

Medical Cannabis Market Report by Species (Indica, Sativa, Hybrid), Derivatives (Cannabidiol (CBD), Tetrahydrocannabinol (THC), and Others), Application (Cancer, Arthritis, Migraine, Epilepsy, and Others), End-Use (Pharmaceutical Industry, Research and Development Centres, and Others), Route of Administration (Oral Solutions and Capsules, Vaporizers, Topicals, and Others), and Region 2024-2032

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Abstracts

The global medical cannabis market size reached US\$ 34.4 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 66.7 Billion by 2032, exhibiting a growth rate (CAGR) of 7.4% during 2024-2032. The increasing product use in treating substance use disorders, the exploration of products for chronic inflammatory conditions, the rising product demand for gastrointestinal disorders, and the rising demand for CBD-based products are some of the factors propelling the market.

Medical cannabis, also known as medical marijuana, is a plant-based medicine derived from the Cannabis sativa or Cannabis indica species. It contains cannabinoids, including tetrahydrocannabinol (THC) and cannabidiol (CBD), which interact with the body's endocannabinoid system to produce therapeutic effects. It has shown potential in alleviating symptoms and managing various medical conditions, including chronic pain, epilepsy, multiple sclerosis, and nausea caused by chemotherapy. Its medicinal use has been legalized in many countries and states, subject to strict regulations and medical prescriptions. Research on medical cannabis continues to grow, exploring its efficacy in treating various health conditions.

The global market is majorly driven by the increasing acceptance of the product for medicinal purposes. In line with this, the expanding legalization of the product is significantly contributing to the market. Furthermore, the rising awareness of the potential therapeutic benefits of the product is positively influencing the market. Apart from this, the rapid advancements in cannabis research and medical studies are offering numerous opportunities for the market. Moreover, the growing prevalence of chronic pain and other medical conditions treatable with the product is catalyzing the market. Besides, the escalating aging population seeking alternative treatments for age-related ailments is propelling the market. The opioid crisis and the search for safer pain management options are bolstering the market. Additionally, the increasing demand for natural and plant-based medicines is providing a boost to the market.

Medical Cannabis Market Trends/Drivers:

Rising clinical trials, research and development (R&D) activities, and commercialization of cannabis-based indications

The rising clinical trials, research and development (R&D) activities, and commercialization of cannabis-based indications are fostering the market. With increasing acceptance and legalization, there is a growing interest among researchers, pharmaceutical companies, and medical professionals to explore the potential therapeutic benefits of the product. Clinical trials and research studies are essential to provide scientific evidence supporting the efficacy and safety of cannabis-based treatments for various medical conditions. As more positive results emerge from these studies, confidence in medical cannabis as a legitimate treatment options increases, leading to wider adoption. Furthermore, commercializing cannabis-based indications has seen substantial investments from pharmaceutical companies and startups. The development of standardized cannabis-based pharmaceutical products offers more consistent dosing, quality control, and regulatory compliance, further legitimizing the product in the healthcare industry. As the product becomes more firmly integrated into mainstream medicine, the market is expected to expand, attracting more patients, healthcare providers, and investors. This positive momentum in research, development, and commercialization fuels the market.

Inflating disposable incomes of the consumers

The inflating disposable incomes of the consumers are favorably impacting the market. As disposable incomes rise, consumers have more financial capacity to spend on healthcare, including alternative and complementary treatments. With increased

purchasing power, individuals are more likely to explore and invest in the product for various health conditions. Medical cannabis, which may not be covered by insurance in some regions, can become a viable option for consumers with higher disposable incomes. Inflating disposable incomes also contribute to a shift in consumer preferences towards more holistic and natural health remedies. As individuals prioritize their well-being, they seek alternative treatments beyond traditional pharmaceuticals, leading to increased demand for the product. Additionally, higher disposable incomes allow consumers to afford these products that may be of higher quality or from reputable sources, boosting the premium segment of the market.

The emergence of new cannabis-based pharmaceutical products

The emergence of new cannabis-based pharmaceutical products is bolstering the market. As research and clinical trials continue to explore the therapeutic potential of cannabinoids and other cannabis-derived compounds, pharmaceutical companies are developing innovative cannabis-based medications. These new pharmaceutical products undergo rigorous testing and regulatory approvals, instilling confidence in medical professionals and patients about their safety and efficacy. As a result, more healthcare providers are open to prescribing cannabis-based medications for various medical conditions, thus driving market adoption. The development of standardized cannabis-based pharmaceuticals also addresses concerns about dosage consistency and quality control, making them more reliable and appealing to patients and healthcare providers. Moreover, the emergence of new cannabis-based medications expands the potential applications of medical cannabis in treating a wide range of conditions, from chronic pain and neurological disorders to mental health ailments.

Medical Cannabis Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global medical cannabis market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on species, derivatives, application, end-use and route of administration.

