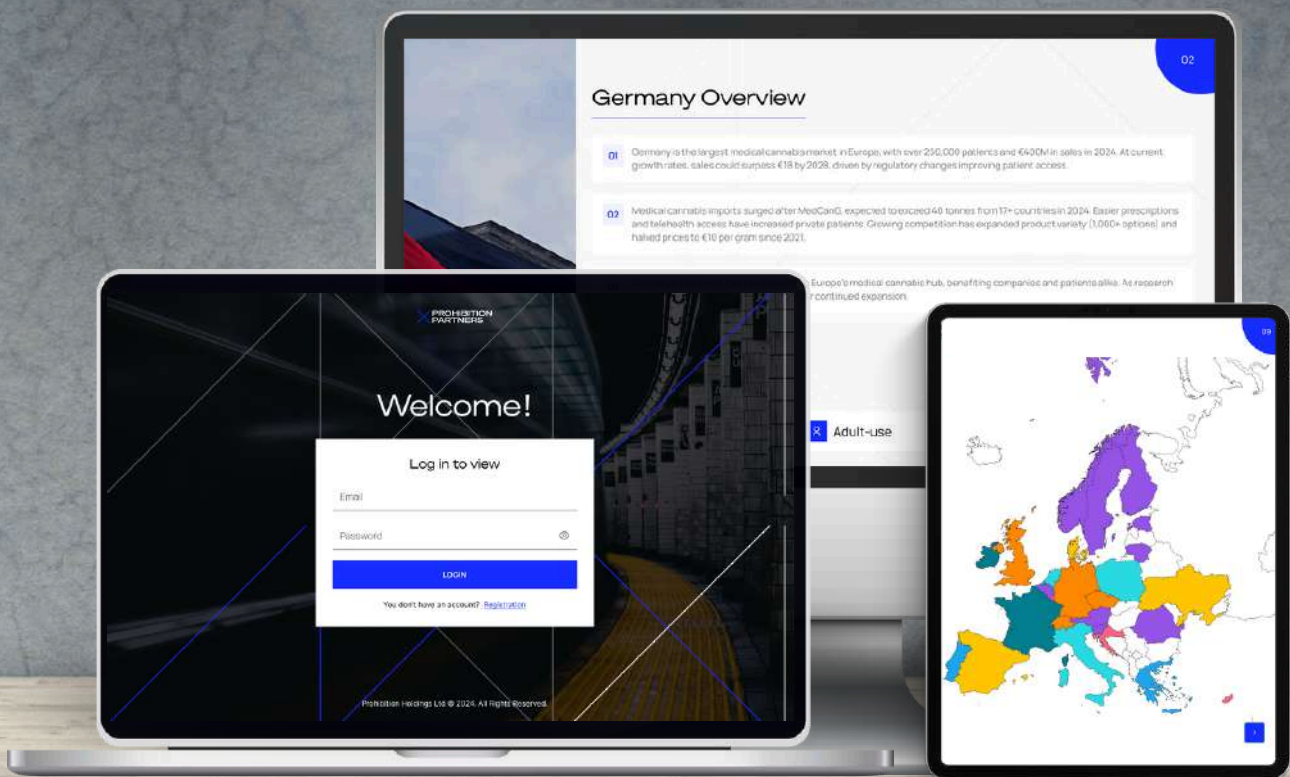


INSIGHTS HUB 1.0

MEDIA KIT — EUROPE



CONTENTS

01

About
Us

02

Insights Hub
Team

04

Note from
Our CEO

05

Press
Releases

06

Insights Hub
Launch

09

Market
Update

11

Germany
Insights

16

UK
Insights

19

Switzerland
Insights

21

Portugal
Insights

24

Graphs &
Charts

27

Media
Contact

ABOUT PROHIBITION PARTNERS

Prohibition Partners is the leading source of data and insights for the global cannabis industry, with a focus on emerging cannabis markets.

Since 2017, we have empowered senior decision makers to identify commercial opportunities and make better business decisions by accessing reliable and credible data on key cannabis markets globally – from market forecasts and the regulatory environment, to product demand and consumer insights.

Our Strategy & Data team provides cutting-edge intelligence to help business leaders, investors and policymakers understand and engage with nascent cannabis markets across the world.

