



bloomwell

Q1, 2026

The Cannabis Barometer





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Cannabis is often portrayed as dangerous and addictive, even though the most severe side effects and addiction potential have only been proven with other prescription medications. In its report, the 'Financial Commission on Health' favors cannabis-based finished pharmaceuticals, and in its second interim report, EKOCAN warns—citing other studies with limited data—against high-potency medical cannabis flowers. Such assumptions are not empirically sound. There are no studies demonstrating such risks or other serious complications associated with medical cannabis. On the contrary, when comparing the side effects of medical cannabis with other prescription drugs, it stands out due to only mild or entirely absent side effects. To date, the risk of developing an addiction from medical cannabis use has not been scientifically proven.

Nevertheless, patients are still often told that medical cannabis should only be used in the most severe cases—for example, when patients are bedridden and 'have exhausted all other treatments.' This view is incorrect: medical cannabis should not be considered a treatment of last resort. On the contrary, an individualized therapeutic trial often appears appropriate at an early stage, when chronic symptoms can still be reduced. Patients who benefit most from medical cannabis typically suffer from common conditions such as sleep disorders, chronic pain, or anxiety disorders. Many have developed side effects from other medications over time, which in turn have led to new illnesses.

Therefore, in addition to symptom relief, a key reason for prescribing medical cannabis is often to reduce—or ideally prevent—such side effects from other medications. Studies from the U.S., for example, show that prescriptions and complications associated with opioids decline when access to medical cannabis becomes easier.

Politicians, professional chambers, and associations often label medical cannabis as an inefficient drug lacking sufficient evidence, driven by intrinsic motives, and even call for restrictions on medical prescriptions. This must be understood as paternalistic, as it stands in stark contrast to the experiences of over one million cannabis patients in Germany. Patients benefit significantly when they are able to replace other prescription drugs with medical cannabis. The often completely absent side effects are also associated with a marked improvement in quality of life and work performance. This is likely the most important finding of our survey, through which we hope to give patients a voice and dispel the many misconceptions surrounding cannabis therapy.



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The Cannabis Barometer

Chapter 1

Development of Side Effects Following the Use of Medical Cannabis

A survey of 3,528 medical cannabis patients.



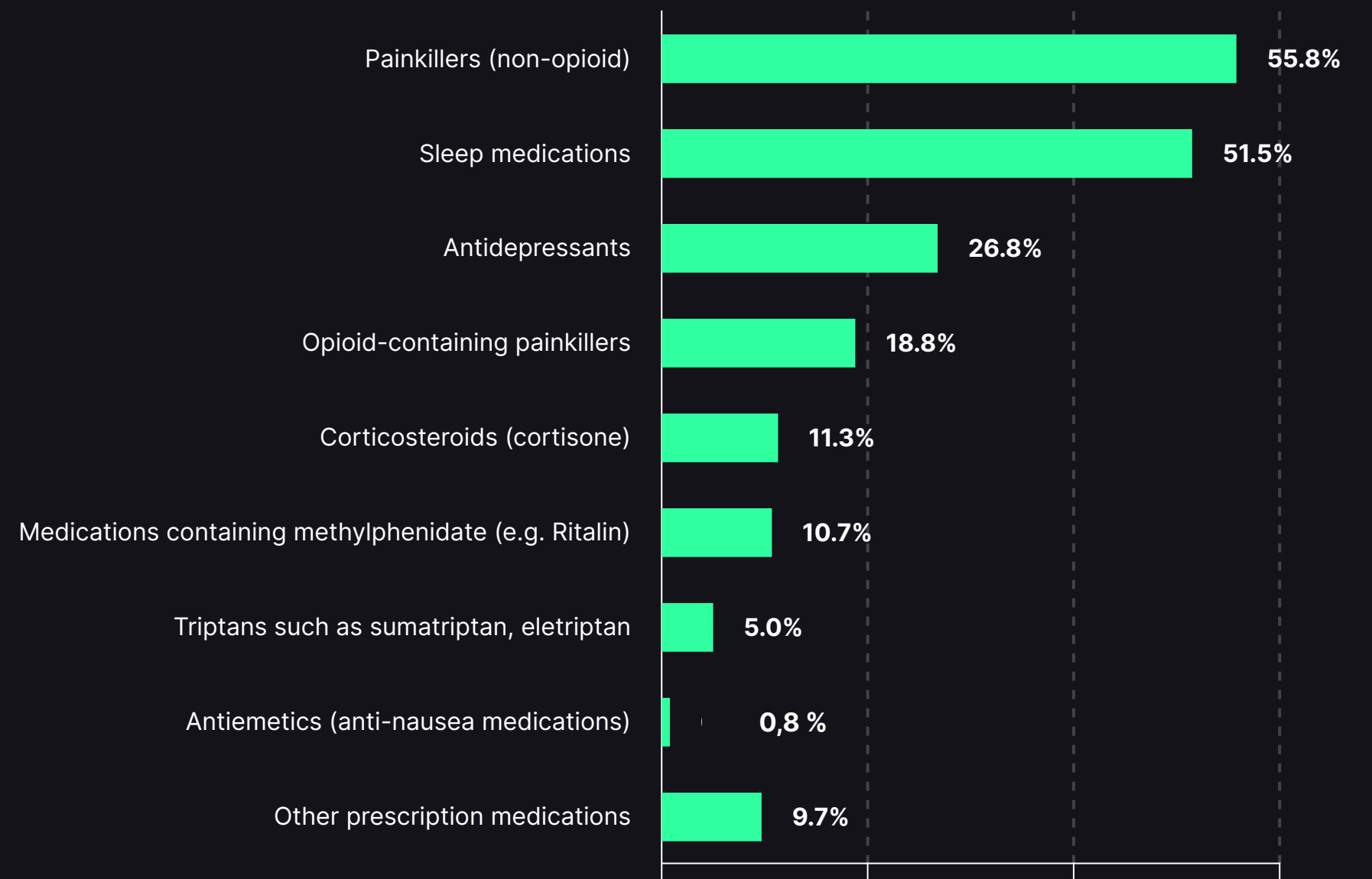
1

Use of Other Prescription Medications

Before starting their cannabis therapy, 55.8% of the surveyed patients took non-opioid pain relievers, 51.5% sleeping pills, 26.8% antidepressants, and 18.8% opioids (all prescription-only).

Survey

“Which medications did you receive before starting cannabis therapy?”



n=3,528 | multiple responses possible.

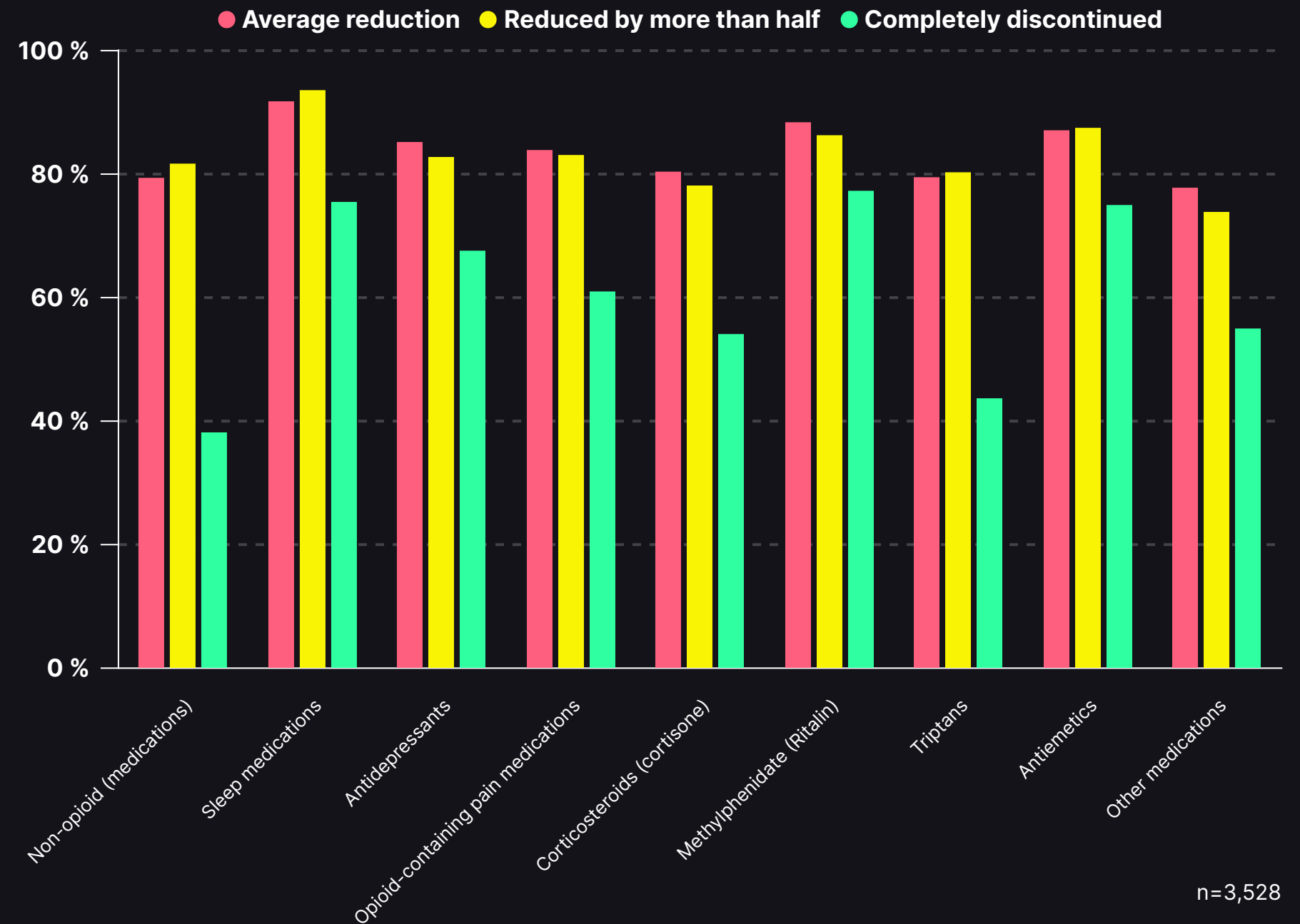
2

Reduction of Other Prescription Medications

Through the use of medical cannabis, patients were able to reduce the use of other prescription medications by an average of 84.5% across all categories. In more than half of the cases, medications could even be stopped completely: the average rate of completely discontinued prescription medications across the various categories is 58.9%. For prescription sleeping pills, 93.6% were able to reduce the use by at least half, and 75.5% were able to discontinue them completely. Patients who took Methylphenidate (e.g., Ritalin) report an average reduction of 88.4% through the use of medical cannabis. 77.3% were able to discontinue it completely. Patients were able to reduce opioids by an average of 83.9%. 61% of patients were able to completely discontinue opioids through the use of medical cannabis.

