



Regulation of the Commercial Marijuana Industry in Michigan

Andrew Brisbo,
MRA Executive Director

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Michigan Overview

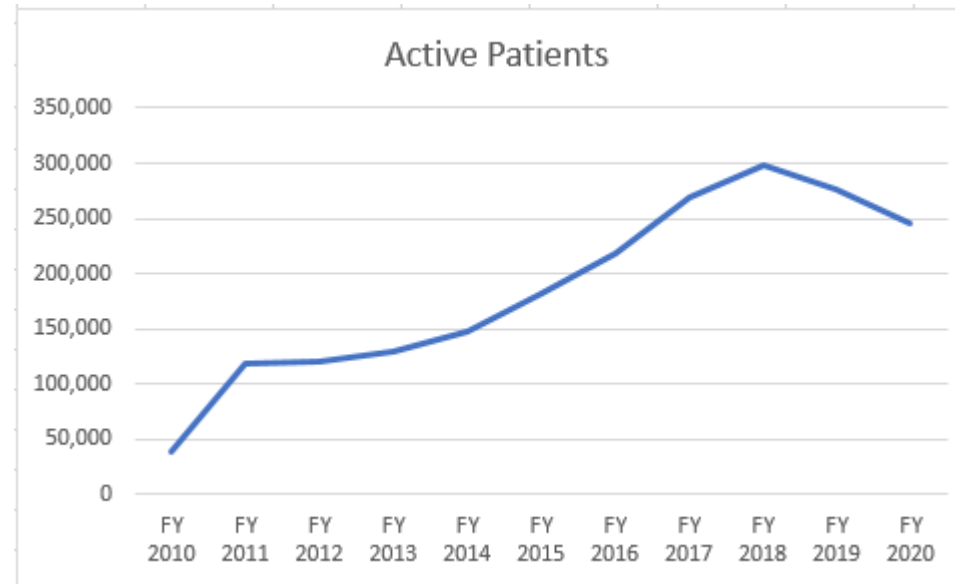
- Patient/Caregiver Registry Program (2008 IL 1)
 - Qualifying conditions
 - Personal allowances
- Medical Facility Licensing (2016 PA 281 & 282)
 - Commercial system
 - Administrative rules
 - Statewide monitoring system – METRC
 - Financing and banking challenges
- Adult-Use Establishment Licensing (2018 IL 1)
 - Personal allowances
 - Commercial system



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Patient and Caregiver Registry Program

- Active registrations
 - 250,805 patients (296 minor patients)
 - 30,689 caregivers



- Online application process
 - 68% of eligible applications

Commercial Industry - Licensing

Medical				
	Received	Issued	Denied	Active
STEP 1 -- Prequalification Applications	2,636	2,167	163	
STEP 2 -- State Operating License Applications	1,832	1,041	34	914
Grower A	168	77	2	74
Grower B	28	13	0	13
Grower C	729	386	1	317
Processor	199	93	4	88
Provisioning Center	625	421	26	377
Secure Transporter	60	35	0	29
Safety Compliance Facility	23	16	1	16
Municipalities opted in to MMFLA	155			
Adult-Use				
	Received	Issued	Denied	Active
Social Equity Applicants	1,583	1,244	226	
STEP 1 -- Prequalification Applications	971	708	7	
STEP 1 -- Social Equity Applications	269	106	0	
STEP 2 -- Establishment License Applications	870	641	8	35
STEP 2 -- Social Equity Applications	34	24	1	616
Grower A	8	2	0	2
Grower B	40	31	0	30
Grower C	293	202	0	194
Excess Grower	52	32	0	32
Processor	82	66	0	66
Retailer	350	276	9	273
Microbusiness	5	3	0	3
Secure Transporter	28	25	0	24
Safety Compliance Facility	14	12	0	12
Designated Consumption Establishment	1	0	0	0
Event Organizer	24	16	0	15
Temporary Event	7	0	0	0
Municipalities opted in/out to MRTMA	1,400	101		