INSIGHTS HUB TEAM



Stephen Murphy
CEO & Co-Founder



Alex Khourdaji
Senior Analyst

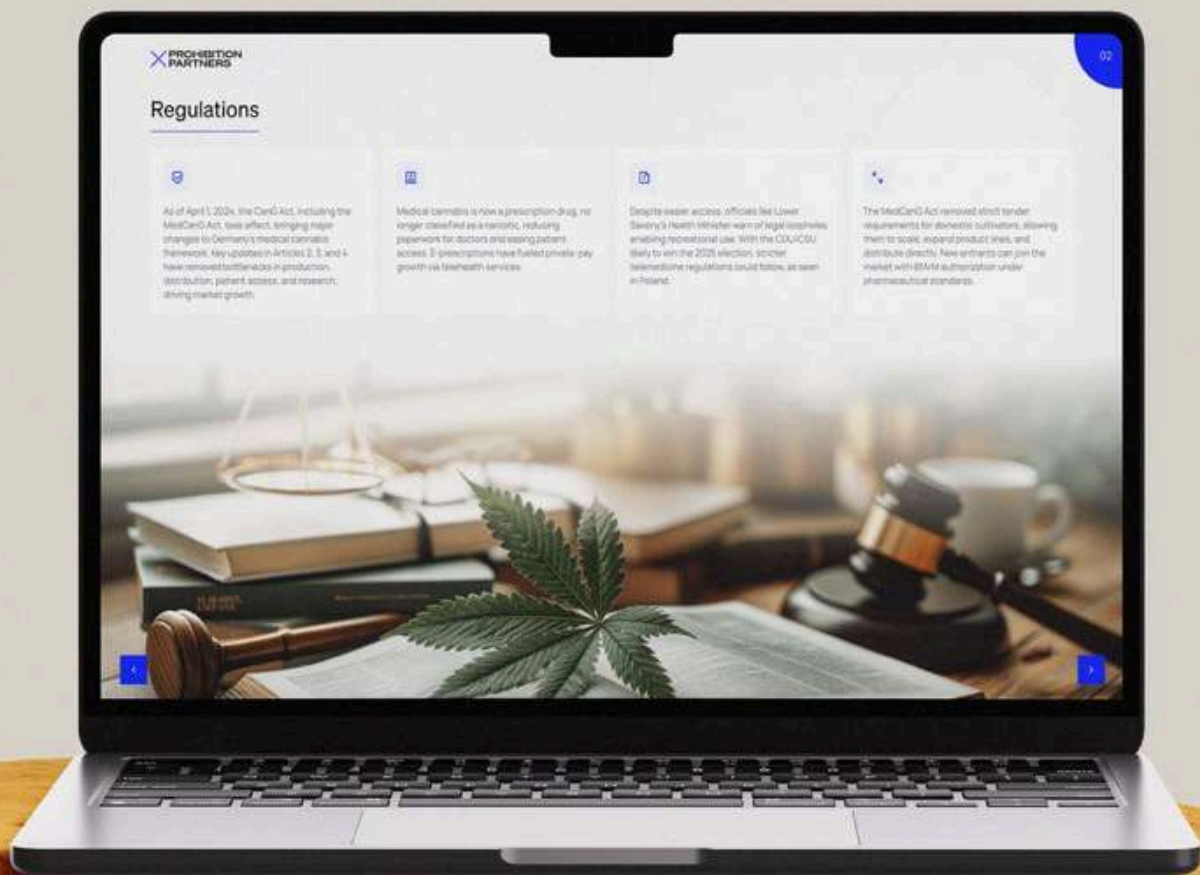


Lawrence Purkiss
Senior Analyst



Mike Hoban
Head of Marketing & Comms

COMPREHENSIVE CANNABIS DATA EXPLORATION — IN REALTIME.



NOTE FROM OUR CEO



Stephen Murphy

Founder & CEO

Since 2017, we have been charting the evolution of cannabis markets across Europe, and we recognised that it was time for something new that matched the pace, scale, and complexity of what is now happening on the ground.

This isn't just a new edition of a static report – it is a complete reimaging of how we deliver insights and data. The Insights Hub gives businesses, policymakers, and patients real-time access to the data and analysis they need in order to navigate an industry that is no longer changing year by year, but week by week.

Insights Hub Key Features



Enhanced Interactivity

Easily navigate through detailed insights, datapoints, and market analysis.



Real-Time Updates

Access the latest industry developments as the global cannabis market continues its rapid evolution.



Comprehensive Data Exploration

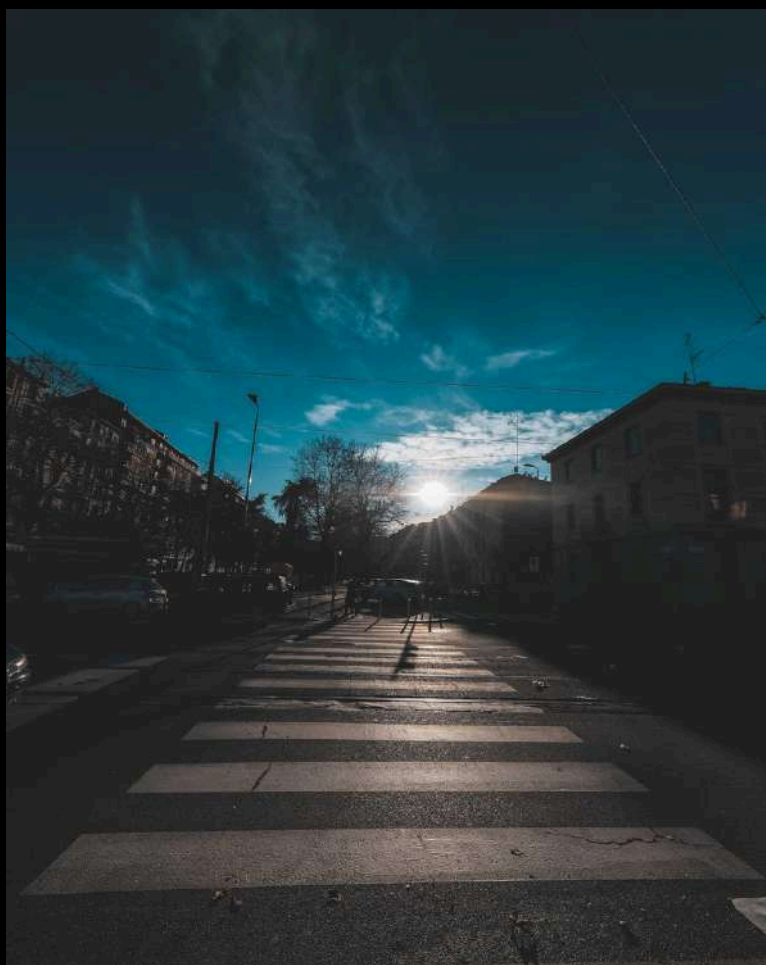
View credible, reliable data and intelligence with greater efficiency – anytime, anywhere.