Survey

Reduction of other prescription medications due to the use of medical cannabis (in percent)



3

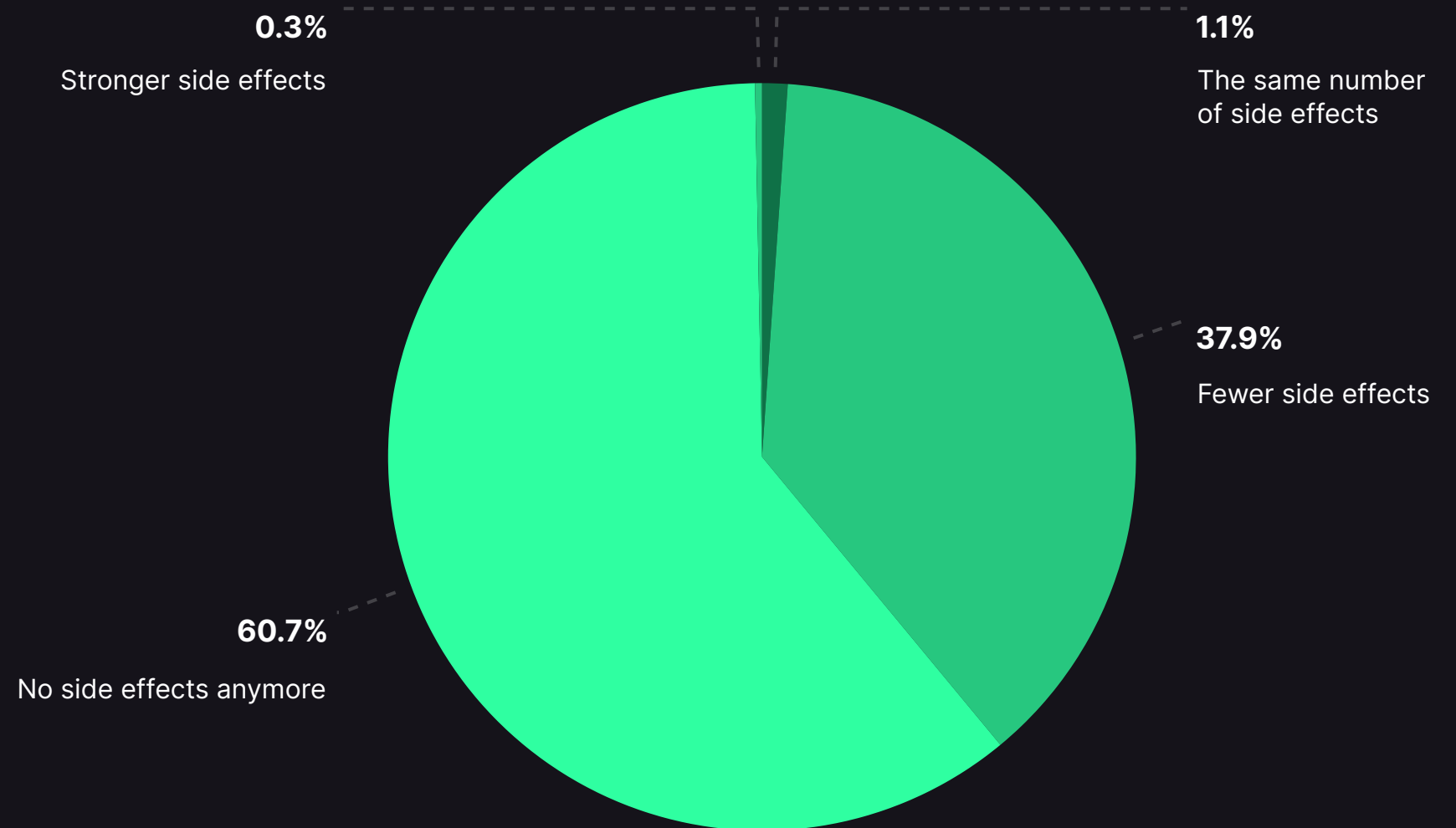
Change in Side Effect Profile

60.7% of patients report no longer experiencing medication-associated side effects due to the use of medical cannabis. For 37.9%, the side effects were reduced. Only for a fraction did the side effects remain just as strong (1.1%) or intensify (0.3%). The comparatively slight or completely absent side effects when taking medical cannabis have also been repeatedly confirmed in other studies (including the BfArM-Begleiterhebung/Federal Institute for Drugs and Medical Devices Cohort Study)

These patient reports prove that in many cases, besides the actual symptom treatment, one of the essential reasons for an individual therapeutic trial with medical cannabis is the absence or reduction of medication-associated side effects.

Survey

Development of side effects due to the use of medical cannabis



n=3,528

4

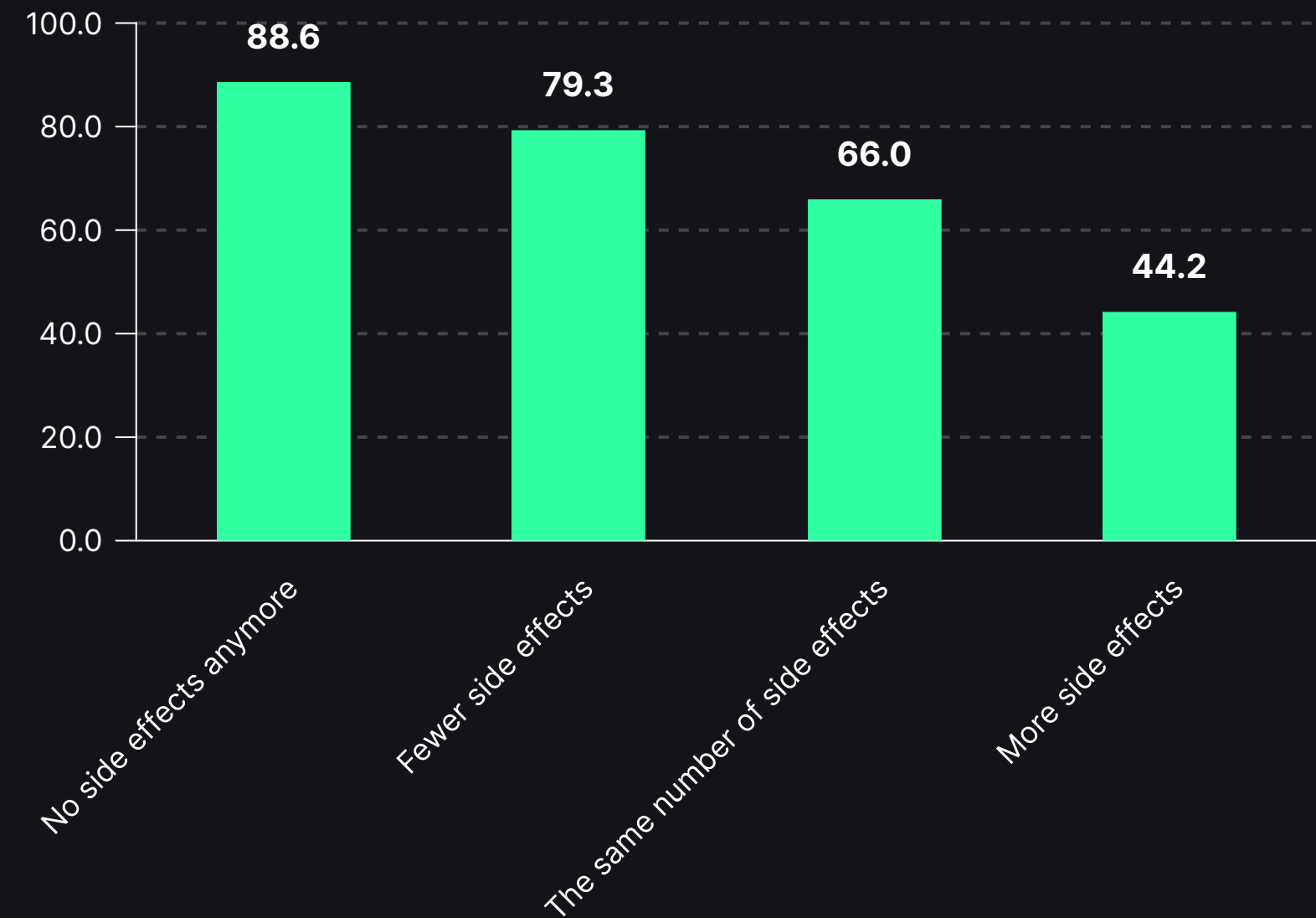
Side Effects Depend on the Intensity of Reduction

Those who were able to discontinue other medications more strongly through the use of medical cannabis report significantly fewer or no side effects on average. For example, the reduction intensity of other prescription medications is 88.6% for patients who no longer experience any side effects. In contrast, those patients who still report "strong side effects" were only able to reduce other prescription medications by an average of 44.2%.

This correlation suggests that the side effects when taking medical cannabis are significantly less severe than when taking other prescription medications and are often completely absent.

Survey

Medication reduction by side-effect outcome



n=3,528

5

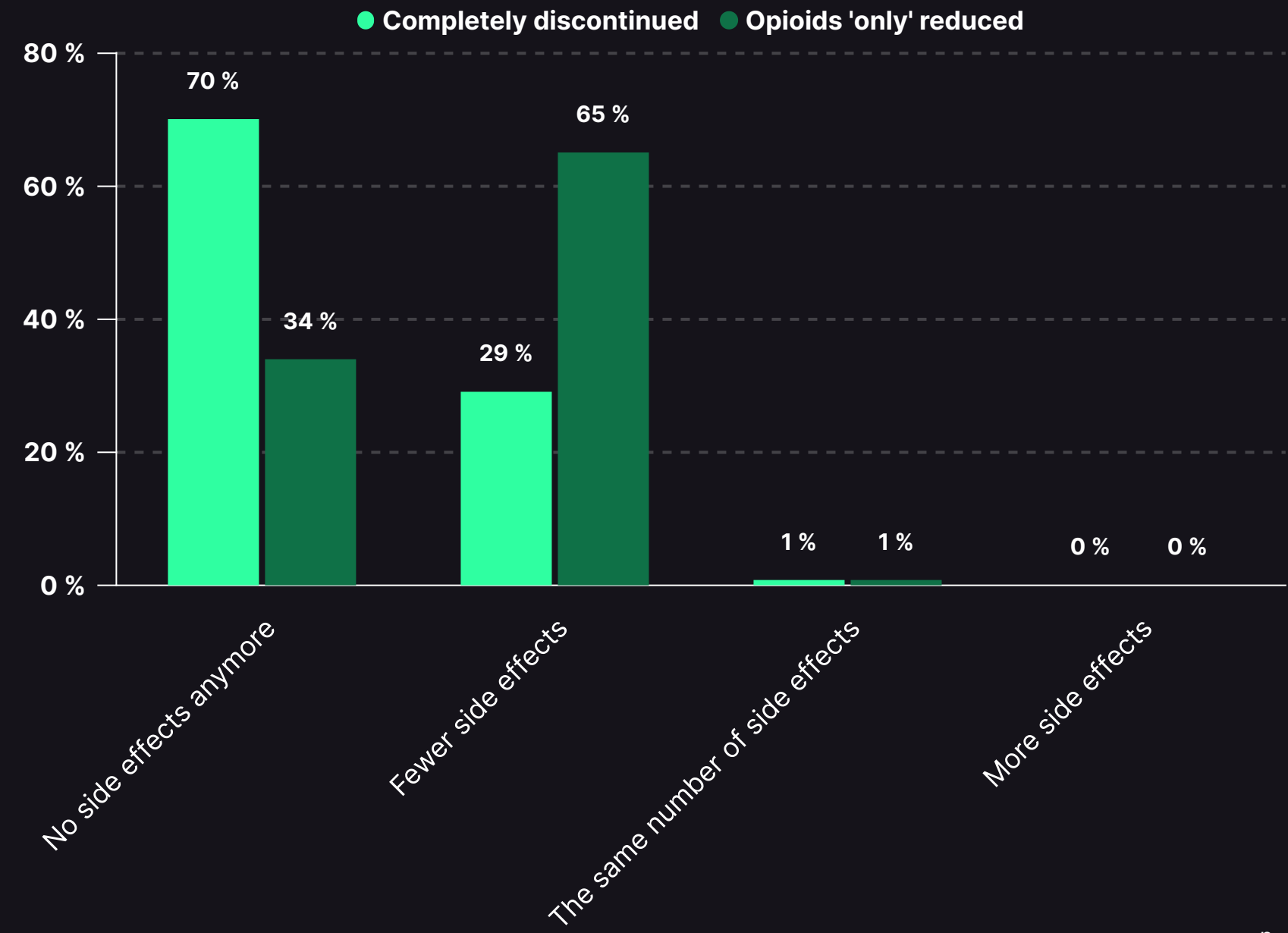
Substitution of Opioids with Medical Cannabis

61% were able to completely discontinue opioids through the use of medical cannabis. 70.1% of these patients no longer experience any side effects. Among opioid patients who were "only" able to reduce their dose, 34% state that they no longer experience any side effects. 65.1% of those who reduced their opioid dose through medical cannabis but could not stop it completely report experiencing fewer side effects. Not a single (former) opioid patient reports stronger side effects as a result of taking medical cannabis.

