

Australia Legal Cannabis Market By Source (Hemp, Marijuana), By Derivatives (CBD, THC, Others), By Cultivation (Indoor Cultivation, Greenhouse Cultivation, Outdoor Cultivation), By End Use (Industrial Use, Medical Use, Recreational Use), By Region and Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Market Overview

The Australia Legal Cannabis Market reached a valuation of USD 126.32 million in 2024 and is projected to expand to USD 420.33 million by 2030, reflecting a robust CAGR of 22.16%. This growth is fueled by progressive legislative developments, increasing medical awareness, and broader access initiatives for therapeutic cannabis. Federal and state-level regulatory advancements are fostering a more organized and transparent cannabis sector. The market is experiencing a notable rise in medical cannabis prescriptions, driven by its application in treating chronic pain, anxiety, sleep disorders, and other conditions. Domestic production is also gaining traction as companies invest in localized cultivation and processing infrastructure, aiming to enhance supply chain efficiency and reduce reliance on imports. Support from healthcare providers, coupled with growth in clinical education and research, continues to boost adoption across medical fields. Meanwhile, the industry is evolving through diversification in product offerings—such as oils, capsules, and topicals—and the integration of digital health platforms, positioning Australia as a key regional hub for cannabis innovation and export.

Key Market Drivers

Favorable Regulatory Environment and Policy Support

A supportive regulatory framework and comprehensive policy measures are key enablers of growth in the Australia Legal Cannabis Market. Since the 2016 legalization of medicinal cannabis, the Australian government has implemented structured systems allowing licensed cultivation, production, and distribution. Agencies like the Therapeutic Goods Administration (TGA) and the Office of Drug Control (ODC) oversee pathways such as the Special Access Scheme (SAS) and the Authorised Prescriber Scheme, facilitating legal, controlled patient access to cannabis treatments when conventional methods fall short. Recent developments, including the reclassification of low-dose CBD as a Schedule 3 substance, reflect a progressive stance aimed at increasing accessibility. Though no products have yet gained OTC approval, this shift highlights the government's intent to broaden access to non-psychoactive cannabis applications. These changes not only enhance patient reach but also encourage foreign investment, support pharmaceutical innovation, and elevate Australia's standing as a regulated and export-ready cannabis market.

Key Market Challenges

High Costs of Production and Patient Access

The Australia Legal Cannabis Market faces significant hurdles due to the high costs associated with producing pharmaceutical-grade cannabis and the barriers these costs create for patient access. Compliance with strict quality and safety standards necessitates large investments in advanced cultivation technology and quality assurance systems. These costs inflate retail prices, placing a financial burden on patients—particularly since medical cannabis is not covered under the Pharmaceutical Benefits Scheme (PBS). As a result, patients must rely on out-of-pocket payments, limiting affordability and reducing uptake, especially among those needing ongoing treatment. The lack of insurance coverage further exacerbates the issue. Additionally, navigating regulatory processes such as the SAS and securing prescriptions from qualified practitioners can be complex and time-consuming. Limited awareness among medical professionals about cannabis therapies adds to access difficulties. Together, these financial and procedural barriers hinder the market's growth potential and restrict the widespread adoption of cannabis-based treatments.

Key Market Trends

Surge in Demand for Low-Dose CBD and OTC Access

A growing consumer interest in wellness and plant-based alternatives is fueling demand for low-dose cannabidiol (CBD) products in the Australian market. This trend gained momentum after the Therapeutic Goods Administration (TGA) reclassified low-dose CBD (up to 150 mg/day) as a Schedule 3 substance, potentially allowing over-the-counter availability without a prescription. While such products have yet received approval, the regulatory shift signals expanded access to cannabis-derived wellness products aimed at managing mild ailments like anxiety and sleep disorders. This evolving preference is prompting companies to invest in the research and development of clinically validated, standardized formulations that comply with strict safety and efficacy guidelines. As consumers increasingly favor self-directed health solutions, the market is witnessing heightened innovation and competition among players aiming to secure a share in this emerging OTC segment.

Key Market Players

Cann Group Limited

Zelira Therapeutics

AusCann Group Holdings Ltd.

Bod Australia

Althea Group

ECOFIBRE

Botanix Pharmaceuticals

EPSILON

Little Green Pharma

Incannex

Report Scope:

Australia Legal Cannabis Market By Source (Hemp, Marijuana), By Derivatives (CBD, THC, Others), By Cultivation...

In this report, the Australia Legal Cannabis Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Australia Legal Cannabis Market, By Source:

Hemp

Marijuana

Australia Legal Cannabis Market, By Derivatives:

CBD

THC

Others

Australia Legal Cannabis Market, By Cultivation:

Indoor Cultivation

Greenhouse Cultivation

Outdoor Cultivation

Australia Legal Cannabis Market, By End Use:

Industrial Use

Medical Use

Recreational Use

Australia Legal Cannabis Market, By Region:

Victoria & Tasmania

Queensland

Western Australia

Northern Territory & Southern Australia

Australia Capital Territory & New South Wales

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Australia Legal Cannabis Market.

Available Customizations:

Australia Legal Cannabis Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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