

# West Virginia Office of Medical Cannabis 2023 Biennial Report



West Virginia Office of Medical Cannabis  
Biennial Report 2023



Jim Justice  
Governor

Sherri A. Young, DO, MBA, FAAFP  
Interim Cabinet Secretary  
West Virginia Department of Health and Human Resources

Matthew Christiansen, MD, MPH  
Commissioner and State Health Officer  
Bureau for Public Health

The following report is filed in compliance with W. Va. Code §16A-10-5.

# TABLE OF CONTENTS

|                                                              |           |
|--------------------------------------------------------------|-----------|
| <b>Introduction .....</b>                                    | <b>5</b>  |
| <b>Assessment of Use of Medical Cannabis .....</b>           | <b>5</b>  |
| Growers .....                                                | 5         |
| Processors .....                                             | 6         |
| Dispensaries.....                                            | 7         |
| Financial Information .....                                  | 12        |
| <b>Assessment of the Benefits and Risks to Patients.....</b> | <b>21</b> |
| Patient Demographics .....                                   | 22        |
| <b>Enforcement/Compliance .....</b>                          | <b>28</b> |
| <b>Recommendations for Amendments.....</b>                   | <b>32</b> |

## **Introduction**

In accordance with the West Virginia Medical Cannabis Act (“Act”), West Virginia Code §16A- 10-5, the Office of Medical Cannabis (OMC) is required to prepare a report every two years, and include the following information:

- An assessment of the use of medical cannabis as a result of the Act;
- An assessment of the benefits and risks to patients using medical cannabis under the Act, including adverse events; and
- Recommendations for amendments to the Act for reasons of patient safety or to aid the general welfare of the citizens of this state.

# **Assessment of the use of medical cannabis as a result of the Act**

## **Growers**

The medical cannabis program has been limited by the Act to 10 grower permits, 10 processor permits, and up to 100 dispensary permits. Following the rigorous application procedure, OMC employed scoring teams to consider applications and provide recommendations to an awards team, which determined the issuance of permits.

On October 2, 2020, OMC issued medical cannabis grower permits. Out of 44 grower applications received, 10 permits were awarded to the following successful applicants outlined in Table 1:

Table 1: Grow Permits

| <b>License Number</b> | <b>Business Name</b>               | <b>Trade Name</b>           | <b>Property Location City</b> | <b>Property Location County</b> | <b>Date Deemed Operational</b> |
|-----------------------|------------------------------------|-----------------------------|-------------------------------|---------------------------------|--------------------------------|
| G020003               | Columbia Care WV LLC               |                             | Falling Waters                | Berkeley                        | 7/8/2021                       |
| G200004               | Mountaineer Holding LLC (Trulieve) |                             | Lesage                        | Cabell                          | 6/29/2021                      |
| G190001               | Harvest Care Medical, LLC          | Country Grown Cannabis      | Bridgeport                    | Harrison                        | 3/11/2022                      |
| G490002               | Buckhannon Grow LLC                |                             | Buckhannon                    | Upshur                          | 3/11/2022                      |
| G440005               | Tariff Labs, LLC                   |                             | Millwood                      | Jackson                         | 2/2/2022                       |
| G410009               | Holistic WV Farms I LLC            | Holistic Industries         | Beaver                        | Raleigh                         | 8/4/2022                       |
| G410007               | Verano WV LLC                      |                             | Beaver                        | Raleigh                         | 3/22/2022                      |
| G290008               | Mountaineer Integrated Care Inc    | Mountaineer Integrated Care | Fort Ashby                    | Mineral                         |                                |
| G490006               | Armory Pharmaceutical, Inc         |                             | Buckhannon                    | Upshur                          | 7/13/2022                      |
| G260010               | Blue Ridge Botanicals, Ltd.        |                             | TBD                           | TBD                             |                                |

Currently, 8 of the 10 grower permits are actively growing plants. Of the two permittees not actively growing, one became operational for a period of time but experienced facility issues and temporarily ceased operations. With additional resources, that permittee is currently working toward resuming operations. The other non-operational permit has experienced difficulty in securing a suitable location. An early location selected was found to have environmental issues while the facility was being renovated. The most recent location was also found to have environmental concerns not suitable for growing medical cannabis plants.

## **Processors**

In accordance with the Act and applicable rules, the allowable forms of cannabis for patient use are: pill; oil; topical forms including gels, creams, and ointments; a form medically appropriate for administration by vaporization or nebulization; dry leaf or plant form; tincture; liquid; and dermal patch.

On November 13, 2020, OMC issued medical cannabis processor permits to 10 successful applicants. Processor permittees will process medical cannabis plant material into allowable forms and distribute to permitted dispensaries for purchase by certified patients. Out of 41 processor applications received, 10 permits were awarded to the following successful applicants outlined in Table 2:

Table 2: Processor Permits

| <b>License Number</b> | <b>Business Name</b>            | <b>Trade Name</b>           | <b>Location City</b> | <b>Location County</b> | <b>Date Deemed Operational</b> |
|-----------------------|---------------------------------|-----------------------------|----------------------|------------------------|--------------------------------|
| P020004               | Columbia Care WV LLC            |                             | Falling Waters       | Berkeley               | 11/17/2021                     |
| P170003               | Harvest Care Medical, LLC       |                             | Bridgeport           | Harrison               | 9/15/2022                      |
| P490001               | Buckhannon WV Processing LLC    | Terrasana                   | Buckhannon           | Upshur                 | 6/21/2023                      |
| P440005               | Tariff Labs, LLC                | Hillfire                    | Millwood             | Jackson                | 5/12/2022                      |
| P410007               | Holistic WV Farms I LLC         | Holistic Industries         | Beaver               | Raleigh                |                                |
| P410002               | Verano WV LLC                   |                             | Beaver               | Raleigh                | 8/4/2022                       |
| P290006               | Mountaineer Integrated Care Inc | Mountaineer Integrated Care | Fort Ashby           | Mineral                |                                |
| P490008               | Armory Pharmaceutical, Inc      |                             | Buckhannon           | Upshur                 | 2/23/2023                      |
| P060009               | Trulieve WV, Inc.               | Trulieve                    | Lesage               | Cabell                 | 6/9/2022                       |
| P130010               | V3 WV GP, LLC                   |                             | TBD                  | TBD                    |                                |

Currently, seven of the 10 processor permits are operational. Of the three permittees not yet operational, one also has a grower permit that is actively growing plants. Of the two remaining permits, one also has a grower permit that is working toward achieving resuming operations and the remaining processor permit is working in conjunction with the grower permit that has not yet been successful in finding a suitable location.

## **Dispensaries**

OMC received 199 dispensary applications for a maximum of 100 permits allowed under the Act. On January 29, 2021, OMC announced the successful applicants for medical cannabis dispensary permits. Recipients of these permits are allowed to operate retail locations within West Virginia for certified patients. A list of the current permits is outlined below:

| License Number | Business Name                                                               | Trade Name                     | City          | Location County | Date Deemed Operational |
|----------------|-----------------------------------------------------------------------------|--------------------------------|---------------|-----------------|-------------------------|
| D060082        | Camo Medical West Virginia LLC                                              | Camo Medical West Virginia LLC | Huntington    | Cabell          |                         |
| D200064        | Cannabis Care of West Virginia LLC                                          | Kanacare Health                | Charleston    | Kanawha         | 6/9/2022                |
| D200053        | Capital City Health and Wellness, LLC (Firelands)                           | The Landing Dispensary         | Charleston    | Kanawha         | 8/10/2022               |
| D170095        | Capital Mountain LLC                                                        | West Virginia Relief           | Clarksburg    | Harrison        | 9/27/2022               |
| D420093        | Capital Mountain LLC                                                        | West Virginia Relief           | Elkins        | Randolph        |                         |
| D190094        | Capital Mountain LLC                                                        | West Virginia Relief           | Kearneysville | Jefferson       |                         |
| D410061        | Columbia Care WV LLC                                                        | Cannabist                      | Beckley       | Raleigh         | 2/7/2022                |
| D100059        | Columbia Care WV LLC                                                        | Cannabist                      | Huntington    | Cabell          | 3/16/2023               |
| D310060        | Columbia Care WV LLC                                                        | Cannabist                      | Morgantown    | Monongalia      | 3/24/2022               |
| D200062        | Columbia Care WV LLC                                                        | Cannabist                      | St. Albans    | Kanawha         | 2/28/2022               |
| D540058        | Columbia Care WV LLC                                                        | Cannabist                      | Williamstown  | Wood            | 12/17/2021              |
| D540096        | CPKH 2 LLC                                                                  | Verdant Creations              | Parkersburg   | Wood            | 12/7/2021               |
| D240036        | Curative Growth, Inc.                                                       | The Riverside Dispensary       | Fairmont      | Marion          | 5/8/2023                |
| D310038        | Curative Growth, Inc.                                                       | The Green House Dispensary     | Morgantown    | Monongalia      |                         |
| D140037        | Curative Growth, Inc.                                                       | The Orchard Dispensary         | Romney        | Hampshire       | 4/21/2023               |
| D050097        | ECS Partners, LLC                                                           | The Foundry                    | Weirton       | Brooke          | 5/26/2022               |
| D200084        | Greene Street Holdings West Virginia, LLC (formerly Compiler Wellness, LLC) | Green Street                   | Charleston    | Kanawha         | 2/17/2023               |
| D060083        | Greene Street Holdings West Virginia, LLC (formerly Compiler Wellness, LLC) | Green Street                   | Cross Lanes   | Kanawha         | 10/4/2022               |
| D060085        | Greene Street Holdings West Virginia, LLC (formerly Compiler Wellness, LLC) | Green Street                   | Huntington    | Cabell          |                         |
| D190007        | Harvest Care Medical, LLC                                                   |                                | Charles Town  | Jefferson       | 9/29/2022               |
| D240009        | Harvest Care Medical, LLC                                                   |                                | Fairmont      | Marion          |                         |
| D060008        | Harvest Care Medical, LLC                                                   | C by Country Grown             | Huntington    | Cabell          | 4/14/2023               |
| D020005        | Harvest Care Medical, LLC                                                   | Appalachian Medical Cannabis   | Inwood        | Berkeley        | 3/16/2023               |
| D020003        | Harvest Care Medical, LLC                                                   |                                | Kearneysville | Berkeley        |                         |
| D020006        | Harvest Care Medical, LLC                                                   | Country Grown Cannabis         | Martinsburg   | Berkeley        | 9/10/2022               |
| D200002        | Harvest Care Medical, LLC                                                   |                                | St. Albans    | Kanawha         |                         |
| D190001        | Harvest Care Medical, LLC                                                   |                                | Shepherdstown | Jefferson       |                         |
| D190010        | Harvest Care Medical, LLC                                                   | Country Grown Cannabis         | Shepherdstown | Jefferson       |                         |
| D200004        | Harvest Care Medical, LLC                                                   |                                | Wheeling      | Kanawha         |                         |
| D240044        | HCWV Sub LLC (formerly The Healing Center WV, LLC)                          | HCWV Sub LLC                   | Fairmont      | Marion          |                         |

