MAY 2023 - APRIL 2025



IMPACT REPORT

Cannabis Industry Council

Building a Thriving UK Cannabis, Hemp & CBD Sector



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SECTION 1: Introduction

Dr Callie Seaman & Jamie Bartley, Outgoing Co-Chairs

As outgoing Co-Chairs, we are pleased to reflect on two years of progress and collaboration within the cannabis industry, with improved patient access and the potential to significantly contribute towards environmental stewardship.

Medical cannabis

A 2024 report from the Care Quality Commission found that the number of CBPM items dispensed over doubled from 81,476 in 2021/22 to 177,566 in 2022/23. While patient numbers were expected to reach 63,000 by the end of 2024, according to Prohibition Partners.

The UK cultivation sector continues to develop, with domestic growers and drug developers, as well as importers, now increasingly able to provide product to the UK market.

However, there continues to be a challenge in getting recognised and compelling clinical trials off the ground for whole plant treatments. The CIC continues to advocate for greater recognition of real-world evidence in clinical decisionmaking, but the position from regulators remains unchanged at present.

Consumer CBD and Industrial Hemp

Unfortunately the UK consumer CBD market continues to be stifled by regulatory over-reach and unsubstantiated 'scientific research', which has fundamentally harmed UK businesses.

On the international stage, the adoption of Article 6.4 at COP29 in Baku, Azerbaijan marked a significant milestone. This agreement establishes a centralised UN-supervised carbon market, facilitating the trading of carbon credits and promoting global emission reductions. For the industrial hemp sector, this development is particularly relevant, as hemp's capacity for carbon sequestration positions it as a valuable asset in achieving climate targets.

The operationalisation of this mechanism is expected to unlock substantial investment flows, potentially reaching \$250 billion annually, thereby bringing opportunities for hemp.

Looking Ahead

This progress reflects a maturing medical cannabis sector in the UK, characterised by increased prescription numbers, and the strengthening of domestic cultivation and research capabilities. We need to continue to build this momentum.

As we move forward, the industrial hemp sector stands at the cusp of unprecedented opportunities. The alignment of supportive domestic policies and international frameworks underscores the growing recognition of hemp's multi-faceted benefits.

We are very pleased that Frances Crewdson and Tom Gray will be picking up the baton from us, as incoming CIC Co-Chairs.

We extend our gratitude to CIC members and partners for your commitment and collaboration. Together, we are not only cultivating a crop but also nurturing a movement that champions patient health, environmental wellbeing, and economic vitality.

Co Chairs: Dr Callie Seaman & Jamie Bartley

SECTION 2: About the Cannabis Industry Council

The Cannabis Industry Council (CIC) brings together organisations, businesses, and groups working across the medical cannabis, industrial hemp, and consumer CBD sectors in the UK. It acts as a collective voice, representing members' interests to the Government, regulators, and other key stakeholders. The CIC aims to influence the future of the cannabis industry in the UK, fostering a responsible, sustainable, and inclusive sector.



4. Ensure the CIC is Well Governed and Financially Sustainable.

Governance

The Cannabis Industry Council is the trading name for Canindcou Limited. The CIC is run entirely as a not-for-profit, and the organisation is governed by its constitution and code of conduct, which are available on the website.

"The CIC is currently the only credible independent body to communicate the key challenges and achievements in the medical cannabis industry with the wider U.K. stakeholder base." Hamish Clegg, Hilltop Leaf

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CIC Leadership team

- Jamie Bartley (Unyte Group) Outgoing Co-Chair & Board Member
- Dr Callie Seaman (Aqualabs), Outgoing Co-Chair & Board Member
- Nick Pateras (Roberge Management Consulting), Secretary & Board Member
- Charles Clowes, Treasurer & Board Member
- Matt Hughes (Medcan Family Foundation), Patient Representative & Board Member
- Frances Crewdson (CannDo Consulting), Incoming Co-Chair
- Tom Gray (Lumino), Incoming Co-Chair
- Ricardo Geada (Lawrence Stephens), Chair, International Working Group
- Dr Sunil Arora, Co-Chair, Prescription Working Group
- Damien Bove (Adact), Chair CBD (wellness) Working Group
- Sam Cannon (Beyond Green), Co-Chair ESG Working Group
- Hamish Clegg (Hilltop Leaf), Co-Chair ESG Working Group
- James Leavesley (Dalgety), Supply Chain Representative
- Dr Shanna Marrinan (4C Labs), Chair, Research and Science Working Group
- Paul North (Volteface), Advocacy Representative
- Sonal Patel (Aurora), Co-Chair, Prescription Working Group
- Tony Reeves (EIHA), Chair, Hemp Working Group
- Professor Mike Barnes (Maple Tree), Honorary President
- Mike Morgan-Giles, CEO