User-Friendly Interface

Seamlessly explore key findings and critical intelligence.

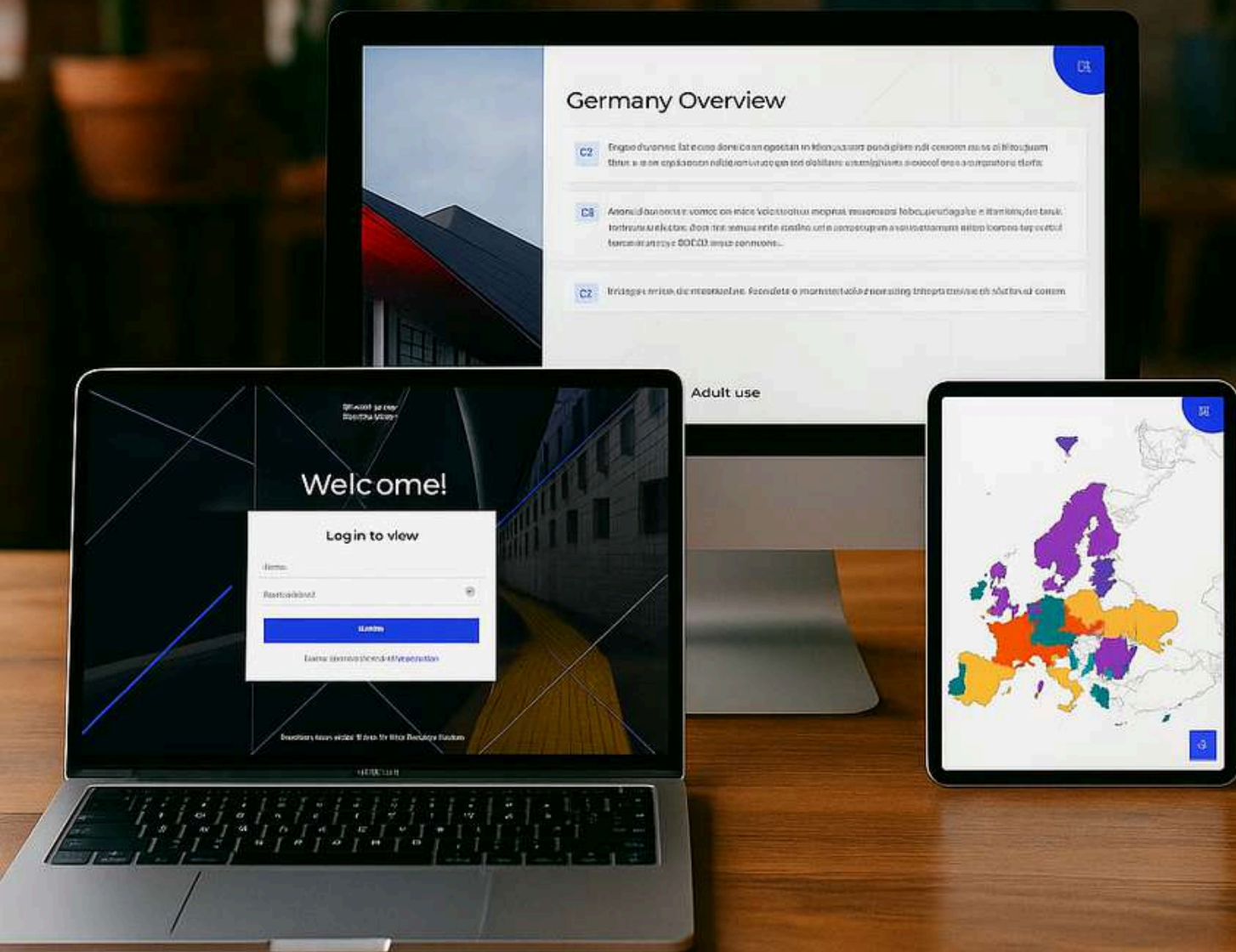
PRESS RELEASES





INSIGHTS HUB LAUNCH

A landmark shift from static reports to real-time data platform aims to redefine how cannabis market data is consumed globally.



