

Q3 2026

The Cannabis Barometer





Foreword by Dr. med. Julian Wichmann

CO-FOUNDER AND CEO BLOOMWELL GMBH

Anyone who acquires cannabis illegally feels four and a half times as stressed as when legally obtaining medicinal cannabis from a pharmacy following a medical prescription. In addition, those affected are worried about contaminants on the illegal market, they do not know what the products contain, and are unsettled by the lower quality. These are the results of our current survey of 7,913 medicinal cannabis patients regarding the differences between the illegal market and medicinal cannabis from the pharmacy. Rarely have so many cannabis patients participated in a voluntary survey. We seem to have struck a nerve with this topic, which is neglected in the debate.

At the same time, with prices for medicinal flowers starting at 2 € per gram, therapy has also become affordable for patients whose costs have no longer been covered by health insurance funds since the end of July 2026. This reduces the risk of these patients drifting into illegal structures. Cannabis telemedicine is the last lifeline for patients here, yet it is once again under fire from the Ministry of Health.

Cannabis may be legally consumed in Germany for recreational purposes, even if it does not come from a pharmacy. Compared to strictly controlled medicinal cannabis from the pharmacy, this cannabis is qualitatively not on par, particularly regarding its pharmacological safety profile. Nevertheless, despite possible legal procurement routes, medicinal cannabis from the pharmacy primarily competes with the illegal market.

A restriction on digital therapy with medicinal cannabis would therefore strengthen this very illegal market. The probability that cannabis would then be misused in a health-damaging manner would likely rise sharply in this case.

Medicinal cannabis patients who have already had experience with the illegal acquisition of cannabis report exactly this risk. In particular, regarding cleanliness, standardization, and thus ease of dosing, the vast majority prefer medicinal cannabis from the pharmacy. They are also worried about receiving contaminated products on the illegal market. Their preferences are clear.

From a public health perspective, nothing would be gained by pushing patients out of legal, medically supervised care and into illegal structures, but much would be lost. In a survey last year, 41% had already indicated they would return there if the MedCanG (Medical Cannabis Act) were restricted. Instead of calling for renewed bans and restrictions, politics should put health protection first. After all, health policy means pointing out solutions for real health threats, not creating additional risks and patronizing patients. We are not out of the woods yet, nor have we reached our goal. These public health successes could all be quickly reversed.

The Cannabis Barometer

Chapter 1

Differences between medicinal cannabis from the pharmacy compared to illegal cannabis.

A survey of 7,913 medicinal cannabis patients.