| License Number | Business Name                                           | Trade Name                      | City          | Location County | Date Deemed Operational |
|----------------|---------------------------------------------------------|---------------------------------|---------------|-----------------|-------------------------|
| D540046        | HCWV Sub LLC (formerly The Healing Center WV, LLC)      | HCWV Sub LLC                    | Parkersburg   | Wood            | 10/31/23                |
| D410023        | Logan Investments (formerly Beckley Retail LLC)         | Greenlight                      | Beckley       | Raleigh         |                         |
| D130068        | Logan Investment Partners LLC                           | Greenlight                      | Lewisburg     | Greenbrier      | 5/21/2022               |
| D230020        | Logan Investment Partners, LLC                          | Greenlight                      | Beckley       | Raleigh         | 7/11/2022               |
| D280017        | Logan Investment Partners, LLC                          | Greenlight                      | Bluefield     | Mercer          | 8/22/2022               |
| D230070        | Logan Investment Partners, LLC                          | Greenlight                      | Princeton     | Mercer          | 5/23/2022               |
| D230069        | Logan Investment Partners, LLC                          | Greenlight                      | Stollings     | Logan           | 6/30/2022               |
| D490067        | Logan Investments (formerly Armory Pharmaceutical, Inc) | Greenlight                      | Buckhannon    | Upshur          |                         |
| D200024        | Logan Investments (formerly Charleston Retail LLC)      | Greenlight                      | Charleston    | Kanawha         |                         |
| D100025        | Logan Investments (formerly Fayetteville Retail LLC)    | Greenlight                      | Fayetteville  | Fayette         |                         |
| D280028        | Logan Investments (formerly Princeton WV Retail LLC)    | Terrasana                       | Princeton     | Mercer          |                         |
| D060039        | Marachem Inc                                            | Barboursville Cannabis Company  | Barboursville | Cabell          | 8/22/2022               |
| D200016        | Mountain State Alternative Care, LLC                    | Appalachian Medical Cannabis    | Charleston    | Kanawha         | 6/27/2023               |
| D180042        | Mountaineer Integrated Care Inc                         | Mountaineer Integrated Care Inc | Ravenswood    | Jackson         |                         |
| D410091        | Mountaineer Relief, LLC (Firelands)                     | The Landing Dispensary          | Beckley       | Raleigh         |                         |
| D410092        | Mountaineer Relief, LLC (Firelands)                     | The Landing Dispensary          | Beckley       | Raleigh         | 12/7/2022               |
| D150088        | Mountaineer Relief, LLC (Firelands)                     | The Landing Dispensary          | Bridgeport    | Harrison        | 9/27/2022               |
| D060089        | Mountaineer Relief, LLC (Firelands)                     | The Landing Dispensary          | Huntington    | Cabell          |                         |
| D060090        | Mountaineer Relief, LLC (Firelands)                     | The Landing Dispensary          | Huntington    | Cabell          | 7/6/2022                |
| D310087        | Mountaineer Relief, LLC (Firelands)                     | The Landing Dispensary          | Morgantown    | Monongalia      |                         |
| D540063        | Mountaineer Remedy LLC (Firelands)                      | The Landing Dispensary          | Parkersburg   | Wood            | 7/7/2022                |
| D330075        | New Leaf WV, LLC                                        | Newleaf                         | Fairmont      | Marion          | 4/26/2023               |
| D190072        | New Leaf WV, LLC                                        | Newleaf                         | Kearneysville | Jefferson       |                         |

| License Number | Business Name                                      | Trade Name                      | City         | Location County | Date Deemed Operational |
|----------------|----------------------------------------------------|---------------------------------|--------------|-----------------|-------------------------|
| D310073        | New Leaf WV, LLC                                   | Newleaf                         | Keyser       | Mineral         |                         |
| D020071        | New Leaf WV, LLC                                   | Newleaf                         | Martinsburg  | Berkeley        | 6/14/2022               |
| D310074        | New Leaf WV, LLC                                   | Newleaf                         | Morgantown   | Monongalia      | 4/13/2023               |
| D200076        | Tariff Labs, LLC                                   | The Landing Dispensary          | Hurricane    | Putnam          |                         |
| D440077        | Tariff Labs, LLC                                   | The Landing Dispensary          | Spencer      | Roane           |                         |
| D170054        | The Next Level Wellness #1, Inc                    | Dbas The Next Level Wellness #3 | Clarksburg   | Harrison        | 6/14/2022               |
| D170056        | The Next Level Wellness #1, Inc                    | Dbas The Next Level Wellness #4 | Clarksburg   | Harrison        | 11/30/2022              |
| D390057        | The Next Level Wellness #1, Inc                    | Dbas The Next Level Wellness #5 | Kingwood     | Preston         | 11/30/2022              |
| D210055        | The Next Level Wellness #1, Inc                    | Dbas The Next Level Wellness #2 | Weston       | Lewis           | 3/31/2023               |
| D020065        | Trulieve (Greenhouse Wellness WV Dispensaries LLC) | Greenhouse Wellness             | Beckley      | Raleigh         | 2/24/2023               |
| D200040        | Trulieve (Mountaineer Holding LLC)                 | Mountaineer Holding LLC         | Belle        | Kanawha         | 9/21/2022               |
| D540041        | Trulieve (Mountaineer Holding LLC)                 | Mountaineer Holding LLC         | Hurricane    | Putnam          | 7/5/2022                |
| D310098        | Trulieve (Solevo Wellness West Virginia LLC)       | Solevo Wellness                 | Milton       | Cabell          | 9/21/2022               |
| D310099        | Trulieve (Solevo Wellness West Virginia LLC)       | Solevo Wellness                 | Morgantown   | Monongalia      | 6/30/2022               |
| D540100        | Trulieve (Solevo Wellness West Virginia LLC)       | Solevo Wellness                 | Parkersburg  | Wood            | 5/21/2022               |
| D490079        | Trulieve WV, Inc.                                  | Trulieve                        | Huntington   | Cabell          | 11/12/2022              |
| D310080        | Trulieve WV, Inc.                                  | Trulieve                        | Morgantown   | Monongalia      | 11/1/2021               |
| D200078        | Trulieve WV, Inc.                                  | Trulieve                        | S Charleston | Kanawha         | 5/21/2022               |
| D210081        | Trulieve WV, Inc.                                  | Trulieve                        | Weston       | Lewis           | 11/4/2021               |
| D490034        | Verano WV LLC                                      | Zen Leaf Buckhannon             | Buckhannon   | Upshur          | 3/22/2023               |
| D170030        | Verano WV LLC                                      | Zen Leaf Clarksburg             | Clarksburg   | Harrison        | 8/15/2022               |
| D200035        | Verano WV LLC                                      | Zen Leaf Dunbar                 | Dunbar       | Kanawha         |                         |
| D310033        | Verano WV LLC                                      | Zen Leaf Morgantown             | Morgantown   | Monongalia      | 12/10/2021              |
| D100031        | Verano WV LLC                                      | Zen Leaf Oak Hill               | Oak Hill     | Fayette         |                         |
| D310032        | Verano WV LLC                                      | Zen Leaf Westover               | Westover     | Monongalia      | 5/21/2022               |
| D350029        | Verano WV LLC                                      | Zen Leaf Wheeling               | Wheeling     | Ohio            | 7/8/2022                |
| D060066        | WV Kindness LLC                                    | WV Kindness LLC                 | Huntington   | Cabell          | 12/3/2021               |
| D060011        | Yuma Way WV LLC                                    | Huntington Gardens Dispensary   | Huntington   | Cabell          | 10/10/2023              |

Of the active 81 permits in the previous table, 55 of those were operational as of November 1, 2023. Those without a date in the column “Date Deemed Operational” are being closely monitored as that status will be taken into consideration during the current renewal period.

Table 4 contains the dispensary permits that were not renewed during the 2023 renewal cycle, with all expiring on January 28, 2024.

Table 4: Original Permits Not Renewed

| License Number | Business Name              | Trade Name                 | City          | Location County |
|----------------|----------------------------|----------------------------|---------------|-----------------|
| D020015        | Holistic WV Farms I LLC    | Holistic WV Farms          | Martinsburg   | Berkeley        |
| D060018        | Holistic WV Farms I LLC    | Holistic WV Farms I LLC    | Barboursville | Cabell          |
| D170019        | Holistic WV Farms I LLC    | Holistic WV Farms          | Bridgeport    | Harrison        |
| D200021        | Holistic WV Farms I LLC    | Holistic WV Farms          | S Charleston  | Kanawha         |
| D310013        | Holistic WV Farms I LLC    | Holistic WV Farms I LLC    | Star City     | Monongalia      |
| D420012        | Holistic WV Farms I LLC    | Holistic WV Farms          | Elkins        | Randolph        |
| D540014        | Holistic WV Farms I LLC    | Holistic WV Farms I LLC    | Parkersburg   | Wood            |
| D060026        | Huntington Retail LLC      | Terrasana                  | Huntington    | Cabell          |
| D310027        | Morgantown WV Retail LLC   | Terrasana                  | Morgantown    | Monongalia      |
| D310022        | Organic Remedies WV, Inc.  | Organic Remedies           | Morgantown    | Monongalia      |
| D150043        | The Healing Center WV, LLC | The Healing Center WV, LLC | Weirton       | Hancock         |
| D310047        | The Healing Center WV, LLC | The Healing Center WV, LLC | Westover      | Monongalia      |
| D350045        | The Healing Center WV, LLC | The Healing Center WV, LLC | Triadelphia   | Ohio            |
| D020049        | V3 WV Vending, LLC         | V3 WV Vending, LLC         | Martinsburg   | Berkeley        |
| D130051        | V3 WV Vending, LLC         | V3 wv Vending, LLC         | Lewisburg     | Greenbrier      |
| D170048        | V3 WV Vending, LLC         | V3 WV Vending, LLC         | Bridgeport    | Harrison        |
| D200050        | V3 WV Vending, LLC         | V3 WV Vending, LLC         | Jefferson     | Kanawha         |
| D410052        | V3 WV Vending, LLC         | V3 WV Vending, LLC         | Summersville  | Nicholas        |
| D190086        | WVLINE LLC                 | WVLINE LLC                 | Charles Town  | Jefferson       |

During the 2023 renewal dispensary renewal cycle, the dispensaries listed in Table 4 either chose not to renew the permit or OMC did not renew the permit due to failure of the permittee to provide adequate progress toward achieving operational status.