Those who can completely discontinue opioids through medical cannabis have a good chance of managing their daily life and work free from side effects.

Survey

Comparison of side effects in patients who discontinued opioids vs. those who reduced them



n=615

What patients report

Ahmed

Ahmed suffers from polio. His left leg is 60% paralyzed. The pain was so severe that he woke up every minute during the night. Now over 50 years old, he has been given various pain medications over time. Due to years of use, he developed problems with his kidneys and stomach. Despite medical recommendations, he refused to take opioids because of their potential for addiction. However, doctors absolutely refused to prescribe him THC-containing medical cannabis.

“Medical cannabis provides me with real relief. I find it sad that society, and especially doctors, think this way.”

6

Quality of Life and Work

Patients predominantly report positive effects on their quality of life and work as a result of taking medical cannabis. 67.8% emphasize better concentration ability, 61.9% more social contacts, and 53.9% fewer professional sick days. Negative effects on quality of life and work occur in only a very few patients due to the use of medical cannabis. 2.5% feel less productive. 1.8% withdraw socially. For 1%, there were complaints from superiors.

Survey

Impact on quality of life and work



n=3,528

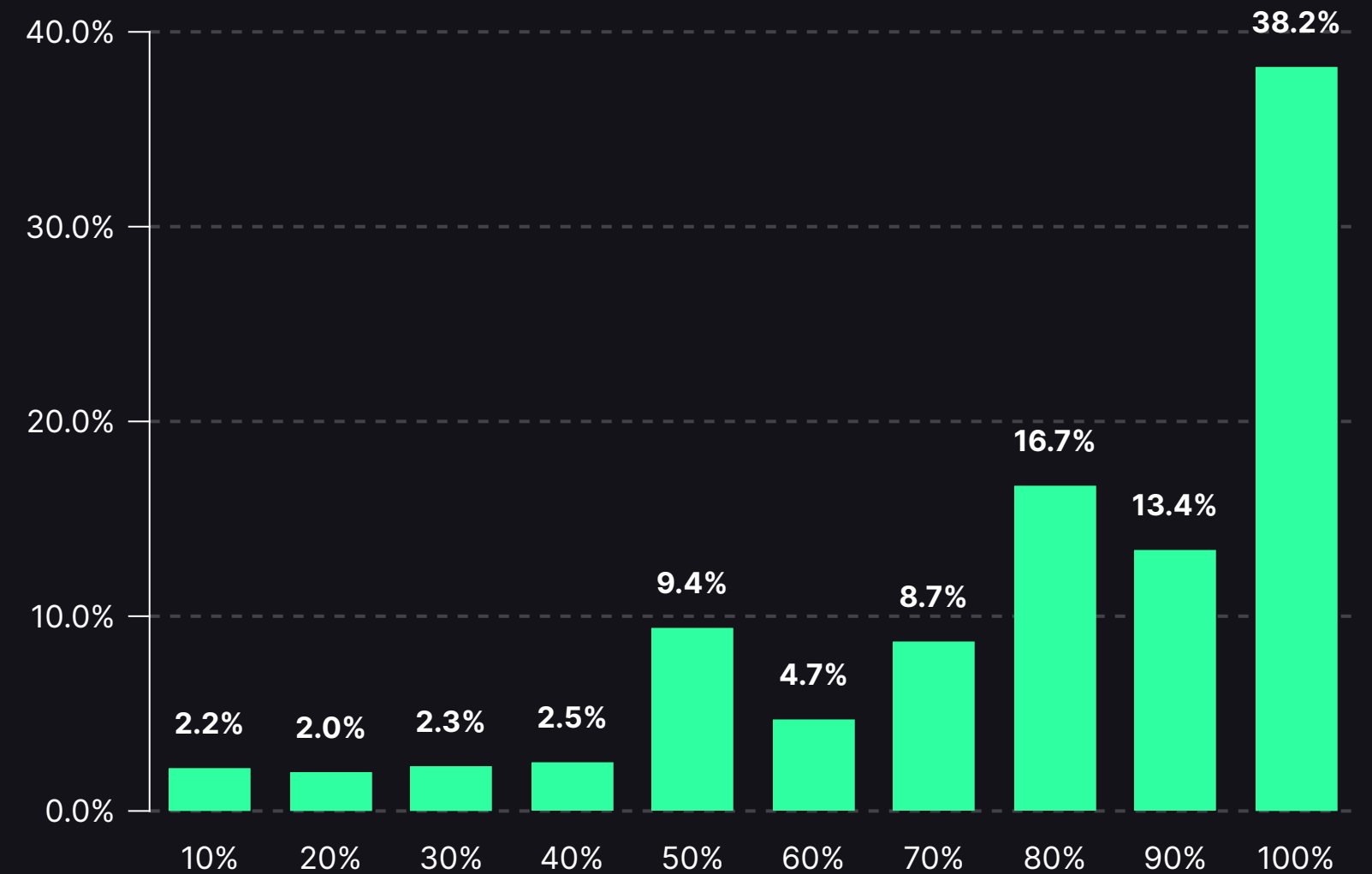
7.1

Reduction of Non-Opioid Pain Relievers

- Average reduction of non-opioid pain relievers through the use of medical cannabis: **79.4%**
- Proportion of those who were able to reduce non-opioid pain relievers by more than half through the use of medical cannabis: **81.7%**
- Proportion of those who were able to completely discontinue non-opioid pain relievers through the use of medical cannabis: **38.2%**

Survey

Painkillers (non-opioid)



n=1,874
79.4%

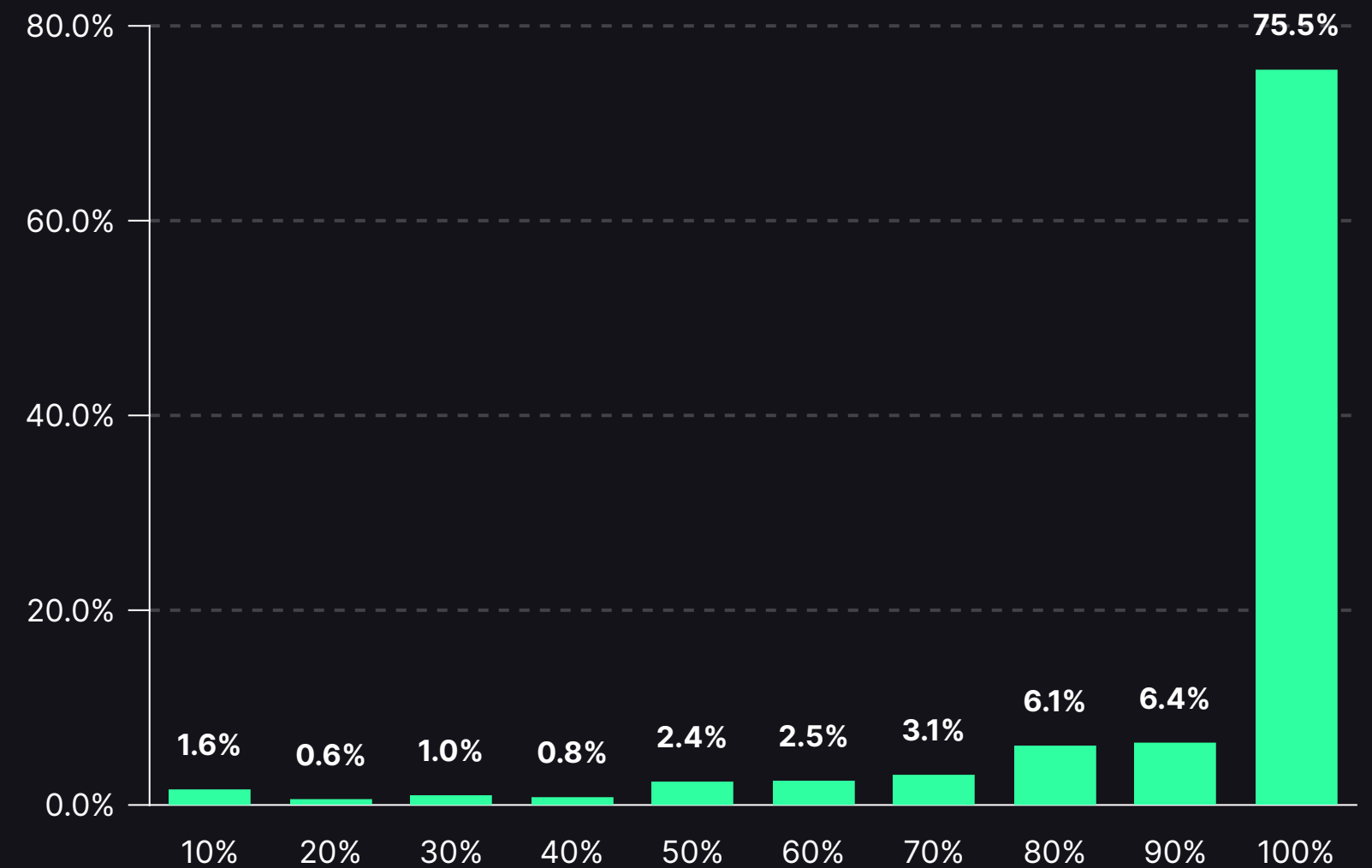
7.2

Reduction of Sleeping Pills

- Average reduction of sleeping pills through the use of medical cannabis: **91.8%**
- Proportion of those who were able to reduce sleeping pills by more than half through the use of medical cannabis: **93.6%**
- Proportion of those who were able to completely discontinue sleeping pills through the use of medical cannabis: **75.5%**