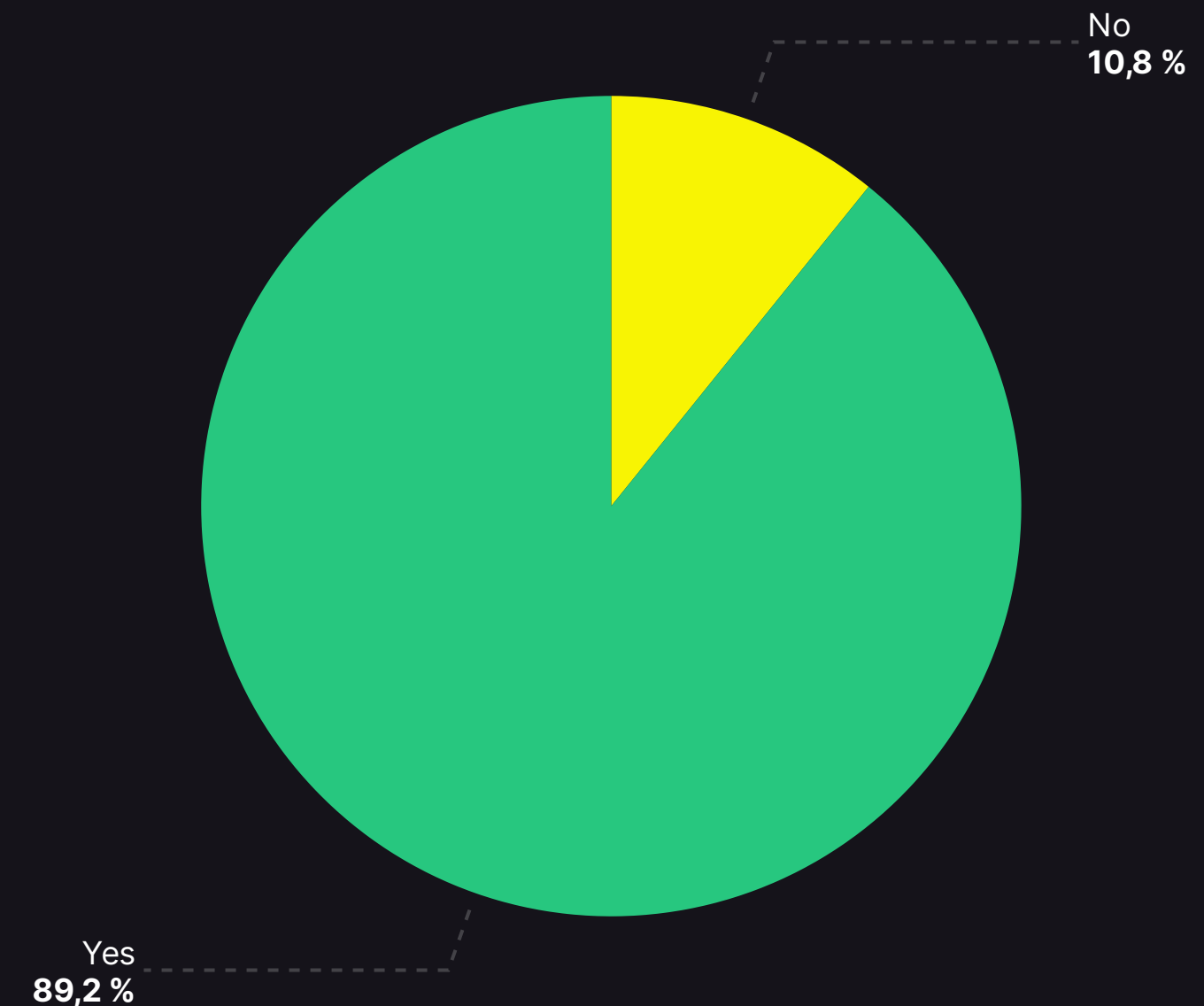
1

Nearly nine out of ten have experience with the illegal market

Nearly nine out of ten participating cannabis users have experience with both procurement routes: both with the illegal acquisition of cannabis and the legal procurement of medicinal cannabis from the pharmacy. This explains one key development in the market: patients have come to trust in digital cannabis therapy and are increasingly turning away from the illegal market. This was exactly one of the coalition's public health goals, which the coalition set in motion with the MedCanG. However, in a survey in the summer of 2025, 41% of participants at that time stated they would return to the illegal market if cannabis telemedicine were restricted (The Cannabis-Barometer Q2 2025). Retrogressive restrictions, as hinted at publicly by the new Minister of Health, could thus reverse these successes.

Survey

Do you already have experience with obtaining cannabis on the illegal market and obtaining medicinal cannabis?



n=7,913

2

Quality, Information, Price, Counseling: Preference for medicinal cannabis from the pharmacy is clear

Among the 7,062 patients who have experience with both medicinal cannabis from the pharmacy and the illegal market, a clear preference for medicinal cannabis from the pharmacy emerges. 96.7% report that medicinal cannabis from the pharmacy is "cleaner and purer" than cannabis from the illegal market. There, contamination by fungi, bacteria, or additional substances can occur. The Sanity Group found in tests in autumn 2024 toxic pesticides in two-thirds of 300 lab samples of illegal cannabis; around 65% contained traces of human feces, bacteria, or viruses. (*1)

In our current survey, 98.2% also report being better informed and advised when redeeming a prescription at a German pharmacy than on the illegal market. The respondents are satisfied with the digital counseling and information. From their perspective, the political criticism of mail-order pharmacies seems incomprehensible. Another advantage is the price: 94.4% report that medicinal cannabis from the pharmacy is cheaper for them than cannabis on the illegal market. As lawmakers originally intended, dealers are clearly at a disadvantage here.

(*1) Source: [Sanity Group: Pesticides, Covid, human feces: What hides in black-market cannabis, October 2024](#)

Survey

How does medicinal cannabis from the pharmacy differ from cannabis on the illegal market?



n=7,062

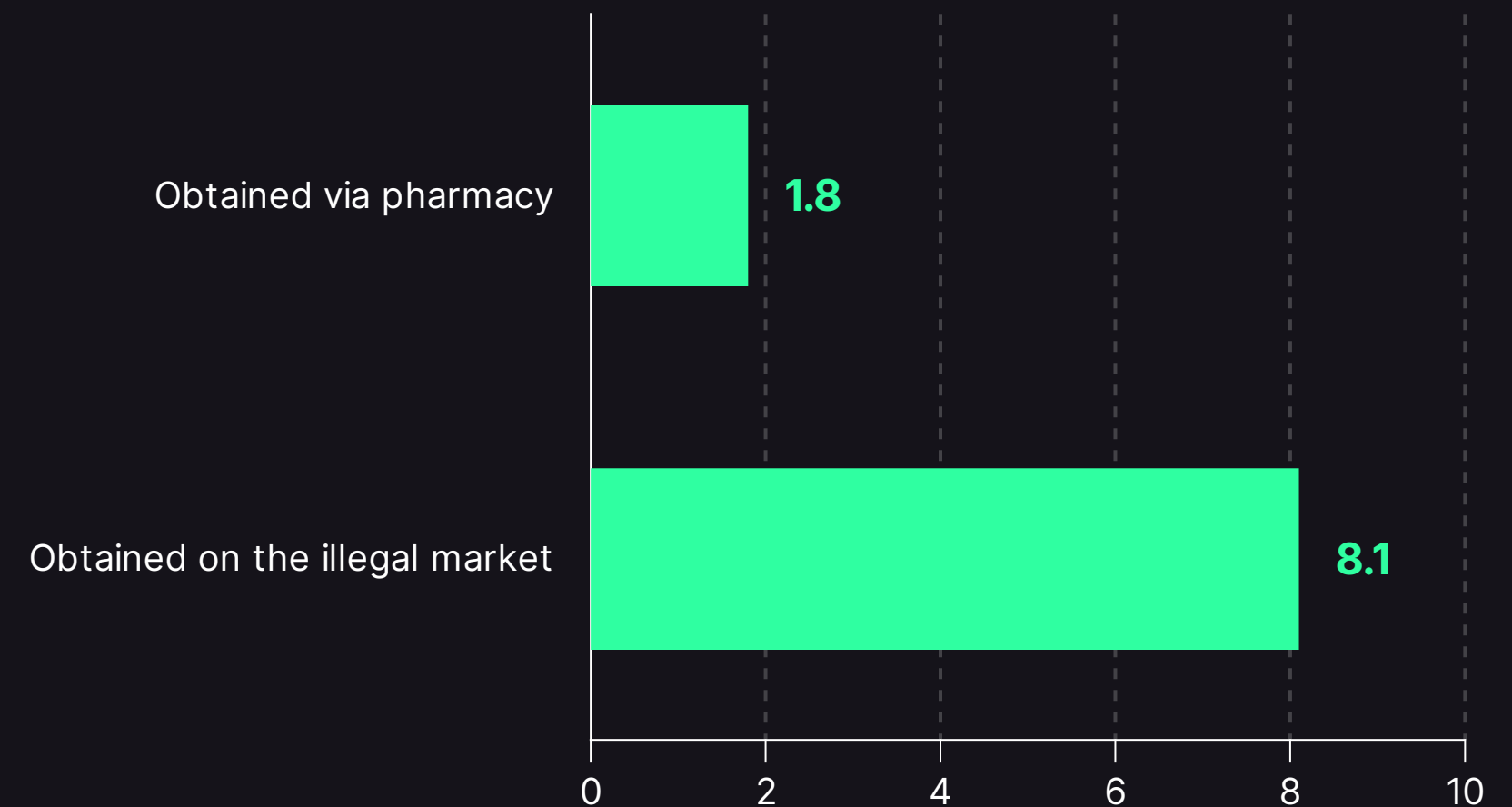
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The stress factor of illegal acquisition burdens those affected

