



Cannabis Control Board

For more information, visit: cannabis.ny.gov/cannabis-control-board-meetings

MAY 20, 2025

AGENDA

- I. Call to Order
- II. Welcome and Opening Remarks
- III. Approval of Meeting Minutes from April 24, 2025, Board Meeting
- IV. Consideration of Adult-Use Applications for Approval
- V. Consideration of CAURD Renewals
- VI. Consideration of Adult-Use Licensee Location Change Amendment Requests
- VII. Consideration of Registered Organization Dispensary Locations
- VIII. Consideration of Approval for the Written Summary of the Board's Deliberation and Decision to Grant an Adult-Use License as Promoting a PCA in April 2025
- IX. Consideration of Public Convenience and Advantage Delegation of Written Decisions to the Cannabis Control Board Chair
- X. Consideration of Certain Applications with Non-Viable Locations Requesting the Board Determine Whether Granting the License Would Promote Public Convenience and Advantage
- XI. Consideration of Administrative Appeal
- XII. Consideration of Proposed Cannabis Showcase Event Regulations
- XIII. Office of Cannabis Management Report
- XIV. Public Comment
- XV. Adjourn

CHAIR WRIGHT OPENING REMARKS

- **Welcome Back:** Good morning, everyone. Though Mother's Day was earlier this month, I want to take a moment to extend continued gratitude to all the mothers and caregivers in our cannabis community. I also want to thank those who joined us for the *Women and Weed: Building Economic Power in Cannabis* luncheon—an inspiring event that honored the women leading this industry forward.
- **Budget Milestone:** The New York State's FY26 budget has been finalized. This is a reminder that our work continues to be part of a broader movement for economic development, public health, and community equity.
- **Event Permits Debut:** I'm thrilled to share that we are officially debuting New York's cannabis showcase event permits regulations. This marks a new chapter one that allows us to engage communities, foster education, and support legal cannabis businesses in exciting and meaningful ways.
- **Looking Ahead:** As we continue our efforts to build a safe, inclusive, and sustainable industry, I want to thank my fellow board members, OCM staff, and all our stakeholders for your unwavering commitment.

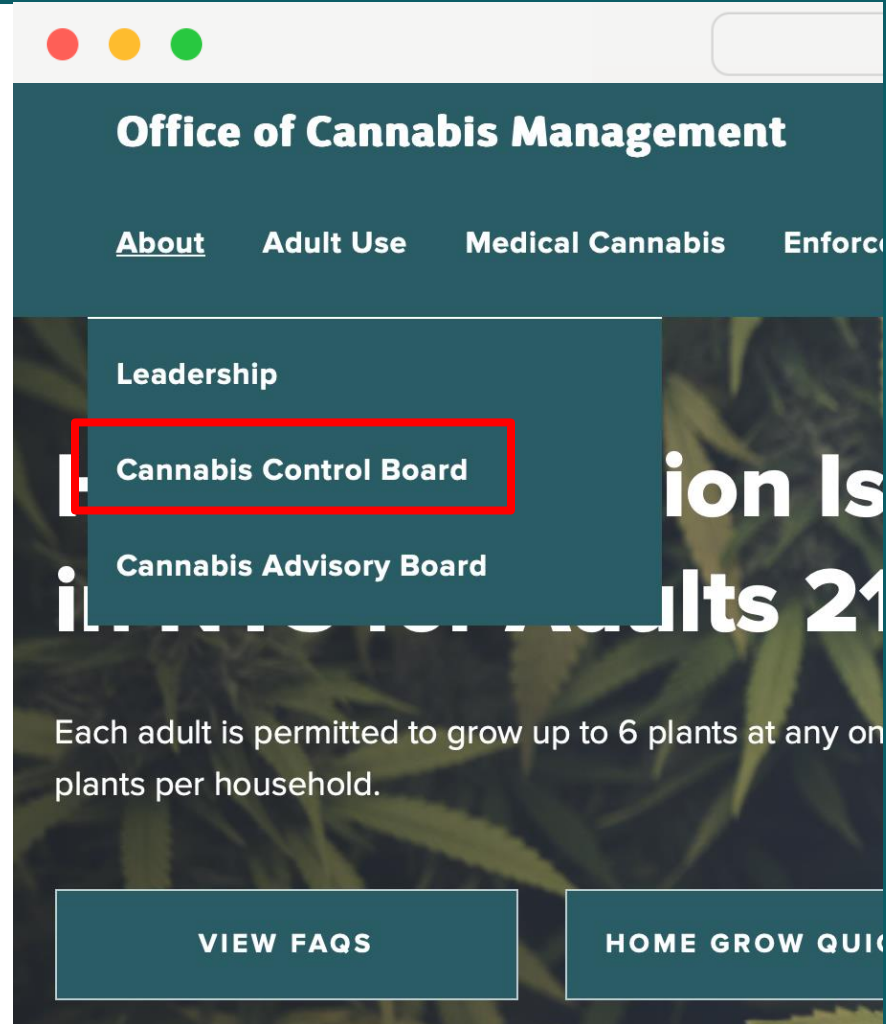


APPROVAL OF MEETING MINUTES FROM THE APRIL 24, 2025 BOARD MEETING

Pursuant to the Open Meetings Law, within two weeks, the following is provided on cannabis.ny.gov on the Cannabis Control Board page:

- Meeting minutes
- Meeting transcript
- Meeting video

The public was provided with information on how to access this meeting in the Public Notice. An unabridged video recording, an unabridged transcript, will be made available on the OCM website within two weeks of the Board meeting.



CONSIDERATION OF ADULT-USE CANNABIS LICENSES FOR APPROVAL

RESOLUTION NO. 2025-32

- On October 4, 2023, OCM opened an application window for adult-use licenses. The application window included applications for cultivators, processors, distributors, retail dispensaries and microbusinesses.
- The application window closed on November 17, 2023, for retail and microbusiness applications who were applying with a location. The remaining applications closed on December 18, 2023. Overall, nearly 7,000 applications were received.
- **52 AU applications** are being recommended for approval today and all have satisfied the necessary requirements in accordance with the Cannabis Law and regulations.
- The Office is actively reviewing and issuing additional adult-use licenses on a rolling basis. If the Office has been in contact with you, please respond to any deficiency letter with the requested information to keep your application processing.