## **Financial Information**

Metrc is the seed-to-sale system that tracks all medical cannabis from the time a seed is planted, or a clone becomes an immature plant and is tagged, then to harvest and drying/curing or to processing, and then to the final product sold to a patient. Metrc also captures all required laboratory test results. From the information captured in Metrc, NCS Analytics monitors the data and flags any outliers that are then followed up on by OMC. The set of following graphics depicts the information captured by Metrc and analyzed by NCS.

Figure 1: Total Sales

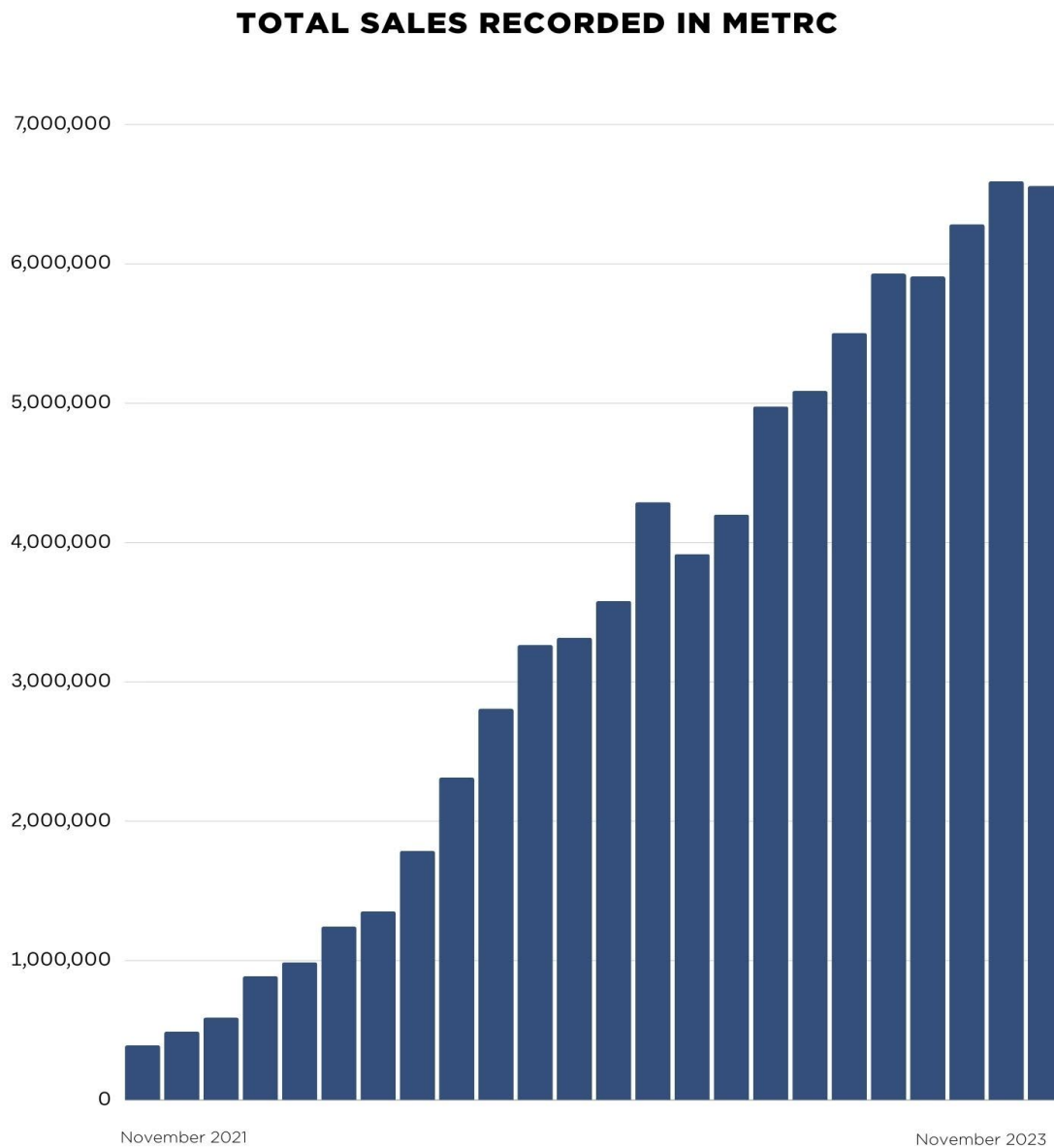


Figure 1 provides the monthly combined sales data for all dispensaries. From two dispensaries operational in November 2021, to 55 dispensaries operational as of October 31, 2023, the increase in sales reflects the additional locations available for patients, new product choices available, and follows the upward trend of the increase in the number of patient applications as shown in Table 5 and Figure 9.

Figure 2: Sales By Product

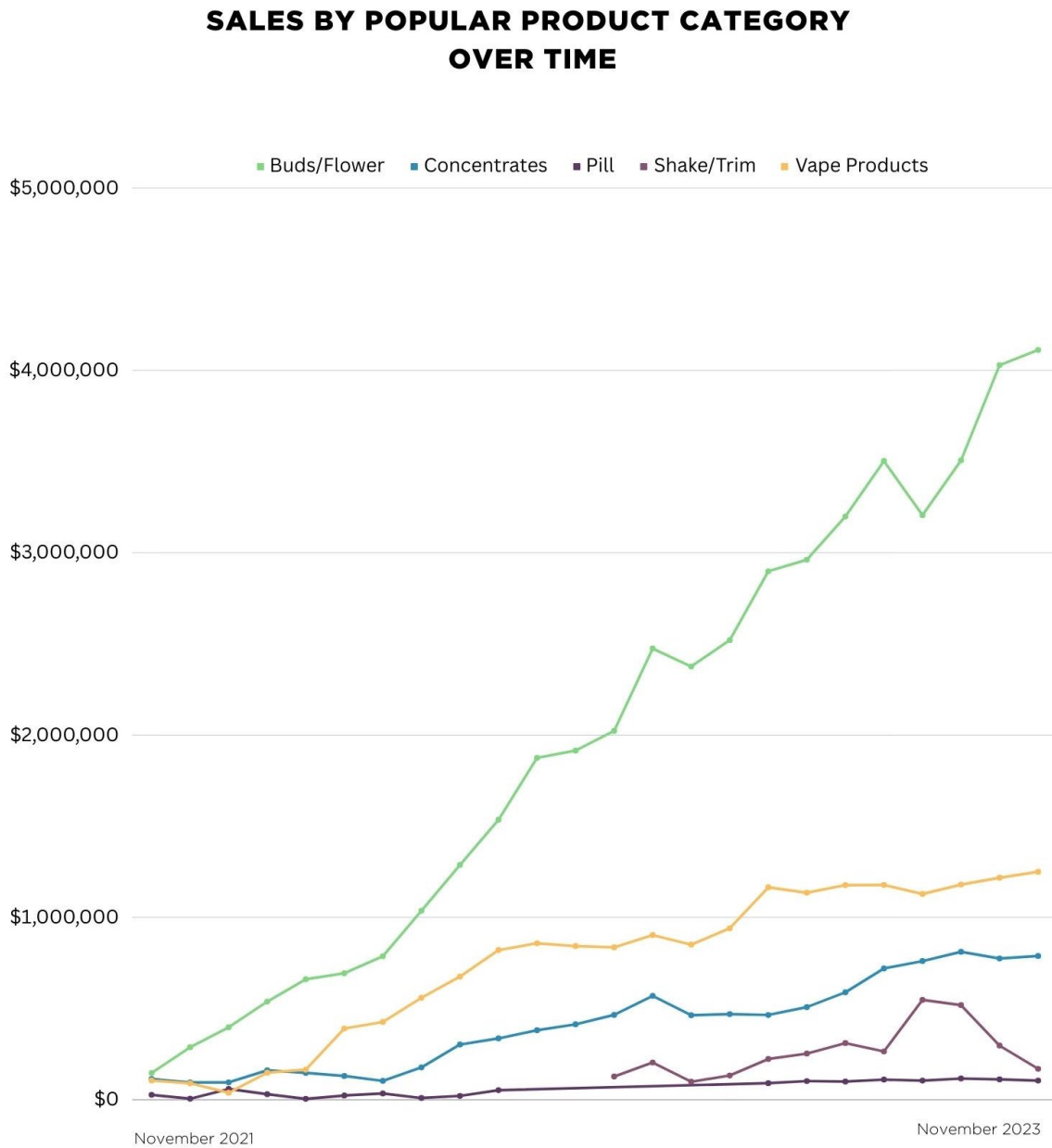
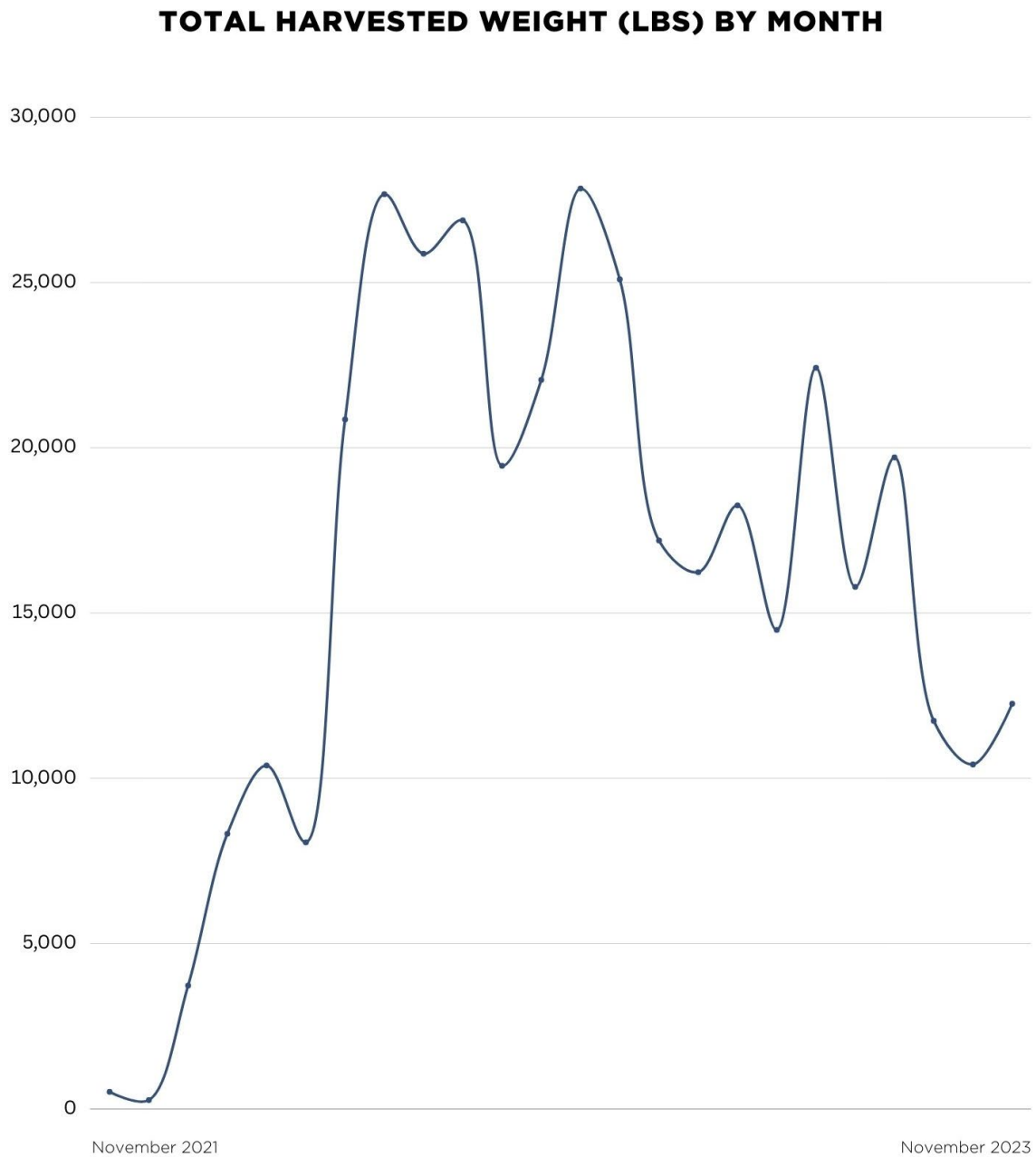