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"The CIC has successfully provided a collective voice for the industry, inclusive of all aspects and interests, unified in the improvement of human health and the environment." Jamie Bartley, Unyte



SECTION 3: CIC Agenda for Change

Medical Cannabis

Introduction

Real-world evidence from Drug Science's T21 programme shows the impact which medical cannabis can have on the lives of people specifically that it improves general health, quality of life, mood, and sleep after just three months.

Prescription cannabis is regularly prescribed for chronic pain, as a safer and more effective alternative to opioids. However, greater stigma still exists in the medical profession (and beyond) around cannabis medicines, compared to opioid medicines (which have far more serious and debilitating side effects, and are a genuine risk to patients and wider society).

However, the UK lags behind comparable jurisdictions such as Australia, Germany and Denmark in terms of prescriptions, partly because only specialist doctors can initiate them. They all allow GPs to prescribe to their patients, and have seen much higher take up of medical cannabis prescriptions. These three jurisdictions have also seen far more women and the elderly being prescribed medical cannabis than the UK.

Furthermore, as noted by the Care Quality Commission, prescriptions for CBPMs are processed manually because CBPMs are not included in the Dictionary of medicines and devices. This means there is a time lag in the prescribing data available to present day.

Real-world evidence remains the only useful analysis of the potential of (botanical) cannabis medicines, because randomised control trials are not an option due to the stringent and restrictive requirements on how they must be undertaken.

The regulatory environment remains challenging, with highly stringent licensing, importation, production and distribution requirements in place.

Engagement

The CIC regularly engages with the Government, politicians, regulators, and policymakers. This includes the CQC, MHRA, NHS England (now being incorporated into the Department for Health), the Advisory Council on the Misuse of Drugs (ACMD), and NICE.

In July 2023, the CIC hosted a parliamentary engagement event and report launch, focused on our campaign to allow GPs to prescribe cannabis medicines to their patients. The event was attended by multiple parliamentarians from across the political spectrum.

Some examples of our recent engagement are as follows:

- November 2024: the CIC responded to the Government's Change NHS consultation
- October 2024: the CIC wrote to the CQC and MHRA, calling for a multi-agency review into the medical cannabis sector, along with our recommendations
- August 2024: the CIC urged the Home Office to back the ACMD recommendations around reducing the barriers to research of controlled substances
- June 2024: the CIC published a cannabis manifesto, ahead of the general election.



Our key priorities have been

Short term:

- Allow and enable the electronic prescribing of cannabis medicines, both from a legal and technical (NHS Digital) standpoint
- Implement the three above-mentioned ACMD recommendations for improving the licensing and research regime for controlled substances.
- Support growth and jobs in the UK economy, via ensuring a level playing field in imports, exports and licensing requirements.

Medium term:

- A clear pathway for patients to access private prescriptions for unlicensed CBPMs from NHS consultations (including for chronic pain)
- NHS and insurers to increase reimbursement of private prescriptions of cannabis medicines for certain indications
- Allow GPs to initiate prescriptions of unlicensed cannabis medicines.

Longer term:

- Mandate NICE to allow real-world evidence to be used to licence botanical medicines, in lieu of clinical trials, where there is sufficient and compelling data.
- Move all responsibility for medical cannabis policy and regulation (including licensing, importation, research, and scheduling) to the Department of Health and Social Care (from the Home Office).
- The Advisory Council on the Misuse of Drugs (ACMD) to be sponsored by both the Home Office and the Department of Health and Social Care (DHSC), with DHSC the lead for any and all medical cannabis matters.