A factor not to be underestimated is the psychological burden to which those affected are exposed on the illegal market. On a scale of 1 to 10, those affected give an average value of 8.1 when they acquire cannabis illegally. 10 stands for a lot of stress, 1 for no stress at all. The participants in the survey put the value for obtaining medicinal cannabis from the pharmacy at an average of 1.8. For those affected, a renewed push back into illegal self-medication would therefore both increase risks on the product side and jeopardize therapeutic success due to greater psychological stress. Those who buy cannabis on the illegal market feel on average four and a half times as much stress when obtaining medicinal cannabis via medical prescription from the pharmacy.

Survey

How much stress does obtaining cannabis cause you?



1 = no stress at all / 10 = a lot of stress

n=7,062

4

Reasons

General well-being is the most important reason for those affected to obtain medicinal cannabis from the pharmacy rather than from the illegal market. 79.8% cited this point. In addition, 77.8% indicated fear of contaminants. 77.4% welcomed product transparency, such as information on THC or CBD. Being allowed to drive a car as a patient without endangering one's driver's license is an important factor for nearly half of the respondents.

Survey

For what reasons do you obtain medicinal cannabis from the pharmacy?



Figures in % / multiple answers possible

n=7,062

The Cannabis Barometer

Chapter 2

**Trends in medicinal
cannabis flowers Q3 2026**

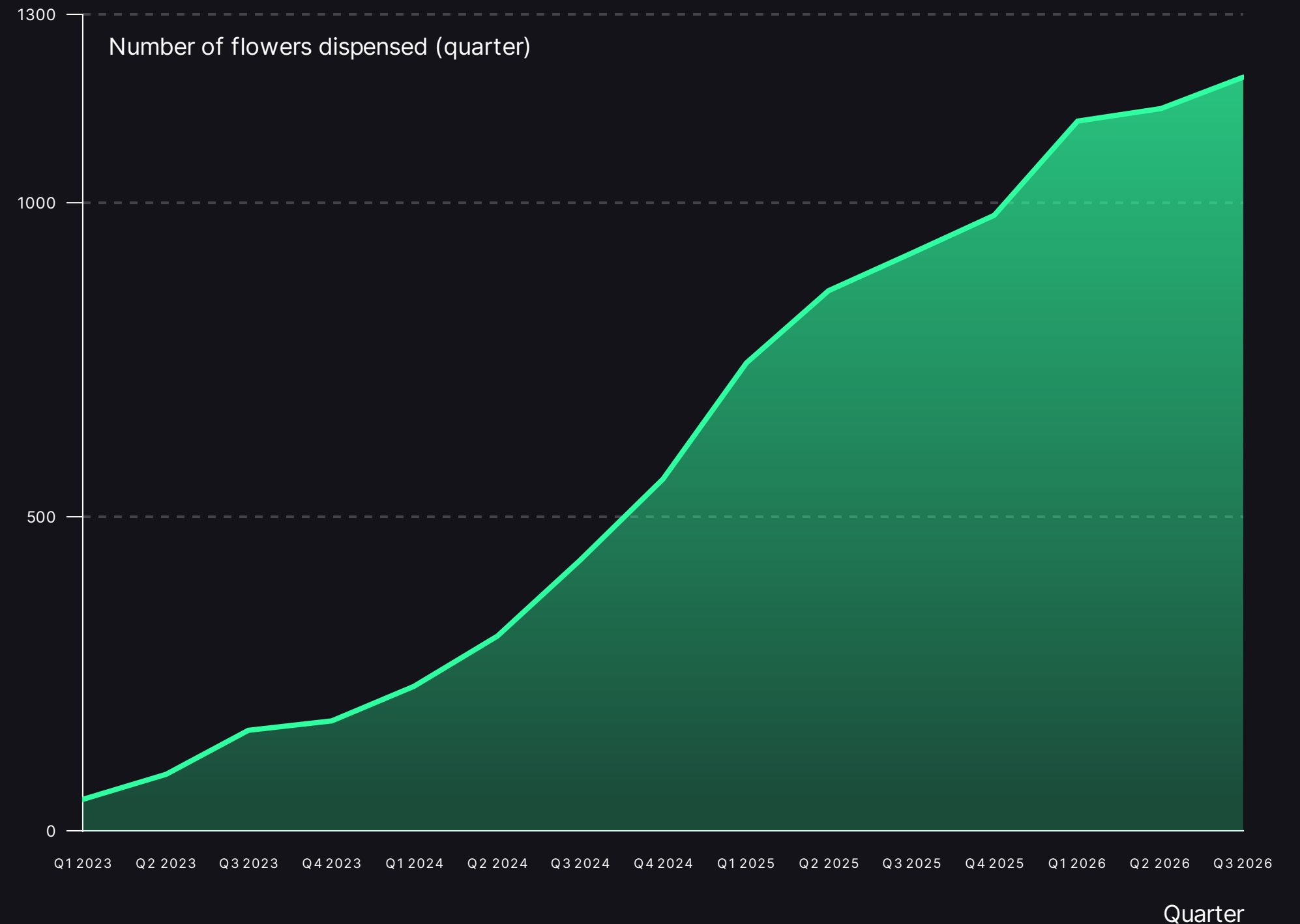


1

More than 1,200 products: A blessing and a curse at the same time.

The variety of medicinal cannabis products is rising continuously to currently over 1,200. For patients, pharmacies, and prescribing doctors, this is both a blessing and a curse. On one hand, a large selection is created. On the other hand, this also complicates availability and overview. Clarity is further complicated by the fact that the same varieties are brought to market under different brand names by different manufacturers. More transparency here would likely strengthen supply security.

Trend



2

The share of very cheap flowers is nearly 84%

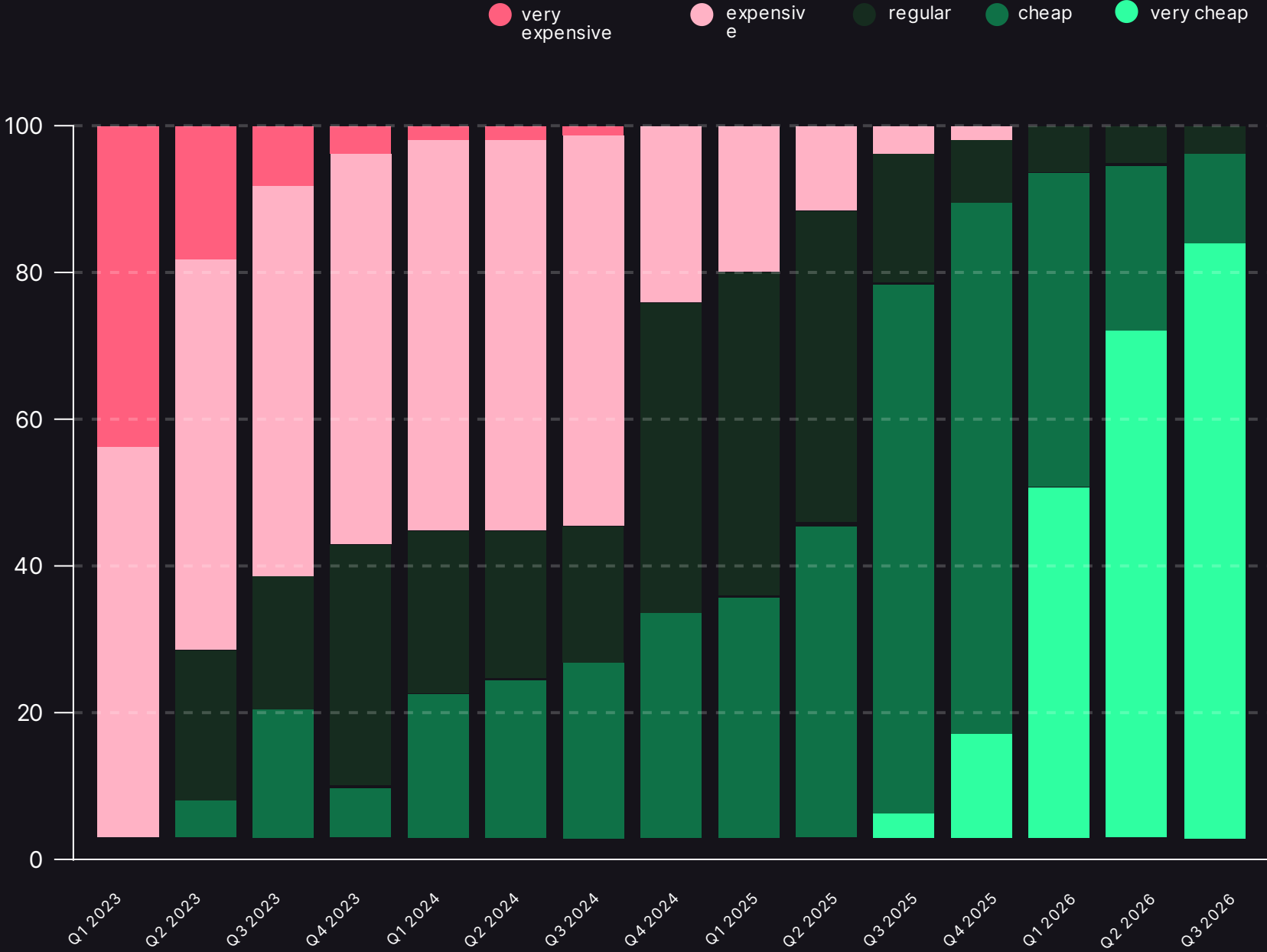
The share of very cheap flowers, priced under 4 € per gram, has risen to 83.5%. These low prices are an important decision factor for the increasing acceptance of medicinal cannabis by patients and the turning away from the black market. From a political perspective, debates on cultivation criteria, product safety, and market development should therefore always focus on the affordability of therapy. With rising prices, a renewed drift back into the illegal market with completely unregulated product quality and largely contaminated products is always to be feared.