RESOLUTION NO. 2025-32: CONSIDERATION OF ADULT-USE CANNABIS LICENSES FOR APPROVAL

CONSIDERATION OF ADULT-USE CANNABIS LICENSES

RESOLUTION NO. 2025-32

Application ID	License Type	Entity Name
OCMCULT-2024-000054	Adult-Use Cultivator License	Windsor Cider LLC
OCMDIST-2023-000175	Adult-Use Distributor License	Equity of Evidence LLC
OCMDIST-2023-000183	Adult-Use Distributor License	TISSA LLC
OCMDIST-2023-000014	Adult-Use Distributor License	Empire Greens NY LLC
OCMDIST2-2024-000017	Adult-Use Distributor License	High Moon Food Group LLC
OCMMICR-2023-000435	Adult-Use Microbusiness License	Settlers of the Swift LLC
OCMMICR-2023-000277	Adult-Use Microbusiness License	Harvest Moon Hydroponics
OCMMICR-2023-000232	Adult-Use Microbusiness License	Booksmart CC LLC
OCMMICR-2023-000374	Adult-Use Microbusiness License	Chuckleberry Acres LLC
OCMMICR-2023-000317	Adult-Use Microbusiness License	IQ CANNABIS-KHUYAY CORP.
OCMMICR-2023-000230	Adult-Use Microbusiness License	Realistic Health & Wellness
OCMMICR-2023-000029	Adult-Use Microbusiness License	Wayne A Mitchell
OCMMICR-2023-000464	Adult-Use Microbusiness License	Happy Cow Cannabis Corporation
OCMMICR-2023-000568	Adult-Use Microbusiness License w/ Retail	TRACEY'S CANDY SHOP LLC
OCMMICR-2023-000356	Adult-Use Microbusiness License w/ Retail	Windmill Botanicals LLC

RESOLUTION NO. 2025-32: CONSIDERATION OF ADULT-USE CANNABIS LICENSES FOR APPROVAL

CONSIDERATION OF ADULT-USE CANNABIS LICENSES

RESOLUTION NO. 2025-32

Application ID	License Type	Entity Name
OCMMICR-2023-000323	Adult-Use Microbusiness License w/ Retail	Patrick S Chesney
OCMMICR-2023-000558	Adult-Use Microbusiness License w/ Retail	Joint Resolution LLC
OCMPROC-2023-000098	Adult-Use Processor License	Kitchen Light LLC
OCMPROC-2025-000004	Adult-Use Processor License	Outcast Acres LLC
OCMPT3B-2024-000112	Adult-Use Processor License Branding	Wallerson Equity Group Inc.
OCMPT3B-2024-000095	Adult-Use Processor License Branding	Pep & Flynt LLC
OCMPT3B-2024-000135	Adult-Use Processor License Branding	Executive Strands LLC
OCMPT3B-2024-000130	Adult-Use Processor License Branding	Kaya Food Products LLC
OCMPT3B-2024-000063	Adult-Use Processor License Branding	Long Live Legacy LLC
OCMPT3B-2025-000014	Adult-Use Processor License Branding	BOMBZAWAY, LLC
OCMPT3B-2025-000007	Adult-Use Processor License Branding	DIME INDUSTRIES NY INC.
OCMPT3B-2024-000079	Adult-Use Processor License Branding	edward maier
OCMPT3B-2024-000131	Adult-Use Processor License Branding	Alchemishi LLC
OCMPT3B-2025-000022	Adult-Use Processor License Branding	Lifted Extracts LLC
OCMPT3B-2024-000076	Adult-Use Processor License Branding	SUPER MIND POWER L.L.C.

RESOLUTION NO. 2025-32: CONSIDERATION OF ADULT-USE CANNABIS LICENSES FOR APPROVAL

CONSIDERATION OF ADULT-USE CANNABIS LICENSES

RESOLUTION NO. 2025-32

Application ID	License Type	Entity Name
OCMPT3B-2024-000121	Adult-Use Processor License Branding	Castro Ventures LLC
OCMPT3B-2024-000083	Adult-Use Processor License Branding	ZOOCANNA, LLC
OCMPT3B-2025-000029	Adult-Use Processor License Branding	Blissfully Yours Ltd.
OCMPT3B-2025-000007	Adult-Use Processor License Branding	DIME INDUSTRIES NY INC.
OCMPT3B-2024-000106	Adult-Use Processor License Branding	Devin J Warmack
OCMRETL-2023-001482	Adult-Use Retail Dispensary License	Brooklyn Botanix LLC
OCMRETL-2023-000071	Adult-Use Retail Dispensary License	Equity Max Property Management, Inc.
OCMRETL-2023-000252	Adult-Use Retail Dispensary License	TIMES SQUARE SHOP INC
OCMRETL-2023-001873	Adult-Use Retail Dispensary License	The F4 LLC
OCMRETL-2023-002009	Adult-Use Retail Dispensary License	Chesterfield Cannabis Co., LLC
OCMRETL-2023-001724	Adult-Use Retail Dispensary License	J&J Merch Inc.
OCMRETL-2023-000185	Adult-Use Retail Dispensary License	Smokey Jungle LLC
OCMRETL-2023-000030	Adult-Use Retail Dispensary License	CANNA Health and Wellness LLC
OCMRETL-2023-001653	Adult-Use Retail Dispensary License	Wintergreen Wellness LLC
OCMRETL-2023-001447	Adult-Use Retail Dispensary License	The Smoking Buffalo LLC

RESOLUTION NO. 2025-32: CONSIDERATION OF ADULT-USE CANNABIS LICENSES FOR APPROVAL

CONSIDERATION OF ADULT-USE CANNABIS LICENSES

RESOLUTION NO. 2025-32

Application ID	License Type	Entity Name
OCMRETL-2023-001358	Adult-Use Retail Dispensary License	Humanities medical supplies Inc
OCMRETL-2023-000219	Adult-Use Retail Dispensary License	BME Holdings of NY LLC
OCMRETL-2023-000146	Adult-Use Retail Dispensary License	Green Galore LLC
OCMRETL-2023-000297	Adult-Use Retail Dispensary License	Organic Blooms LLC
OCMRETL-2023-001157	Adult-Use Retail Dispensary License	BK Greenery LLC
OCMRETL-2023-000551	Adult-Use Retail Dispensary License	WLMC Mainco LLC
OCMCAURDP-2023-000219	Conditional Adult-Use Retail Dispensary	Washington Place Dispensary

RESOLUTION NO. 2025-32: CONSIDERATION OF ADULT-USE CANNABIS LICENSES FOR APPROVAL

ADULT-USE CANNABIS LICENSE TOTALS

License Type	May Board Meeting	Total Licenses Issued
Adult-Use Cultivator License	1	203
Adult-Use Distributor License	4	200
Adult-Use Microbusiness License	12	270
Adult-Use Processor License	17	402
Adult-Use Retail Dispensary License	18	377
CAURD Final Licensed	0	274
Total	52	1,726

NOVEMBER QUEUE

PENDING APPLICATIONS

License Status	Count
Final License Issued	619
Provisional Licenses Issued	203
Applications Under Review (in different statuses of review)	441
Applications that have been “Closed” (Denied, Withdrawn or Voided)	340
Total	1,603

DECEMBER QUEUE

PENDING APPLICATIONS



Adult-Use
Cultivators

169



Adult-Use
Processors

117



Adult-Use
Distributors

182



Adult-Use
Microbusiness

886



Adult-Use
Retail Dispensary

2,706

CONSIDERATION OF CONDITIONAL ADULT-USE RETAIL DISPENSARY APPLICATIONS FOR RENEWAL

RESOLUTION NO. 2025-33

- Part 116 outlines the requirements for the CAURD license. The CAURD conditional period lasts four (4) years, with the first renewal required after two (2) years from the date the license was first granted.
- The five **(5) CAURD licenses** up for renewal today received their initial CAURD license in early 2023.
- CAURD licenses submitted a renewal application in accordance with Part 116 including requiring the submission of a notice to the municipality to the applicable municipality or community board in which the CAURD licensee operates.



