before CanG went into effect and medical cannabis was still classified as a narcotic – **by approximately 1,100%.**

RELATIVE ORDERED AMOUNT (IN GRAMS) GROWTH WITH RESPECT TO MARCH'S ORDERS





Niklas Kouparanis

Co-Founder and CEO, Bloomwell Group GmbH



Self-paying cannabis patients benefit from falling prices, but the dramatic price drop from April to May 2025 should set off alarm bells for many wholesalers. While some still publicly claim there are supply shortages, we're actually heading into a phase of extreme oversupply. Exporters from around the world are now flooding the German market with large quantities of medically regulated cannabis, intensifying the price war.

Looking at the political map, one can only shake their head. The sharpest critics of digital access are coming from the very regions where the highest share of patients benefit from it – as if they want to alienate their own voters.

A majority of Germans now support full legalization, and the medical benefits of cannabis are widely accepted across all social strata.

The premise that at politicians are seriously considering slowing digital innovation in an already overburdened healthcare system, re-criminalizing patients, threatening jobs, and forfeiting tax revenue is beyond absurd – and would be laughable if the consequences for patients and public health weren't so serious.



Methodology

Bloomwell conducted an anonymous survey in June 2025 with 2,571 patients who began cannabis therapy through Bloomwell.

Additionally, prescription data from January 2023 to June 2025, – in the six-figure range – was anonymously analyzed. The June 2025 figures are future projections that may slightly vary. All prescriptions were paid out of pocket via Bloomwell's online platform and filled by partner pharmacies in Germany.

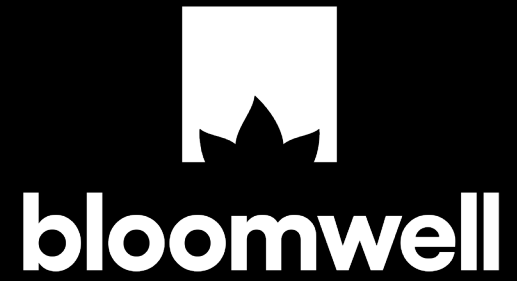


Frankfurt-based Bloomwell Group is one of Europe's leading companies for medical cannabis. Founded in 2020, it has become the central hub of a new cannabis ecosystem covering the entire value chain – except cultivation.

Through innovation and full digitization of the therapy process, Bloomwell ensures effective and reliable patient care. It also contributes to the destigmatization of medical cannabis through real-world data-based research.

Bloomwell is a European pioneer in telemedicine, digital payments, and individualized e-prescription solutions for medical cannabis. Today, it provides tens of thousands of patients, pharmacies, physicians, and wholesalers with a central digital infrastructure each month. Patients can receive personalized e-prescriptions via the Bloomwell platform, signed digitally by D-Trust, a company of the German Federal Printing Office.

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