FOR IMMEDIATE RELEASE

Prohibition Partners Launches Groundbreaking Interactive Cannabis Insights Hub

London, UK, Tuesday 29 July, 2025 — Prohibition Partners, the world's leading provider of cannabis market intelligence and data, has today unveiled its most significant innovation to date: Prohibition Partners' Insights Hub, a next-generation digital platform that transforms traditional industry reporting into a live, continuously evolving data exploration experience.

The 10th edition of the European Cannabis Report, long regarded as the go-to European resource for investors, regulators, operators, and policymakers across the global cannabis landscape, is now available to access for free via the Insights Hub.

A New Era of Cannabis Market Insights

The Insights Hub addresses the growing need for timely, insightful, and real-time data on key cannabis markets globally, in a rapidly evolving policy and commercial landscape.

Key features include:

- **Live Market Tracking** – Users can explore real-time regulatory developments, import & export data, licensing frameworks, and investment opportunities across more than 30 European countries.
- **Dynamic, Interactive Data Visualisations** – Rich visual interfaces allow users to toggle data layers such as product trends, policy status, medical access, and adult-use legislation.
- **Updated in Real Time** – The Insights Hub will be continually updated with the latest data, intelligence and insight from Prohibition Partners' global network of analysts and data scientists.

A Future of Innovation

The nine previous editions of the European Cannabis Report reflect on over a decade of immense change across European cannabis markets — from early medical pilot programs to the emergence of adult-use frameworks in countries like Germany and Malta. The new Insights Hub ensures these developments are no longer retrospective observations but real-time touchpoints for strategy, risk management, and opportunity assessment.

With European markets continuing to mature and legislative reform accelerating across the continent, Prohibition Partners' digital shift ensures that investors, businesses, and policymakers are equipped with the tools to lead rather than follow. Prohibition Partners' Insights Hub is now live and available to access for free.

[CONTINUED OVERLEAF]

By December 2025, the Insights Hub will incorporate global data and intelligence – not just Europe. Registered users will soon also be able to access insights on cannabis markets in North America, LATAM and the Caribbean, APAC, Oceania, and Africa and the Middle East – all online, using any device.

Industry Impact

Since its founding, Prohibition Partners has set the standard for cannabis industry research. The launch of the Insights Hub marks a critical evolution in how data is delivered and consumed—supporting faster, more informed decisions at every level of the cannabis value chain.

For real-time, comprehensive cannabis data exploration, register now: insightshub.prohibitionpartners.com



Since 2017, we've been charting the evolution of cannabis markets across Europe, we knew it was time for something new that matched the pace, scale, and complexity of what's happening on the ground. This isn't just a new edition of our flagship report – it's a complete reimagining of how we deliver insights and data. The Insights Hub will continually evolve, and give businesses, policymakers, and patients real-time access to the data and analysis they need to navigate an industry that is no longer changing year by year, but week by week.



Stephen Murphy

Founder & CEO, Prohibition Partners

END OF RELEASE



EUROPEAN MEDICAL MARKET UPDATE

Unprecedented growth, driven by progressive legislation, expanding patient access, and a maturing supply chain.

FOR IMMEDIATE RELEASE

Europe's Medical Cannabis Market Surges amid Regulatory Reforms and Growing Patient Demand

London, UK, Tuesday 29 July, 2025 — The European medical cannabis sector is experiencing unprecedented growth, driven by progressive legislation, expanding patient access, and a maturing supply chain, according to The European Cannabis Report: 10th Edition — now available to access for free via Prohibition Partners' new comprehensive cannabis data Insights Hub.

Germany continues to lead the European medical cannabis market, now valued at over €670 million, thanks to the transformative MedCanG law enacted in April 2024. By removing cannabis from the narcotics list and eliminating bureaucratic hurdles, Germany has created Europe's most open medical cannabis ecosystem. The market is now supported by over 20 telemedicine clinics, a robust import and distribution network, and falling flower prices, further boosting accessibility.

The Czech Republic and Denmark are establishing themselves as rising European exporters. Czech reforms have enabled commercial cultivation and a significant increase in exports – over 1,300 kg of medical cannabis was shipped to Germany in 2024. In Denmark, a decision to make its pilot programme permanent has cemented the country's role as a major exporter, with over 7 tonnes sent to Germany in 2024 alone.

Poland is now Europe's fourth-largest market, projected at €72 million in 2025. Recent regulatory improvements, product approvals, and telemedicine adoption spurred rapid growth, although a 2024 ban on online-first consultations has introduced new friction.

In the UK, the medical cannabis market – an almost-entirely private market – is expected to exceed €300 million in 2025. Over 30 telehealth platforms serve a rapidly expanding patient base, although high treatment prices and a lack of public reimbursement remain key challenges. Domestic production is ramping up, with several UK-based producers now supplying locally cultivated cannabis.