*In light of the sharply declining prices since 2024, the categorization has been adjusted since the Q1 2026 report.

- < 4.00 €/g (Very cheap)
- ≥ 4.00 to < 7.00 €/g (Cheap)
- ≥ 7.00 to < 10.00 €/g (Regular)
- ≥ 10.00 to < 13.00 €/g (Expensive)
- ≥ 13.00 €/g (Very expensive)

Trend

Price categories – flowers dispensed



3

Average price drops to 3.77 € per gram

The average price per gram of medicinal cannabis flower continues to fall in the third quarter to 3.77 € per gram. The cheapest flowers were again offered in the third quarter for below 2 € per gram. After statutory health insurance (GKV) stopped covering medicinal cannabis flowers, these low therapy costs are particularly relevant for GKV patients who now want to continue their therapy with cannabis flowers as self-payers. For manufacturers and wholesalers, scaling and optimizing processes and supply chains are becoming increasingly important in this market environment. Furthermore, product innovation leads to opening up new market segments.

Trend



4

Share of non-irradiated flowers

The share of irradiated flowers plays a very minor role in the third quarter as well. Some providers have meanwhile specialized in highly efficient germ reduction using new methods without the use of ionizing radiation.



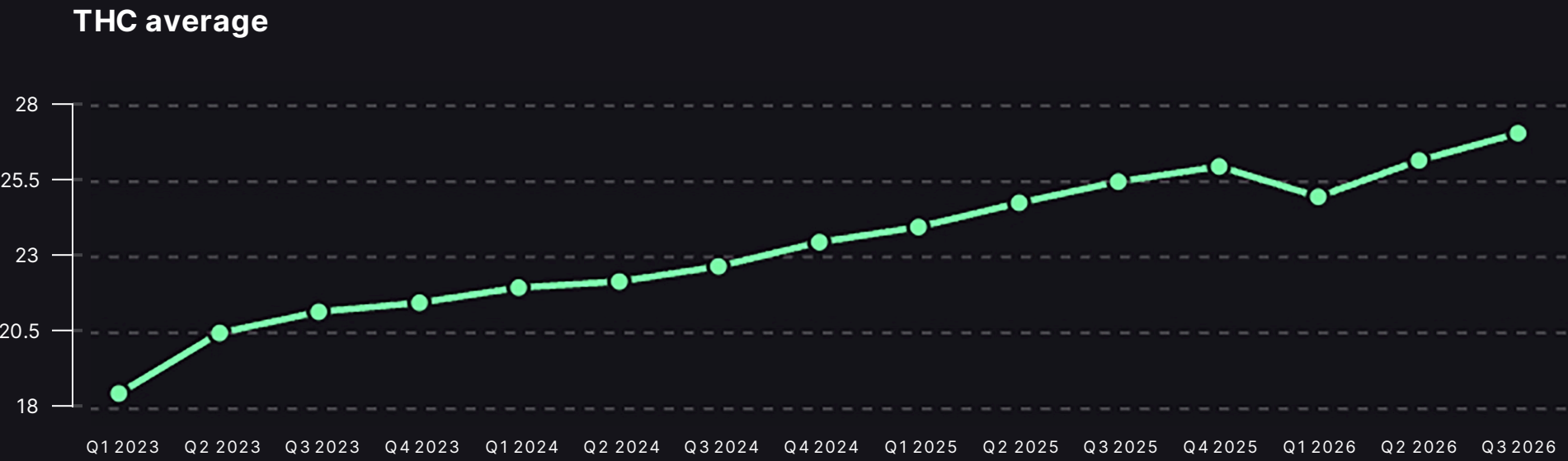
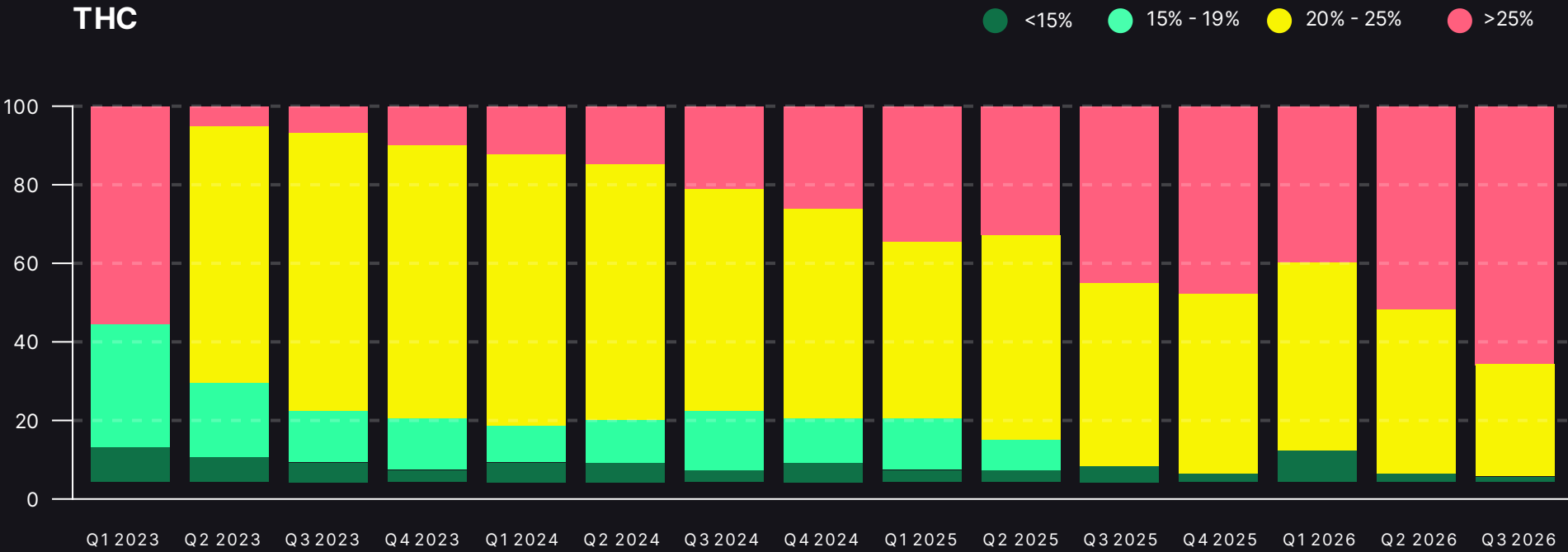
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THC content