Industrial Hemp and Consumer CBD

Introduction

There has been a notable contraction of the UK's legitimate CBD market in recent years, largely due to regulatory challenges and the slow novel food authorisation process.

Uncertainty regarding permissible levels of THC in consumer CBD products have also stifled investment, innovation and consumer choice, despite the associated lack of risk.

Additionally, the FSA's recommended ADI of 10mg of CBD for consumers appears to be entirely arbitrary, too low and based on limited data, hindering product development and consumer usage.

There have been improvements with regards industrial hemp licensing and farming (as noted below), however these have yet to be fully implemented by the Government.

Additionally, regulatory impediments, such as the inability for direct foreign investment (due to the Proceeds of Crime Act), and the ban on cultivating CBD flower from industrial hemp have held back the industry from expansion.

Industrial hemp has the potential to significantly contribute towards decarbonising the built environment, which is currently not close to meeting 2050 net zero targets in its current trajectory.

<u>Engagement</u>

As part of the CBD/Hemp APPG, the CIC engages with parliamentarians and industry stakeholders on core matters for the industry, such as investment, licensing, and carbon credits. We also regularly engage with Defra in respect to industrial hemp, and the Food Standards Agency (FSA) with regards the consumer CBD market.

In April 2024, following ongoing engagement between the CIC and Defra, the UK Government announced pivotal changes to industrial hemp licensing, including: • Allowing licence holders to cultivate hemp anywhere on a licensed farm, eliminating the need to specify exact fields.

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- Extending the maximum licence period from three to six years, subject to compliance.
- Introducing an option to apply for a licence with a deferred start date of up to one year.
- The Government has also accepted the recommendation from the ACMD to increase the permissible THC level in hemp in the field to 0.3%. This is important as climate change and shifts in weather patterns can cause THC levels to tick over the current 0.2% level, resulting in crops having to be unnecessarily destroyed.

Our key priorities have been

Short term:

- FSA guidance around 10mg/day limit of CBD consumption amended, to be based upon scientific research
- Approval process for CBD products streamlined and fast-tracked to enable safe and compliant products to be sold, alongside a science-based recommendation for permissible levels of THC
- The construction industry incentivised to use carbon positive building materials in new builds and retrofitting

Medium term:

- The Proceeds of Crime Act revised to enable legitimate foreign investment into the cannabis industry
- Home Office to allow the extraction of CBD flower with an Industrial Hemp Licence
- Create a market-based UK approval process for industrial hemp seeds

Longer term:

• Move all responsibility for industrial hemp policy and regulation (including licensing, importation, and research) to Defra (from the Home Office)

SECTION 4: CIC Activity

CIC Reports

The CIC has produced a series of reports intended to promote broader awareness, understanding, and education of issues relating to regulated cannabis. These reports can be found below.



Cannabis in Buildings

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The Use of Prescription Cannabis in Buildings

https://www.cicouncil.org.uk/landlords-risk-breaching-equality-act-over-prescription-cannabis/

This report discusses the potential legal risks landlords face under the Equality Act by discriminating against tenants who use prescribed medical cannabis. It highlights that conditions treated by medical cannabis can be considered disabilities, and landlords must make reasonable adjustments to accommodate these tenants, similar to other medications.



Good Practice Guide for Medical Cannabis Clinics https://www.cicouncil.org.uk/cic-releases-cannabis-clinic-good-practice-guide/

This guide aims to promote high standards of care and ethical practices within clinics in the sector, covering key areas such as patient safety, clinical governance, and responsible prescribing.



Yes We Can? Experiences and views of the patient community https://www.cicouncil.org.uk/eight-in-10-patients-prefer-prescriptions-to-illicit-cannabis/

This report showcases a survey indicating that a significant majority of patients using cannabis for medical purposes prefer obtaining it through legal prescriptions rather than the illicit market. Patients cite reasons such as the assurance of quality, safety, and legal compliance as key factors driving their preference for prescribed medical cannabis.