Meanwhile, Italy remains tightly regulated, with state-controlled cultivation and procurement largely restricting market growth. Despite being one of the first movers in Europe, the market remains dominated by a few suppliers, led by Bedrocan. Across the continent, flowers remain the dominant product format, but oils, extracts, and even vape cartridges are gaining traction – especially in markets like Germany and the UK. Canadian, Portuguese, and Danish producers continue to dominate exports into the region.

As Europe edges closer to harmonised frameworks and broader patient access, the medical cannabis sector is poised for continued acceleration, potentially surpassing €1.5 billion in combined value across leading markets by the end of the decade.

For real-time, comprehensive cannabis data exploration, register now: insightshub.prohibitionpartners.com

END OF RELEASE



GERMANY INSIGHTS: MEDICAL

A new era of growth and European cannabis policy reform leadership following the implementation of the MedCanG in 2024.

FOR IMMEDIATE RELEASE

From Red Tape to Record Growth: MedCanG Sparks Europe's Biggest Medical Cannabis Boom

Berlin, Germany, Tuesday 29 July, 2025 — Germany's medical cannabis industry is entering a new era of growth and global leadership following the implementation of the MedCanG law in April 2024. Already Europe's largest medical cannabis market, Germany is now experiencing an unprecedented surge in demand, fuelled by sweeping regulatory reform, increased patient access, and a fast-maturing domestic supply chain.

Market Size and Momentum

With an estimated market value of over €670 million in 2025 and expectations for continued rapid expansion, reaching €1.32 billion by 2029, Germany is cementing its role as Europe's most open and commercially dynamic cannabis market.

Rewriting the Rules: Regulation and Opportunity

The MedCanG legislation removed cannabis from the narcotics list, streamlined prescribing, and enabled new pathways for cultivation, import, and distribution—transforming the landscape for patients and producers alike. By reclassifying cannabis as a standard prescription medication, the law has lifted burdens on doctors, enabled e-prescriptions, and dramatically expanded telehealth access.

Domestic cultivation has also been unshackled. The previous tender system — limited to 2,600 kilograms annually and just three approved producers — has been replaced by a licensing regime allowing qualified producers to scale operations and introduce new product lines. Tilray/Aphria, Aurora, and Demecan have retained and expanded their positions, with more players expected to follow under the new framework.

Telehealth Boom Drives Patient Access

The new rules have led to explosive growth in digital prescribing. Prohibition Partners has identified more than 20 telemedicine platforms now serving Germany's medical cannabis patients. The five largest operators individually attract over 150,000 monthly website visitors—underscoring how e-health is unlocking access for thousands of new patients.

Price Declines & Product Expansion

The average price per gram for medical cannabis flower in Germany dropped from €10.19 in June 2024 to €7.42 in May 2025 — a reflection of increasing competition, growing imports, and broader product availability. Low-cost offerings from countries like Portugal and Uruguay are expanding market access, while premium Canadian products maintain high-end price points above €11 per gram thanks to unique strains and potent THC profiles.

Product diversity is growing but remains flower-heavy: 86% of offerings are flower-based, while oils account for 13.5%. The first vape cartridge entered the German market in 2023 via Ilios Santé, with more innovation expected in extract-based products.

[\[CONTINUED OVERLEAF\]](#)

Market Size and Momentum

With an estimated market value of over €670 million in 2025 and expectations for continued rapid expansion, reaching €1.32 billion by 2029, Germany is cementing its role as Europe's most open and commercially dynamic cannabis market.

Imports Rise to Match Soaring Demand

In 2024, Germany imported 72,000 kilograms of medical cannabis — double the volume from 2023. Canada remains the dominant supplier, accounting for more than half of all imports, followed by Portugal (24%) and Denmark (10%). Germany also serves as a regional distribution hub, re-exporting to markets including Poland, the UK, and the Czech Republic.

Domestic Production: From Tender to Open Market

Before MedCanG, domestic cultivation was locked into restrictive tendering. That system has now been dismantled, with licensed producers free to expand capacity and diversify their portfolios. Aurora, Tilray/Aphria, and Demecan were the first to transition into the new framework, signalling the start of a more flexible and scalable domestic supply chain. As of March 2025, these three remain the only licensed domestic cultivators, though further applications are expected.

For real-time, comprehensive cannabis data exploration, register now: insightshub.prohibitionpartners.com



With the introduction of the MedCanG, Germany has created the most liberal and commercially robust medical cannabis market in Europe. The combination of regulatory reform, telehealth infrastructure, and rising domestic and international supply is setting the benchmark for how quickly medical cannabis markets can scale.



Alex Khourdaji

Senior Analyst, Prohibition Partners

END OF RELEASE



GERMANY INSIGHTS: ADULT-USE

More than 230 cannabis cultivation associations now legally serve adult members across the country — while dozens of cities prepare to launch the next phase of legalisation through scientific pilot projects.