Breakup by Species:

- Indica
- Sativa
- Hybrid

Indica dominates the market

The report has provided a detailed breakup and analysis of the market based on the species. This includes indica, sativa, and hybrid. According to the report, indica represented the largest segment.

As one of the primary cannabis species, Cannabis indica is known for its high CBD content and relatively lower THC levels compared to Cannabis sativa. The increased interest in CBD-based products and therapeutic applications has boosted the demand for Cannabis indica strains. CBD is recognized for its potential benefits in managing various health conditions, such as pain, anxiety, and inflammation, without inducing the psychoactive effects commonly associated with THC.

Moreover, Indica's relaxing and sedative properties make it appealing for medicinal use in addressing sleep disorders and promoting relaxation. As consumers seek natural alternatives to traditional medications, Cannabis indica is increasingly sought after as a potential treatment option. The evolving legal landscape and greater acceptance of medical cannabis have also contributed to the market growth of Cannabis indica products. With the increasing number of states and countries legalizing medical cannabis, indica strains are gaining traction among patients and healthcare professionals, propelling market expansion further.

Breakup by Derivatives:

Cannabidiol (CBD)

Tetrahydrocannabinol (THC)

Others

Tetrahydrocannabinol (THC) dominates the market

The report has provided a detailed breakup and analysis of the market based on the derivatives. This includes cannabidiol (CBD), tetrahydrocannabinol (THC), and others. According to the report, THC represented the largest segment.

Tetrahydrocannabinol (THC) is crucial in propelling the market due to its psychoactive properties and potential therapeutic benefits. As one of the primary cannabinoids found in cannabis, THC is known for its ability to interact with the body's endocannabinoid system, producing various physiological and psychological effects. The psychoactive nature of THC attracts a segment of consumers seeking relief from pain, stress, and anxiety, making it an appealing option for medicinal use. Patients with chronic pain,

cancer-related symptoms, and multiple sclerosis may find THC-containing medical cannabis products beneficial in managing their symptoms.

Furthermore, the recreational use of THC has helped destigmatize cannabis overall, leading to increased acceptance and legalization of medical cannabis in various regions. This evolving legal landscape has contributed to the market growth of medical cannabis, making it more accessible to patients in need. As research continues to explore the potential medical applications of THC and its combination with other cannabinoids, the demand for products containing THC is expected to grow, further driving the market expansion.

Breakup by Application:

- Cancer
- Arthritis
- Migraine
- Epilepsy
- Others

Cancer dominates the market

The report has provided a detailed breakup and analysis of the market based on the application. This includes cancer, arthritis, migraine, epilepsy, and others. According to the report, cancer represented the largest segment.

Cancer is a significant market driver due to its potential to manage cancer-related symptoms and side effects of cancer treatments. Medical cannabis has shown promise in alleviating chemotherapy-induced nausea and vomiting and stimulating appetite in cancer patients experiencing cachexia and weight loss. Moreover, cancer-related pain management is critical for medical cannabis usage, as cannabinoids, including THC and CBD, may offer analgesic properties. Patients seeking alternatives to traditional pain medications are turning to medical cannabis to manage pain and improve their quality of life.

Furthermore, medical cannabis may have anti-inflammatory and anti-tumor properties, sparking interest in its potential role as an adjunct therapy in cancer treatment. Research continues to explore these possibilities, driving the demand for medical cannabis products. The growing number of cancer patients and increasing acceptance of medical cannabis as a complementary treatment option contributes to market growth.

As medical professionals recognize the potential benefits, cancer patients are increasingly incorporating medical cannabis into their treatment plans, further fueling the market.

Breakup by End-Use:

Pharmaceutical Industry
Research and Development Centres
Others

Pharmaceutical industry dominates the market

The report has provided a detailed breakup and analysis of the market based on the end-use. This includes the pharmaceutical industry, research and development centres, and others. According to the report, the pharmaceutical industry represented the largest segment.

The pharmaceutical industry is pivotal in strengthening the market through extensive research and development, and commercialization of cannabis-based medications. As the potential therapeutic benefits of cannabinoids and cannabis-derived compounds gain recognition, pharmaceutical companies are investing in clinical trials and R&D activities to develop novel cannabis-based pharmaceutical products. These companies are exploring various delivery methods, formulations, and dosages to create standardized and regulated medical cannabis treatments. By developing pharmaceutical-grade cannabis products, they aim to address concerns about consistency, safety, and efficacy, which are essential for medical professionals and patients.

Furthermore, pharmaceutical companies' involvement in the medical cannabis market brings credibility and legitimacy to the industry, encouraging wider acceptance and adoption by healthcare professionals. This collaboration between the pharmaceutical industry and medical cannabis fosters the integration of cannabis-based treatments into mainstream medicine, driving market growth and expanding the scope of medical cannabis usage for various health conditions.

