

APPENDIX:

Cannabis Jobs State-by-State

Medical and adult-use cannabis remain illegal in Alabama, Georgia, Idaho, Indiana, Kansas, Kentucky, Mississippi, Nebraska, North Carolina, South Carolina, South Dakota, Tennessee, Texas, Virginia, Wisconsin, and Wyoming.

Some states marked as illegal, such as Texas, do have extremely limited CBD-only laws. Leafly does not consider CBD-only laws to be a form of medical cannabis legalization.

Alaska

Estimated
\$163m annual
market



Direct	2,810
Indirect	421
Induced	703
Total Jobs Supported By Cannabis	3,934

Alaska is a tough market to capture because the state itself operates on its own wavelength. Based on state-reported cannabis sales figures, we estimate Alaska as a \$163 million annual market. Figuring in the state's radical seasonality—summer cruise ship passengers hit

the stores with money to spend—and Alaska's limited cannabis infrastructure, we estimate direct jobs at 2,810. That's a 418% increase over the number from our last jobs report, in late 2017, when the state's stores were just starting to open.

Arizona

179,000
ounces of
flower sold
monthly



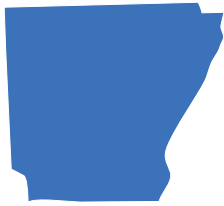
Direct	11,370
Indirect	1,705
Induced	2,842
Total Jobs Supported By Cannabis	15,917

Arizona's 183,789 patients support annual medical cannabis sales of \$587 million. State regulators track cannabis sales in their own special way: by weight. In December 2018, there were 179,000 ounces of flower sold. The state also tracks concentrates and infused products

(including edibles) by weight, which makes no sense whatsoever. We worked with the flower sales data and the patient count, and we factored in additional sales of concentrates and edibles based on their share of the market.

Arkansas

32 approved dispensaries



Direct	135
Indirect	20
Induced	34
Total Jobs Supported By Cannabis	189

Arkansas has approved 32 dispensaries, but the first handful aren't expected to open until later this summer. There are five licensed grow operations, but they don't have a market yet. Meanwhile, more than 7,000 patients have signed up for medical marijuana cards, which

the state began mailing in February. We expect Arkansas to be a \$30 million industry by the end of 2019, but it's not there yet. Expect this state's job count to spike—if you're looking, they're hiring.

California

\$2.47b in sales in 2018



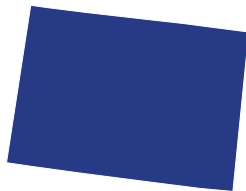
Direct	47,822
Indirect	7,173
Induced	11,956
Total Jobs Supported By Cannabis	66,951

When it reaches maturity, California should be a \$6 billion to \$8 billion annual market. But we're years away from a mature market in which most consumers have finally migrated from the illicit to the legal, licensed industry. California cannabis saw massive shakeups in 2018, with many unlicensed dispensaries shutting down, some licensed adult-use stores opening up, and

lots of towns and counties banning cannabis businesses altogether. Given all the upheaval, we identified 2018 as a year of stasis for California and estimate \$2.47 billion in sales. Patients and adult consumers didn't go away, they're merely adjusting to the new reality. As a result, our job tally in California is just a slight increase from last year's count.

Colorado

\$1.63b in sales in 2018



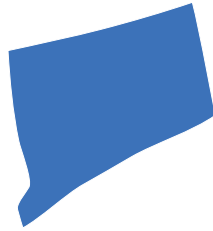
Direct	31,486
Indirect	4,723
Induced	7,872
Total Jobs Supported By Cannabis	44,081

Cannabis sales in Colorado increased 7.7% in 2018, putting total annual sales at \$1.63 billion. Given the value of the market, the number of state cannabis employee worker cards, and

Colorado's robust climate for indirect cannabis jobs, we estimated this year's direct jobs count at 31,486.

Connecticut

30% increase
in medical
patients



There were 30,640 registered medical cannabis patients in Connecticut as of January 2019, a 30% increase over January 2018. However, Connecticut still has only nine dispensaries and four licensed producers—tiny numbers for a

Direct	1,800
Indirect	270
Induced	450
Total Jobs Supported By Cannabis	2,520

state with 3.5 million people. (For comparison, Arizona, a medical state with twice the population of Connecticut, has five times the market size.)