RESOLUTION NO. 2025-33: CONSIDERATION OF CAURD APPLICATIONS FOR RENEWAL

CONSIDERATION OF CONDITIONAL ADULT-USE RETAIL DISPENSARY APPLICATIONS FOR RENEWAL

RESOLUTION NO. 2025-33

License ID	License Type	Entity Name
OCM-CAURD-23-000006	Conditional Adult-Use Retail Dispensary	William Jane Corporation
OCM-CAURD-23-000007	Conditional Adult-Use Retail Dispensary	Good Grades, LLC
OCM-CAURD-23-000008	Conditional Adult-Use Retail Dispensary	Florisun LLC
OCM-CAURD-23-000011	Conditional Adult-Use Retail Dispensary	Stage One Cannabis LLC
OCM-CAURD-23-000014	Conditional Adult-Use Retail Dispensary	Designs by Pyramid Inc.



RESOLUTION NO. 2025-33: CONSIDERATION OF CAURD APPLICATIONS FOR RENEWAL

CONSIDERATION OF ADULT-USE LICENSEE LOCATION CHANGE AMENDMENT REQUESTS

RESOLUTION NO. 2025-34

- Sections 13(1), 67(2), 126(1), and 129 of the Cannabis Law allows the Board to authorize amendments to cannabis licenses and permits. Sections 120.18(d)(1)(iii), 132.9(9)(ii), and 130.7(f) of Title 9 of the New York Codes, Rules and Regulations outline the criteria for such amendments.
- The Office of Cannabis Management launched an amendment survey on August 27, 2024, which allows adult-use cannabis licensees to request certain amendments including location or cultivation tier changes which require Board approval in accordance with the cannabis regulations. The Office has begun the review of amendments submitted and will be reviewing requests on a rolling basis.
- For the applications listed in the attached resolution, the Office is recommending approval. The licensees have provided all necessary information in accordance with the cannabis regulations.



RESOLUTION NO. 2025-34: CONSIDERATION OF ADULT-USE LICENSEE LOCATION CHANGE AMENDMENT REQUESTS

CONSIDERATION OF REGISTERED ORGANIZATION DISPENSARY LOCATIONS

RESOLUTION NO. 2025-35

Pursuant to §35(3)(e) of the Cannabis Law, the Board may amend a registered organization's registration, in part to allow a registered organization to add additional dispensaries as allowed under the Cannabis Law.

Registered Organization	New Dispensing Facility Location	Proposed Facility Name	Proposed Hours of Operation
NY State of Mind Flower LLC	76 North Greenbush Rd, Unit B, Troy, NY 12180	New York State of Mind	Mon-Sat: 10AM-6PM, Sun: 12PM-4PM
Nonna Farms LLC	1401 Military Rd, Niagara Falls, NY 10038	The Flowstate	Sun-Sat: 8AM-10PM
Nonna Farms LLC	141 Broadway, Rensselaer, NY 12144	The Flowstate	Sun-Sat: 8AM-10PM



RESOLUTION NO. 2025-35: CONSIDERATION OF REGISTERED ORGANIZATION DISPENSARY LOCATION



CONSIDERATION OF APPROVAL FOR THE WRITTEN SUMMARY OF THE BOARD'S DELIBERATION AND DECISION TO GRANT AN ADULT-USE LICENSE AS PROMOTING PCA IN APRIL 2025

RESOLUTION NO. 2025-36

- At the April 24, 2025, CCB meeting, via Resolution No. 2025-29, the Board considered **OCMRETL-2023-001586** and voted to grant the license finding the proposed location would promote public convenience and advantage pursuant to 9 NYCRR 119.4(b).
- This resolution approves a written decision for the granting of a license to the above referenced applicant in April 2025 as promoting public convenience and advantage.



RESOLUTION NO. 2025-36: CONSIDERATION OF APPROVAL FOR THE WRITTEN SUMMARY OF THE BOARD'S DELIBERATION AND DECISION TO GRANT AN ADULT-USE LICENSE AS PROMOTING PCA IN APRIL 2025

CONSIDERATION OF DELEGATION OF POWER TO CCB CHAIR TO REVIEW AND APPROVE WRITTEN DECISIONS FOR MATTERS DETERMINING WHETHER A LICENSE WOULD PROMOTE PCA

RESOLUTION NO. 2025-37

- Pursuant to Section 10(11), the Board is authorized to exercise the powers and perform the duties in relation to the administration of the board and the office of cannabis management as are necessary but not specifically vested by the Cannabis Law.
- Pursuant to Section 119.4(b) of Title 9 of the New York Codes, Rules and Regulations (9 NYCRR), the Board may determine that granting a license would promote public convenience and advantage as described in paragraphs 9 NYCRR 119.4(a)(1) and 119.4(a)(2).
- The Board delegates to the Board Chair the power to review and approve written decisions explaining the Board's determinations on matters involving consideration of whether granting a license would promote public convenience and advantage pursuant to 9 NYCRR 119.4(b).



RESOLUTION NO. 2025-37: CONSIDERATION OF PCA DELEGATION OF WRITTEN DECISIONS TO THE CCB CHAIR

CONSIDERATION OF CERTAIN APPLICATIONS WITH NON-VIABLE LOCATIONS REQUESTING THE BOARD DETERMINE WHETHER GRANTING THE LICENSE WOULD PROMOTE PCA

RESOLUTION NO. 2025-38

- There are **two (2)** matters before the Board today in which the applicant has proposed a location that does not meet the distance requirements set forth in N.Y. Comp. Codes R. & Regs. Tit. 9 § 119.4(a).
- The applicants have requested the Board proceed with the review of the entire application and determine whether granting the license would promote public convenience and advantage pursuant to 9 NYCRR § 119.4(b).



RESOLUTION NO. 2025-38: CONSIDERATION OF CERTAIN APPLICATIONS WITH NON-VIABLE LOCATIONS REQUESTING THE BOARD DETERMINE WHETHER GRANTING THE LICENSE WOULD PROMOTE PCA

CONSIDERATION OF ADMINISTRATIVE APPEAL

Article 2 of the Cannabis Law §§ 10 and 17:

The Cannabis Control Board (“Board”) is charged with the responsibility of issuing a final determination when an administrative decision is appealed.