FOR IMMEDIATE RELEASE

Germany's Adult-Use Cannabis Reform Gains Ground as Associations Flourish and Cities Push for Pilot Projects

Berlin, Germany, Tuesday 29 July, 2025 – One year into Germany's groundbreaking cannabis reform, momentum continues to build as over 230 cannabis cultivation associations have received permits to legally serve adult members across the country.

Implemented under the Cannabis Control Bill (CanG), Germany's model has already delivered one of Europe's most progressive frameworks for adult-use cannabis. With legal possession, home cultivation, and non-profit distribution through associations now fully underway, the focus is shifting toward regionally controlled, legal retail sales. However, recent changes in government and wider political issues have hindered its development.

While the federal government remains cautious – and leadership changes have cast doubt on broader commercial reforms – 28 districts across 10 states have submitted or expressed interest in launching scientific pilot projects under the Consumer Cannabis Science Competence Ordinance (KCanWV). These projects aim to study the real-world effects of legal retail cannabis on youth protection, public health, and the illicit market.

In Hanover, for instance, a flagship project backed by the Hanover Medical School plans to study 4,000 participants in a controlled commercial cannabis supply chain, aiming to deliver critical data to policymakers across Europe. Meanwhile, cultivation associations continue to expand, with regions like North Rhine-Westphalia and Lower Saxony leading in permit approvals. Innovative models – such as Cannabis Social Club Ganderkesee – are already providing members with access to a diverse range of strains at fair prices, supported by strict non-profit rules, youth protections, and education efforts.

With over 660 associations applying for licenses, and federal laws allowing expungement of certain past convictions, Germany is not only reshaping access – it is reshaping justice. Despite political headwinds, a growing coalition of cities, researchers, and community groups is ensuring the spirit of reform moves forward.

For real-time, comprehensive cannabis data exploration, register now: insightshub.prohibitionpartners.com



Germany is showing the world how to balance public health, personal freedom, and market control. What began as a cautious step has evolved into a serious foundation for a post-prohibition landscape.



Alex Khourdaji

Senior Analyst, Prohibition Partners



UK INSIGHTS

The UK already has the second-largest medical cannabis market in Europe and the fifth-largest medical cannabis market globally outside of the United States.

FOR IMMEDIATE RELEASE

UK Medical Cannabis Market Accelerates Towards £543M: Domestic Cultivation, Patient Demand & Global Supply Chain Fuel Expansion

London, UK, Tuesday 29 July, 2026 — The UK's medical cannabis market is undergoing a rapid transformation, with newly-released projections showing the market more than doubling in size from over £258 million in 2025 to more than £543 million by 2029. Despite a slow start post-legalisation in 2018, demand from patients, online consultations, and domestic production are driving unprecedented market momentum.

A Market Ripe for Investment & Innovation

Private-sector growth continues to outpace public policy in the UK, where medical cannabis remains a fully private-pay market. Prescriptions are limited to specialist doctors, and no NHS reimbursement is currently available. Yet the industry is thriving, as patient numbers rise year-on-year and infrastructure—from clinics to pharmacies—expands to meet demand.

Barriers and Breakthroughs in Supply Chain

While the UK's regulatory system is strict—particularly around import licensing and manufacturing—its openness to new market entrants is notable. Imports dominate current supply, with a growing share of “raw material” imports being finalised in the UK. Domestic cultivation is also on the rise, with commercial producers (e.g. Dalgety, Glass Pharms & Celadon) scaling up operations. Glass Pharms alone is set to produce 1,750 kilograms annually under a supply deal with Releaf Clinics.

Digital Platforms Power Patient Access

Digital infrastructure is central to market growth. Over 30 telehealth platforms now support the UK's medical cannabis patients, with Releaf and Curaleaf Clinics each drawing over 700,000 monthly website visitors — suggesting broad interest far beyond the current active patient base. The convenience of online consultations has become a defining feature of the UK's cannabis ecosystem.

Stability in Price, Shifts in Product Mix

Average prices for flower products remain steady, with only a slight year-on-year decrease from £7.47 to £7.25 per gram. Flower still dominates (67% of available products), but oils, vapes, and even edibles are gaining ground. Around half of the UK's oil products are formulated domestically, primarily by Curaleaf and Grow Group.

Global Supply Chains with a UK Twist

Canada remains the largest international supplier, followed by Portugal and the UK itself—evidence of domestic production making a mark. Notably, many imports arrive as bulk product or raw material and undergo final processing or packaging in the UK to meet stringent legal requirements. Imports rose dramatically from under 3 tonnes annually (pre-2022) to 15.5 tonnes in 2024. As of March 2025, over two tonnes have already been imported, suggesting another strong year ahead.

[\[CONTINUED OVERLEAF\]](#)

A New Phase of Market Maturity

Having legalised the use of cannabis as an unlicensed medical treatment in 2018, the UK was initially slow to facilitate patient access to treatment. This has changed in recent years, and there is now an active patient base of approximately 50,000-60,000 in the UK, with an estimated 80,000 individuals expected to receive treatment with medical cannabis throughout 2025.

The UK is already the second-largest medical cannabis market in Europe. Discounting the US, the UK ranks as the fourth-largest medical cannabis market globally, after Germany, Australia, and Canada.