Survey

Sleep medications



n=1,712 Ø 91.8%

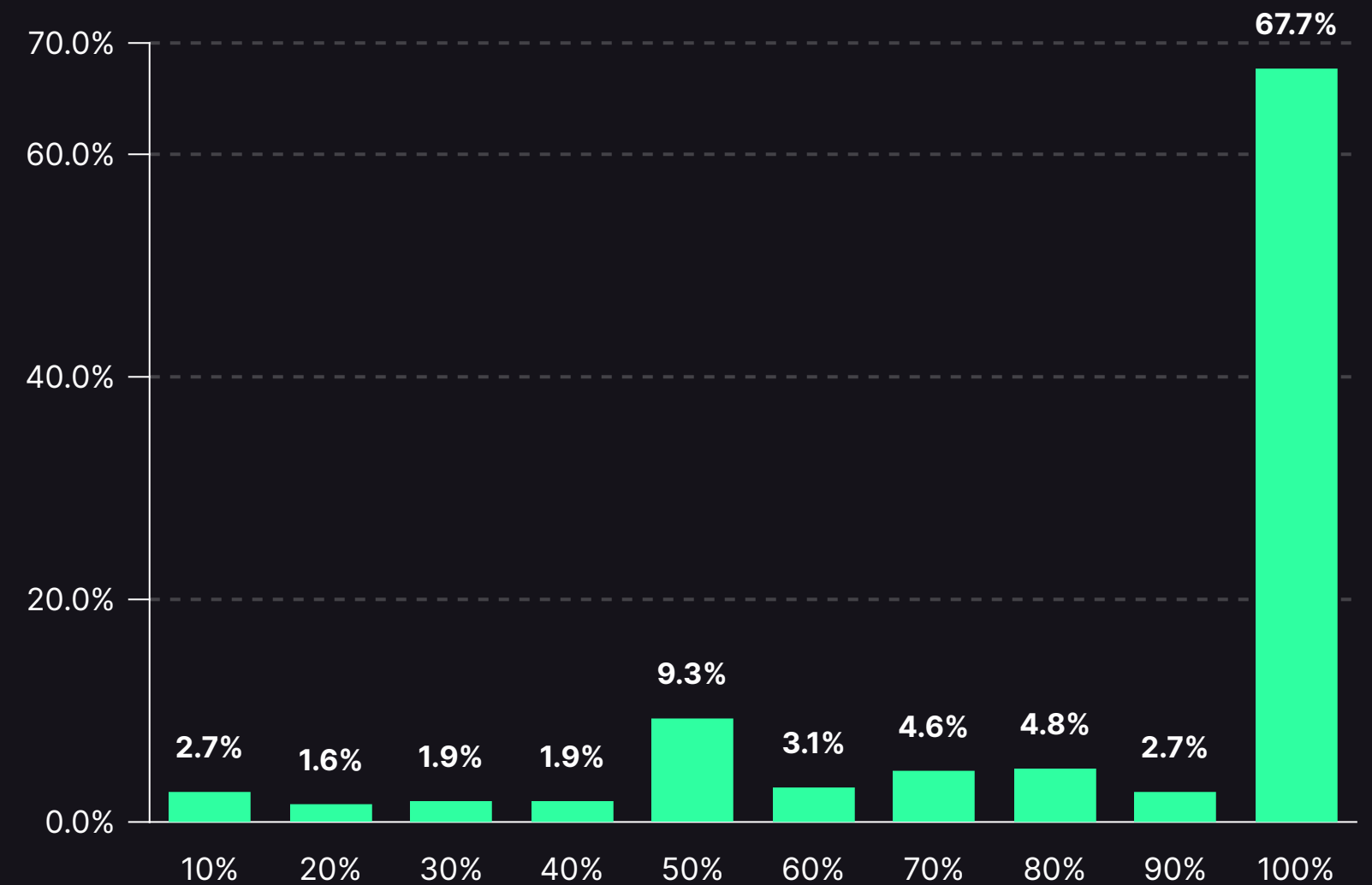
7.3

Reduction of Antidepressants

- Average reduction of antidepressants through the use of medical cannabis: **85.2%**
- Proportion of those who were able to reduce antidepressants by more than half through the use of medical cannabis: **82.8%**
- Proportion of those who were able to completely discontinue antidepressants through the use of medical cannabis: **67.6%**

Survey

Antidepressants



n=863 Ø 85.2%

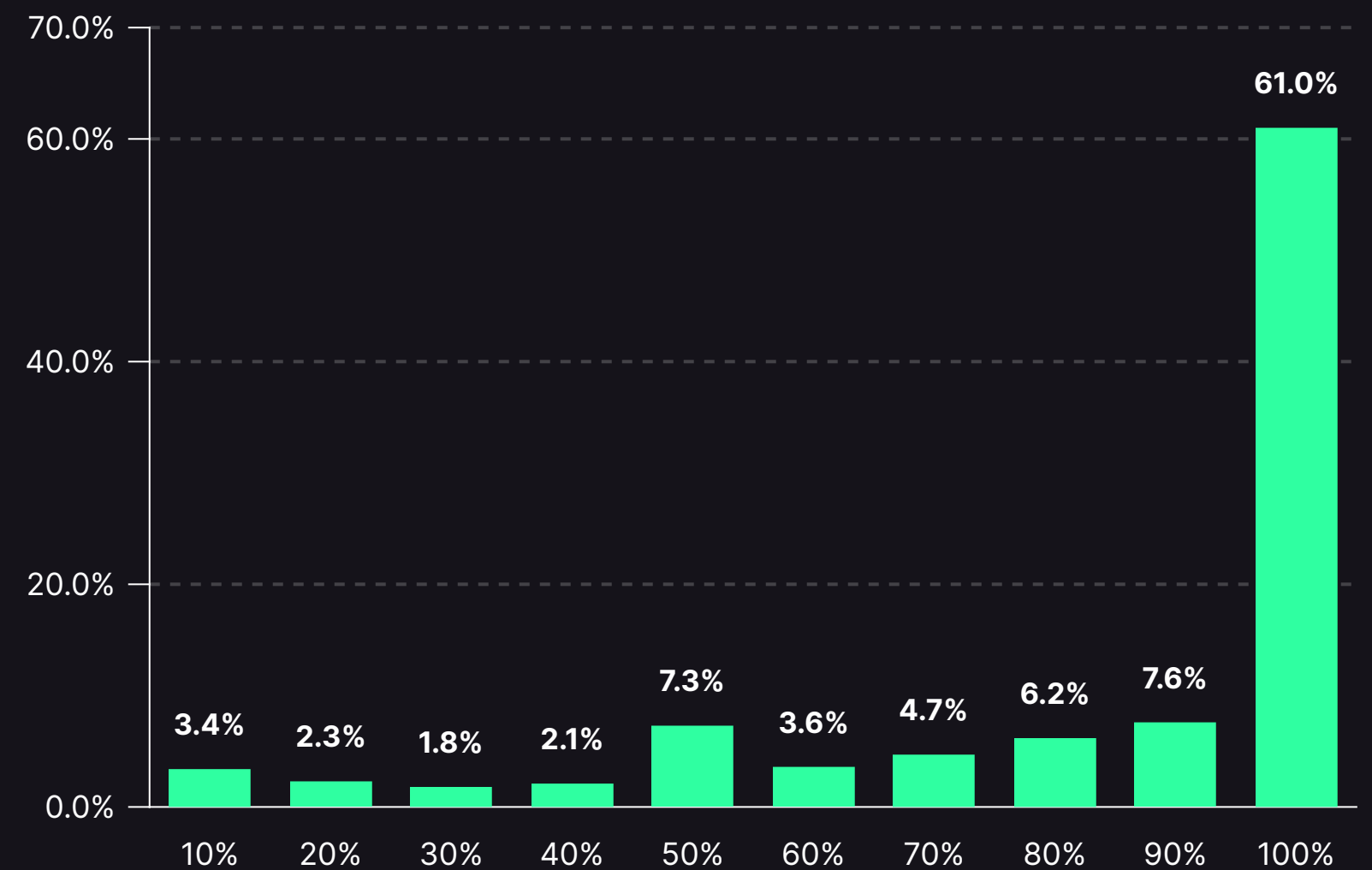
7.4

Reduction of Opioid-Containing Pain Relievers

- Average reduction of opioids through the use of medical cannabis: **83.9%**
- Proportion of those who were able to reduce opioids by more than half through the use of medical cannabis: **83.1%**
- Proportion of those who were able to completely discontinue opioids through the use of medical cannabis: **61%**

Survey

Opioid-containing pain medications

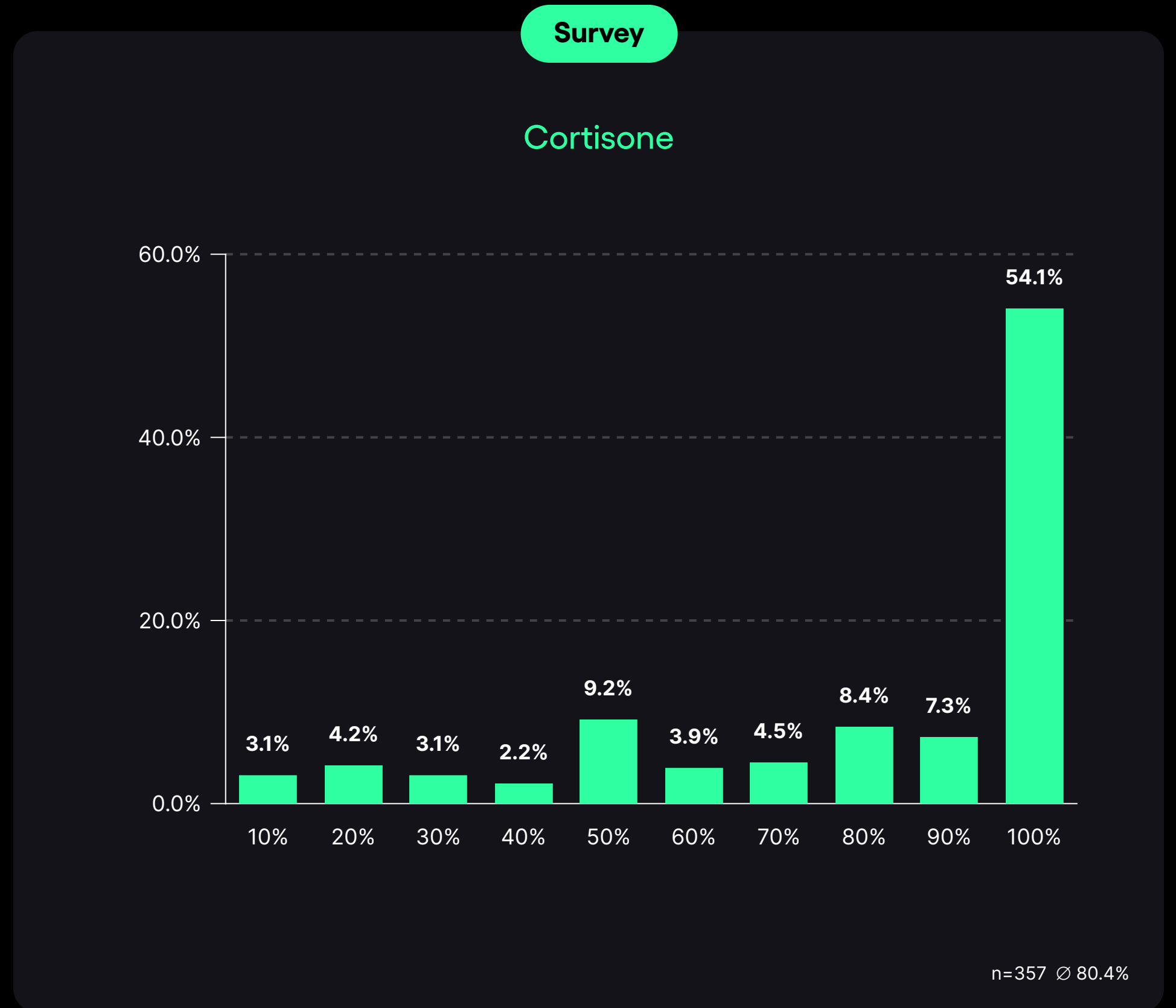


n=615 Ø 83.9%

7.5

Reduction of Cortisone

- Average reduction of cortisone through the use of medical cannabis: **80.4%**
- Proportion of those who were able to reduce cortisone by more than half through the use of medical cannabis: **78.2%**
- Proportion of those who were able to completely discontinue cortisone through the use of medical cannabis: **54.1%**