Figure 2 depicts the five most popular product types with their volume of sales over the two-year period. With flower as the most popular product, there is a widening gap as flower sales increase exponentially over all other product types. Pill sales have remained constant, while concentrates and vape products show an upward trend in sales. Shake/trim is a new product offering with fluctuating sales.

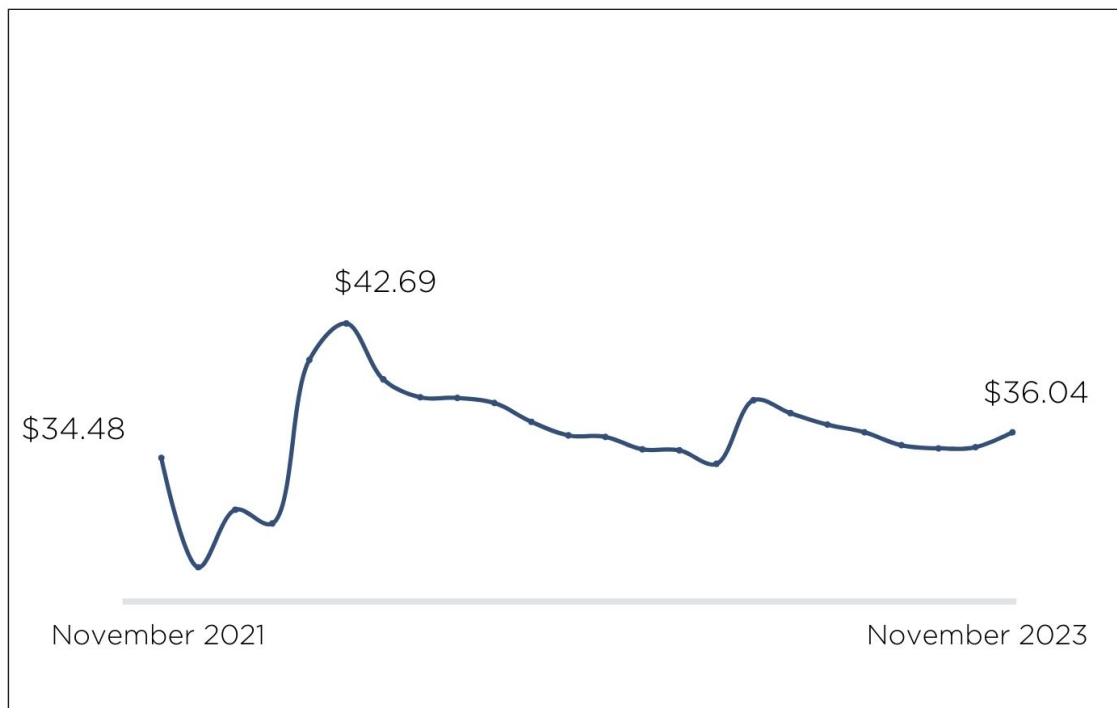
Figure 3: Harvested Weight



With the growth cycle of medical cannabis plants, the average harvest time is 10-32 weeks from seed to harvest. The first grower planted seeds and/or clones the last week of June of 2021, which is reflected in the low harvest amounts in late 2021. As additional growers became operational and started harvesting plants, there was a spike in pounds harvested in 2022, as depicted in Figure 3. As demand is becoming more predictable due to the number of active patients, growers have adjusted their plantings to meet demand.

Figure 4: Price Per Unit for Vape Products

Average Price Per Unit Over Time  
**VAPE PRODUCTS (EA)**



|        | VAPE PRODUCTS (EA) |
|--------|--------------------|
| Nov-21 | \$ 34.48           |
| Dec-21 | \$ 27.79           |
| Jan-22 | \$ 31.31           |
| Feb-22 | \$ 30.47           |
| Mar-22 | \$ 40.46           |
| Apr-22 | \$ 42.69           |
| May-22 | \$ 39.27           |
| Jun-22 | \$ 38.18           |
| Jul-22 | \$ 38.14           |
| Aug-22 | \$ 37.83           |
| Sep-22 | \$ 36.68           |
| Oct-22 | \$ 35.85           |

|        |          |
|--------|----------|
| Nov-22 | \$ 35.76 |
| Dec-22 | \$ 35.00 |
| Jan-23 | \$ 34.94 |
| Feb-23 | \$ 34.11 |
| Mar-23 | \$ 38.00 |
| Apr-23 | \$ 37.21 |
| May-23 | \$ 36.51 |
| Jun-23 | \$ 36.04 |
| Jul-23 | \$ 35.25 |
| Aug-23 | \$ 35.06 |
| Sep-23 | \$ 35.13 |
| Oct-23 | \$ 36.04 |

Figure 4 provides the average price for each vape cartridge sold. From the initial offering price of \$34.48, a dip in the price down to \$27.79 occurred followed by an increase to the highest price of \$42.69 in April of 2022. Since then, the price appears to be leveling off with fluctuations between \$34.31 to \$38.00 per unit.

Figure 5: Price Per Unit on Topicals

Average Price Per Unit Over Time

**TOPICALS (EA)**



|        | TOPICALS (EA) |
|--------|---------------|
| Nov-21 | \$ 36.57      |
| Dec-21 | \$ 24.54      |
| Jan-22 | \$ 22.96      |
| Feb-22 | \$ 26.51      |
| Mar-22 | \$ 28.53      |
| Apr-22 | \$ 29.11      |
| May-22 | \$ 26.24      |
| Jun-22 | \$ 32.92      |
| Jul-22 | \$ 35.61      |
| Aug-22 | \$ 37.04      |
| Sep-22 | \$ 36.94      |
| Oct-22 | \$ 38.36      |