C7AWSM LLC v. OCM – Insp. No. 103 2024 0716 0031

Appellants submit the instant appeals to the Board for review (Title 9 of the New York Codes, Rules, and Regulations § 133.25[k])

The proposed decisions were provided in advance of today’s meeting and posted on the OCM website.

C7AWSM LLC V OCM

INSPECTION NO. 103 2024 0716 0031

RESOLUTION NO. 2025-39

Appellant Asserts:

- Appellee OCM did not effectuate proper service under Cannabis Law 138-b;
- The ALJ failed to address Appellant's argument that Appellee failed to effectuate service in accordance with Cannabis Law 138-b;
- Appellee failed to comport with statutory and regulatory requirements to consider evidence of abatement;

Recommendation: Grant Appellant's Appeal and the Relief Requested, Vacating the OTS

- Service not effectuated in accordance with Cannabis Law § 138-b. Cannot be said to have provided notice that is reasonably calculated to apprise the *interested* parties of the action
- NOV, Cease Order, OTS issued with an address that was not the address inspected; Also issued with a business name that was different than Appellant's business name;
- As determined by ALJ, personal service not effectuated based on a refusal; papers left in store after employee left the store and before it was padlocked;
- The mailing and posting also not reasonably calculated to apprise interested party of action – wrong address.

🔍 RESOLUTION NO. 2025-39: CONSIDERATION OF ADMINISTRATIVE APPEAL

EVENT REGULATIONS

OVERVIEW OF SECTION 130-A OF THE CANNABIS LAW:

- Signed into law by Governor Hochul on March 30, 2025, following the success of the previous Cannabis Growers Showcase.
 - The CGS program was initiated in 2023 and allowed cultivators to partner with conditional adult-use retailers and processors across New York to organize events showcasing New York brands and selling adult-use cannabis products to consumers.
- Section 130-a of the Cannabis Law is in effect, **but please note the following:**
 - If approved by the Board, the regulations will begin the New York State Administrative Procedure Act (SAPA) process, for public comment. This can take anywhere from **45-100+ days**.

OVERVIEW OF SECTION 130-A OF THE CANNABIS LAW: SHOWCASING

- The statute defines *showcase* as “exhibiting or displaying at a cannabis showcase event by a permittee or authorized licensee of an adult-use cannabis and cannabis product and may include branded merchandise and educational materials.”
- The statute limits a *cannabis showcase event* to pop-up locations, and farmers' and public markets as defined in the Agriculture and Markets Law.

OVERVIEW OF SECTION 130-A OF THE CANNABIS LAW: AUTHORIZATIONS

- Only licensed adult-Use (AU) cannabis dispensaries and RODs may apply for event showcase permits. The permitted retailer is the only licensee/person/entity authorized to sell cannabis at showcase event.
 - Microbusinesses may not participate as a permittee, but they may showcase as a cultivator or processor if they have such authorization.
- Requires AU retailers and RODs applying for a permit to demonstrate a partnership with at least one licensed cultivator and at least one licensed processor as a condition to receive such permit. Such cultivators and processors are limited to showcasing cannabis at events.
- A separate permit is required for each AU retailer at an event, and they are required to partner with at minimum one cultivator and one processor.
- Each permittee is limited to partnering with no more than one processor for each licensed cultivator authorized on the permit application.
- Permit cannot exceed 14 days.

SNAPSHOT OF REGULATORY FRAMEWORK: ALLOWANCES

- Permit holders may hold events at a pop-up location, or a farmers' or public market.
- AU retail dispensaries and RODs are authorized to hold a permit and must partner with one cultivator and one processor who would showcase.
- The permittee is the only licensee authorized to sell cannabis products to consumers.
- Licensees that are showcasing would be authorized to sell cannabis merchandise directly to consumers.
- Licensees may offer other activities such as presentations related to the cultivation and processing of cannabis. This would be dependent upon the scope and location of the event.
- Permittees are responsible for the timely reporting of sales activity to the Office.
- Like other application fees, there will be incentives for SEE applicants.

SNAPSHOT OF REGULATORY FRAMEWORK: LIMITATIONS & RESTRICTIONS

- Events are restricted to adults 21+.
- No on-site consumption will be allowed at these events.
- Events may not exceed 14 days, but the Office will be offering permits that are shorter than 14 days. This ensures flexibility for permit applicants.
 - For shorter amounts of time, there will be a discounted rate.



SNAPSHOT OF REGULATORY FRAMEWORK: ENFORCEMENT

- All licensees will be subject to existing enforcement and penalty structure currently used by the Office for violations and non-compliance.
- Licensees must take steps to prevent any person under 21 years of age to be within the cannabis events sales area.
- Licensees, persons, and other entities will face sanctions for holding non-permitted cannabis showcase events.

CONSIDERATION OF PROPOSED CANNABIS SHOWCASE EVENT REGULATIONS

RESOLUTION NO. 2025-40

- The **Cannabis Growers Showcase (CGS)** program was initiated in 2023 and allowed cultivators to partner with conditional adult-use retailers and processors across NYS to organize events showcasing New York brands and selling adult-use cannabis products to consumers.
- §130-a: Signed into law by Governor Hochul on March 30, 2025, following the success of the previous CGS.
- Pursuant to **subdivision 13 of §130-a**, and **subdivision 1 of §13 of the Cannabis Law**, the CCB is charged with promulgating regulations governing Cannabis Showcase Event Permits and has the authority to propose such rules and regulations as it may deem necessary or proper to fully effectuate the provisions of the Cannabis Law.
- With this resolution, the Board directs the Office to file a Notice of Proposed Rulemaking with the Secretary of State for the proposed Cannabis Showcase Event Permit regulations, as may be amended for changes to conform with the State Administrative Procedure Act.