Delaware

356 estimated
direct jobs



Delaware’s medical cannabis industry is incredibly small, and the state’s recordkeeping doesn’t offer accurate, up-to-date insights. The latest report we could find was from June 30, 2018 and cited 6,060 patients and 196 cannabis

Direct	356
Indirect	53
Induced	89
Total Jobs Supported By Cannabis	498

“agents” (owners, employees, or volunteers) registered as of that date. Based on the tiny patient population and market size, we estimate 356 jobs directly connected to the medical marijuana industry.

District of Columbia

6 licensed
medical
dispensaries



Washington, D.C., has legalized the adult use of cannabis, but the District has no legal retail stores because Congress has used its control over the D.C. budget to prevent the city from spending any money to enact a licensing

Direct	356
Indirect	55
Induced	91
Total Jobs Supported By Cannabis	511

and regulatory system. In the meantime, the District’s six licensed medical dispensaries continue to operate and serve 6,231 registered patients, creating a \$19 million annual market with about 365 direct cannabis jobs.

Florida



10,358 current cannabis jobs

Florida's medical marijuana market absolutely exploded in 2018. The state spent 2016 passing its legalization amendment, 2017 finalizing the regulations, and 2018 building out the industry.

Direct	10,358
Indirect	1,554
Induced	2,590
Total Jobs Supported By Cannabis	14,502

One year ago, Florida had 1,290 direct cannabis jobs. Today it has 10,358. Those workers serve a patient population of 176,278 (as of Jan. 24, 2019), which could top 250,000 by the end of 2019.

Hawaii



Almost 24k medical marijuana patients

Hawaii had 23,746 medical marijuana patients licensed as of January 2019, but the state's medical cannabis community is disproportionately centered around local caregivers and homegrown cannabis. Until very recently, 31% of registered patients lived on the Big Island of Hawaii, where no dispensary existed. Other islands have only one or two dispensaries at inconvenient locations. As a

Direct	310
Indirect	47
Induced	78
Total Jobs Supported By Cannabis	435

result, patients were obtaining their cannabis from local non-commercial sources. Homegrown cannabis thrives here relative to other legal states, because cannabis grows extremely well in Hawaii and Hawaiians are proud to provide for themselves from backyard gardens. These factors combined help explain why a population of nearly 24,000 patients supports only 310 direct jobs.

Illinois



55 licensed dispensaries

The 55 licensed dispensaries in Illinois served an average monthly total of 26,000 patients last year and tallied about \$12 million per month in sales. That's an unusually high per-patient purchase total. But with 46,000 total patients in the system, it may reflect a buying pattern

Direct	3,020
Indirect	453
Induced	755
Total Jobs Supported By Cannabis	4,228

in which many patients visit a dispensary only every six to eight weeks, making larger purchases across fewer trips. The state's total annual market is estimated to be \$137 million, which supports 3,020 direct cannabis jobs.

Iowa

5 licensed dispensaries



Iowa's first five dispensaries opened in late 2018, so this state's medical cannabis industry is just getting started. That's not to say it's going to take off—products are limited to a maximum of 3% THC, which will limit the relief many

Direct	55
Indirect	8
Induced	14
Total Jobs Supported By Cannabis	77

patients are looking for. There were only 930 patients certified as of late December 2018, and we're predicting a total annual market in the low single-digit millions in 2019.

Louisiana

No pharmacies open yet



Louisiana's medical cannabis program has always been a mess, and it probably won't get much better anytime soon. As of January 2019, nine cannabis pharmacies have been specially licensed by the state, but none had yet opened. The earliest they're expected to receive any cannabis is May 2019. Medical providers

Direct	22
Indirect	3
Induced	6
Total Jobs Supported By Cannabis	31

are now able to write medical marijuana recommendations without any patient limit, but they aren't recorded or tracked by any state agency. Consequently, Louisiana doesn't have any data on how many patients have been state-approved, nor does it expect to in the foreseeable future.