Promoting cannabis: current rules & regulations

Cannabis Industry Council Promoting Cannabis: Current Rules & Regulations https://www.cicouncil.org.uk/new-guide-to-cannabis-marketing-launched/

This guide focuses on responsible marketing practices within the cannabis industry. The guide is intended to help businesses navigate the complexities of advertising cannabis products in a way that is compliant with regulations and advertising rules.



ESG Benefits of an Expanded Medicinal Cannabis Market



This resource explores the potential environmental, social, and governance (ESG) benefits of a growing medicinal cannabis market. It argues that a well-regulated industry can contribute positively to areas such as sustainable agriculture, job creation, and improved healthcare access.



The Use of Prescription Cannabis at Work

Cannabi Industry Council



& Driving



This resource provides guidance on the use of prescription cannabis in the workplace. It addresses the legal considerations, employer responsibilities, and employee rights related to medical cannabis use, aiming to promote understanding and fair treatment in employment settings.

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Cannabis & Driving

https://www.cicouncil.org.uk/resources/cannabis-driving/-over-prescription-cannabis/

These resources offer information and recommendations related to cannabis and driving. It likely covers the legal implications, safety concerns, and guidance for both patients using medical cannabis and law enforcement officers in assessing impairment.



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Protect our Patients: Why GPs should be able to prescribe cannabis meds https://www.cicouncil.org.uk/report-cannabis-prescribing-can-cut-nhs-waiting-lists-and-crime/



This report argues that allowing NHS general practitioners to initiate medical cannabis prescriptions could lead to reductions in NHS waiting lists and crime rates. It suggests that providing legal access to medical cannabis can alleviate pressure on the healthcare system and reduce reliance on the illicit market.



Cannabis A-Z

Cannabie Industry Council



This A-Z guide provides information and definitions related to cannabis.



The economics of prescribing cannabis for chronic pain

C Control Brug - RASS RUA

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The Economics of Prescribing Cannabis for Chronic Pain https://www.cicouncil.org.uk/medical-cannabis-could-save-nhs-4-billion-each-year/

This peer-reviewed academic report makes the case that integrating medical cannabis into NHS treatment options could result in significant cost savings for the healthcare system, potentially up to £4 billion annually.

The Value of Real World Evidence: The case of medical cannabis https://www.cicouncil.org.uk/resources/the-value-of-real-world-evidence-the-case-of-medicalcannabis/

This resource emphasises the importance of real-world evidence (RWE) in the context of medical cannabis. It argues for the acceptance of data collected from actual patient use, alongside traditional clinical trials, in support of the efficacy and safety of cannabis-based medicines.

Events

The CIC actively participated in and hosted several key industry events, including the Cannabis Industry Awards Dinner, which saw significant attendance and positive feedback raising the profile of the sector and its leading organisations.

CIC events

2025

- CIC AGM & industry networking, Fieldfisher, 25 June - 75 attendees
- Northern industry networking, 22 May 60 attendees
- UK cultivators roundtable, Unyte, 25 March
- Industry networking, 5 February 80 attendees

2024

- CIC summit, Fieldfisher, 18 November 83 attendees
- Somai presents: Cannabis Industry Awards Dinner, 7 November - 140 attendees
- Military veterans roundtable, Lawrence Stephens, 7 October
- CIC AGM, 17 July 2024 90 attendees
- All-member meeting, 22 April 75 attendees
- Industry networking, 8 March 80 attendees.

2023

- CIC conference and networking, Gowling, 2 November - 99 attendees
- Parliamentary event, 17 July 67 attendees
- All-member meeting, 4 May 63 attendees

Events supported

- Hempen, Hemp Industry Conference, 26
 May 2024
- Drug Science and Medcan Family Foundation, UK Patient Conference, 3 November 2023
- Tenacious Labs, CBD/Hemp APPG, ongoing

Medical Cannabis Awareness Week

The CIC plays a key role in Medical Cannabis Awareness Week (MCAW), an annual event held in the first week of November. During MCAW, the CIC collaborates with organisations like the Medical Cannabis Clinicians Society and Drug Science to host events, encourage dialogue between industry and patients, and discuss necessary changes within the medical cannabis sector.