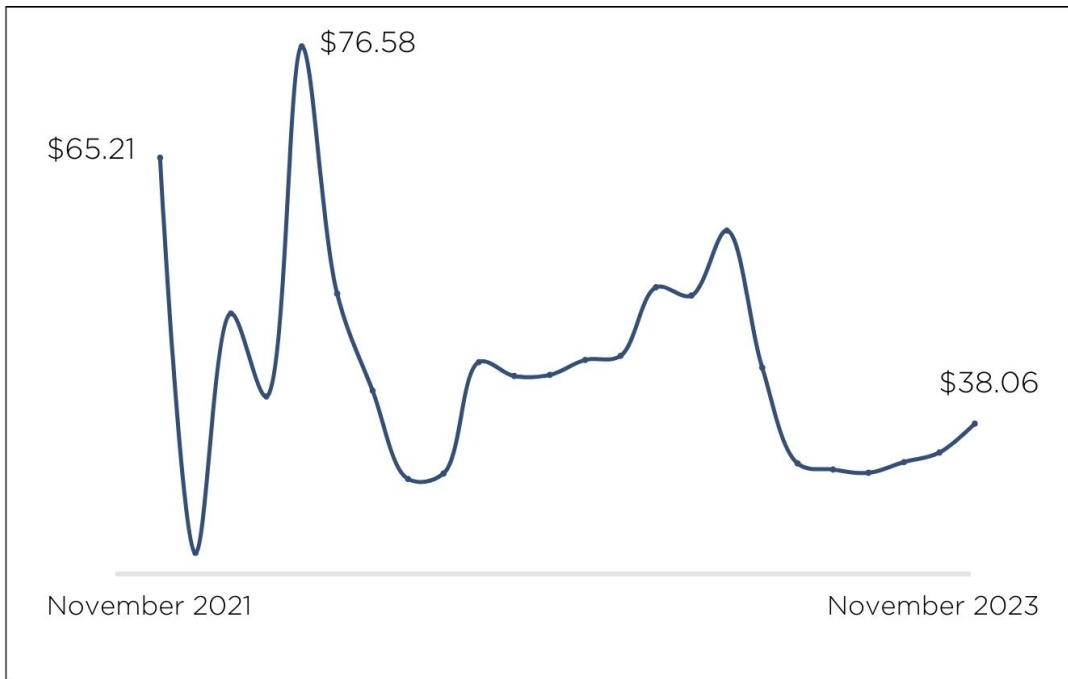
|        |          |
|--------|----------|
| Nov-22 | \$ 37.16 |
| Dec-22 | \$ 34.46 |
| Jan-23 | \$ 30.56 |
| Feb-23 | \$ 32.52 |
| Mar-23 | \$ 32.47 |
| Apr-23 | \$ 33.10 |
| May-23 | \$ 33.04 |
| Jun-23 | \$ 34.44 |
| Jul-23 | \$ 34.26 |
| Aug-23 | \$ 34.38 |
| Sep-23 | \$ 32.95 |
| Oct-23 | \$ 33.08 |

Figure 5 provides the average price for each container of topical products. From the initial price of \$36.57, a sharp decline in the price to \$22.96 was followed by an increase to the highest price of \$38.36 in October of 2022. Since that time, the price appears to be leveling off with fluctuations between \$30.56 to \$34.44 per unit sold.

Figure 6: Price Per Unit on Pills

Average Price Per Unit Over Time

**PILL (EA)**



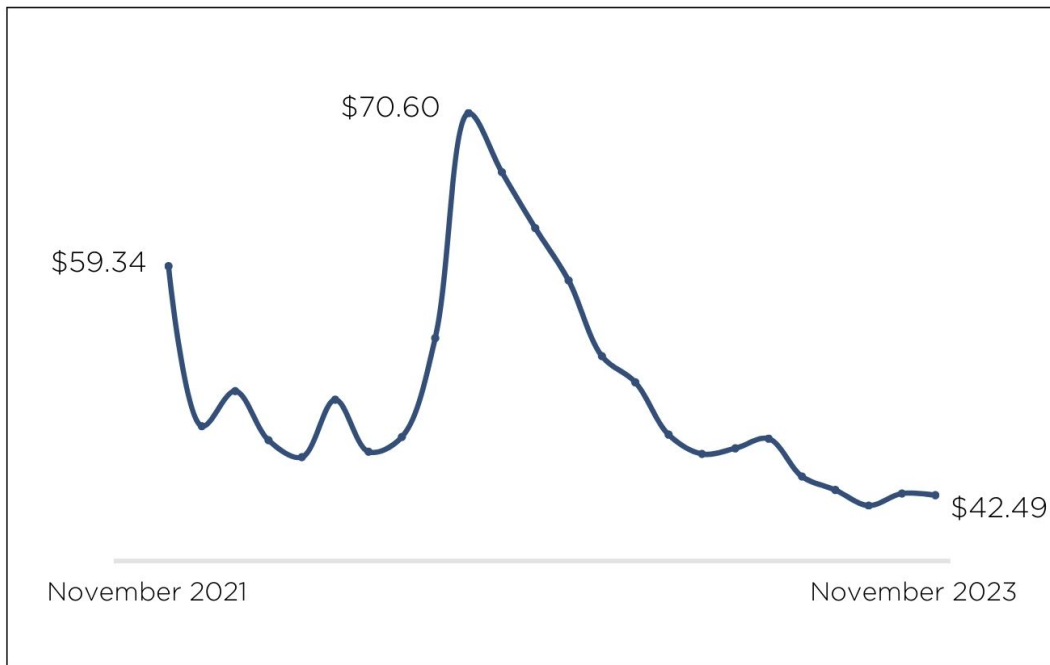
|        | PILL (EA) |
|--------|-----------|
| Nov-21 | \$ 65.21  |
| Dec-21 | \$ 24.86  |
| Jan-22 | \$ 49.32  |
| Feb-22 | \$ 40.84  |
| Mar-22 | \$ 76.58  |
| Apr-22 | \$ 51.33  |
| May-22 | \$ 41.44  |
| Jun-22 | \$ 32.42  |
| Jul-22 | \$ 32.97  |
| Aug-22 | \$ 44.35  |
| Sep-22 | \$ 42.93  |
| Oct-22 | \$ 43.04  |

|        |          |
|--------|----------|
| Nov-22 | \$ 44.57 |
| Dec-22 | \$ 44.99 |
| Jan-23 | \$ 51.99 |
| Feb-23 | \$ 51.14 |
| Mar-23 | \$ 57.78 |
| Apr-23 | \$ 43.78 |
| May-23 | \$ 34.00 |
| Jun-23 | \$ 33.38 |
| Jul-23 | \$ 33.05 |
| Aug-23 | \$ 34.14 |
| Sep-23 | \$ 35.11 |
| Oct-23 | \$ 38.06 |

Figure 6 provides the average price per unit of pills sold. This product type shows a large fluctuation from the initial offering price in November of 2021 of \$65.21 to a low of \$24.86 the following month. The price rose to a high of \$76.58 in March of 2022 and fell to \$32.42 in June of 2022. Following that dip, the price rose steadily to \$57.78 in March of 2023, and then fell to \$33.05 in July of 2023. Since then, the price is rising at what appears to be a slow and steady rate.

Figure 7: Price Per Unit on Concentrates

Average Price Per Unit Over Time  
**CONCENTRATE (EA)**



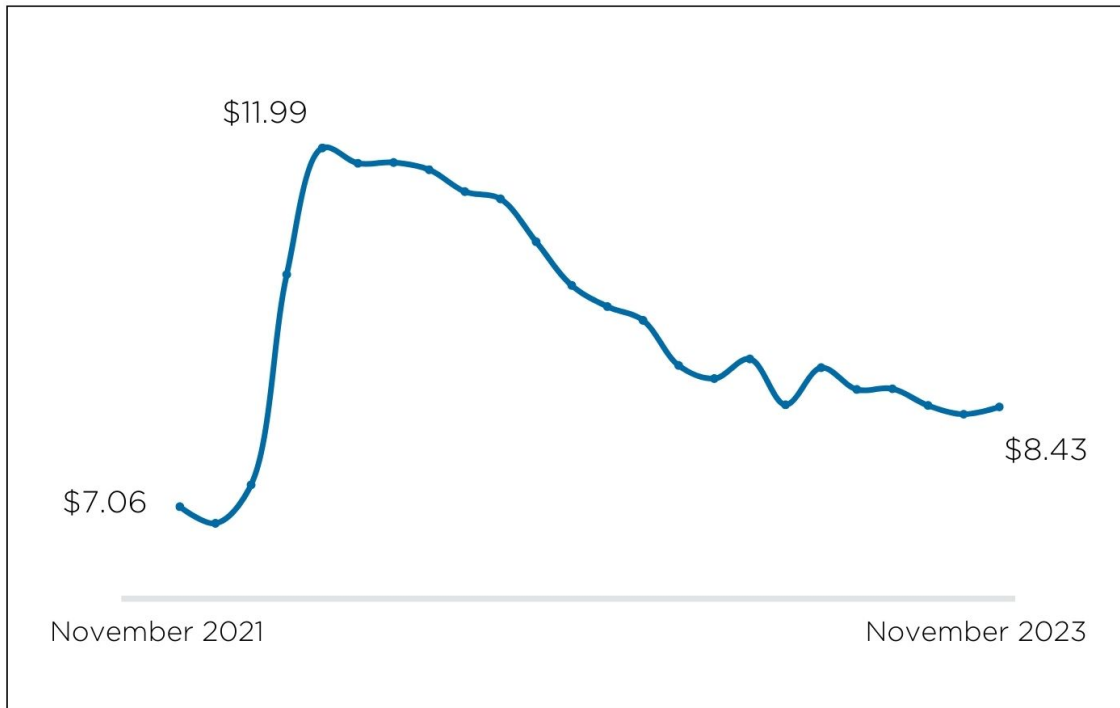
|        | CONCENTRATE (EA) |
|--------|------------------|
| Nov-21 | \$ 59.34         |
| Dec-21 | \$ 47.57         |
| Jan-22 | \$ 50.15         |
| Feb-22 | \$ 46.54         |
| Mar-22 | \$ 45.29         |
| Apr-22 | \$ 49.52         |
| May-22 | \$ 45.69         |
| Jun-22 | \$ 46.78         |
| Jul-22 | \$ 54.05         |
| Aug-22 | \$ 70.60         |
| Sep-22 | \$ 66.25         |
| Oct-22 | \$ 62.14         |

|        |          |
|--------|----------|
| Nov-22 | \$ 58.29 |
| Dec-22 | \$ 52.72 |
| Jan-23 | \$ 50.80 |
| Feb-23 | \$ 46.95 |
| Mar-23 | \$ 45.53 |
| Apr-23 | \$ 45.94 |
| May-23 | \$ 46.65 |
| Jun-23 | \$ 43.87 |
| Jul-23 | \$ 42.88 |
| Aug-23 | \$ 41.73 |
| Sep-23 | \$ 42.62 |
| Oct-23 | \$ 42.49 |

Figure 7 provides the average price per unit of concentrates sold. This product type has experienced a large fluctuation from the initial price in November of 2021 of \$59.34 to a low of \$45.29 in March of 2022. A price spike to \$70.60 in August of 2022 was followed by a steady decline to \$42.73 in August of 2023, with the following two months at a relatively level price.