Maine

45,936 medical cannabis patients



Maine legalized adult-use cannabis a few years ago but the state legislature hasn't created a regulatory system, and we don't expect one to emerge in 2019. The state has certified 45,936 medical cannabis patients and enrolled 2,418 caregivers. It's unclear how many are currently active—Maine is another big homegrow state, so many patients are growing cannabis themselves,

Direct	400
Indirect	60
Induced	100
Total Jobs Supported By Cannabis	560

receiving it from a friend, or working with a private, non-commercial caregiver. There are only eight registered dispensaries in the entire state. Despite an increase in the overall number of registered patients, our estimate in Maine now decreases to 400 direct cannabis jobs, below our 2017 tally.

Maryland

Potential \$200m market in 2019



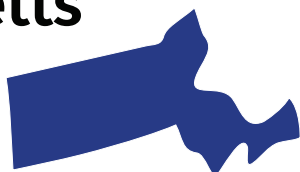
Maryland's medical cannabis system finally got up and running in 2018, with \$107 million in annual sales to 48,236 patients through more than 65 dispensaries. Because the industry in early 2018 was much smaller than it was in late

Direct	3,183
Indirect	477
Induced	796
Total Jobs Supported By Cannabis	4,456

2018, we're now estimating Maryland as a \$164 million annual market, with the expectation that it could hit \$200 million by the end of 2019. Our jobs estimate spiked, too, growing 470% in one year to 3,183 full-time cannabis jobs.

Massachusetts

\$3m in sales in one week



It's so early in the life of the full Massachusetts adult-use cannabis market that it's hard to say exactly how big it is. We ended up using sales during the second week of January 2019 as a kind of benchmark for normalcy—the souvenir first-time buyers had moved through the market after its slow launch in late November, holiday shoppers were gone, and the people buying

Direct	3,029
Indirect	453
Induced	755
Total Jobs Supported By Cannabis	4,228

during the second week in January were more likely to be everyday customers. That week saw about \$3 million in sales, which annualizes to a \$156 million market. It's a dramatically conservative estimate given that a large number of Massachusetts cannabis stores are still waiting to open.

Michigan

Potential \$3b in annual sales



Michigan is a bit of a conundrum because the state regulatory system remains in flux. Adult-use licenses and retail sales are coming in 2020. (Not 2019, sorry. The law only requires state regulators to have business applications available by Dec. 6, 2019, with no explicit

Direct	15,839
Indirect	2,736
Induced	3,960
Total Jobs Supported By Cannabis	22,535

deadline for processing.) Once the state builds out its full licensed retail industry, Michigan could reach \$3 billion in annual sales. But that's a few years away—for now we're estimating it as a \$870 million market, with 15,839 direct cannabis jobs.

Minnesota

14,574 registered patients



Direct	726
Indirect	109
Induced	182
Total Jobs Supported By Cannabis	1,017

Minnesota is one of the nation's tightest medical cannabis states, counting only 14,574 patients among a population of 5.5 million. Still, that's more than a year ago, when there were only 8,129 patients. There are only two dispensary companies, LeafLine Labs and

Minnesota Medical Solutions, which together operate eight storefronts across the state. Both have faced financial difficulties in the past. We've got Minnesota as an annual market worth \$37.5 million, which supports 726 direct cannabis jobs.

Missouri

600 estimated full-time jobs



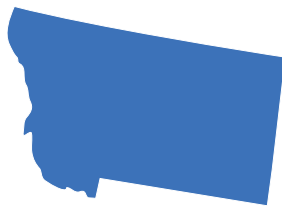
Direct	600
Indirect	90
Induced	150
Total Jobs Supported By Cannabis	840

Missouri just legalized medical cannabis in November 2018, so nothing's up and running yet. Patient applications will be accepted starting in early June 2019. The state expects to issue 60 grow licenses, 80 processing/manufacturing licenses, and 200 dispensary

licenses. Missouri has a population of 6 million people, nearly the size of Arizona, so the eventual medical market could be quite robust. For now, though, we're estimating 600 full-time jobs based on the work that we know goes into cannabis startups and licensing applications.