SECTION 5: Industry Spotlight

Industry Stats: Medical Cannabis

62,960	UK patient numbers estimate at end of 2024 Prohibition Partners
79%	Patients who say they prefer prescription to illicit cannabis
117,566	CBPM items dispensed in 2022/23 Care Quality Commission
120	Active CBPM prescribers in the UK Maple Tree Consultants
42	Clinics prescribing CBPMs in the UK, Jersey, Guernsey and Isle of Man (as of April 2025) MedBud
£5.65 billion	Overall annual benefit from NHS prescribing CBPMs for chronic pain <u>CIC and Drug Science</u>
5	Patients prescribed unlicensed CBPMs by the NHS since 2018 Maple Tree Consultants
27%	NHS Foundation Trusts prescribing licensed CBPMs in 2023
73%	GPs who would be open-minded about prescribing CBPMs Primary Care Cannabis Network
1.8 million	People self-medicating with illicit cannabis in the UK

Industry Stats: Industrial Hemp and Consumer CBD

Zero	Carbon emissions from buildings using hemp-lime construction <u>Frontiers</u>
0.3%	Amount of THC that the Government will allow in hemp in the field Home Office
£1 billion	Estimated value of the UK consumer CBD market in 2025 Maple Tree Consultants
10mg	CBD daily dosage limit recommendation for consumers FSA

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Patient Stories

"Medical cannabis has helped me leave opioids behind. However, the costs involved are causing major stress issues. When your health depends on how much you have in the bank, life becomes problematic."

"My journey took an unexpected turn when I became aware of the possibility of legal cannabis use. At first, I assumed it was reserved for cases as dramatic as cancer or epilepsy, so I didn't pursue it further. Several months later, I delved into the topic for my husband, who struggled with a chronic pain. Surprisingly, we managed to secure access for him quickly and easily, though we couldn't afford it for me at the time."

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"Perhaps most significantly, cannabis had the remarkable effect of brightening my outlook on life. It was like discovering a secret ingredient that made the recipe of life not only palatable but enjoyable. Granted, my path may not align with the choices most people make, but I've found contentment and a general sense of happiness."

"I am new to using medical cannabis which is helping me manage my osteoarthritis pain.

It has been life changing and I'm grateful to have access."

"Cannabis has been the most effective treatment for my wife's chronic pain condition... After my son was born I let her try some illicit Cannabis and it worked for her pain far better than any other medical intervention...then we discovered medical cannabis. So we get my wife a prescription and it comes and she has the best month with pain she's had."

"Medical Cannabis changed my life. It's given me a freedom I could never expect from the NHS and I'm extremely grateful given the horrendous pain medicine they were serving me up for the last 15 years."

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The 2024 Cannabis Industry Awards, presented by SOMAÍ Pharmaceuticals, was a testament to the innovation and dedication that define our community.

The event, run by the CIC, MCCS, and Drug Science, brought together 140 pioneers and leaders whose contributions are driving the industry forward.

Celebrating these achievements underscores the vibrant and dynamic nature of our sector.

With the nominees and winners, who were determined by public vote, as follows:

Contribution to Science (sponsored by Gowling)

- Winner: Dr Callie Seaman (Aqualabs)
- Runner-up: Dr Mikael Sodergren and Simon Erridge (Curaleaf / Imperial College)
- Third place: Dr Simon Tordoff (CB1 Medical)

<u>Contribution to Social Impact (sponsored by</u> <u>Hilltop Leaf)</u>

- Winner: Heidi Whitman (EmpowHer Cannabis Society)
- Runner-up: Matt Hughes (Medcan Family Foundation)
- Third place: Tom Whettem (British Cannabis)



SECTION 6: CIC Membership

Benefits and Opportunities

By joining the CIC, members become part of a strong nationwide network with the ability to influence the future of the industry. Benefits include:



Working Groups

Participation in various working groups (e.g. Environment, Social & Governance; Hemp; Prescription Cannabis; CBD (wellness); Research & Science; International; Standards; Rare Diseases) to develop priorities and drive activity.



Events & Networking

Access to regular networking meetings, forums, conferences, and webinars.



PR Opportunities

Opportunities to feature your organisation through blogs, case studies, speaking opportunities, and podcasts.



Online Listing

A directory listing for your organisation to increase digital reach and reputation.