The long-term rising THC content of medicinal cannabis flowers has caused lively discussion and, in part, public criticism. Among other things, it was claimed that an increasing number of hospital cases might be attributed to highly potent medicinal cannabis flowers. No corresponding data exists for such hypotheses. There are no studies from Germany that specifically investigate hospitalization rates or other side effects of cannabis patients. Rather, such analyses do not differentiate between recreational cannabis and medicinal cannabis, although such sub-analyses would be fundamentally possible and desirable. Especially illegal or novel synthetic cannabinoids are proven to be the primary cause of known health risks associated with cannabis.

Therefore, there are more plausible theories for the rising share of THC content in medicinal cannabis flowers, as observed in other countries: e.g., that patients reduce their dose of medicinal cannabis flowers for cost reasons, but keep the active ingredient amount constant. Moreover, for new patients, the active ingredient amount is usually gradually increased under medical supervision in the initial phase. As with other medications, there is also a physical habituation to the ingredients in medicinal cannabis, making a dosage increase medically necessary. Additionally, there are socio-psychological theories: increased hospital admissions may potentially indicate that those affected are more open to seeking help when problems arise. The criminalization of cannabis had previously deterred recreational users from seeking help, at least before April 1, 2024.

Trend



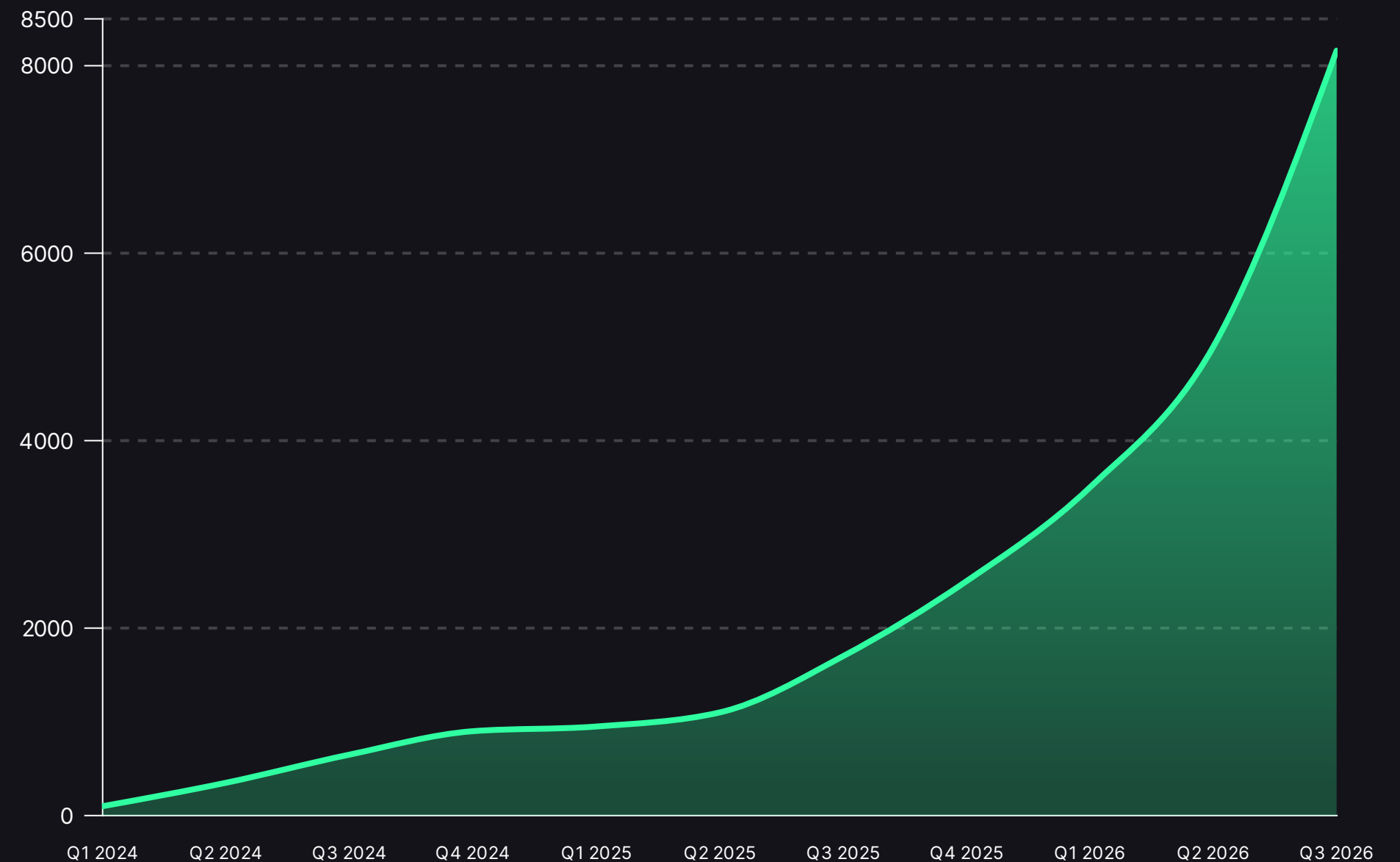
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Dispensed quantities continue to rise in the third quarter