Breakup by Route of Administration:

Oral Solutions and Capsules
Vaporizers

Topicals
Others

Oral solutions and capsules dominate the market

The report has provided a detailed breakup and analysis of the market based on the route of administration. This includes oral solutions and capsules, vaporizers, topicals and others. According to the report, oral solutions and capsules represented the largest segment.

Oral solutions and capsules are propelling the market due to their convenience, dosage accuracy, and ease of administration. As pharmaceutical companies develop standardized cannabis-based medications in these forms, patients can consume medical cannabis more discreetly and precisely. Oral solutions and capsules offer consistent dosing, making it easier for healthcare professionals to prescribe and monitor patient treatment. This standardization fosters confidence in medical cannabis as a legitimate therapeutic option.

Moreover, these delivery methods cater to patients who prefer a smoke-free and non-inhalation approach to medical cannabis consumption. They especially appeal to older adults and individuals seeking alternative treatments for various health conditions. The convenience of oral solutions and capsules contributes to better patient compliance, leading to more successful treatment outcomes. As medical cannabis gains wider acceptance and pharmaceutical-grade products become available in these forms, the market growth of medical cannabis is accelerated, attracting patients and healthcare professionals to explore its therapeutic potential further.

Breakup by Region:

North America
United States
Canada
Asia-Pacific
Europe
Germany
France
Italy
Spain
Netherlands

Latin America
Middle East and Africa

North America exhibits a clear dominance, accounting for the largest medical cannabis market share

The report has also provided a comprehensive analysis of all the major regional markets, which includes North America (the United States and Canada); Asia Pacific, Europe (Germany, Italy, France, the Netherlands, and Spain), Latin America, and Middle East and Africa. According to the report, North America accounted for the largest market share.

North America is fostering the market growth due to its progressive regulatory environment, increasing acceptance, and widespread legalization across various states and countries in the region. In particular, the United States and Canada have been at the forefront of the medical cannabis movement, with many states and provinces legalizing medical cannabis for therapeutic use. The growing awareness and acceptance of medical cannabis have increased patient demand as individuals seek alternative treatments for various medical conditions. This increasing demand, in turn, has spurred investments in research, development, and commercialization of medical cannabis products, driving market growth.

Moreover, well-established pharmaceutical companies and research institutions in North America have accelerated the development of standardized and regulated cannabis-based medications, further propelling market expansion. The evolving legal landscape, coupled with a strong consumer base and supportive healthcare policies, positions North America as a significant driving force behind the market's global growth.

Competitive Landscape:

Top companies are strengthening the market by leveraging their resources, expertise, and brand recognition. These companies invest heavily in research and development to create innovative cannabis-based products with consistent quality and efficacy. They expand their presence in key markets through strategic partnerships and acquisitions, driving consumer awareness and accessibility. Their established distribution networks enable the widespread availability of medical cannabis products, reaching a broader patient base. Furthermore, these companies also engage in educational initiatives to raise awareness among healthcare professionals and the general public about the therapeutic potential of medical cannabis. Their efforts to comply with regulatory standards and maintain product safety build trust and credibility in the industry. By

setting high industry standards and fostering best practices, these companies contribute to the market growth, leading the way for continued expansion and acceptance of medical cannabis as a legitimate and effective treatment option.

The report has provided a comprehensive analysis of the competitive landscape in the medical cannabis market. Detailed profiles of all major companies have also been provided.

Canopy Growth Corporation

GW Pharmaceuticals, plc

Aurora Cannabis, Inc.

Aphria, Inc.

MedReleaf Corporation

Insys Therapeutics, Inc.

CanniMed Therapeutics, Inc.

Cara Therapeutics, Inc.

United Cannabis Corporation

Recent Developments:

In 2020, Canopy Growth entered a strategic partnership with Acreage Holdings, Inc., a U.S.-based cannabis operator. This agreement was structured to allow Canopy Growth to acquire Acreage once cannabis becomes federally legal in the United States. This collaboration aimed to position Canopy Growth for future growth in the U.S. cannabis market.

In 2021, GW Pharmaceuticals was acquired by Jazz Pharmaceuticals. This acquisition allowed Jazz Pharmaceuticals to expand its product portfolio into the cannabinoid-based therapies domain and bolster its presence in the neurology and rare disease markets.

In 2021, Aurora Cannabis completed a strategic business transformation plan involving various cost-saving initiatives, restructuring, and divestitures to improve financial performance and focus on its core businesses.

Key Questions Answered in This Report

1. What was the size of the global medical cannabis market in 2023?
2. What is the expected growth rate of the global medical cannabis market during 2024-2032?
3. What are the key factors driving the global medical cannabis market?
4. What has been the impact of COVID-19 on the global medical cannabis market?

5. What is the breakup of the global medical cannabis market based on the species?
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8. What is the breakup of the global medical cannabis market based on end-use?
9. What is the breakup of the global medical cannabis market based on the route of administration?
10. What are the key regions in the global medical cannabis market?
11. Who are the key players/companies in the global medical cannabis market?

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