Services & Training

Discounted access to third-party services (e.g. tax, legal, financial), training and events.



Sponsorship

Opportunities to build brand awareness by sponsoring CIC activities.



Other benefits

Access to publications, member newsletters, CIC logos, and opportunities to join the leadership team.

To find out more about the benefits of joining CIC, please click here.

Working Groups

The CIC's working groups drive forward key priorities identified by its members. These groups are open to all members and focus on specific areas for change within the industry:



Explores international best practices and opportunities for the UK cannabis sector.



Research & Science

Aims to foster evidence-based policy, research, and innovation within the cannabis industry.



Standards

Develops and promotes industry-wide standards for quality and safety.



CBD (Wellness)

Addresses the regulatory landscape and promotes quality standards for the CBD wellbeing sector.



Rare Diseases

Focuses on the potential of cannabis-based medicines for treating rare conditions.

Membership categories

CIC has 101 members (as of 23/06/25), within the supply chain, those offering services/products to the industry, and third sector organisations. Categories as follows:



Membership

Cannabis Industry

Apply Now

Refer Now

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Become a Member

The CIC offers various membership categories for businesses and organisations. For 2025/26, annual membership fees (excluding VAT) are as follows:

- UK Platinum Member (two-years upfront): £2,200 £6,600. Find out more here.
- UK Full Member: £350 £3,300. <u>Find out more here</u>.
- UK Associate Member (services): £350 £2,400
- UK Associate Member (third sector): Free £1,100
- Associate Member (non UK): £350 £3,500

Refer a Member

- We are offering a £25 Amazon voucher to any individual working for a CIC member that successfully nominates another organisation for membership.
- This offer applies to paid types of CIC membership only. It does not apply to any free member categories, the International Observer scheme, or any supporter categories.

Supporters

The Cannabis Industry Council offers categories for individuals who wish to support the organisation's objectives and stay informed about the development of the UK cannabis sector.

- Supporter: This category is open to individuals from across the world who support the broad objectives of the Cannabis Industry Council. The annual fee for this category is £25.
- Student and Lecturer Supporter: This category is available to individuals worldwide who are studying, researching, or teaching a relevant subject at a higher education university or institute. This category is free to join, with a recognised university email address (e.g., .edu or .ac.uk).

International Observers



Cannabis Industry Council International Observer

Observer

General

Academic

- The International Observer category is open to reputable trade associations, membership organisations, and professional bodies who are based overseas.
- This c ategory is not open to supply chain businesses or for-profit organisations.

SECTION 8: Press and Media Stats

Press Coverage

- The CIC has secured media coverage across influential outlets within the medical cannabis and policy sectors.
- The organisation has been featured in wellregarded industry publications, including the Telegraph, Mail, Politico London Influence, Cannabis Health, and Business of Cannabis.
- Media coverage has effectively highlighted significant milestones, such as policy advocacy initiatives.
- CIC's messaging has been tied to current political developments, demonstrating agility in aligning with national discussions.
- CIC has focused on engaging industryspecific outlets to ensure that stakeholders directly involved in medical cannabis policy are informed of the organisation's work.

Social Media Activity

- CIC has achieved significant growth in follower numbers across our platforms LinkedIn, Twitter / X, and Instagram.
- Growth metrics suggest the social media strategy is performing well.
- CIC is achieving strong numbers despite the sensitive nature of the work.
- Growth without significant amplification by followers shows that the messaging is compelling enough to organically attract new audiences.
- Cross-Platform Success: Growth is consistent across platforms, which indicates a cohesive and well-executed strategy.

The Cannabis Industry Podcast

- The Cannabis Industry Podcast, created by the CIC, hosts experts within the UK cannabis industry to chart the vision for the industry's future.
- The podcast is hosted and produced by CIC Student Ambassador Luke Strong.
- Guests so far have included: Adam Windish (British Cannabis), Jamie Bartley (Unyte Group), Heidi Whitman (Consultant), Dr Callie Seaman (Aqualabs).
- Available on Spotify, Amazon, Apple and more - <u>https://linktr.ee/cannabis_podcast</u>







The Collective Voice for the UK Cannabis Sector

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