In the third quarter of 2026, the quantities dispensed by pharmacies increased to 8,161% in relation to the first quarter of 2024, the last before the removal of medicinal cannabis from the Narcotics Act (BtMG). This increase is also reflected in the rising import quantities in Germany. The BMG (Federal Ministry of Health) expects 300 tons of medicinal cannabis flowers to be imported in 2026. However, the resulting criticism of telemedicine therapy cannot be justified by this. Contrary to the frequently alleged abuse of medicinal cannabis for recreational purposes, it is far more plausible that many patients have successfully switched from illegal self-therapy to legal, medically supervised care for health-related motives. Switching to legal medical care significantly reduces health risks from frequently contaminated "street cannabis". Furthermore, medicinal cannabis thus becomes an economic factor for the healthcare system and also generates tax revenue.

Trend

Quantity (in grams) – development in % relative to the quantity in Q1 2024



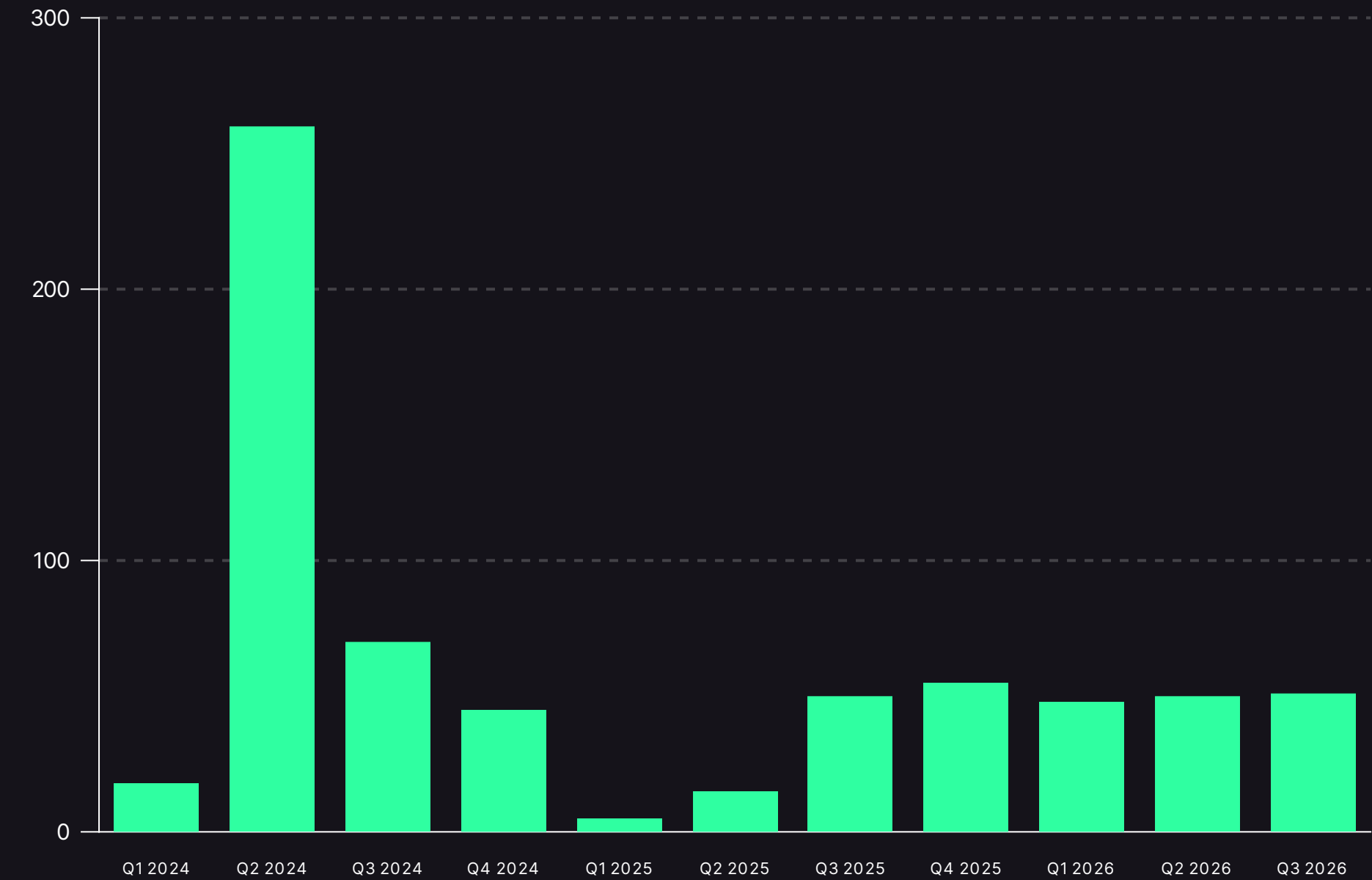
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Quantities also rise quarter on quarter