Montana

31,186 registered patients



Direct	871
Indirect	131
Induced	218
Total Jobs Supported By Cannabis	1,220

After a painful shutdown of the state's entire medical marijuana industry in 2016, Montanans voted to revive dispensaries and let them operate in a more regulated environment. As of January 2019, the state had registered 31,186 patients, which should yield annual sales in the \$95 million range. But state cannabis tax

revenue in 2018 indicated a market of only \$45 million, which means a lot of patients are growing their own or obtaining cannabis outside the licensed dispensary market. We're going conservative on Montana and calling it an industry that supports 871 direct jobs.

Nevada

\$608m in first-year sales



Nevada is a state with only 3 million residents and an adult-use cannabis market that hit \$608 million during the state's first full year of legal sales. We were surprised the figure wasn't closer to \$1 billion, given the massive Las Vegas tourism market. Here's what you learn on the ground in Las Vegas, though: Most tourists still

Direct	11,766
Indirect	1,765
Induced	2,942
Total Jobs Supported By Cannabis	16,473

don't realize cannabis is legal and available for all adults. With megastores like Planet 13 opening and becoming part of the Las Vegas experience, we expect the state's sales figures to rise steadily in 2019. For now, it's an industry that supports 11,766 direct cannabis jobs.

New Hampshire

Estimated \$21.6m market



New Hampshire's medical cannabis program keeps growing, slowly and steadily. As of Nov. 29, 2018 (the latest data available), the state had

Direct	418
Indirect	63
Induced	105
Total Jobs Supported By Cannabis	586

registered 7,120 patients and 449 designated caregivers. We estimate a \$21.6 million market that supports 418 direct cannabis jobs.

New Jersey

Estimated \$121m market



New Jersey's medical cannabis program has improved greatly since the election of Gov. Phil Murphy last fall, but the state's data remains terrible. Our research indicated New Jersey had registered 27,000 patients as of June 2018 and

Direct	2,350
Indirect	353
Induced	588
Total Jobs Supported By Cannabis	3,291

was adding about 500 per week, putting the rough patient count at about 40,000 as of Jan. 1, 2019. This patient population creates a \$121 million annual market, which supports 2,350 direct cannabis jobs.

New Mexico

\$145m spent on cannabis medicine in 2018



Direct	2,807
Indirect	421
Induced	702
Total Jobs Supported By Cannabis	3,930

For a small state with limited means, New Mexico does a pretty good job tracking its medical cannabis program. According to state

data, New Mexico's 68,000 patients spend an annual \$145 million on cannabis medicine, which supports 2,807 direct cannabis jobs.

New York

Adult-use legalization expected in 2019



Direct	5,067
Indirect	760
Induced	1,267
Total Jobs Supported By Cannabis	7,094

New York's medical cannabis program continues to expand, and many are expecting the state Legislature to pass adult-use legalization later

in 2019. The state had registered 86,234 patients as of early January 2019, creating a \$262 million market that supports 5,067 direct cannabis jobs.

North Dakota

8 dispensaries are expected to open in 2019



Direct	16
Indirect	2
Induced	4
Total Jobs Supported By Cannabis	22

North Dakota legalized medical marijuana back in 2016, but since then state officials have slow-walked the regulatory process. Eight dispensaries are currently in the process of

being licensed and are expected to open later in 2019. We estimate two full-time jobs per dispensary right now, for a total of 16.

Ohio

\$15m annual market



Ohio is just getting started. Its first four medical dispensaries opened in mid-January 2019, and the state has a tiny patient count of 4,964 among a population of more than 11 million

Direct	292
Indirect	44
Induced	73
Total Jobs Supported By Cannabis	409

residents. Ohio could eventually have a \$1 billion medical-only market, but that will take a while. For now, it's a \$15 million annual market supporting 292 direct cannabis jobs.

Oklahoma

Estimated \$109m market



The legal cannabis industry is staring at Oklahoma in wide-eyed wonder. In June 2018, the state's voters legalized medical marijuana, and eight months later Oklahoma has a wide-open, booming industry. The current law has few limitations or regulations, there are no restrictions on qualifying conditions, and the

Direct	2,107
Indirect	316
Induced	527
Total Jobs Supported By Cannabis	2,950

state seems to be printing licenses day and night. At last count there were 44,000 patients, 950 issued dispensary licenses, and 1,600 certified growers. Last year Oklahoma was a \$0 industry. As of February 2019, we estimate it's a \$109 million annual market. That number could double or triple by the end of the year.