RESOLUTION NO. 2025-40: CONSIDERATION OF PROPOSED CANNABIS SHOWCASE EVENT
REGULATIONS

OFFICE OF CANNABIS MANAGEMENT REPORT

MARKET UPDATE

SOCIAL & ECONOMIC EQUITY UPDATE

PUBLIC HEALTH AND EDUCATION UPDATE

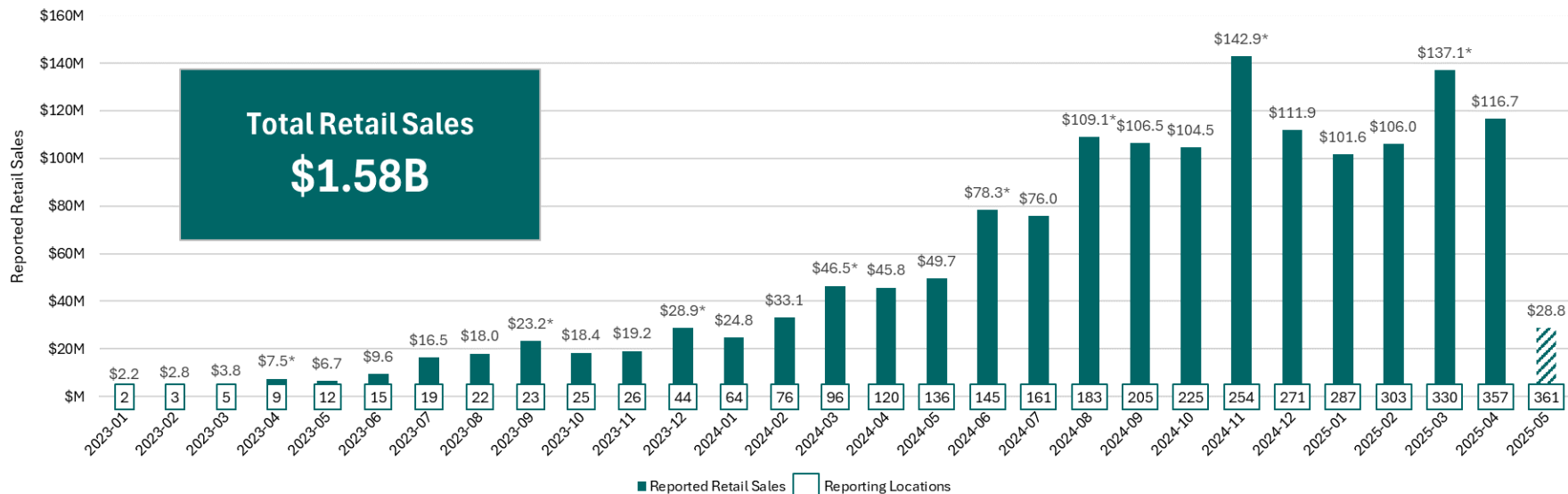
SEED TO SALE UPDATE

RETAIL DISPENSARY MAP HIGHLIGHT

MARKET UPDATE

2025 SALES HAVE REGAINED MOMENTUM WITH CONSECUTIVE MONTHLY GROWTH THROUGH APRIL

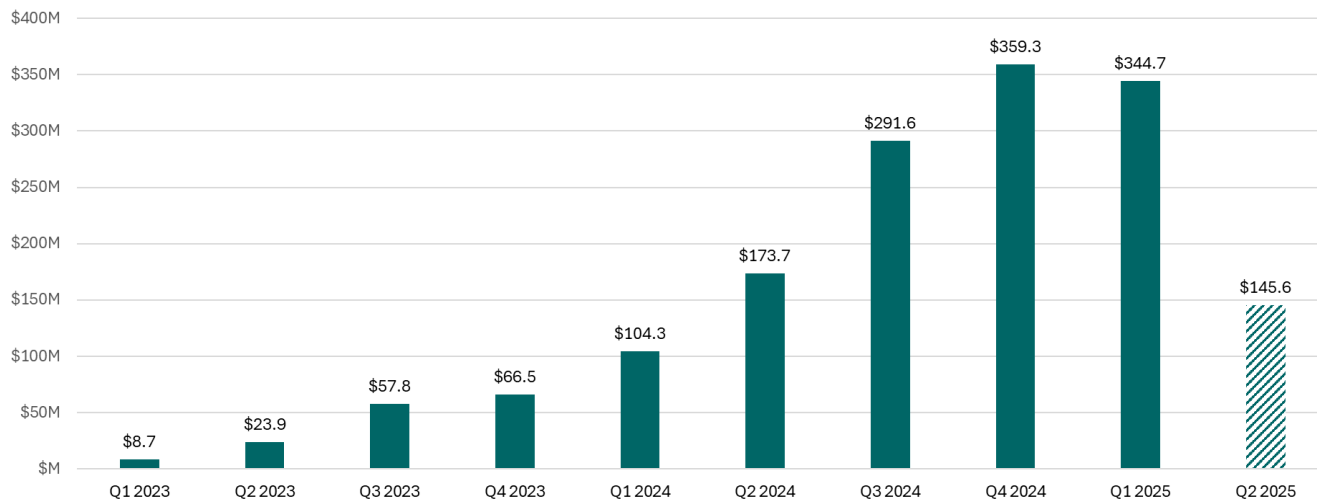
New York Cannabis Reported Retail Sales By Month



* Month with 5 reporting weeks rather than 4 reporting weeks.
Sales from the first 4 weeks of March 2025 were \$110.2M