In the quarterly comparison as well, quantities continue to rise in a similar ratio to the previous four quarters. The quantities dispensed in the third quarter of 2026 were again around 50% higher than in the second quarter of 2026. Researchers from the EKOCAN project team, which is evaluating the impact of Germany’s Cannabis Act, now also consider it likely that medical cannabis has become the most important source of cannabis in Germany. With this, Germany has reached an important milestone in the transformation away from illegal value chains toward a regulated, legal, and controlled system. Against the backdrop that an estimated 20 million people in Germany are fundamentally eligible for medicinal cannabis therapy, the German system serves as a model for progressive, EU-compliant regulation.

Trend

Quantity – development of the quantity in % compared to the previous quarter





Afterword by Niklas Kouparanis

CO-FOUNDER AND CEO OF BLOOMWELL GROUP GMBH

The illegal market causes stress. Stress is considered one of the central causes of illness in Germany. For this reason alone, the extremely increased quantities now dispensed via Bloomwell exclusively by local German pharmacies are a great success from a public health perspective. Our new Minister of Health has quite rightly emphasized that the best health is that which prevents illness from arising in the first place. Stress, contaminated products, and permanent risks have represented an immense burden for millions of cannabis users in Germany for decades. Switching to legal medical care means prevention and health protection.

Instead of abstract debates about potential abuse, the focus should be on strengthening the supply security of over a million patients. First this concretely involves questions of youth protection, verification of prescriptions, or the promotion of digitalization and technology, especially in rural areas. Second, we should think about how we could simplify access for seniors.

But instead of considering with the involved actors how solutions can be designed, some important political decision-makers are threatening renewed bans. What we need now is trust and consistency to continue following the path we have embarked upon. Individual freedom, including the choice of therapy together with the treating physician, health and youth protection, as well as prevention are not a contradiction. Digital cannabis therapy has already contributed to a significant increase in the quality of life and work for those affected.

In March of next year, the industry in Germany will also celebrate its tenth anniversary. It has professionalized itself. Markus Söder, Minister-President of Bavaria, has called for a cannabis tax. In fact, one has long existed in the medical sector. Medicinal cannabis companies are now reliable partners for many established consultants and service providers in Germany. They could be so for politicians as well.

Methodology

For this report, Bloomwell conducted a non-representative, anonymous, and GDPR-compliant online survey of 7,913 medical cannabis patients in September 2026.

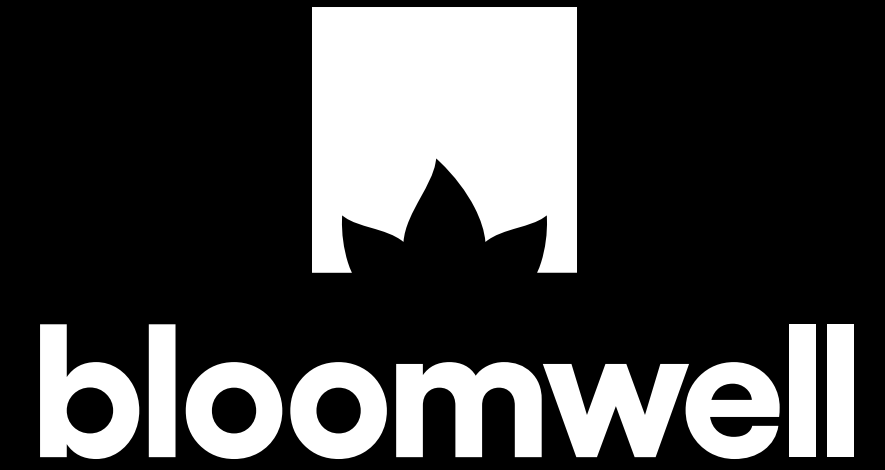
For the report, Bloomwell considered anonymized datasets of cannabis patients in the six-digit range and prescriptions in the seven-digit range. All considered prescriptions were redeemed by self-paying patients via the online platform Bloomwell at German partner pharmacies.

This English version was translated with AI assistance.

About Bloomwell

Based in Frankfurt, the Bloomwell Group is one of the leading companies for medicinal cannabis in Europe. Founded in 2020, it has developed into the central point of contact in a new cannabis ecosystem that covers the entire value chain except cultivation. Through innovation and the digitalization of the entire therapy process, the Bloomwell Group ensures effective and reliable care for patients with medicinal cannabis and, through data-based research activities based on real-world data, also contributes to the destigmatization of cannabis in medicine. The Bloomwell Group is a European pioneer in the development of telemedical offerings, digital payment integrations, and individual e-prescription solutions for medicinal cannabis. Today, it provides a central digital infrastructure each month to cannabis patients in the six-digit range, pharmacies, doctors, and wholesalers. On request, patients receive an individual e-prescription with qualified remote signature via the Bloomwell platform, provided by D-Trust, a company of Bundesdruckerei.

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