Commercial Industry - Regulation

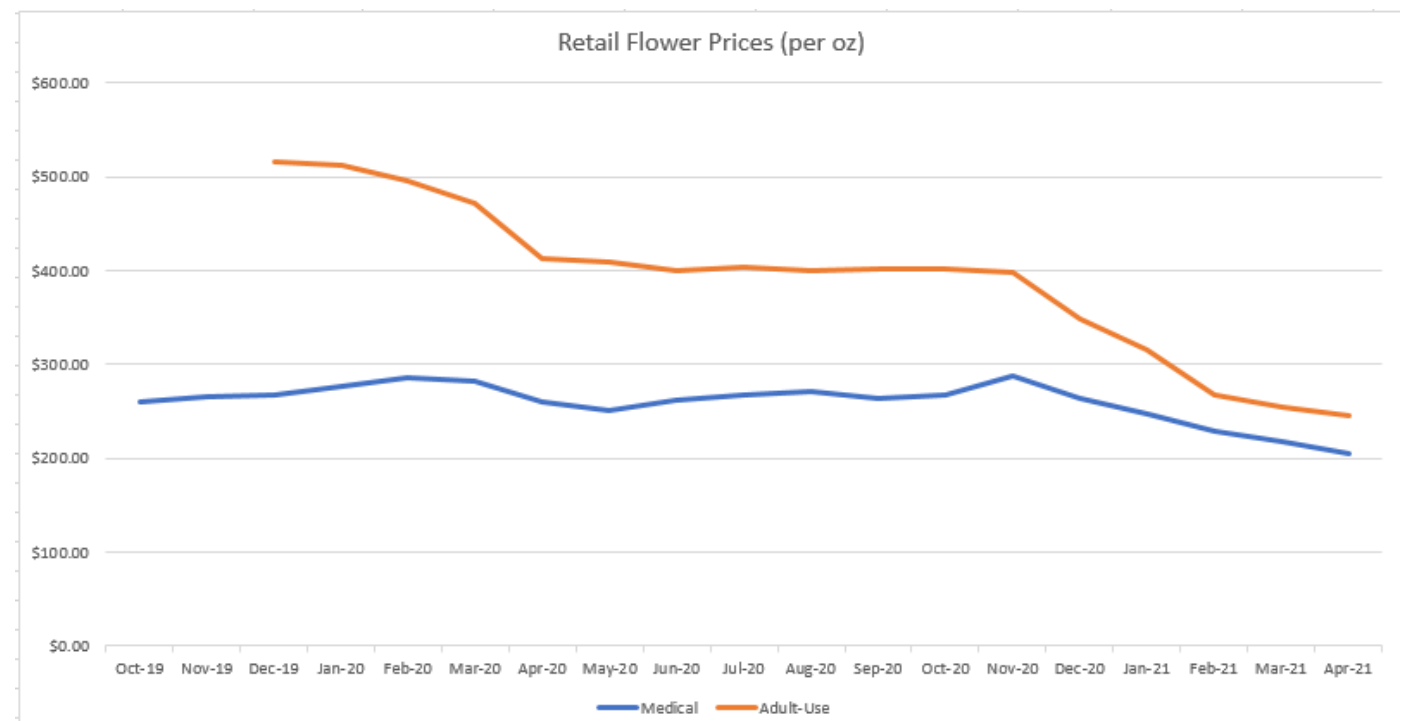
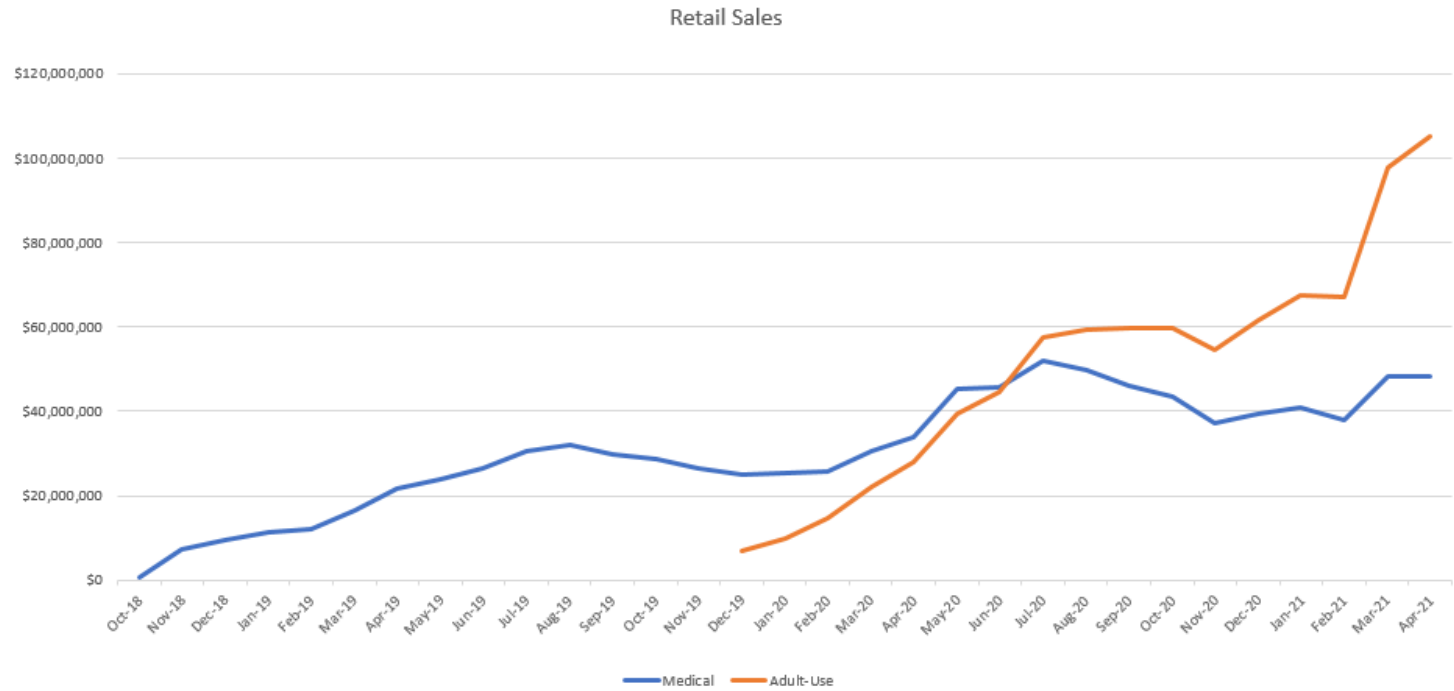
Medical			
	Warning	FC	Order
Enforcement Actions	40	88	39
Grower A	2	5	1
Grower B			
Grower C	6	7	3
Processor	4	9	6
Provisioning Center	28	60	23
Secure Transporter		2	1
Safety Compliance Facility		5	5