Figure 8: Price Per Unit on Flower

Average Price Per Unit Over Time  
**BUDS/FLOWER**



|        | Buds/Flower |
|--------|-------------|
| Nov-21 | \$ 7.06     |
| Dec-21 | \$ 6.83     |
| Jan-22 | \$ 7.36     |
| Feb-22 | \$ 10.25    |
| Mar-22 | \$ 11.99    |
| Apr-22 | \$ 11.78    |
| May-22 | \$ 11.79    |
| Jun-22 | \$ 11.69    |
| Jul-22 | \$ 11.39    |
| Aug-22 | \$ 11.29    |
| Sep-22 | \$ 10.70    |
| Oct-22 | \$ 10.10    |

|        |         |
|--------|---------|
| Nov-22 | \$ 9.81 |
| Dec-22 | \$ 9.62 |
| Jan-23 | \$ 9.00 |
| Feb-23 | \$ 8.82 |
| Mar-23 | \$ 9.09 |
| Apr-23 | \$ 8.46 |
| May-23 | \$ 8.97 |
| Jun-23 | \$ 8.67 |
| Jul-23 | \$ 8.68 |
| Aug-23 | \$ 8.45 |
| Sep-23 | \$ 8.33 |
| Oct-23 | \$ 8.43 |

Figure 8 provides the price per gram of flower sold. The initial price of \$7.06 in the first month of sales was quickly followed by an increase of nearly 70% to \$11.99 per gram in March of 2022. Since that time, the price has steadily fallen to \$8.43 per gram in November of 2023.

## **Assessment of the benefits and risks to patients using medical cannabis under the Act, including adverse events**

The Act allows West Virginia residents with a serious medical condition to procure medical cannabis for certified medical use in the following forms: pill; oil; topical forms including gels, creams, or ointments; a form medically appropriate for administration by vaporization or nebulization, dry leaf or plant form; tincture; liquid; or dermal patch.

Research relating to the benefit and/or risks associated with medical cannabis will be undertaken and reported by OMC. Upon approval for release of funds, OMC will develop a research program in collaboration with academic institutions to study the benefits and risks associated with the use of medical cannabis.

## **Patient Demographics**

As indicated in Table 5, the number of patient applications received continues to increase as additional dispensaries open and more individuals become aware of the availability and benefits of medical cannabis products.

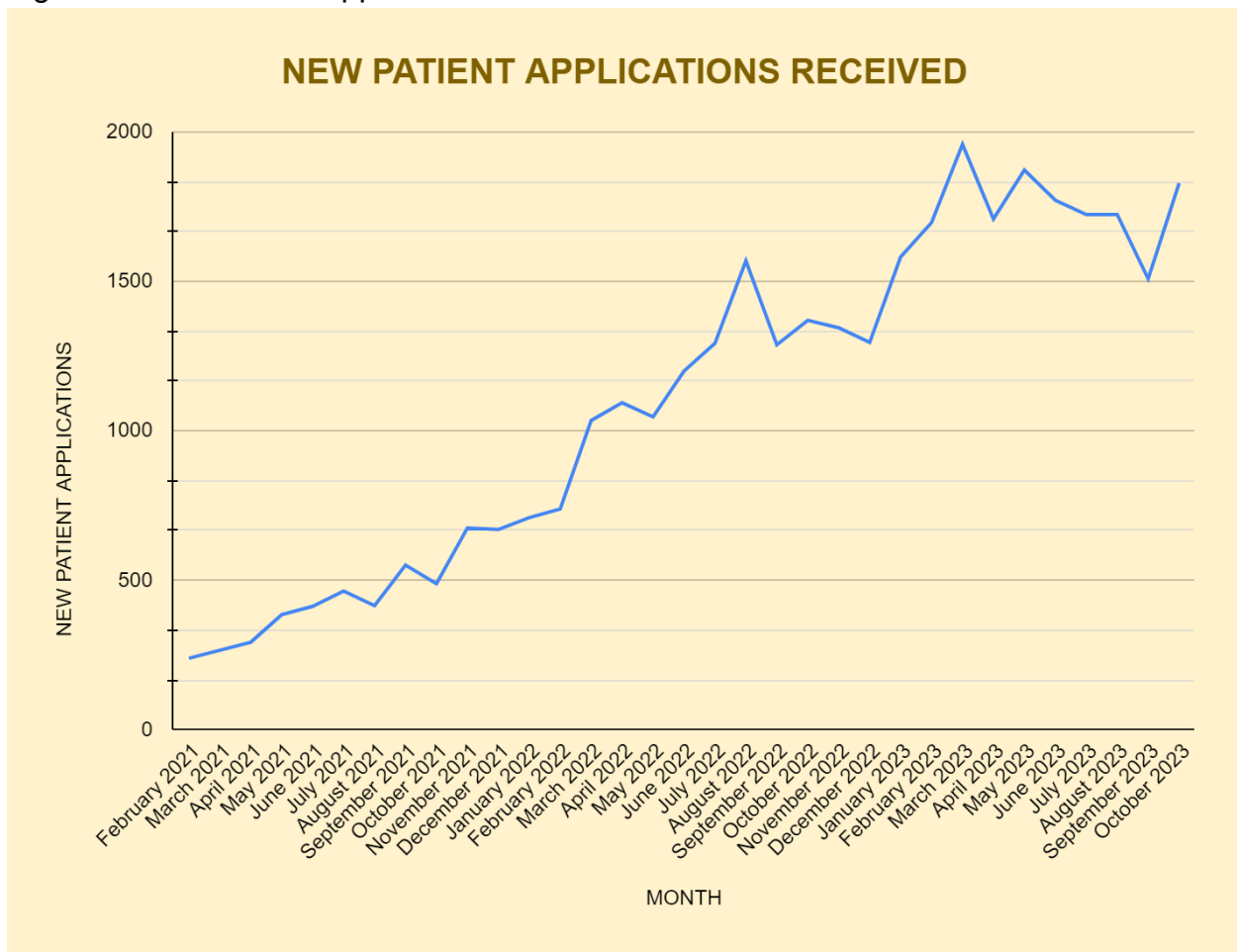
Table 5: Patient Applications

| <b>Patient Applications Received</b> |                 |
|--------------------------------------|-----------------|
| <b>Year</b>                          | <b>Received</b> |
| <b>2021</b>                          | <b>4860</b>     |
| <b>2022</b>                          | <b>13986</b>    |
| <b>2023</b>                          | <b>17378</b>    |
| <b>Total</b>                         | <b>36224</b>    |

Following the opening of dispensaries in November of 2021, the number of patient applications submitted quickly increased. OMC saw a 287% increase in applications from November 1, 2021, to October 31, 2023, and a 24% increase the following year.

As shown in Figure 9, the number of patient applications rose sharply in the year following the initial dispensary openings.

Figure 9: New Patient Applications



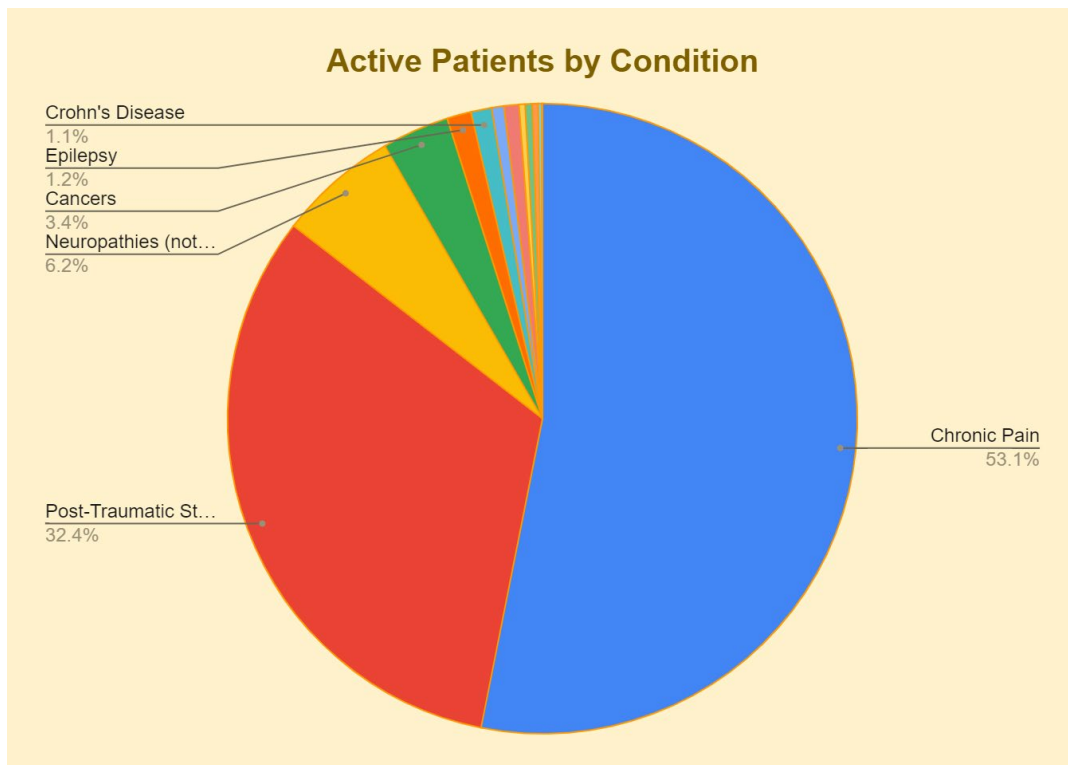
As shown in Table 5 and Figure 9, the number of patient applications received continues to increase, though the rate of increase has slowed. OMC has noticed a decline in the rate of applications received during the holiday months of November and December, with a sharper increase during the first quarter of each calendar year.

### **Serious Medical Conditions**

Figure 9 reflects the serious medical conditions of the patients approved for an identification card. Many patients have more than just one of the serious medical conditions to qualify as a patient.

Figure 9: Medical Conditions

| Active Patients by Condition                         |       |
|------------------------------------------------------|-------|
| Chronic Pain                                         | 19405 |
| Post-Traumatic Stress Disorder                       | 11818 |
| Neuropathies ( <i>not neuropathic/chronic pain</i> ) | 2256  |
| Cancers                                              | 1257  |
| Epilepsy                                             | 454   |
| Crohn's Disease                                      | 391   |
| Spinal Cord Damage                                   | 231   |
| Amyotrophic Lateral or Multiple Sclerosis            | 280   |
| Parkinson's Disease                                  | 109   |
| Intractable Seizures                                 | 138   |
| Human Immunodeficiency Virus                         | 106   |
| Terminal Diagnoses                                   | 69    |
| Sickle Cell Anemia                                   | 5     |
| Huntington's Disease                                 | 7     |



As shown in Figure 9, 53% of all patients have been diagnosed with Chronic Pain as a qualifying condition to be certified as a medical cannabis patient, followed by 32.4% of patients diagnosed with Post Traumatic Stress Syndrome.