For real-time, comprehensive cannabis data exploration, register now: insightshub.prohibitionpartners.com



The UK medical cannabis market is entering a new phase — defined by scale, sophistication, and strong signals of long-term viability. As domestic cultivation scales and digital access becomes more embedded, the market is evolving rapidly from niche to mainstream — creating opportunity for global players and domestic pioneers alike.



——— **Lawrence Purkiss**

Senior Analyst, Prohibition Partners

END OF RELEASE



SWITZERLAND INSIGHTS: ADULT-USE

The emergence of a European leader in evidence-based cannabis policy reform, as the nation's pioneering adult-use pilot trials continue to deliver promising results

FOR IMMEDIATE RELEASE

Switzerland Sets the Pace for Cannabis Reform in Europe: Successful Pilot Trials Pave the Way for Full Legalisation in 2026

Zurich, Switzerland, Tuesday 29 July, 2026 – Switzerland is emerging as a European leader in evidence-based cannabis reform, as the nation's pioneering adult-use pilot trials continue to deliver promising results – prompting lawmakers to prepare for full legalisation as early as 2026.

Launched in 2023, Switzerland's adult-use cannabis trials now include seven operational studies involving over 10,000 registered participants. These state-sanctioned pilots, conducted in collaboration with universities, hospitals, and public health authorities, allow participants to legally purchase and consume cannabis through regulated outlets such as pharmacies, cannabis social clubs, and dedicated retail shops.

Early results from key projects – including Weed Care (Basel), Züri Can (Zurich), and Grashaus Projects (Basel-Landschaft) – have shown no disruption to public safety or health, with participants reporting greater access to safer, higher-quality products and shifting away from illicit markets. Highlights from the trials include:

- €23.7 million in estimated total cannabis sales by the end of 2025 across all pilot projects – funds that would have otherwise supported illicit cannabis sellers.
- 87kg of cannabis sold through Weed Care in Basel, redirecting nearly €1 million from the illicit market.
- Over 70% of participants in multiple trials are opting for lower-risk consumption methods, such as tinctures, edibles, and vapes.
- Strong public engagement: 84% of participants value access to higher-quality products, and 89% see their participation as contributing to better regulation.
- No increase in quantity or frequency of use observed across participants.

In February 2025, the Swiss National Council's Social Security and Health Committee voted to approve a draft bill for full adult-use legalisation, which would permit residents to grow, buy, possess, and consume cannabis under a state-monopoly model. Cannabis sales would be limited to licensed outlets, taxed according to THC content, and reinvested into the public health system. A final version of the law is expected to be voted on in 2026.

If approved, Switzerland would become the first country in Europe to establish a regulated, nationwide adult-use cannabis market – potentially setting the benchmark for progressive cannabis policy across the continent.

Switzerland's model is unique in its scientific, non-commercial approach, with every pilot subject to rigorous data collection on impacts to health, youth protection, illicit markets, and social equity. Researchers from ETH Zürich, the University of Lausanne, the University of Geneva, and other institutions continue to publish interim reports, which will shape the future legal framework. Additional pilot projects are currently under review, including new proposals in Ticino, demonstrating growing interest across the country despite political differences at the local level.

For real-time, comprehensive cannabis data exploration, register now: insightshub.prohibitionpartners.com



PORTUGAL INSIGHTS

A European leader in cannabis production and exports,
with very real scope to expand this leadership to
patient care.



FOR IMMEDIATE RELEASE

Portugal: Europe's Cannabis Cultivation Powerhouse Could Also Lead the Way in Patient Care

Lisbon, Portugal, Tuesday 29 July, 2026 – Portugal has emerged as one of the world's most important players in medical cannabis cultivation and export. With over 18 tonnes exported in 2024 alone and more than 60 licensed companies operating across the cannabis supply chain, Portugal is no longer just a regional contributor – it's a global powerhouse.

While domestic access to cannabis-based medicines remains tightly restricted, Portugal's business-friendly regulatory environment, low production costs, and ideal growing conditions have turned the country into Europe's leading exporter of medical cannabis—and a key supplier for markets as far afield as Germany, Poland, the UK, and Australia.

Export Growth Surges as Global Demand Increases

In the first three quarters of 2024, Portugal exported more than 18,000 kilograms of medical cannabis—a 54% year-on-year increase. Germany accounts for nearly half (46%) of these exports, with other key destinations including Spain (20%), Poland (16%), the UK (10%), and Australia (5%).

Portugal's cannabis production footprint continues to expand each year, supported by an experienced agricultural workforce, favourable climate, and competitive operational costs. In many cases, companies also act as re-exporters, processing imported cannabis materials and sending them to other markets—further strengthening Portugal's role in the global cannabis supply chain.

Domestic Market Still Faces Barriers

Despite its status as an international cannabis leader, Portugal's domestic medical cannabis market remains small and underdeveloped. Patient access is limited due to a range of factors: a restrictive product approval process, limited medical infrastructure and clinician education, high out-of-pocket prices, and the absence of public reimbursement.

