Medical Marijuana Advisory Board Meeting

Tuesday, March 22, 2022

10:00am to noon
MMAB Agenda

I. Call to order, roll call and introduction of new Board members
II. Approval of the previous meeting’s minutes – meeting Nov. 16, 2021
III. Program Update
IV. Old Business
   a. Opportunity to provide feedback and/or contact the Board
V. New Business
   a. Subcommittee Chairs and Members
   b. Subcommittee Updates:
      i. Regulatory Review – Janet Getzy Hart, Subcommittee Chair
      ii. Patient and Caregiver – Shalawn James, Subcommittee Chair
         • Findings and Recommendations about Affordable Access to Medical Marijuana.
      iii. Medical Review – Dr. Denise Johnson, Subcommittee Chair
         • Update on a process for approving Serious Medical Conditions (SMCs) for research only.
         • Proposed update on the policy to add, modify, or remove a qualifying medical condition.
      iv. Reports – Luke Schultz, Subcommittee Chair
         • Presentation of report outlining the Board’s actions pertaining to a SMC Application for Chronic Hepatitis.
   v. Medical Research – Bhavini Patel, Subcommittee Chair
      • Discussion on new forms of medical marijuana.
VI. Additional Discussion/Q&A
VII. Adjournment
Medical Marijuana Program Update

• Medical Marijuana Assistance Program
• Program Metrics
• Patient Purchasing Activity
• Permittee Pricing Trends
Medical Marijuana Assistance Program (MMAP)
## Medical Marijuana Program Update

### Current and Planned Medical Marijuana Assistance

<table>
<thead>
<tr>
<th></th>
<th>Full Cost</th>
<th>Current Cost After Benefits</th>
<th>MMAP Phase 1</th>
<th>MMAP Phase 2</th>
<th>MMAP Phase 3 (TBD)</th>
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<tbody>
<tr>
<td><strong>MM Identification Card</strong></td>
<td>$50.00</td>
<td>$25.00</td>
<td><strong>No Cost</strong></td>
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<td><strong>50% discount</strong></td>
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<td><strong>Caregiver Background Checks</strong></td>
<td>$20.85</td>
<td>$7.60</td>
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<tr>
<td></td>
<td></td>
<td><strong>65% discount</strong></td>
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<tr>
<td><strong>Patient Product Cost</strong></td>
<td>Dispensary Retail Price</td>
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<td><strong>Implemented March 1, 2022</strong></td>
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35 P.S. Section 10231.902
Program Metrics
Medical Marijuana Program Update

- Program to date:
  - 740,757 Patients and Caregivers Registered;
  - 406,454 Active Patient Certifications;
  - 1,779 Approved Practitioners;
  - 20.0 Million Patient Dispensing Events;
  - 56.8 Million Products Dispensed;
  - $4.8 Billion in Total Sales;
  - $1.9 Billion by G/Ps to Dispensaries; and
  - $2.9 Billion by Dispensaries.
Patient Purchasing Activity
Month on Month Dispensary Sales

- Previous 12 Months (3/20-2/21)
- Most Recent 12 Months (3/21 - 2/22)
Medical Marijuana Program Update

Year on Year Dispensary Sales for Jan and Feb

- Jan 2020: $40,000,000
- Jan 2021: $60,000,000
- Jan 2022: $100,000,000
- Feb 2020: $20,000,000
- Feb 2021: $40,000,000
- Feb 2022: $80,000,000
Medical Marijuana Program Update

Permittee Pricing Trends
Medical Marijuana Program Update

Sales Volume Increases as Demand and Operational Dispensaries Grow

Dry Leaf Sales

![Bar Chart showing Dry Leaf Sales from January 2020 to February 2022. Sales volumes increase over time, with peaks in December 2021 and January 2022.](chart)
Medical Marijuana Program Update

Sales Volume Increases as Demand and Operational Dispensaries Grow

Dry Leaf Sales and Retail Pricing Trends

-14.000%
-12.000%
-10.000%
-8.000%
-6.000%
-4.000%
-2.000%
0.000%

Dry Leaf Sales
Operational Dispensaries
Trend of Price/Gram


77 80 95 100 117 129 138 149 155

$0.00 $10,000,000.00 $20,000,000.00 $30,000,000.00 $40,000,000.00 $50,000,000.00 $60,000,000.00 $70,000,000.00

0.000% -2.000% -4.000% -6.000% -8.000% -10.000% -12.000% -14.000%

Pennsylvania Department of Health

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Medical Marijuana Program Update

Wholesale Price Decline Trend Greater Than Retail Price Reductions

Dry Leaf Retail and Wholesale Pricing Trends

![Graph showing dry leaf retail sales and wholesale price trend from January 2020 to February 2022. The graph indicates a declining trend in wholesale prices compared to retail prices. Operational dispensaries are represented by blue bars, and the trend of price per gram is shown by an orange arrow.](image-url)
Medical Marijuana Program Update

Dry Leaf Dispensary Pricing Trailing Grower/Processor Wholesale Pricing

Dry Leaf Retail and Wholesale Pricing Trends

Retail Price/Gram Trend

Wholesale Price/Gram Trend

Pennsylvania Department of Health
Medical Marijuana Program Update

Dry Leaf Retail and Wholesale Pricing Details

Retail Price/Gram

Wholesale Price/Gram
MMAB Agenda

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Subcommittee Assignments:

- Regulatory (i) Types of Medical Professionals
- Medical Review (ii) Modify Types of Conditions
- Medical Research (iii) Form of Medical Marijuana
- Patient and Caregiver (v) Affordable Access
- Reports (j)(4) Issue Written Reports

35 P.S. § 1201(j)(5)(i)-(v)
Subcommittee Updates

- Regulatory Review – Janet Getzy Hart, Subcommittee Chair
- Medical Review – Dr. Denise Johnson, Subcommittee Chair
  - Update on a process for approving Serious Medical Conditions (SMCs) for research only.
  - Proposed update on the policy to add, or remove a qualifying medical condition.
Subcommittee Updates Cont.

• Medical Research – Bhavini Patel, Subcommittee Chair
  ▪ Discussion on new forms of medical marijuana.

• Patient and Caregiver – Shalawn James, Subcommittee Chair
  ▪ Findings and Recommendations about Affordable Access to Medical Marijuana.

• Reports – Luke Schultz, Subcommittee Chair
  ▪ Presentation of report outlining the Board’s actions pertaining to a SMC Application for Chronic Hepatitis.
• Additional Discussion/Q&A

• Next Board Meeting

📅 May 26, 2022 (10:00am to noon)