2025 SALES ARE NEARLY \$500 MILLION ~1 MONTH INTO Q2 2025

New York Cannabis Reported Retail Sales
By Quarter



Retail Revenue Totals

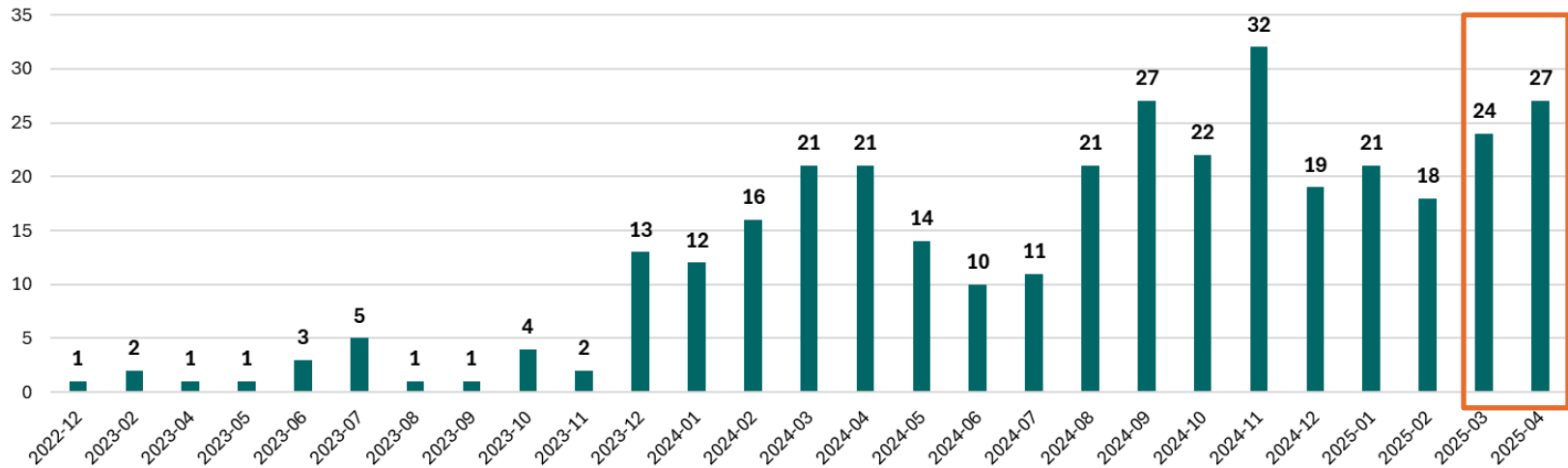
2023
\$156.9 million

2024
\$928.9 million

YTD 2025
\$490.3 million

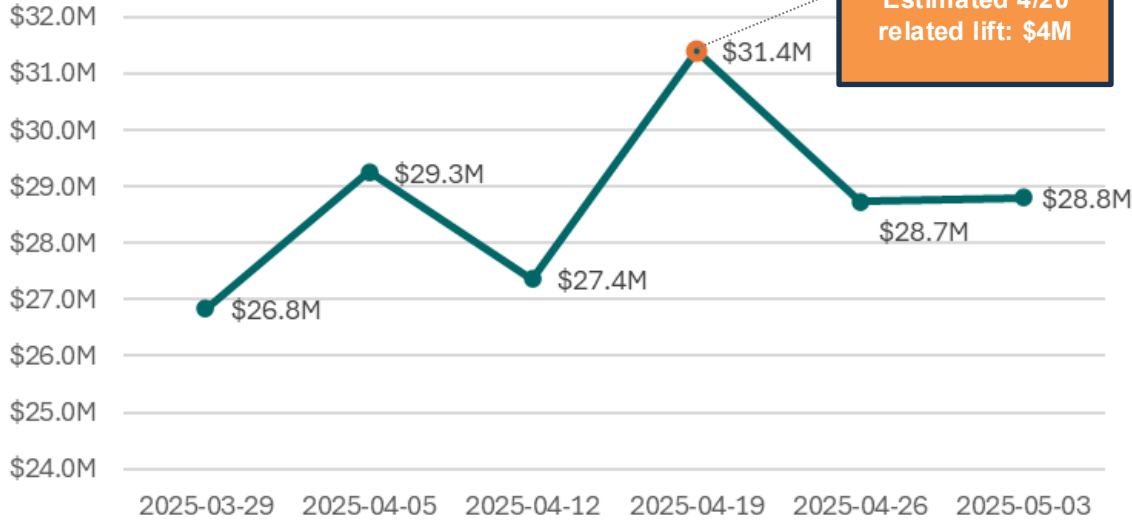
NEW STORE OPENINGS JUMPED AHEAD OF 4/20, WITH 19 STORES OPENING IN THE TWO WEEKS BEFORE THE HOLIDAY

Store Openings by Month
All Retail Locations



4/20 WAS NEW YORK'S BEST SALES WEEK EVER; MANY OTHER STATES SAW SALES FALL SHARPLY

New York Cannabis Reported Retail Sales
By Week



19
4/20 Store Openings
(NY)

In 2 weeks leading up to 4/20/2025

14%
WoW Sales Growth
(NY)

Week of 4/20/2025 vs. preceding 4-week average

18%
YoY Sales Growth
(NY)

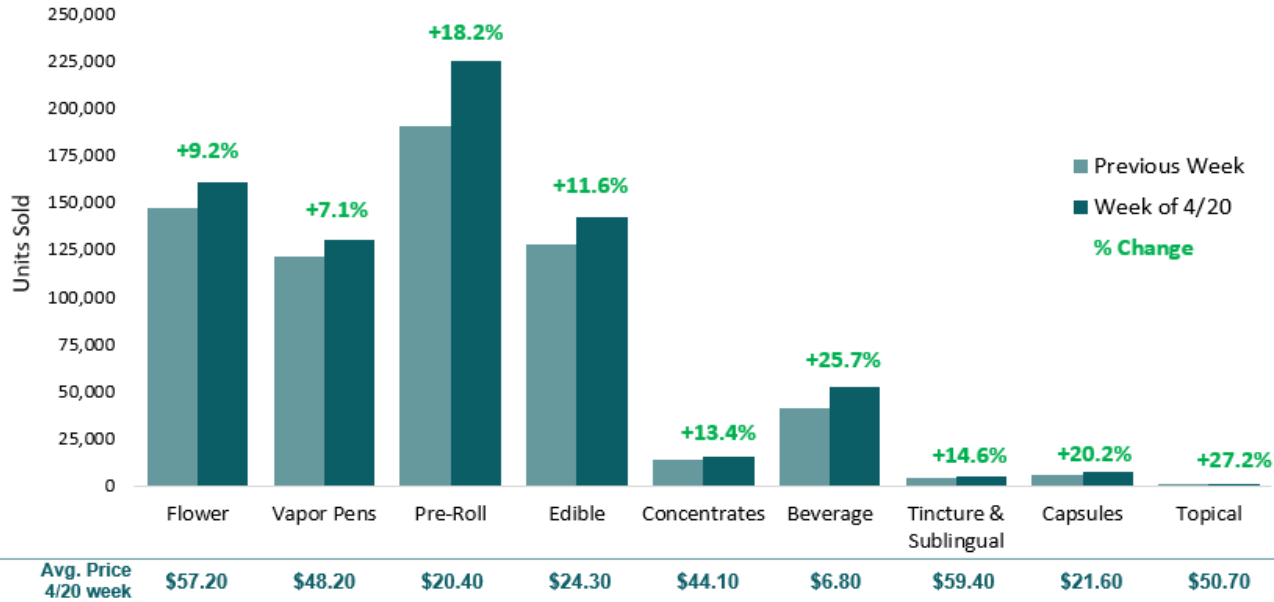
Day of 4/20/2025 vs. 4/20/2024

- 37%
YoY Sales Decline
(Benchmark States*)