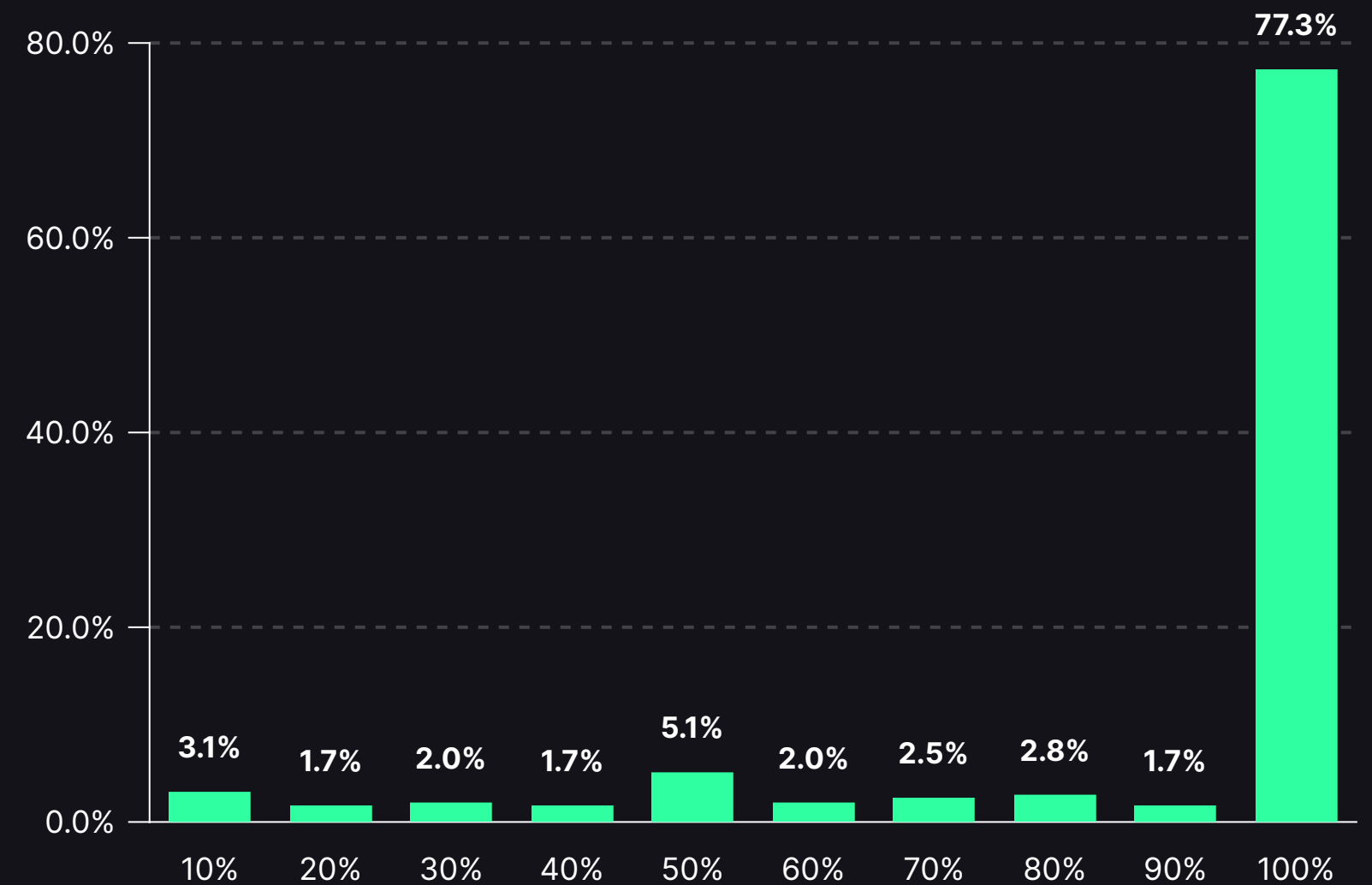
7.6

Reduction of Methylphenidate

- Average reduction of Methylphenidate (e.g., Ritalin / Medikinet) through the use of medical cannabis: **88.4%**
- Proportion of those who were able to reduce Methylphenidate-containing preparations by more than half through the use of medical cannabis: **86.3%**
- Proportion of those who were able to completely discontinue Methylphenidate through the use of medical cannabis: **77.3%**

Survey

Methylphenidate (e.g. Ritalin)



n=353 Ø 88.4%

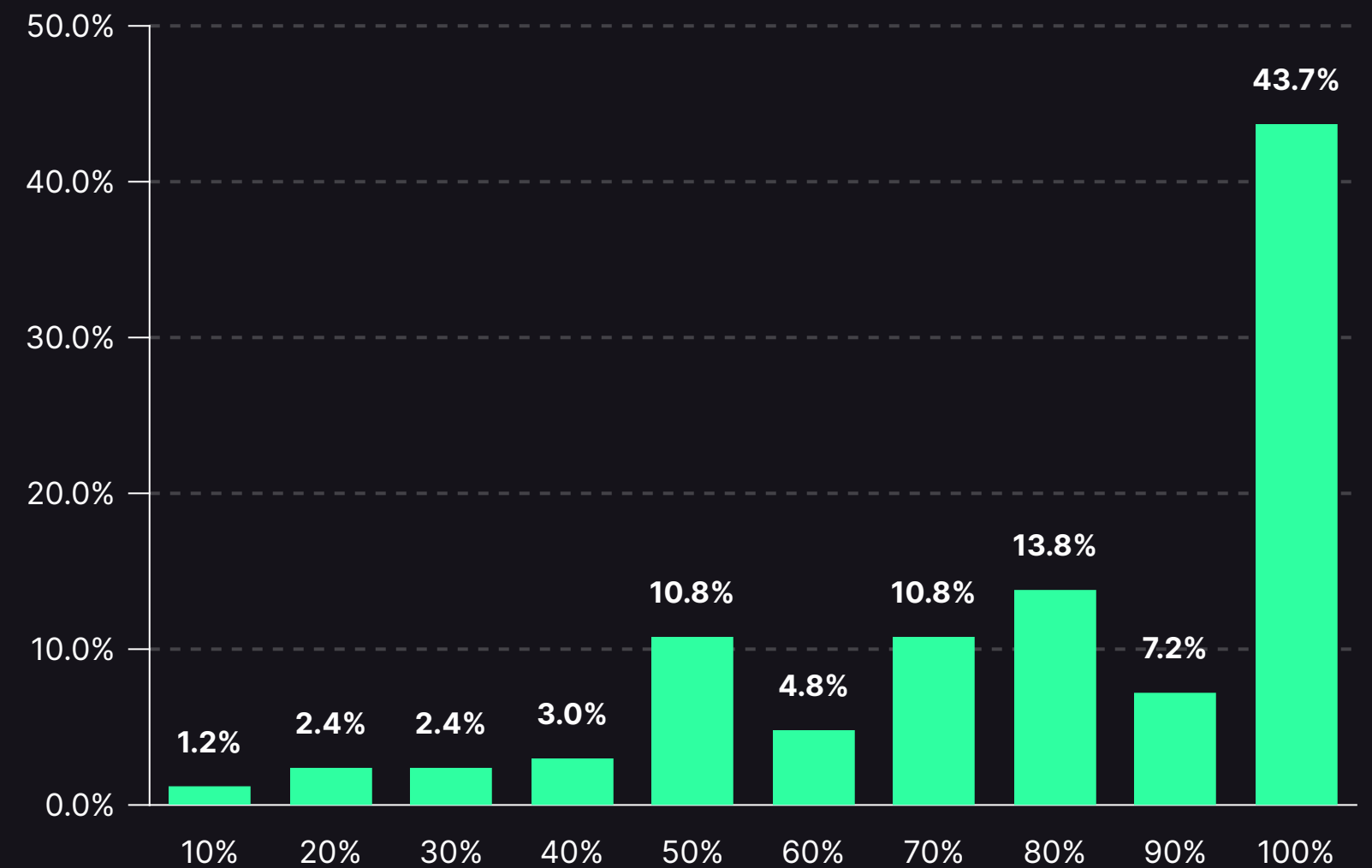
7.7

Reduction of Triptans

- Average reduction of Triptans through the use of medical cannabis: **79.5%**
- Proportion of those who were able to reduce Triptans by more than half through the use of medical cannabis: **80.3%**
- Proportion of those who were able to completely discontinue Triptans through the use of medical cannabis: **43.7%**

Survey

Triptans



n=167 Ø 79.5%

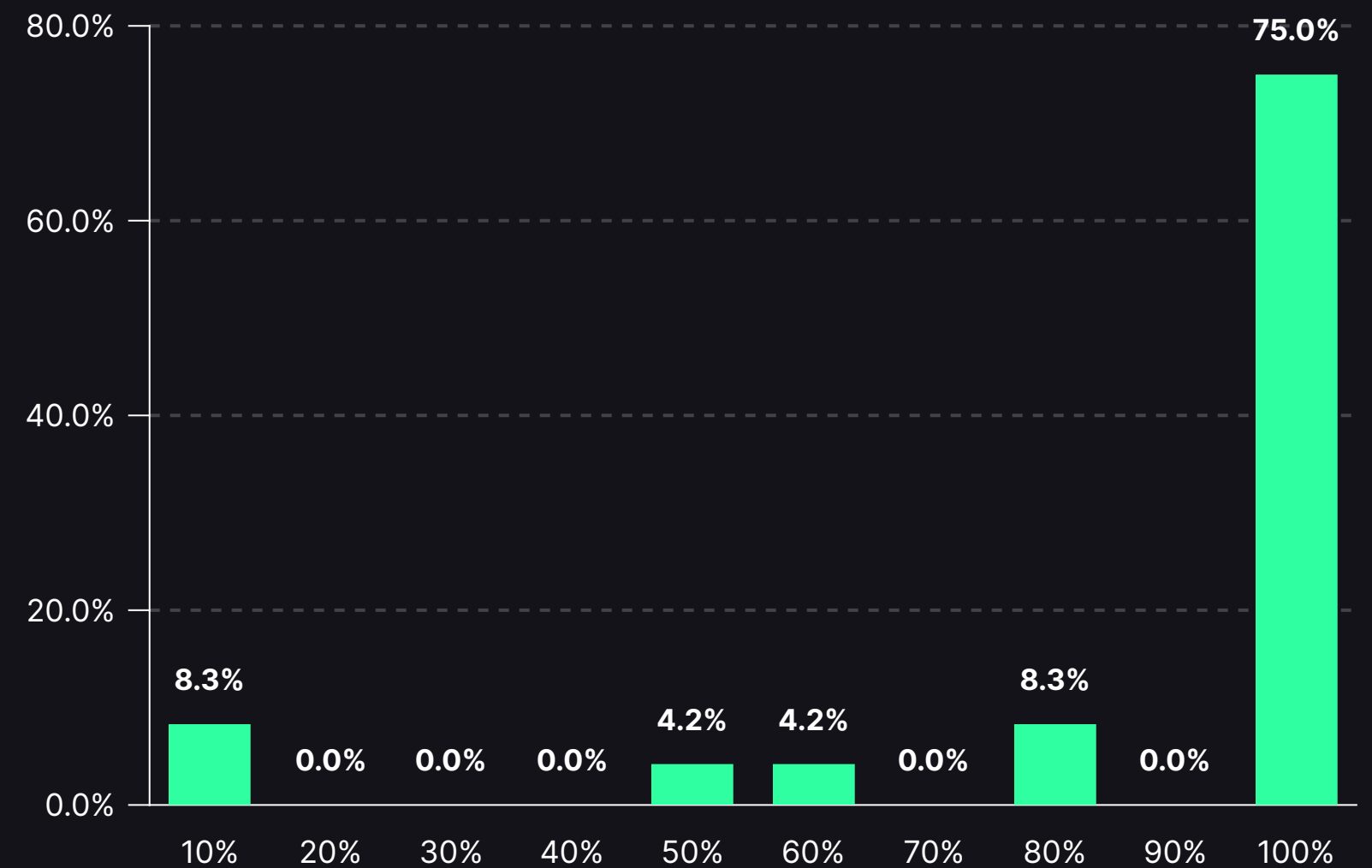
7.8

Reduction of Antiemetics

- Average reduction of antiemetics through the use of medical cannabis: **87.1%**
- Proportion of those who were able to reduce antiemetics by more than half through the use of medical cannabis: **87.5%**
- Proportion of those who were able to completely discontinue antiemetics through the use of medical cannabis: **75.0%**

