

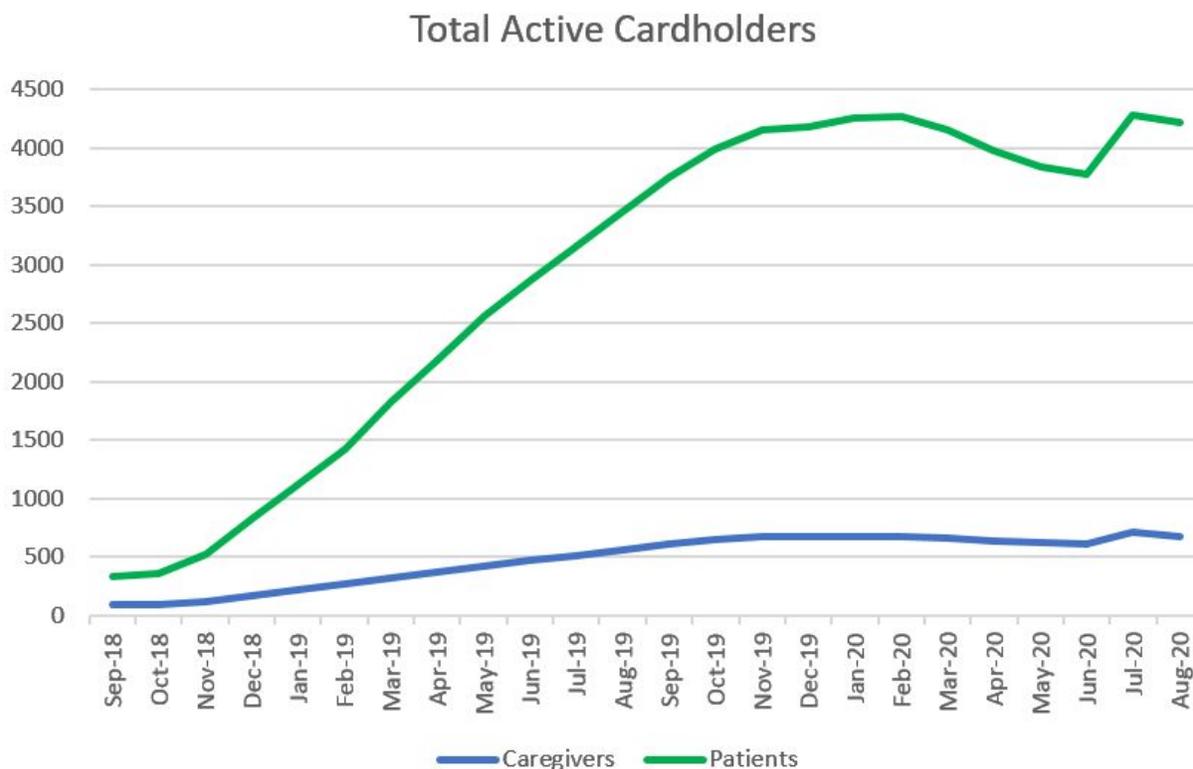
**Iowa Department of Public Health**  
**Iowa Medical Cannabidiol Program - Market Analysis**  
**Request for Proposal #58821019**

This information is provided to applicants in order to develop an understanding of Iowa’s market and to aid in the development of responses for the ‘Business Overview and Plan Section’.

**1. Patient and Caregiver Data**

Prior to the availability of in-state manufacturing and dispensing of medical cannabidiol products, patient participation in the Iowa Medical Cannabidiol Program was limited. Licensed dispensaries began selling products on December 1, 2018. **Figure 1** represents the number of active cardholders participating in the program over time.