### **Patients by Age**

The age range of 35-54 is the largest percentage of patients who have been issued an ID card. Patients aged 55 and up comprise approximately one-third of the approved patients. Figure 10 illustrates age breakdown.

Figure 10: Patients by Age

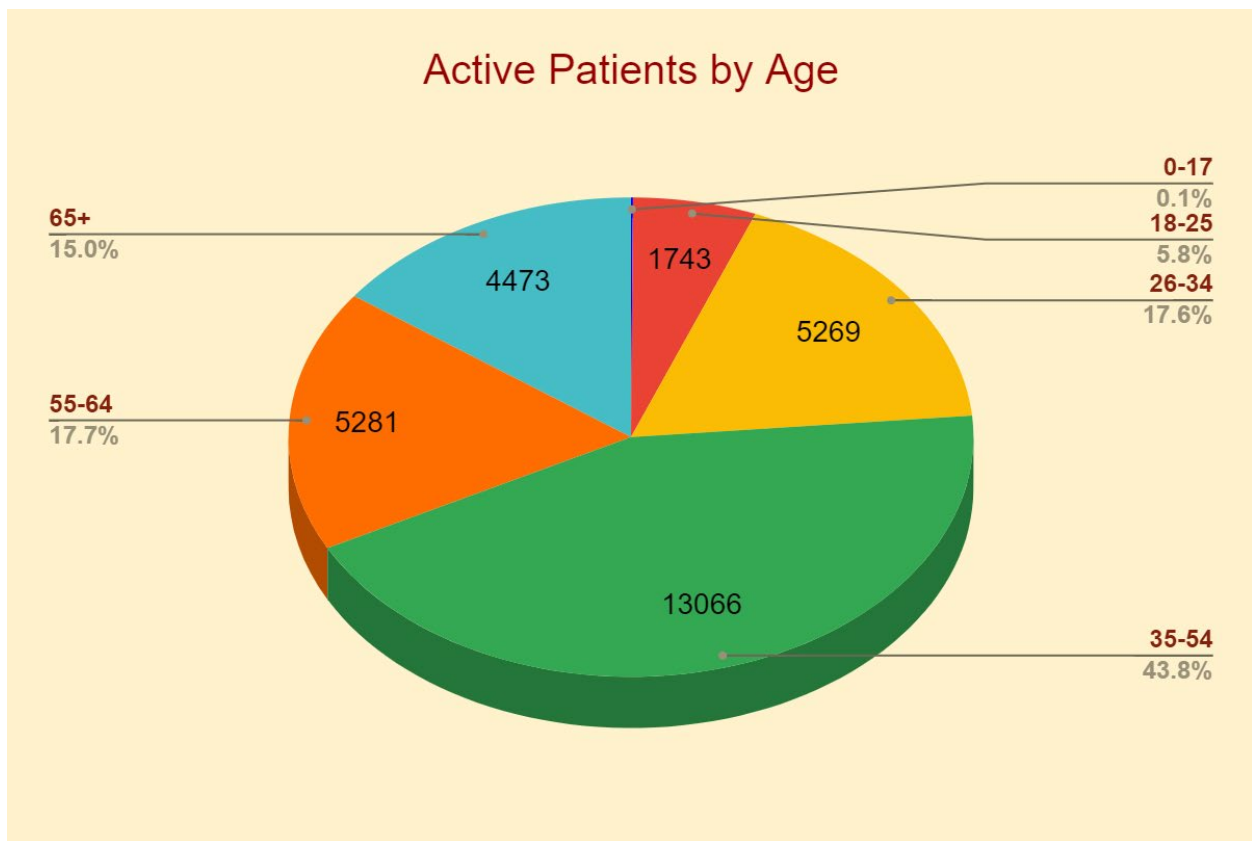
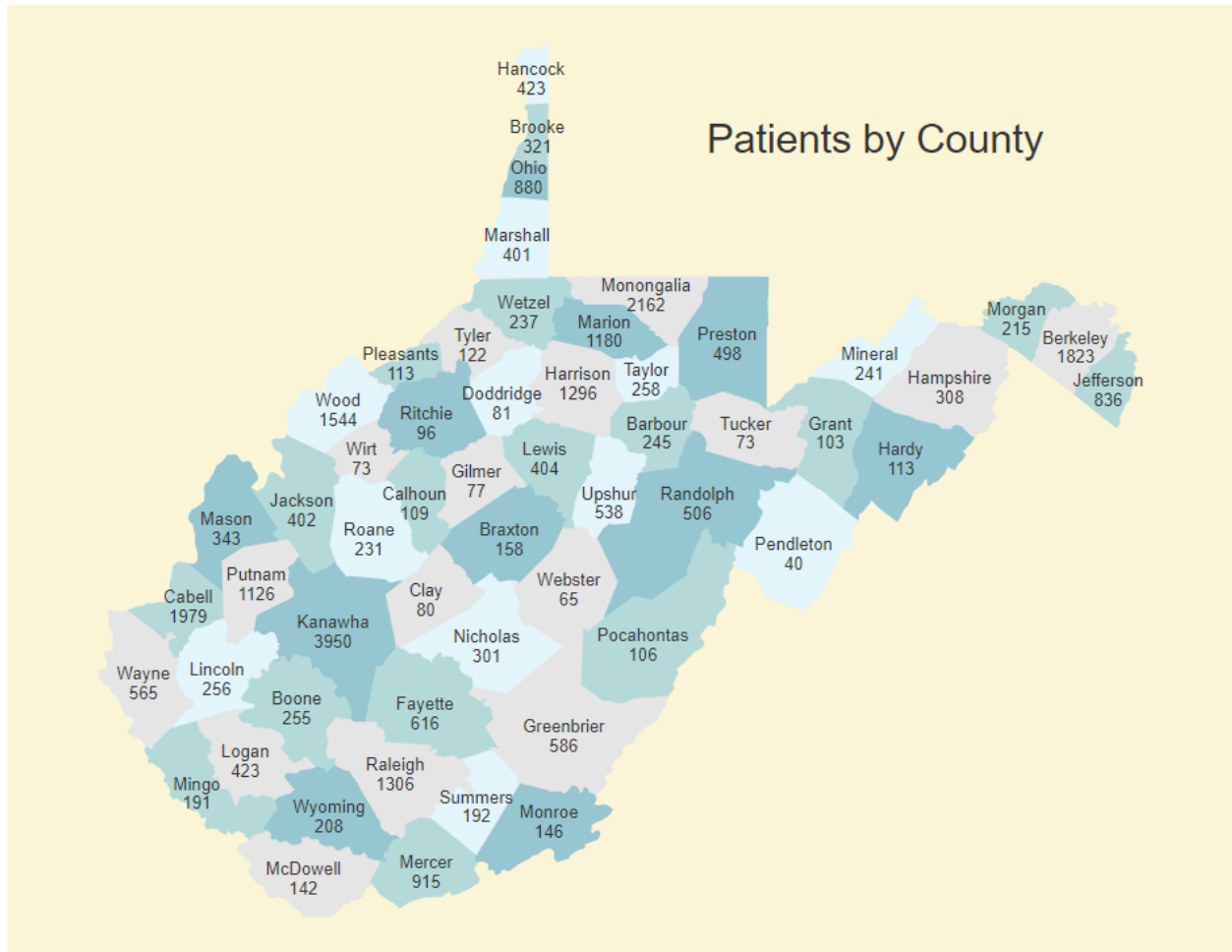


Figure 10 shows a breakdown of registered patients based on age ranges. The largest number of patients are in the 35-54 age range. Three-fourths, or over 76%, of patients are aged 35 and over.

## Patients by County

As expected, the patients approved per county follow the US Census population data. Figure 11 provides information on patients in each county.

Figure 11: Breakdown of Patients Per County



The top five counties with the highest number of patients are: Kanawha, Monongalia, Cabell, Raleigh and Wood. They comprise over 38% of all patients in West Virginia and 33% of the state's population.

## **CAREGIVERS**

A caregiver is an individual designated by a patient (who has been issued a medical cannabis patient ID card by OMC) and who is approved by the Bureau to obtain medical cannabis from an approved dispensary located within West Virginia in order for the caregiver to deliver medical cannabis to the patient.

All minor patients are required to have a registered caregiver who must be one of the following:

- A parent or legal guardian,
- An individual designated by a parent or legal guardian, or
- An appropriate individual approved by the Bureau when no parent or legal guardian is appropriate or available.

There are currently 132 registered caregivers. This includes 30 active minor patients with 30 active caregivers, and 102 active caregivers for adult patients.

## **PHYSICIANS**

OMC began accepting physician registrations on May 28, 2020. Physicians must register online and complete the mandatory four-hour education course. The registration application period is open indefinitely. There is no limit on physician participation. As of October 31, 2023, 134 physicians have registered with OMC to certify patients with a serious medical condition eligible for the use of medical cannabis.

## **ADVERSE EVENTS**

To date, no adverse events have been reported.

## ENFORCEMENT/COMPLIANCE

### Advertisement Requests

Pursuant to 64CSR109-23, medical cannabis advertising may not contain statements that are deceptive, false, or misleading, and may not contain any content that can reasonably be considered to target individuals under the age of 21. All promotional, advertising, and marketing materials must be approved by the Bureau prior to their use. Figure 12 provides information on advertising.

On March 24, 2023, OMC implemented a new procedure for submitting advertisement requests. As of October 31, 2023, OMC staff have reviewed 1,085 advertisement requests.