Medical cannabis in Portugal is governed by strict rules, with INFARMED maintaining rigorous control over prescribing, distribution, and pharmacy dispensation. As a result, many patients find it difficult to access or afford treatment, and local demand remains a fraction of the country's production capacity.

For real-time, comprehensive cannabis data exploration, register now: insightshub.prohibitionpartners.com



Portugal's cannabis sector is a story of global ambition. Its influence is felt in every major European market and beyond, yet the next phase of growth will depend on unlocking access at home. With regulatory reform and public education, Portugal has the potential to lead not just in production – but in patient care as well.



Lawrence Purkiss

Senior Analyst, Prohibition Partners

END OF RELEASE

DATA VISUALISATIONS: GRAPHS & CHARTS

Static and interactive data visualisations you can embed in online articles and media sites.

SEND A REQUEST

We have a multitude of static and interactive data visualisations that you can embed in articles and on your website. Please email Mike Hoban (michael@prohibitionpartners.com) to request data visualisations, as well as raw datasets.

[EMAIL NOW »](#)

Now live and accessible for free via
insightshub.prohibitionpartners.com



MEDIA CONTACT

If you're working on a story and need expert commentary, interviews, additional data visualisations, or have any other press-related requests, please don't hesitate to reach out. I'll be your main point of contact and am here to help ensure you have everything you need.

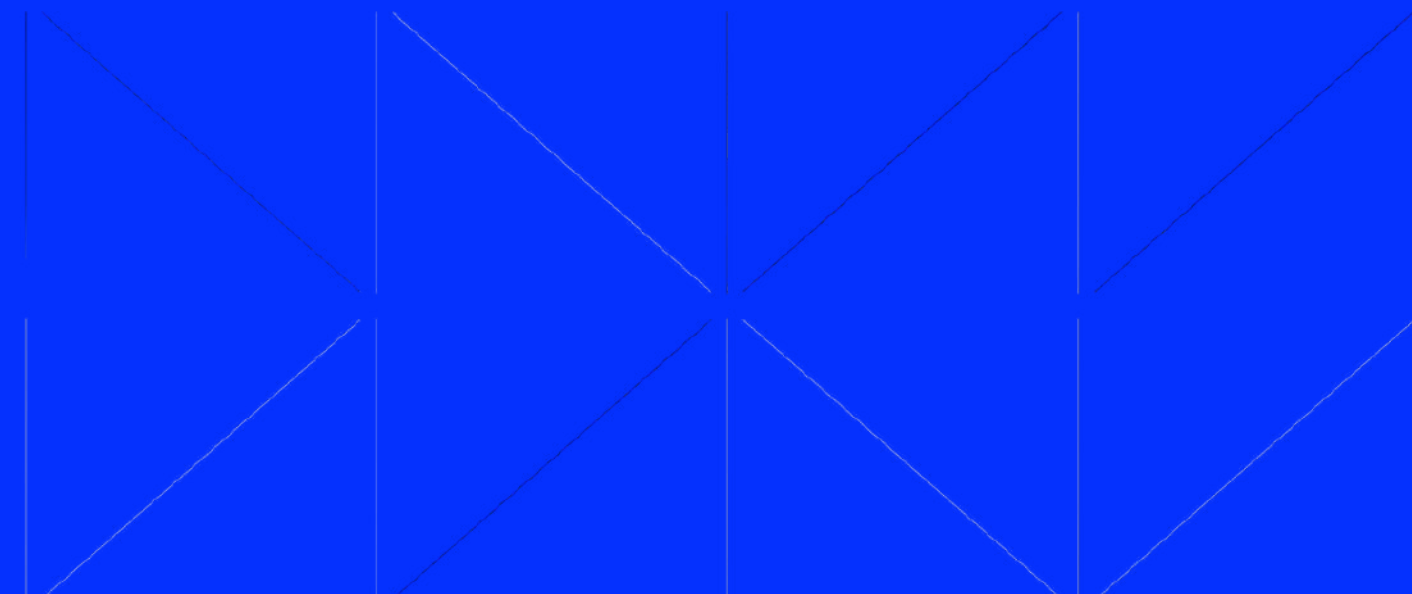


Mike Hoban

Head of Marketing & Comms

michael@prohibitionpartners.com

+44 (0)7841 697 433



LONDON

A: 31 New Inn Yard, Shoreditch,
London, EC2A 3EY, United Kingdom

T: +44 203 036 2820

info@prohibitionpartners.com
prohibitionpartners.com

DISCLAIMER

Our publications may contain advertising and sponsorships. We are not responsible in any manner whatsoever for the content of advertisers' or sponsors' materials. All responsibility for the advertisement and sponsorship material rests with the respective advertiser and sponsor. We, Prohibition Partners, do not make any representations, endorse, evaluate, guarantee, warranty (express, implied or otherwise) or recommend the advertised / sponsored products, services, companies or any claims made by the advertisers or sponsors that appear in publications, including in print, online and in digital formats. We accept no liability whatsoever, howsoever arising, in respect of any such advertisements and sponsorships.