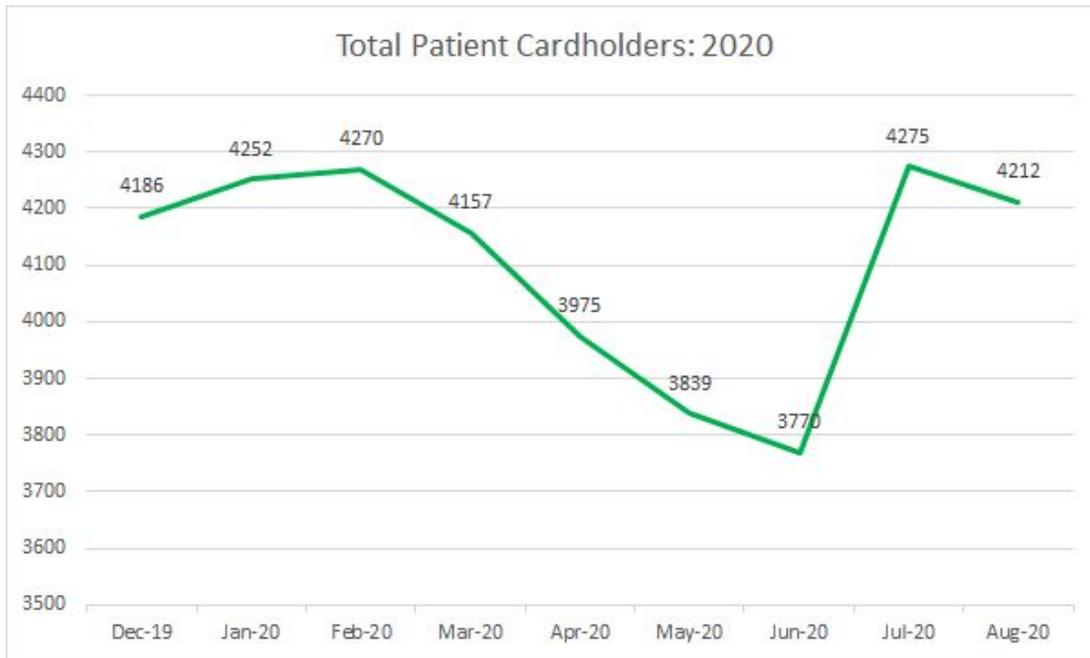
**Figure 1.**



\*Patient numbers steadily increased from November 2018 through November 2019.

Figure 2 represents active patient cardholders from December 2019 through August 2020.

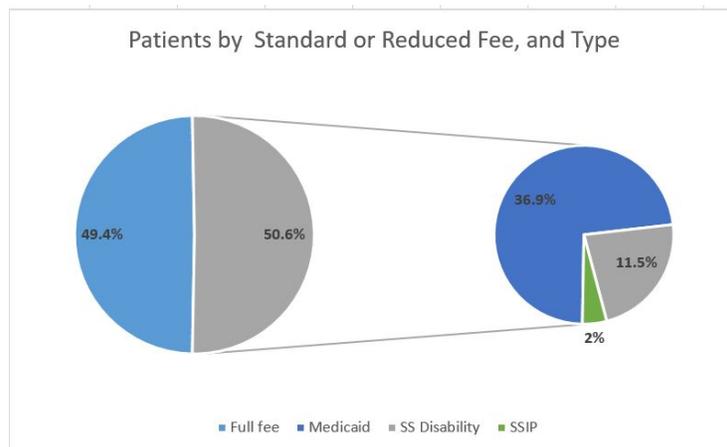
Figure 2.



Patient numbers peaked in February 2020 and steadily decreased until the end of June 2020. With the implementation of House File 2589 on July 1, 2020, IDPH began issuing cards to patients and caregivers. Prior to this implementation, cards were issued by the Iowa DOT which were difficult to access due to COVID-19.