Survey

Antiemetics



n=24 Ø 87.1%

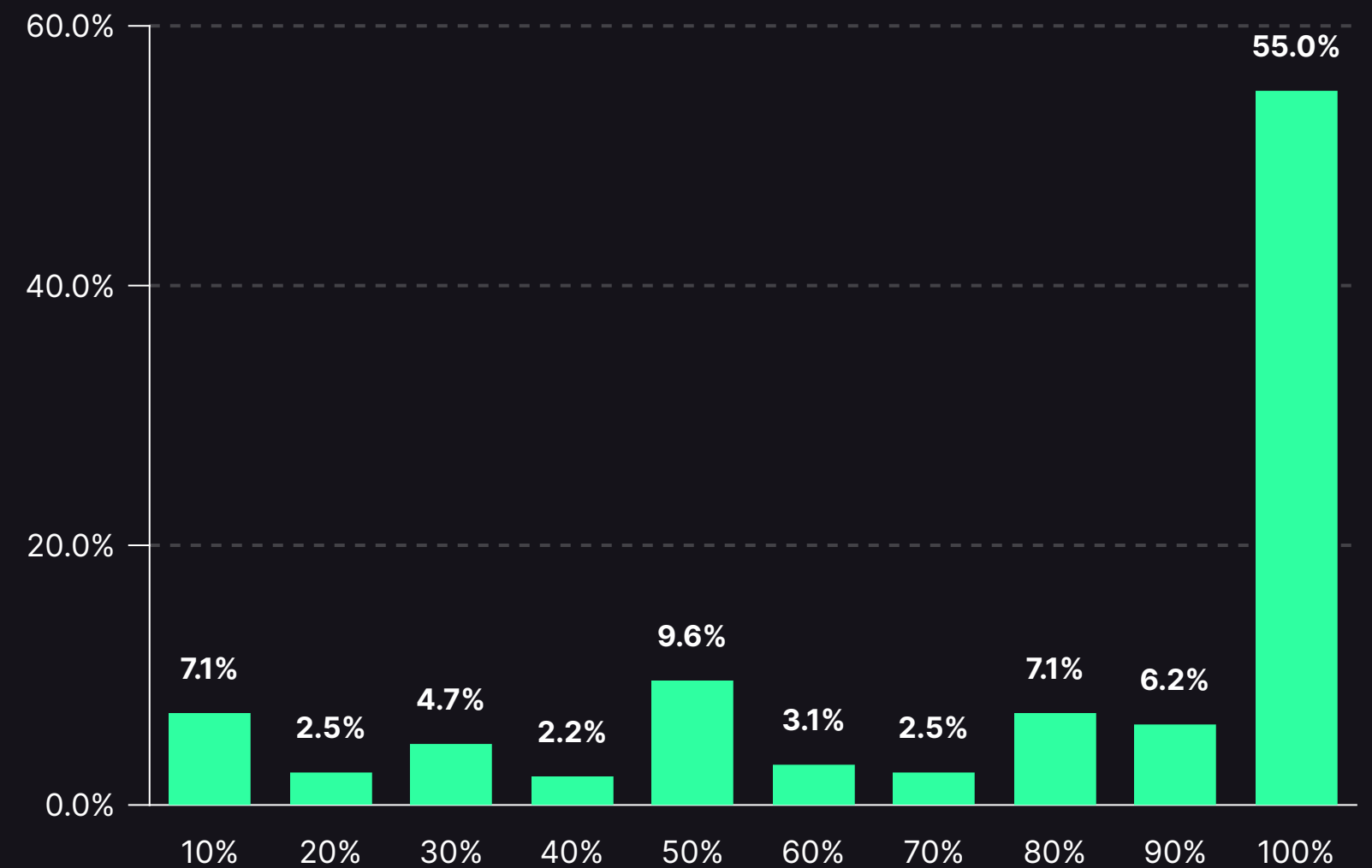
7.9

Reduction of Other Medications

- Average reduction of other medications through the use of medical cannabis: **77.8%**
- Proportion of those who were able to reduce other medications by more than half through the use of medical cannabis: **73.9%**
- Proportion of those who were able to completely discontinue other medications through the use of medical cannabis: **55.0%**

Survey

Other medications



n=322 Ø 77.8%



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The Cannabis Barometer

Chapter 2

Trends in Medical Cannabis Flowers Q1 2026



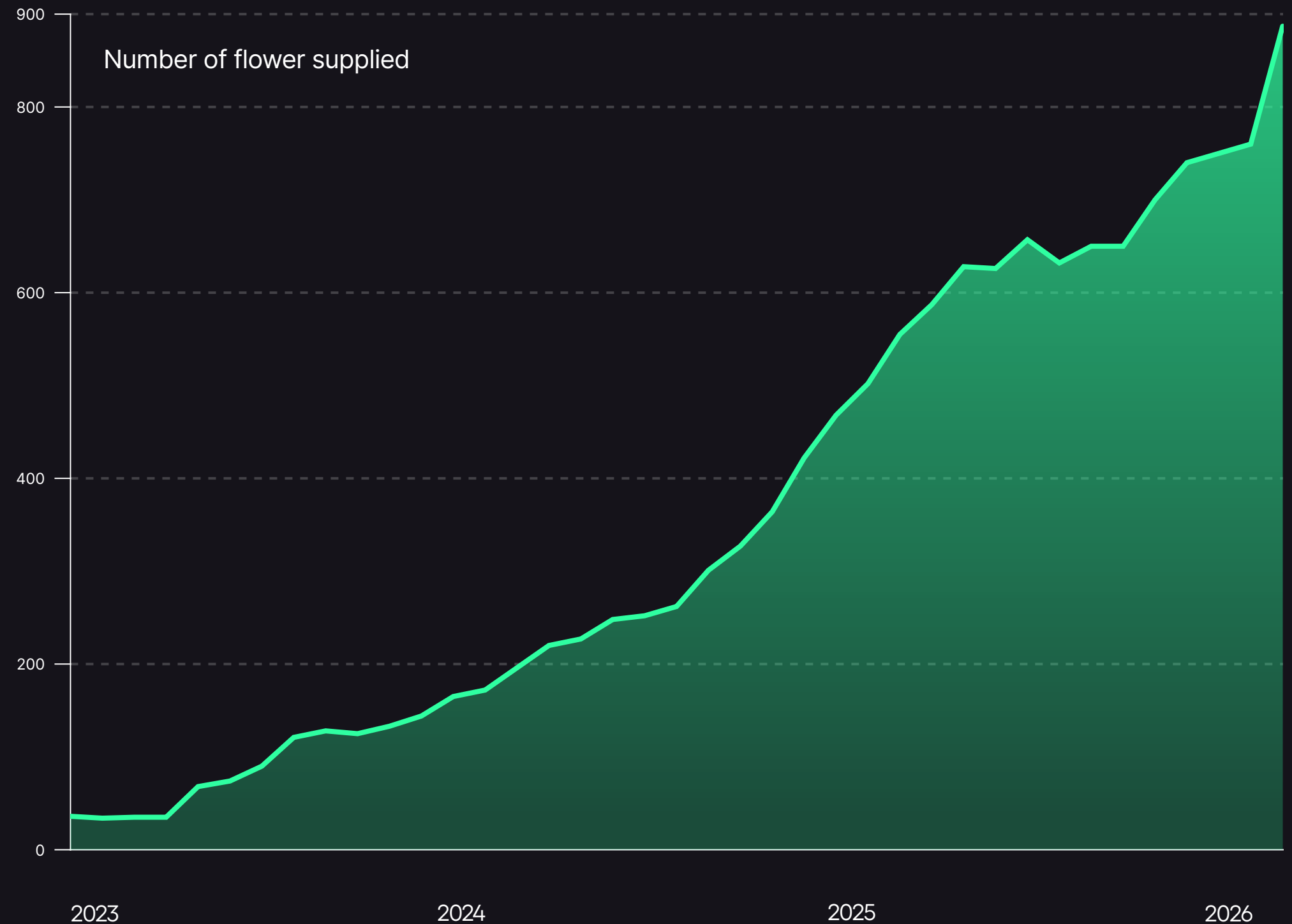
1

Diversity of Medical Cannabis Products

The number of different flower products for cannabis therapy in Germany is constantly growing, now reaching 887.

In view of this variety of strains, supply security depends on specialized online mail-order pharmacies. Non-specialized pharmacies are not in a position to stock a sufficient variety of cannabis flowers without the expiration date being exceeded in the case of significant quantities.

Trend



2

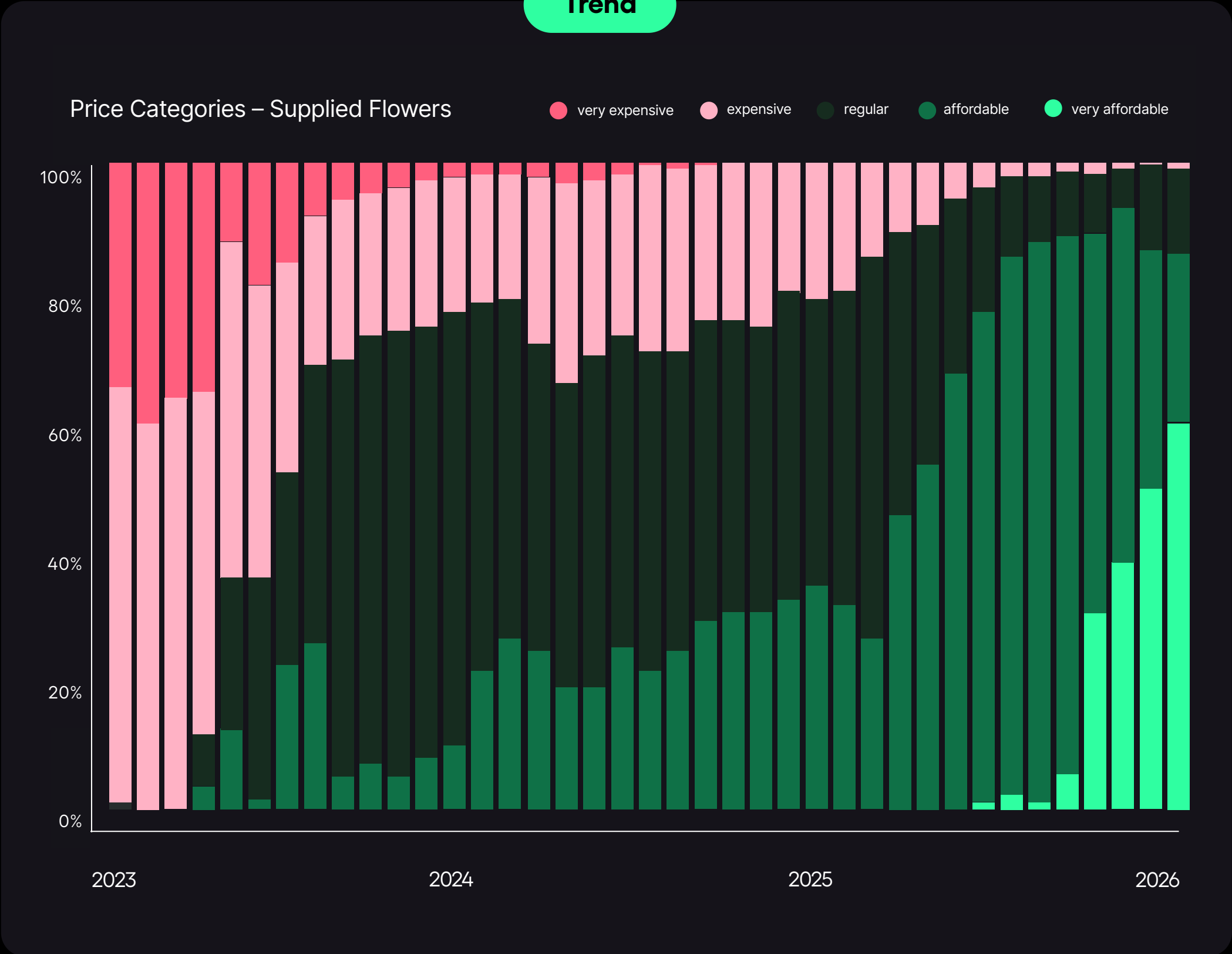
The Share of Very Affordable Flowers Rises Less than 4 € is 60 %

Very affordable flowers priced at under four euros per gram account for almost 60%. Only 6.13% are priced at more than seven euros per gram. Flowers that cost more than ten euros are effectively no longer dispensed in the self-payer sector.