Oregon

\$675m annual market



After comparing Oregon's population and cannabis sales to Colorado's and Washington's, we came to the conclusion that the state's consumers are seriously lagging in their conversion from the illicit to the legal, regulated market. Oregon's \$675 million annual market supports 13,069 full-time cannabis jobs. But Colorado has 40% more residents and 130%

Direct	13,069
Indirect	1,960
Induced	3,267
Total Jobs Supported By Cannabis	18,296

more cannabis sales. Washington has 85% more residents and 150% more cannabis sales. People in Washington and Colorado are not that much more into cannabis than the residents of Oregon. The state's well-publicized overproduction and leakage problems are real—they're displayed right there in the sales data.

Pennsylvania

Estimated
\$200m market



Pennsylvania came into its own as a medical marijuana market in 2018. The state has registered 98,000 patients, with 66,000 of those having obtained a card that allows them to purchase at licensed dispensaries. The past

Direct	3,878
Indirect	582
Induced	970
Total Jobs Supported By Cannabis	5,430

year's ramp-up has been phenomenal. The Philadelphia-area dispensary TerraVida, for instance, saw 3,000% staff growth in 2018. We captured this as a \$200 million annual market supporting 3,878 direct cannabis jobs.

Rhode Island

Estimated
\$57m market



Rhode Island, like Delaware, is a small state with terrible medical cannabis data. We estimate

Direct	1,101
Indirect	165
Induced	275
Total Jobs Supported By Cannabis	1,541

it has a \$57 million annual market, supporting 1,101 full-time cannabis jobs.

Utah

14 total jobs supported by cannabis



Utah voters legalized medical cannabis in November 2018, but state legislators seem intent on delaying implementation as much as they can. Under current law, the Utah Department of Health must issue medical cannabis cards and accept applications for dispensaries by March 1, 2020. Prior to then,

Direct	10
Indirect	1
Induced	3
Total Jobs Supported By Cannabis	14

patients meeting criteria outlined in the Medical Cannabis Act may legally possess cannabis without a card. We're not expecting any real revenue to appear until at least mid-2020. For now, we're estimating a small handful of jobs in state government and with early licensing consultants.

Vermont

Estimated
\$17m market



Both medical and adult-use cannabis are legal in Vermont, but the state has yet to enact any regulatory scheme that would allow the creation of a legal, licensed adult-use industry. Cannabis remains legal to possess, but it's impossible to legally purchase for any adult who's not a

Direct	335
Indirect	50
Induced	84
Total Jobs Supported By Cannabis	469

medical patient. We estimate Vermont as a \$17 million annual market supporting 335 direct jobs. It's also possible that many Vermont adult consumers are purchasing from state-legal stores across the border in Massachusetts.

Washington

Estimated
1.735b market



Washington used to have the best cannabis sales data in the nation. Hands down, nobody else was even close. But then the state's seed-to-sale tracking system crashed in 2018, and the Washington Liquor and Cannabis Board's tidy monthly sales spreadsheet went dark. Fortunately, the state still keeps close track

Direct	33,591
Indirect	5,039
Induced	8,398
Total Jobs Supported By Cannabis	47,028

of how much cannabis tax revenue it receives. By comparing the 2018 tax revenue to the 2017 figure and using the known value of 2017 cannabis sales, we captured Washington as a \$1.735 billion annual market, which puts it, for the first time, ahead of Colorado in annual cannabis sales.

West Virginia

Legalized
medical use in
2017



West Virginia legalized medical marijuana in 2017, but under state law the Bureau for Public Health can't issue patient and caregiver cards until July 1, 2019. And even that's not assured—the department doesn't have an established

Direct	10
Indirect	1
Induced	3
Total Jobs Supported By Cannabis	14

way to accept funds from the state Department of Health and Human Resources, so that July 1 deadline is looking like a mirage at this point. Hang in there, West Virginia.