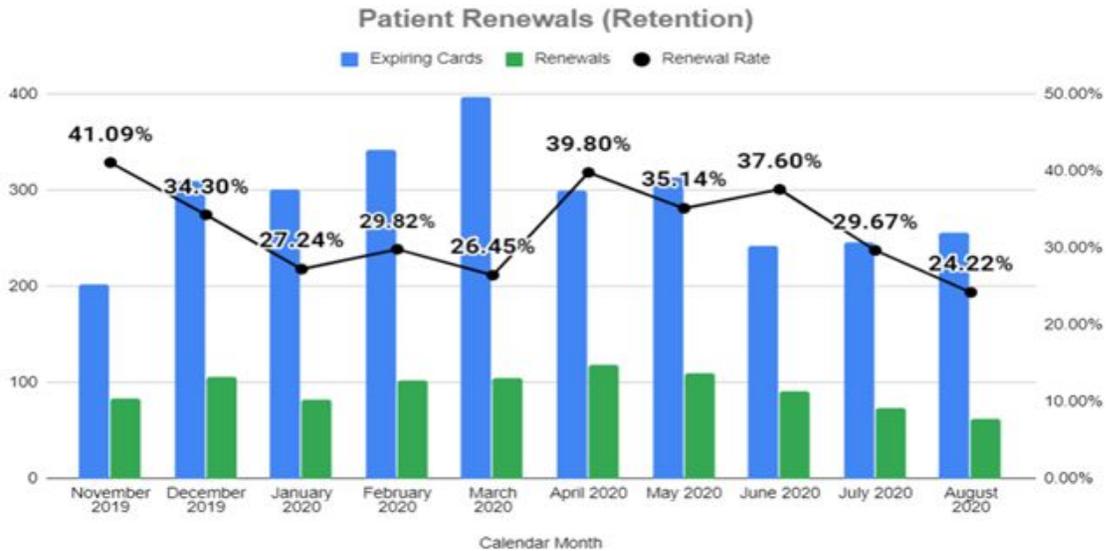
Patients pay an annual application fee of \$100 to participate in the Iowa mCBD Program. Patients may qualify for a reduced fee of \$25 if the patient qualifies for certain social assistance programs. Figure 3 represents the relative number of patients who qualify for reduced application fees.

Figure 3.



A patient's medical cannabidiol registration card is valid for one year from the date of issuance. **Figure 4** represents the number of cards expiring each month as compared to the number of renewal applications. **Figure 5** represents patient renewals at different time periods within card expiration.