Figure 12: Advertising Requests

#### Advertisement Requests 3/24/23-10/31/23

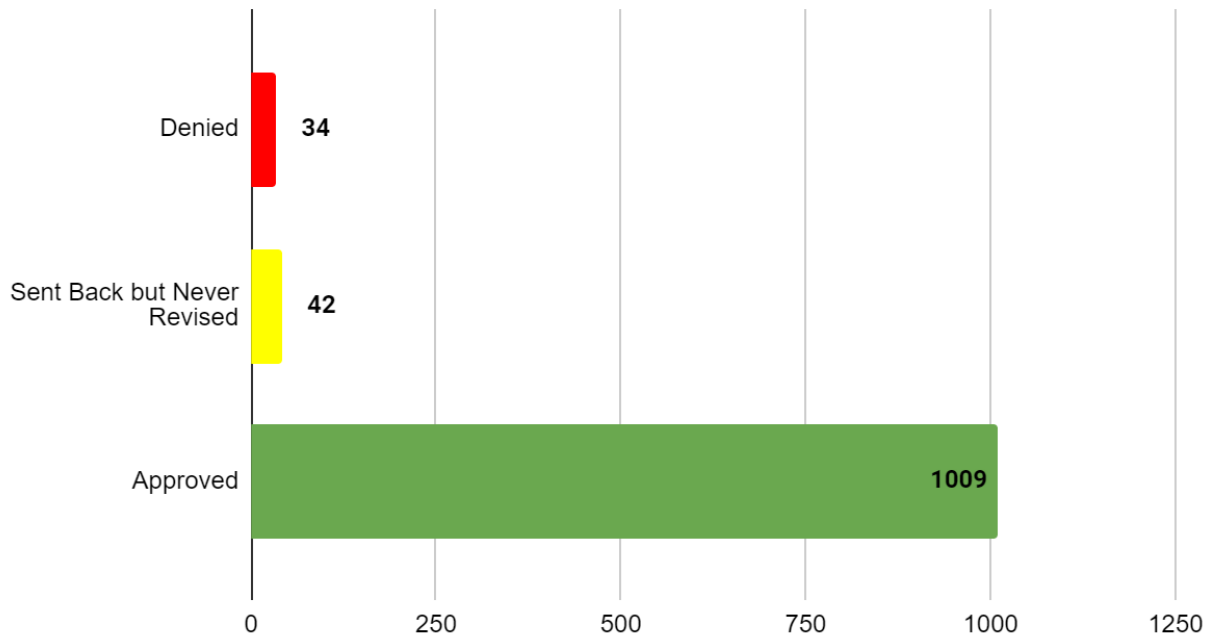


Figure 12 provides a summary of the number of advertising requests reviewed by OMC staff. Of the 1,085 requests received, approximately 93% were approved.

## Inspections

388 Total

Initial/Operational: 59

Routine Inspections: 329

Pursuant to 64CSR109-18, the Bureau may conduct announced or unannounced inspections or investigations to determine a medical cannabis organization's compliance with its permit, the Act, or legislative rules. Medical cannabis organizations are inspected at least once quarterly. OMC Investigators utilize both an iPad application and a handheld RFID tag reader during inspections of medical cannabis organizations. An inspection or investigation may include a medical cannabis organization's site, facility, vehicles, books, records, papers, documents, data, and other physical or electronic information. Some areas that may be inspected for compliance include: surveillance equipment, alarm systems, inventory, and implementation of standard operating procedures. Initial or operational inspections occur when new permits for dispensaries, processors, or growers are issued but prior to the licensee becoming operational. Figure 13 provides information on industry inspections.

Figure 13: Industry Inspections

### Inspections 11/1/21-10/31/23

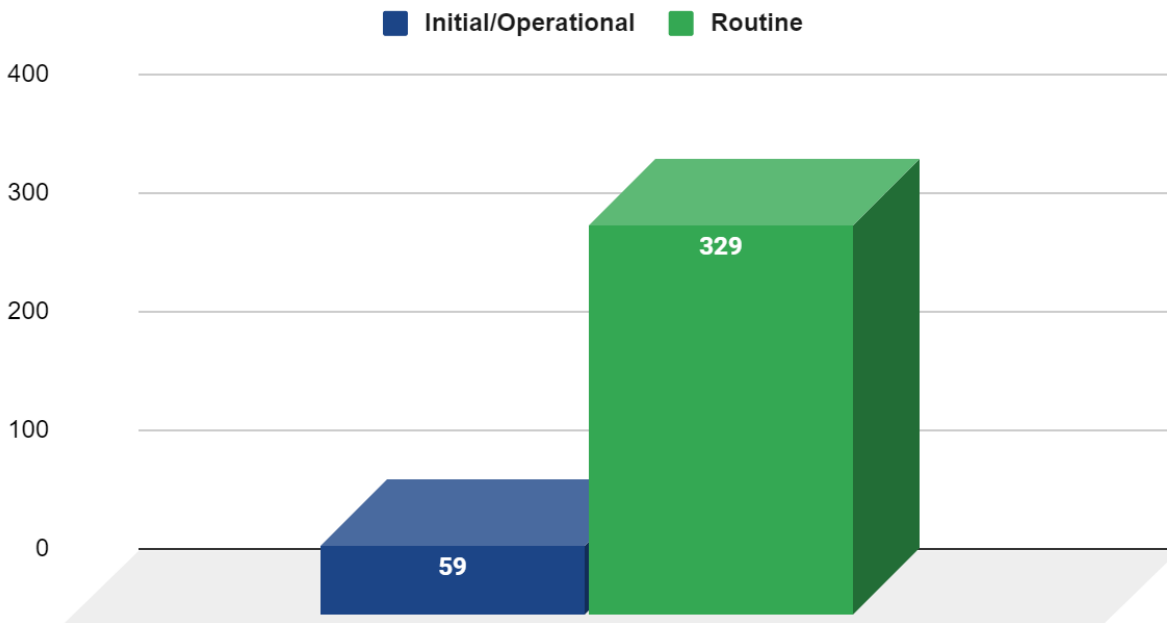


Figure 13 shows a break of the inspections performed by the OMC Compliance/Enforcement staff. The goal is for every permittee to be inspected quarterly.

## Employee Background Checks

Total 1,019  
Approved 958  
35 Pending  
26 Denied

In accordance with relevant legislative rules, OMC requires criminal history records checks for each principal, operator, financial backer, or employee of a medical cannabis organization. Persons with felony criminal convictions related to the sale or possession of illegal drugs, narcotics, or controlled substances are prohibited from participating in a medical cannabis organization. The WV OMC is also required to make a determination that the individual is of good moral character. Figure 14 provides data on industry employee background checks.

Figure 14: Cannabis Industry Background Checks

### Employee Background Checks 11/1/21-10/31/23

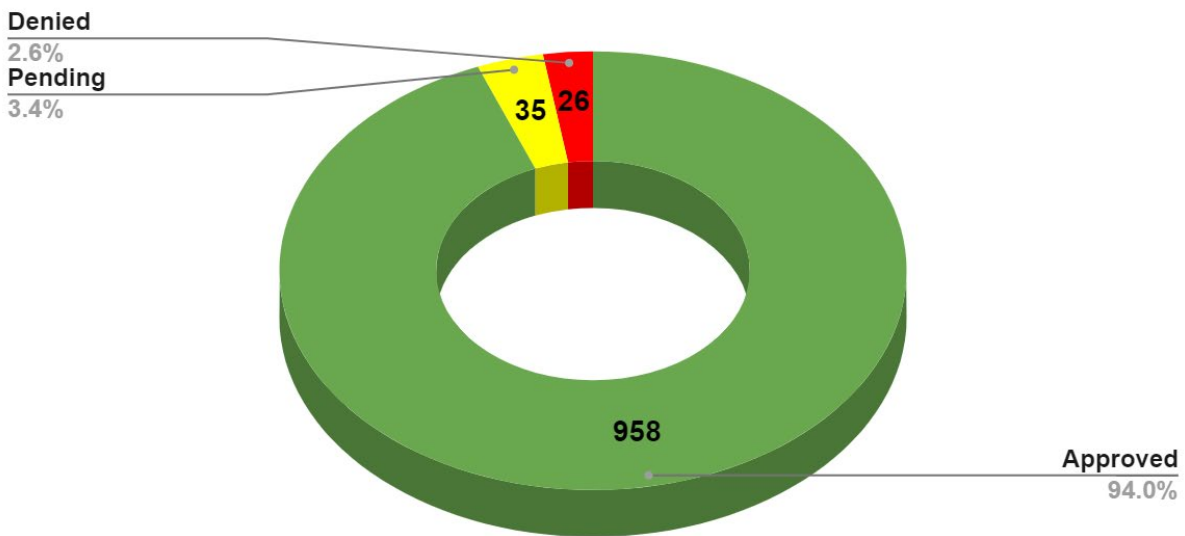


Figure 14 shows the number of industry background checks reviewed by OMC Enforcement/Compliance staff. Of the 1,019 background checks reviewed, 94% were approved for employment or affiliation with a permittee.

## **New Product/Strain Name Submissions**

On March 22, 2023, OMC implemented a new procedure for submitting new product and strain name requests. As of October 31, 2023, OMC reviewed 230 new product and/or strain name submissions.

## **Investigations**

As of October 31, 2023, OMC has conducted 91 investigations.

OMC has conducted investigations for diversion, sales to expired or deactivated patients, fraud, inventory discrepancies, industry employee misconduct, and other complaints from employees, patients, or members of the public.

## **Violations and Fines**

The OMC has the authority and responsibility to impose sanctions to achieve compliance with West Virginia Code and rules. These sanctions may include written warnings, improvement plans, restrictions, monetary penalties, suspensions, and possible revocations of permits.

As of October 31, 2023, OMC issued Administrative Orders for a total of 29 violations by medical cannabis organizations. A total of \$28,000 in administrative fines were imposed.

## **Professional Development and Training**

The West Virginia Office of Medical Cannabis has conducted approximately 30 training sessions for law enforcement and two training sessions for all the state's magistrates. The training is now approved for in-service training hours by the Law Enforcement Professional Standards (LEPS) Subcommittee of the Governor's Committee on Crime, Delinquency and Corrections. OMC plans to expand training opportunities statewide.

## **Recommendations for amendments to the Act for reasons of patient safety or to aid the general welfare of the citizens of this state**

Recommendations regarding changes to the Act related to patient safety or the general welfare of the citizens of this state will be assessed when adequate data becomes available, and research has been conducted.

### **Future Plans**

1. Development of a Youth Prevention Program
2. Collaboration with the Fusion Center
3. Continued Law Enforcement Training