* Given the sharply decreased prices since 2024, the categorization has been adjusted compared to previous reports.

- < €4.00/g (Very inexpensive)
- = €4.00 to < €7.00/g (Inexpensive)
- = €7.00 to < €10.00/g (Regular)
- = €10.00 to < €13.00/g (Expensive)
- ≥ €15.00/g (Very expensive)

Trend



3

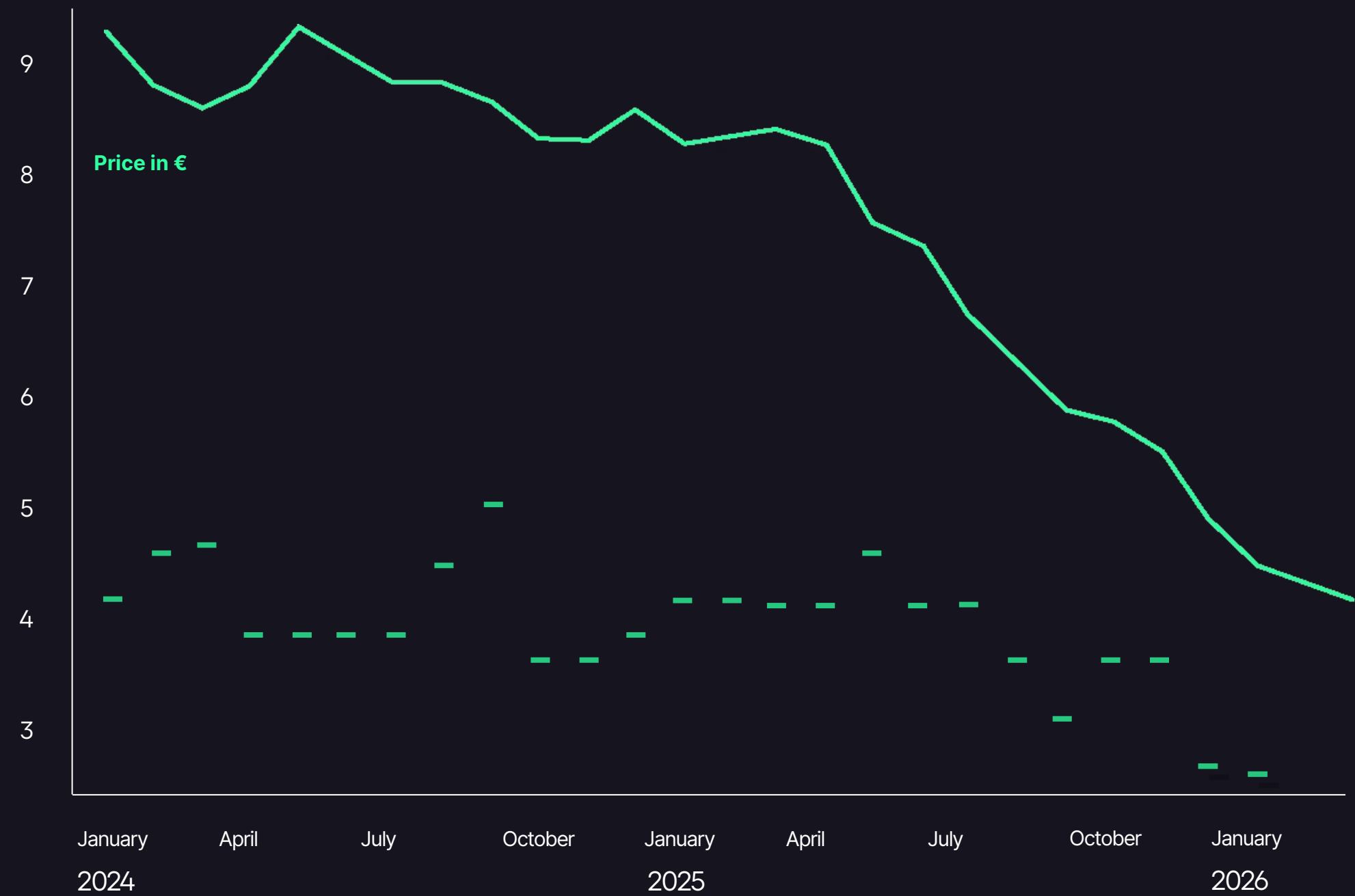
Price Reductions Reach Patients

The average price of the flowers is now 4.52 euros.

*This low price is one of the success factors ensuring that more and more patients are switching from illegal self-medication to digital, medically supervised therapy and are now obtaining controlled medical cannabis of pharmaceutical quality from the pharmacy**. There are now more than a million cannabis patients in Germany, a large part of whom previously self-medicated illegally**. Recently, even former dealers have been complaining in the press that they can no longer compete on price with pharmaceutical cannabis from the pharmacy.*

Trend

Average price & lowest price per gram – dispensed cannabis flowers

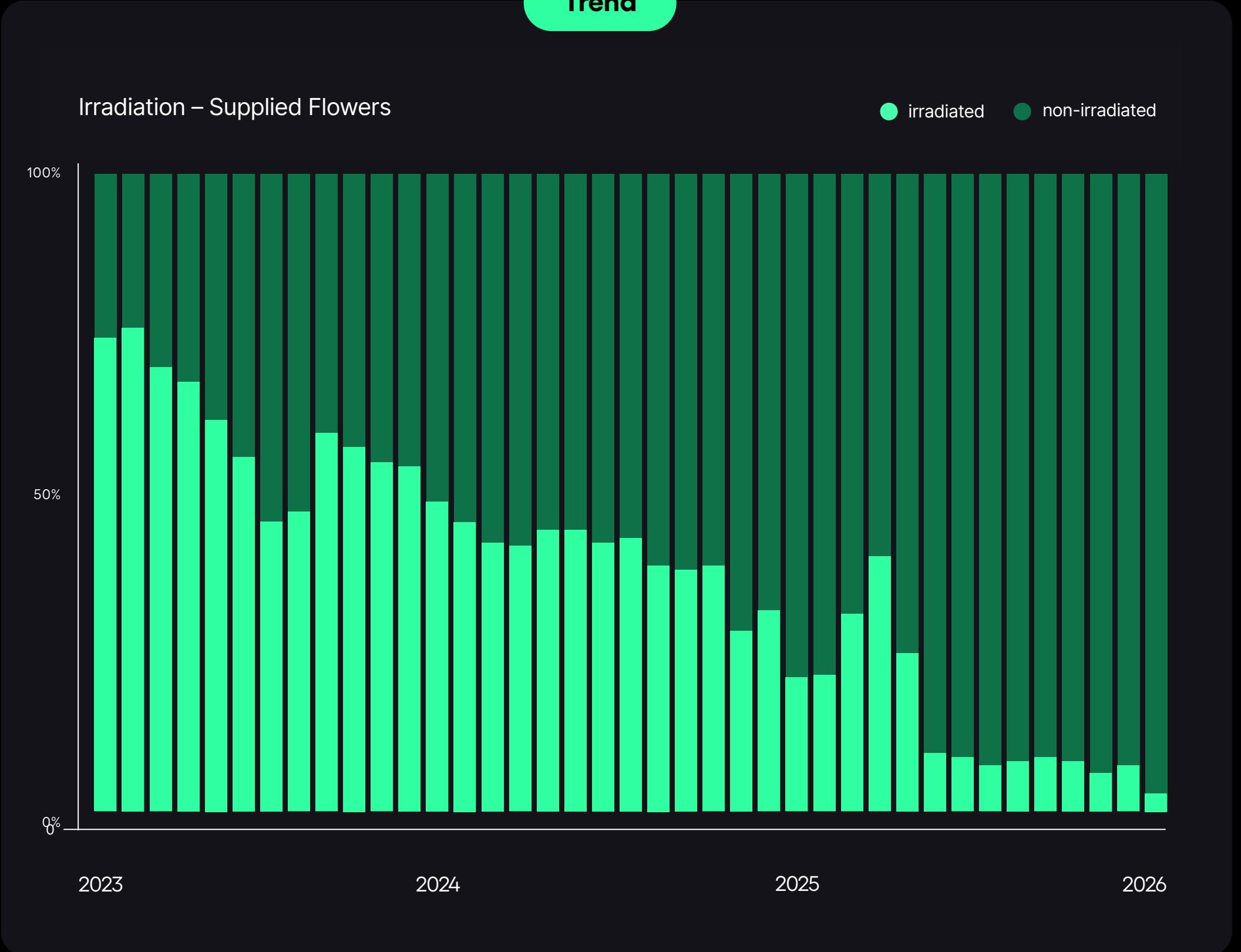


4

Share of Non-Irradiated Flowers Reaches a Peak

In March 2026, the share of irradiated flowers once again fell to a new low, well below 10%. Conversely, the share of non-irradiated flowers in March was higher than ever before.