**Figure 4.**



**Figure 5.**

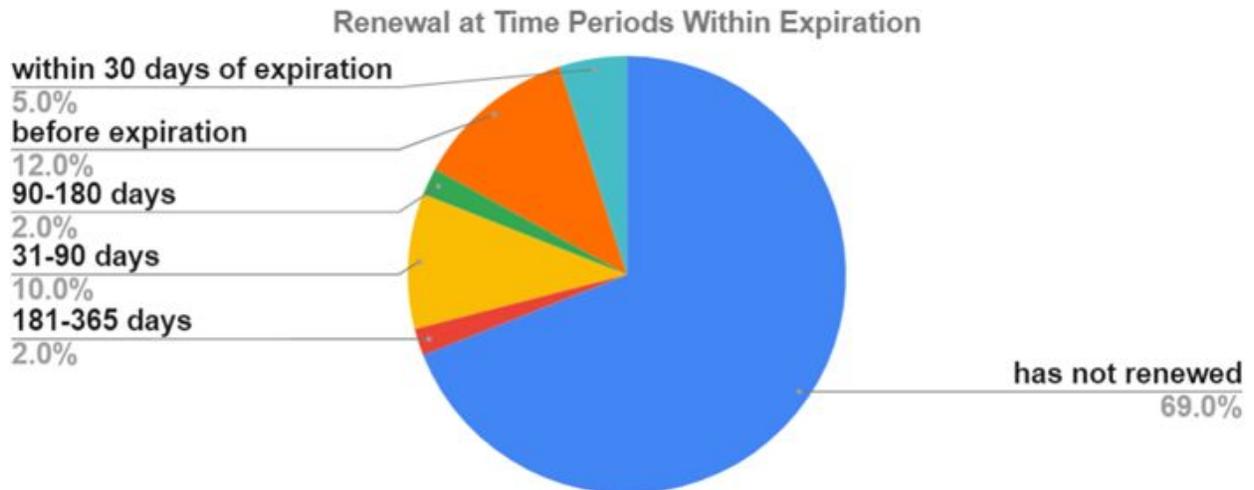
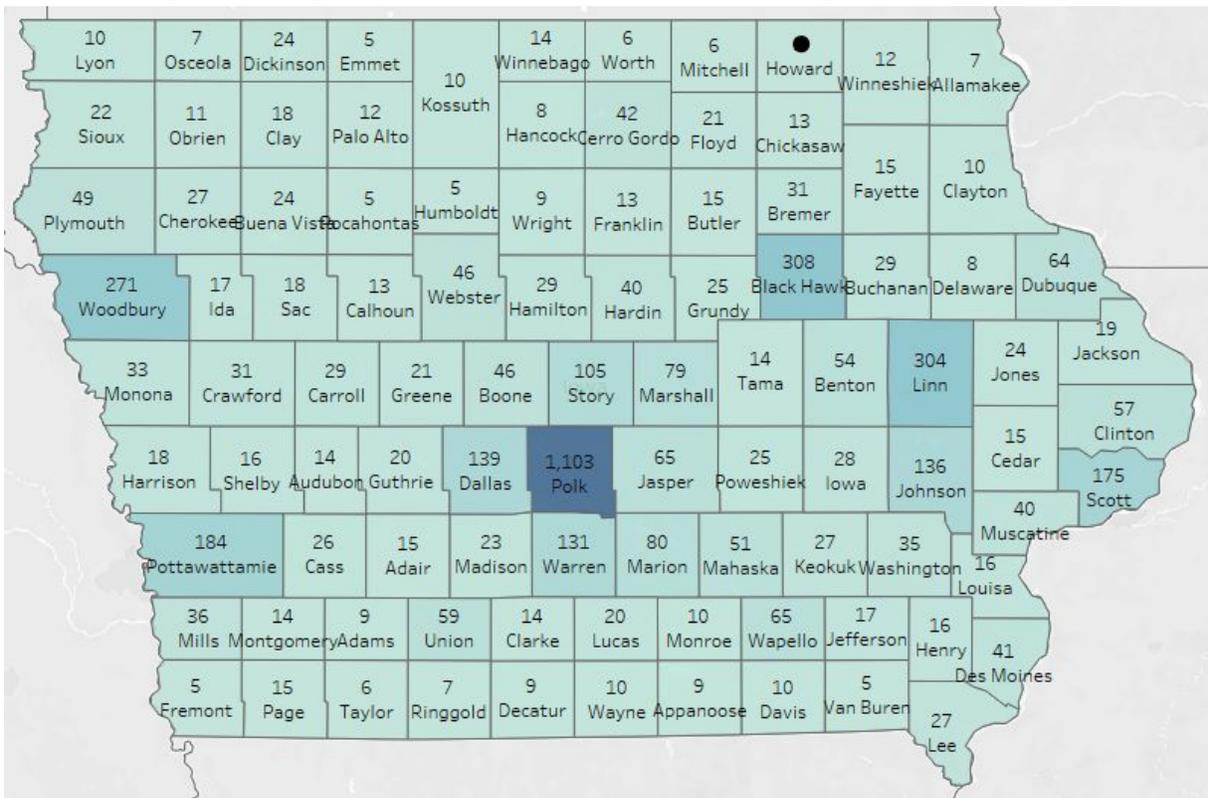


Figure 6 represents the density of patient cardholders by county in Iowa.

Figure 6.