Day of 4/20/2025 vs. 4/20/2024

PRE-ROLLS LED UNIT SALES, BUT TOPICALS & BEVERAGES LED WEEK-OVER-WEEK GROWTH ON 4/20

Increase in Products Sold 4/20 Week from Previous Week



Total 4/20 Sales
\$3.8 million

Flower & Prerolls
Share of Sales
54%

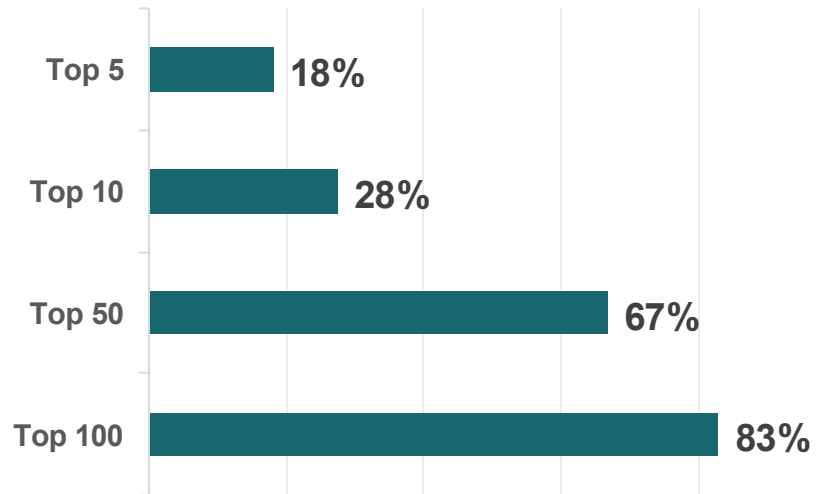
Sources: OCM Retail Data, Headset

THE NUMBER OF BRANDS IN NY IS GROWING QUICKLY, WITH REVENUE CONCENTRATED AMONG THE TOP 100

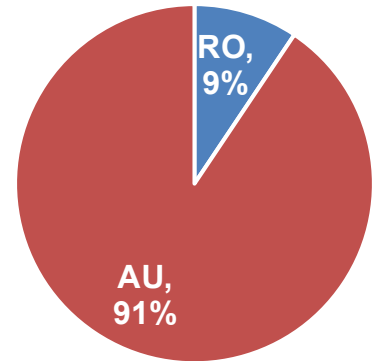
Brands in Market
575

Change Since
Feb. '25
+12%

Top Brand Share of Retail Sales
April 2025

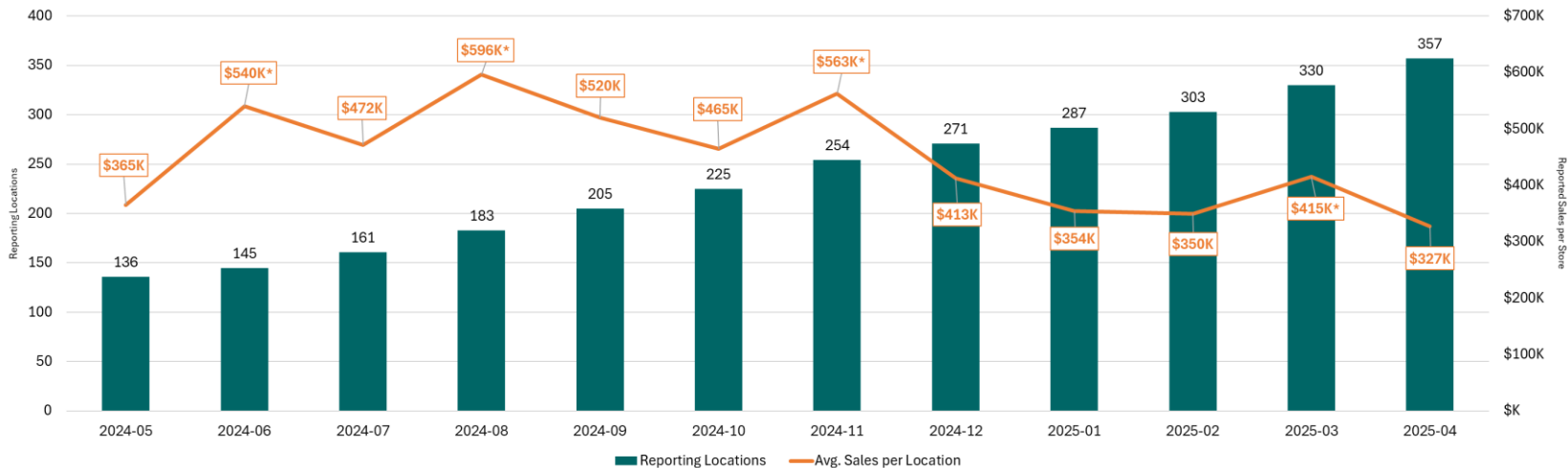


RO Share of Sales



SALES PER STORE HAS DECLINED 37% SINCE SEP-24 DUE TO INCREASED RETAIL DENSITY & PRICE COMPRESSION

Number of Stores Reporting and Avg. Sales per Store
by Month

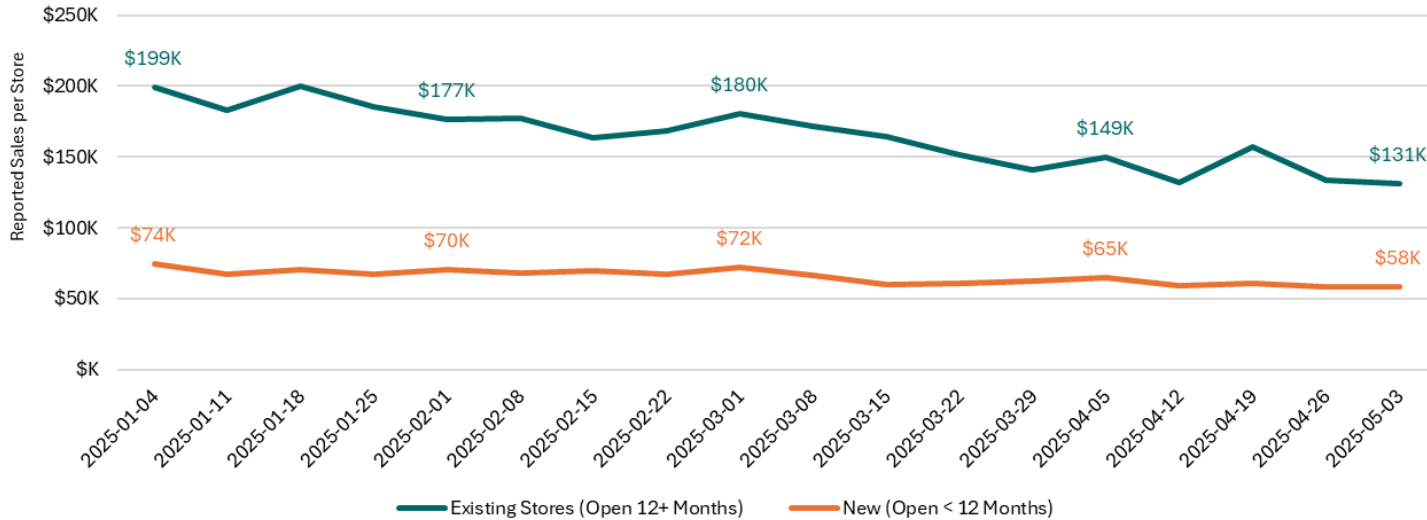


+74%
Stores Count Change
(Sep-24 to Apr-25)

-37%
Sales per Store
(Sep-24 to Apr-25)