Adult-Use			
	Warning	FC	Order
Enforcement Actions	15	13	4
Grower A			
Grower B			
Grower C	3	2	1
Excess Grower			
Processor		3	1
Retailer	12	8	2
Microbusiness			
Secure Transporter			
Safety Compliance Facility			
Designated Consumption Establishment			
Event Organizer			
Temporary Event			

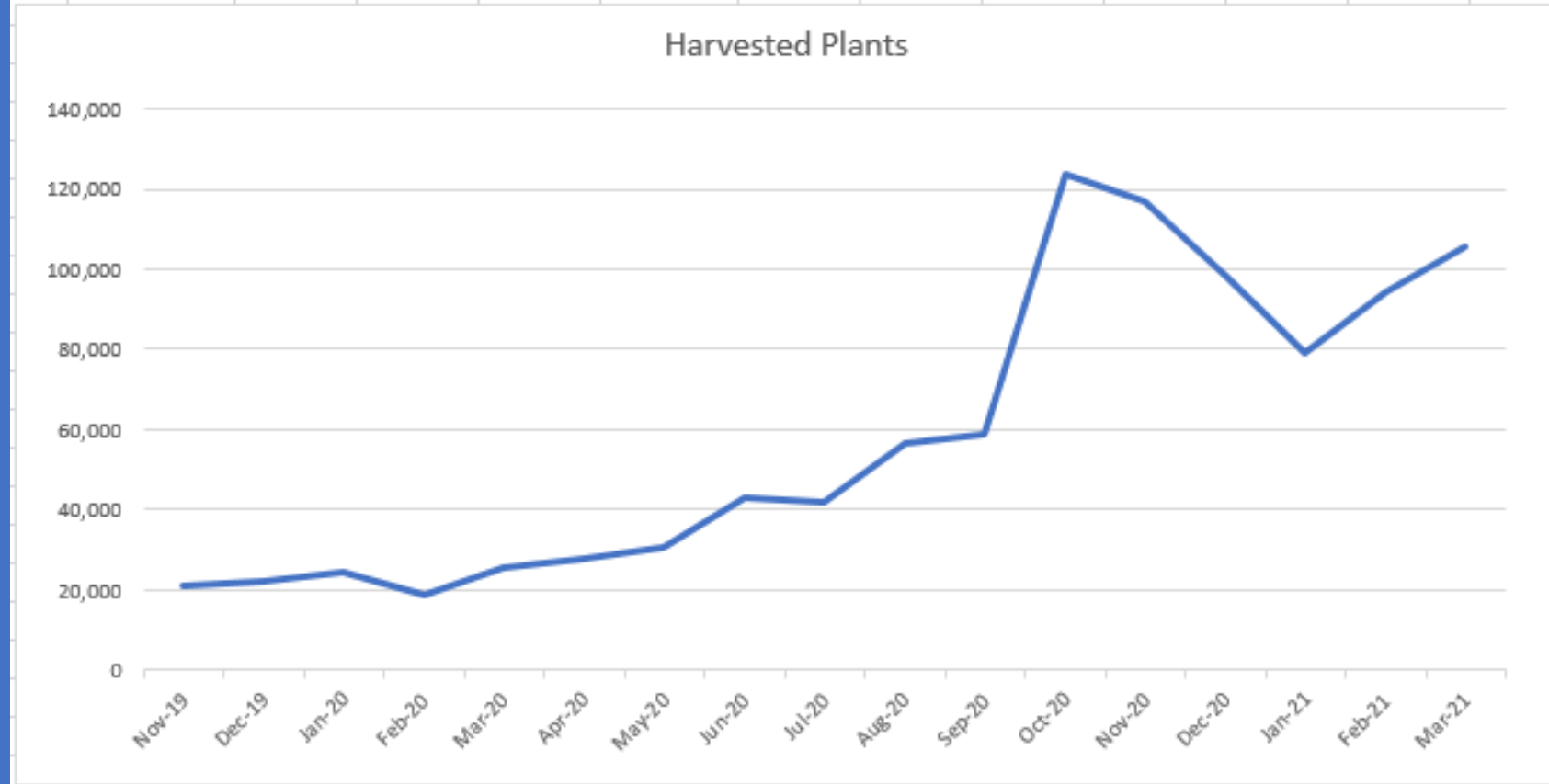


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Commercial Industry – Market Activity



Commercial Industry – Market Activity



- FY 2020 Tax Revenue Generated (\$776M in sales):
 - Sales Tax - \$48.6M
 - Excise Tax - \$34.2M
- FY 2021 Projected Tax Revenue (\$1.4B in sales):
 - Sales Tax - \$88.5M
 - Excise Tax - \$88.0M

FY 2021

- Legislative policy
 - Tribal commercial operations
 - Marijuana and hemp intersections
 - Equity recommendations
 - Telemedicine for patient certifications
 - Monitoring federal policy
- Administrative rules
 - Updates for statutory changes
 - COVID lessons
 - Equity recommendations
 - Miscellaneous changes
- Stakeholder engagement
 - Association meetings
 - Scientific advisory workgroup
 - METRC user workgroup
 - Health/research advisory workgroup
 - Sustainability advisory workgroup
- Agency operations
 - Specialty areas
 - Field operations



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The Marijuana Regulatory Agency will establish Michigan as the national model for a regulatory program that stimulates business growth while preserving safe consumer access to marijuana.



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