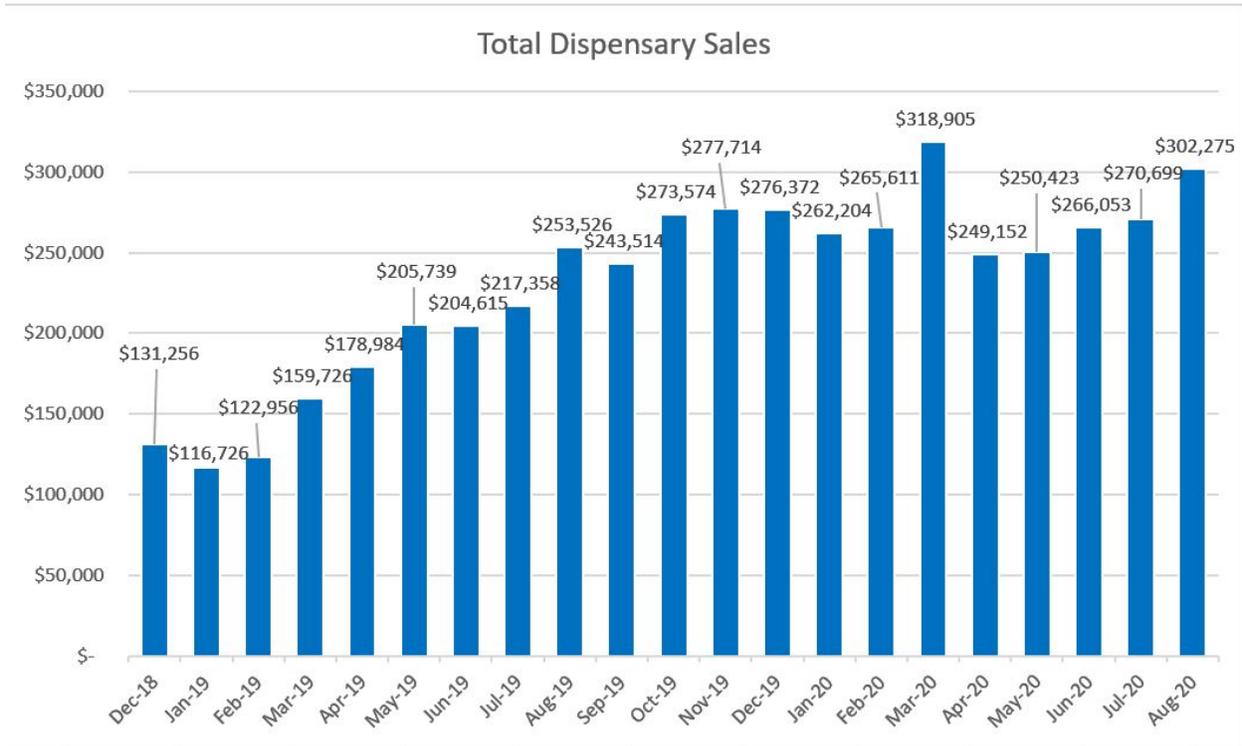


In accordance with Iowa Code Chapter 124E, the department may license up to five medical cannabidiol dispensaries in Iowa. From December 1, 2018 until March 28, 2020, five dispensaries operated in Iowa. Two of the dispensaries closed on March 29, 2020. The three remaining dispensaries are Iowa Cannabis Company (Black Hawk county), MedPharm Iowa (Woodbury county), and MedPharm Iowa (Polk county). MedPharm Iowa also operates as a licensed manufacturer. The department will award the two available dispensary licenses in early September 2020.

## 2. Sales Data

**Figure 7** represents total dispensary sales data for every month since dispensary sales began in December 2018. Sales totals do not include tax.

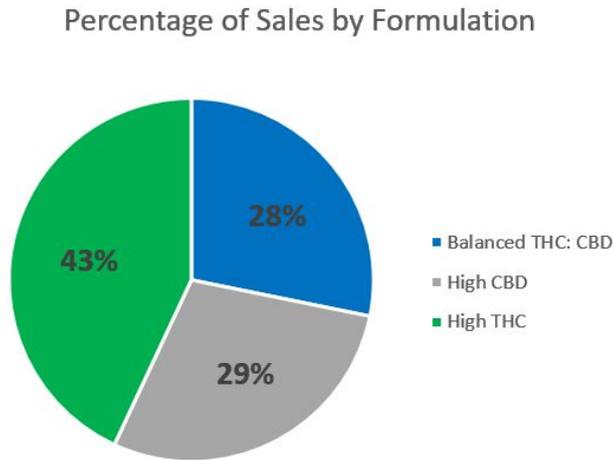
**Figure 7.**



### 3. Product Forms

Prior to the implementation of House File 2589, medical cannabidiol products produced by a licensed manufacturer were limited to 3% THC by weight or volume. House File 2589 removed the 3% THC limit on products. **Figure 8** represents the percentage of product units sold according to the product's CBD:THC ratio.

**Figure 8.**



**Figure 9** represents the product units sold by product type. It should be noted that low-THC vaporizable products became available August 7, 2019, and high-THC vaporizable products became available August 7, 2020. Sales data is from December 1, 2019 through August 31, 2020.

**Figure 9.**