Trend



5

THC Content

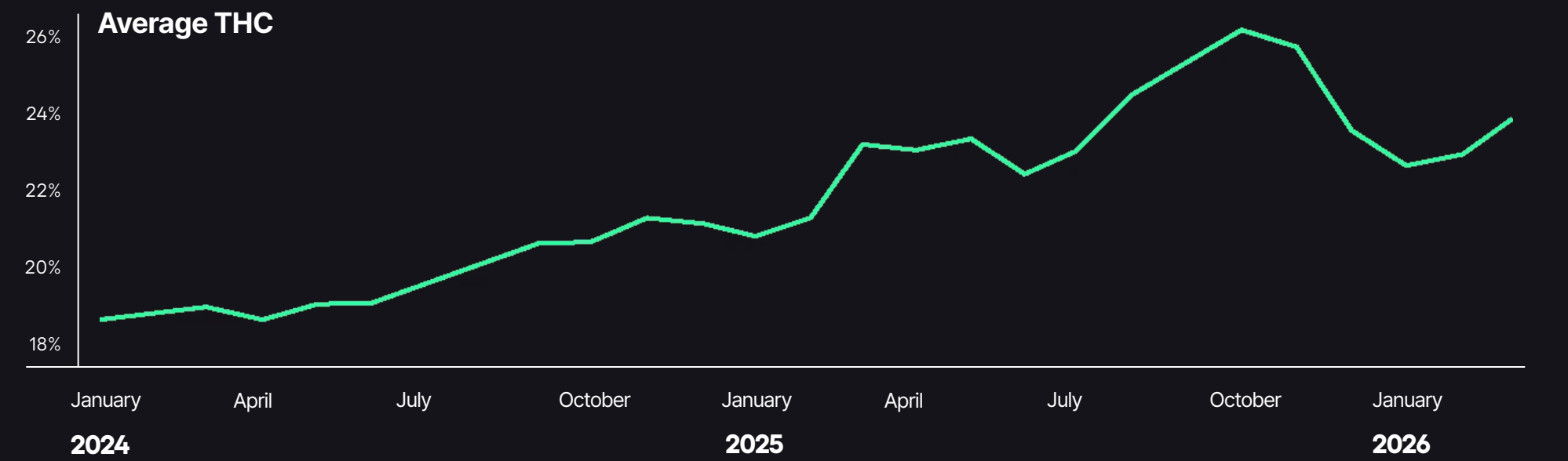
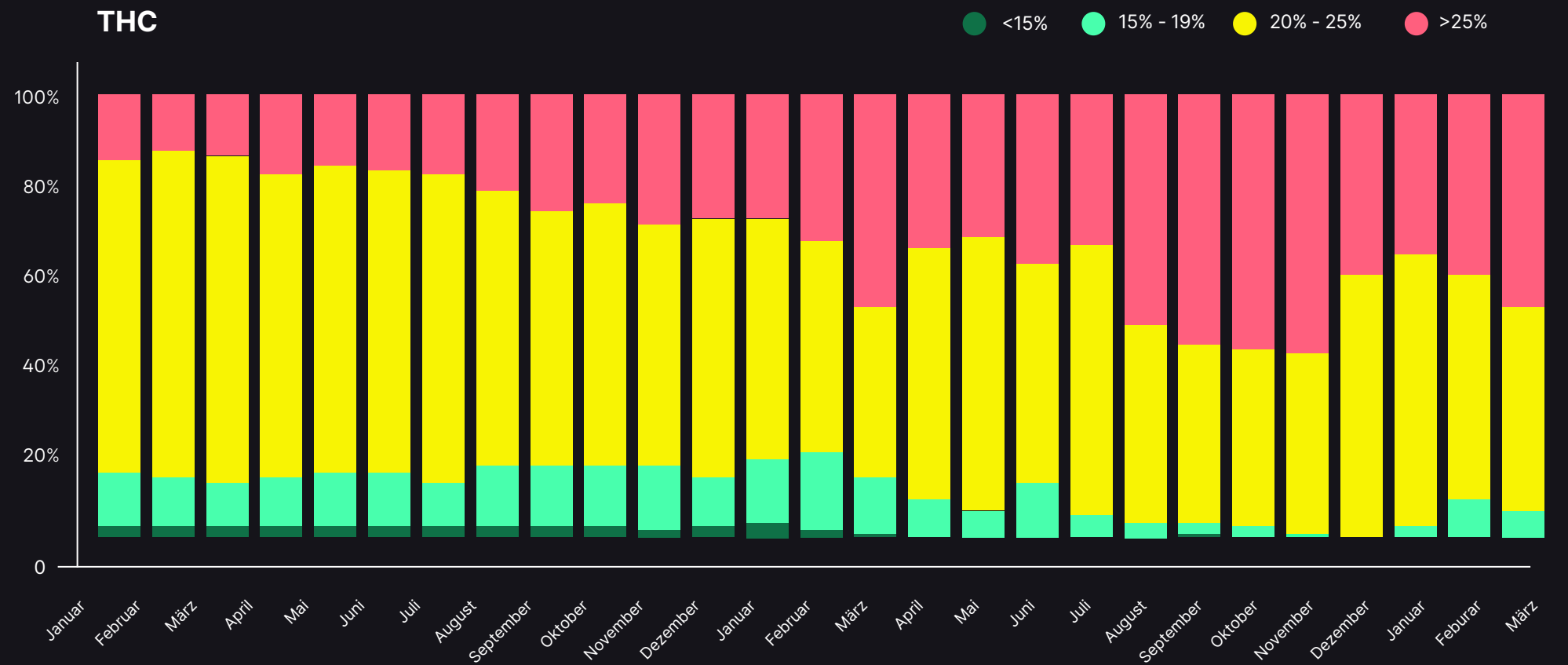
In January 2026, the share of dispensed flowers with a THC content of over 25% decreased again compared to December 2025. In February and March 2026, the value stabilized at roughly the level of the end of last year. The share of flowers with a THC content below 15% increased in February and March.

The second interim report by EKOCAN currently criticizes the routine prescription of more potent cannabis flowers with more than 10% THC, alleging that there is insufficient evidence from controlled studies for this, and that the use of highly potent flowers is associated with a higher risk to psychological health.

“EKOCAN refers to studies from the recreational area to prove the risk to psychological health arising from highly potent THC strains. Such studies cannot be transferred one-to-one to medical cannabis**. Furthermore, the authors define the term evidence extremely narrowly and completely disregard promising real-world data or patient reports**. Dr. Franjo Grotenhermen, a physician specialized in cannabis for decades, rightly points out that until a few years ago, there were simply no opportunities to conduct clinical studies with cannabis strains with more than 10% THC**. In any case, there are few of these expensive studies for a natural product like cannabis flowers**. How then should its efficacy and safety for various indications be proven by such large-scale and expensive studies?”*

— Dr. med. Julian Wichmann

Trend



6

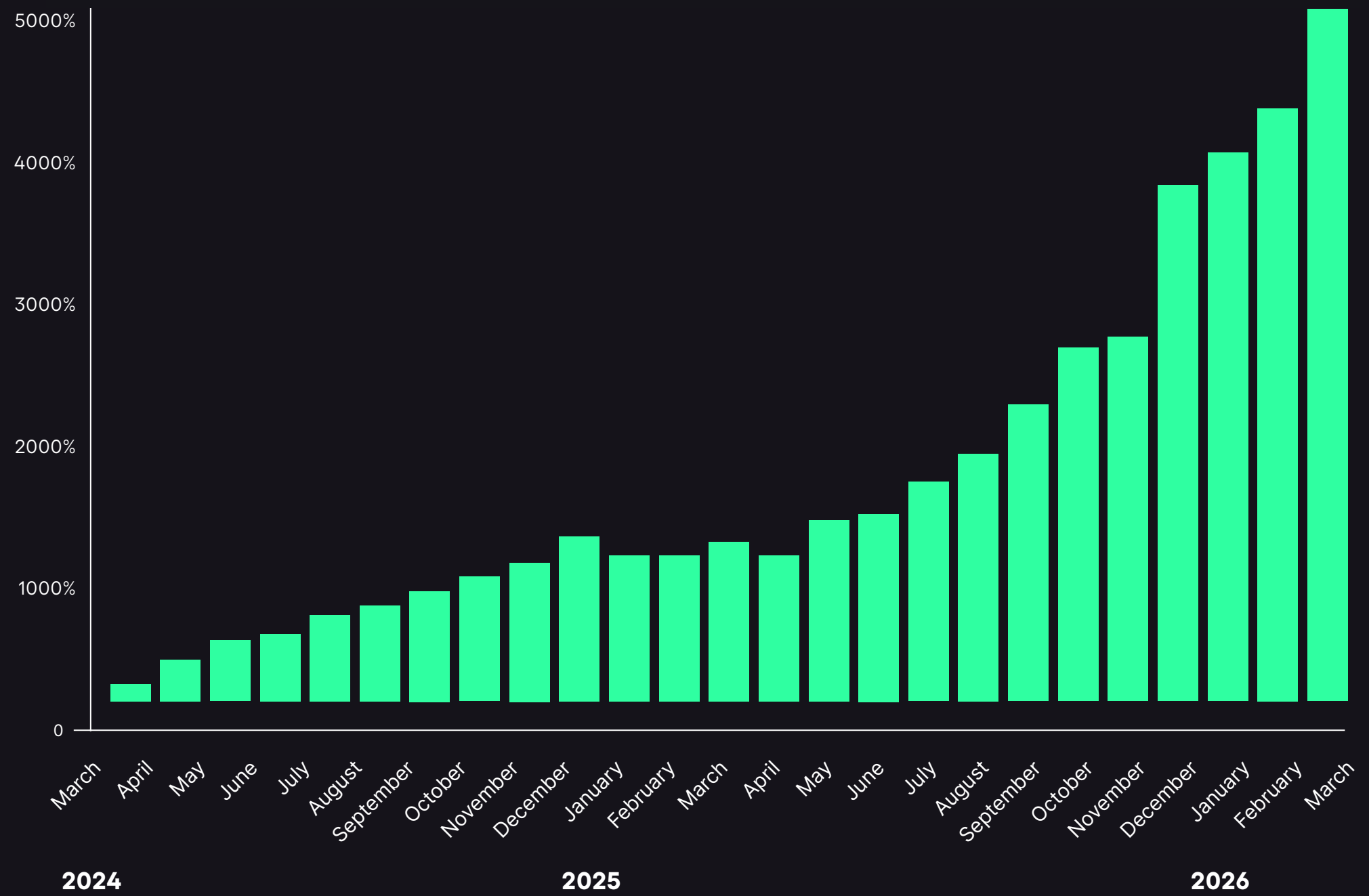
Number of Prescribed Quantities Continues to Rise in the First Quarter

In March 2026, the number of received prescriptions reached an all-time high. And were again 1,200% above the figures for the fourth quarter of 2025 (in relation to March 2024). Compared to the first quarter of 2025, the prescribed quantities have approximately tripled.

The continually rising prescription figures could signal that patients are still self-medicating illegally and are now continuously transitioning to digital and medically supervised therapy. Furthermore, millions of additional patients could benefit in the future from low-threshold telemedicine access to cannabis therapy, considering the spread of common diseases in Germany and the significantly fewer side effects with a successful reduction of other prescription medications.*

Trend

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





Niklas Kouparanis

CO-FOUNDER AND CEO BLOOMWELL GROUP GMBH

Experts in Germany are now largely in agreement that a large portion of cannabis users in Germany were pushed into illegal self-medication due to the high hurdles for a prescription before cannabis was removed from the Narcotics Act*. Given more than a million cannabis patients in Germany, 200 tons of imported cannabis in 2025, and continuously increasing prescription numbers, no one can seriously deny how many of these patients have now successfully transitioned to legal, medically supervised care**. Over 90 percent of cannabis users in Germany pursue health or medical motives**. Digital therapy is therefore the real game-changer on the way to legal sources of supply and the most effective lever of the CanG (Cannabis Act) to reduce the black market**. We must never forget that the illegal market represents the greatest health threat to citizens, especially patients, who still too often expose themselves to considerable risks there.

Statements by politicians who nonetheless speak of a booming black market are in clear contradiction to the empirical, partly scientifically collected data of the Ekocan Report and undermine the basis for evidence-based political decisions*.

Absurdly, the very people who make such claims simultaneously demand more restrictions for medical cannabis—and would thereby solely strengthen that black market, push patients back into illegality, and financially harm local German pharmacies in return**. We should not be fooled: those who want to replace cannabis flowers with finished medicinal products, but at the same time want to abolish GKV (Statutory Health Insurance) cost coverage and demand that price regulation be applied in the self-payer sector, are not concerned with patient safety and interests, but with their own motives.

The current German model serves as an example for all of Europe, but we must continuously fight to ensure that the paternalism of more than a million patients does not increase again.

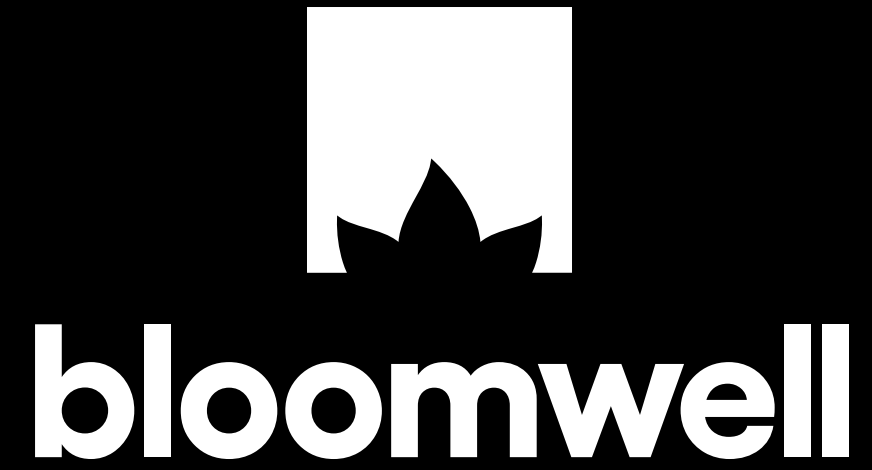
Method

For this report, Bloomwell surveyed 3,528 medical cannabis patients online in March 2026.

Furthermore, for the report, prescriptions in the seven-figure range from January 2024 to March 2026 were anonymized and evaluated. The data for March 2026 are extrapolated and may vary slightly at a later date. All prescriptions were redeemed by self-paying patients via the online platform Bloomwell 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 more than 100.000 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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