SALES COMPRESSION IS OCCURRING ACROSS THE MARKET BUT IS IMPACTING INCUMBENT STORES MORE ACUTELY YTD 2025

New York Cannabis Reported Sales per Store
By Week, By Store Tenure

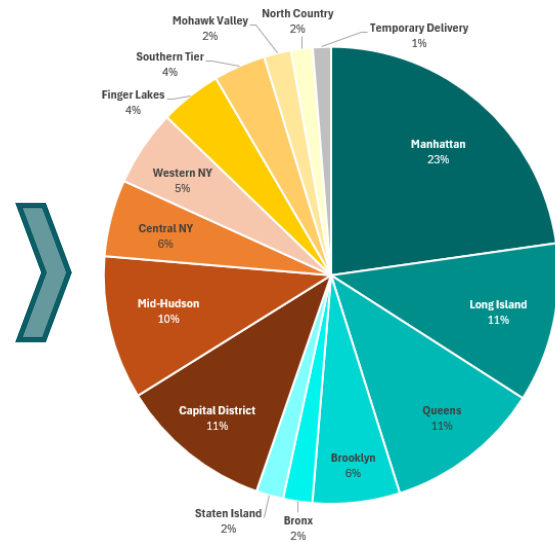
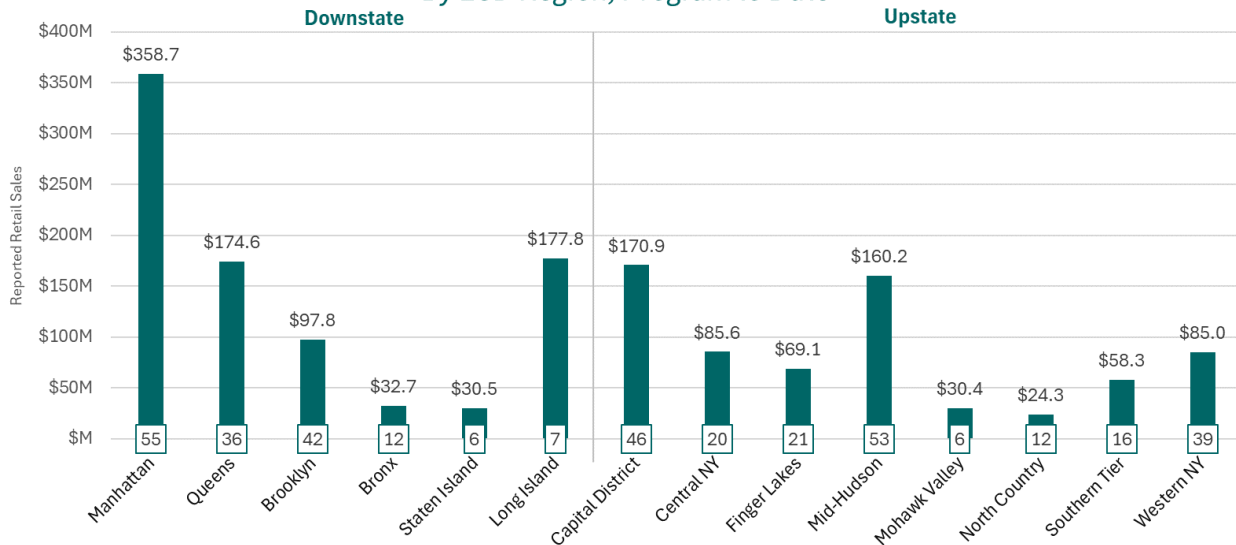


-35%
Existing Store (12+ Mo's)
Sales per Store Change

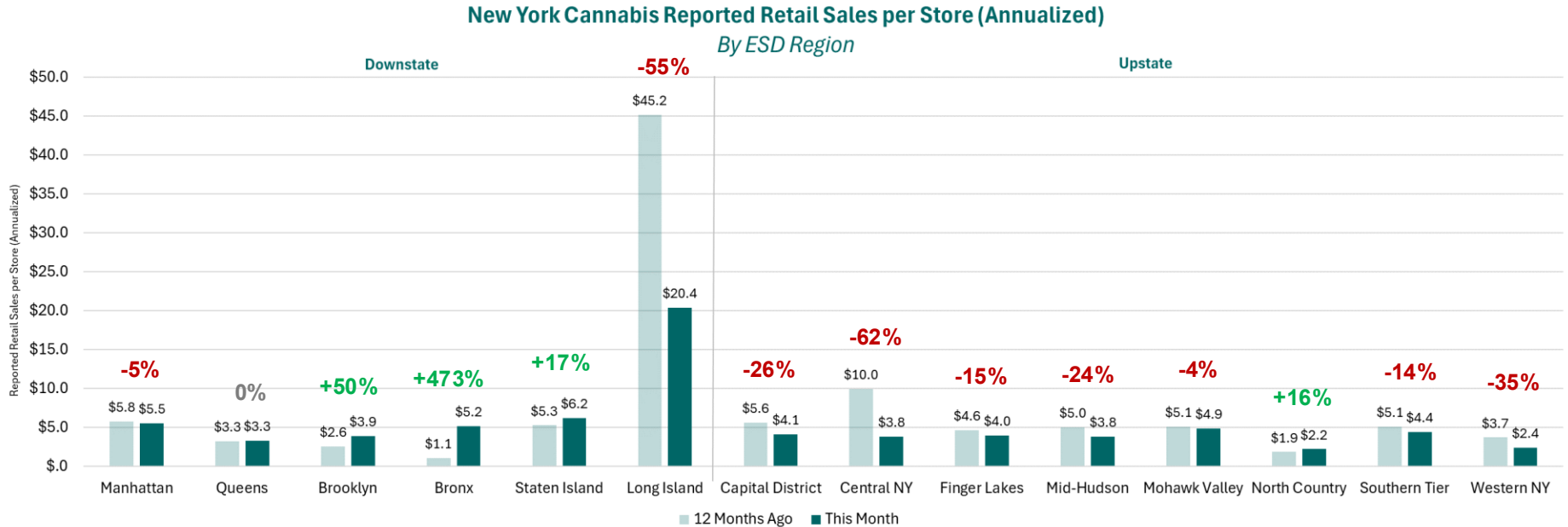
-22%
New Store (1-12 Mo's)
Sales per Store Change

SINCE PROGRAM INCEPTION, SALES VARY WIDELY BY REGION WITH POPULOUS REGIONS LEADING

New York Cannabis Reported Retail Sales
By ESD Region, Program to Date



LI HAS SEEN THE STEEPEST DECLINE IN AVG STORE SALES; UPSTATE SALES ARE DOWN IN ALL BUT ONE REGION



LICENSES ISSUED

Total Licenses Issued

1,726

CAURD with
Final Licenses

274

Registered
Organization
Dispensing and
Non-dispensing
(ROD/ROND)

9

Provisionally
Approved Retail
Dispensaries

195



Adult-Use
Cultivators

203



Adult-Use
Processors

402



Adult-Use
Distributors

200



Adult-Use
Microbusiness

270



Adult-Use
Retail Dispensary

377

*Note: Many AUCCs and AUCCPs are in the process of transitioning to "non-conditional" licenses.

**Note: Provisionally approved retail dispensaries is just AU Retail.

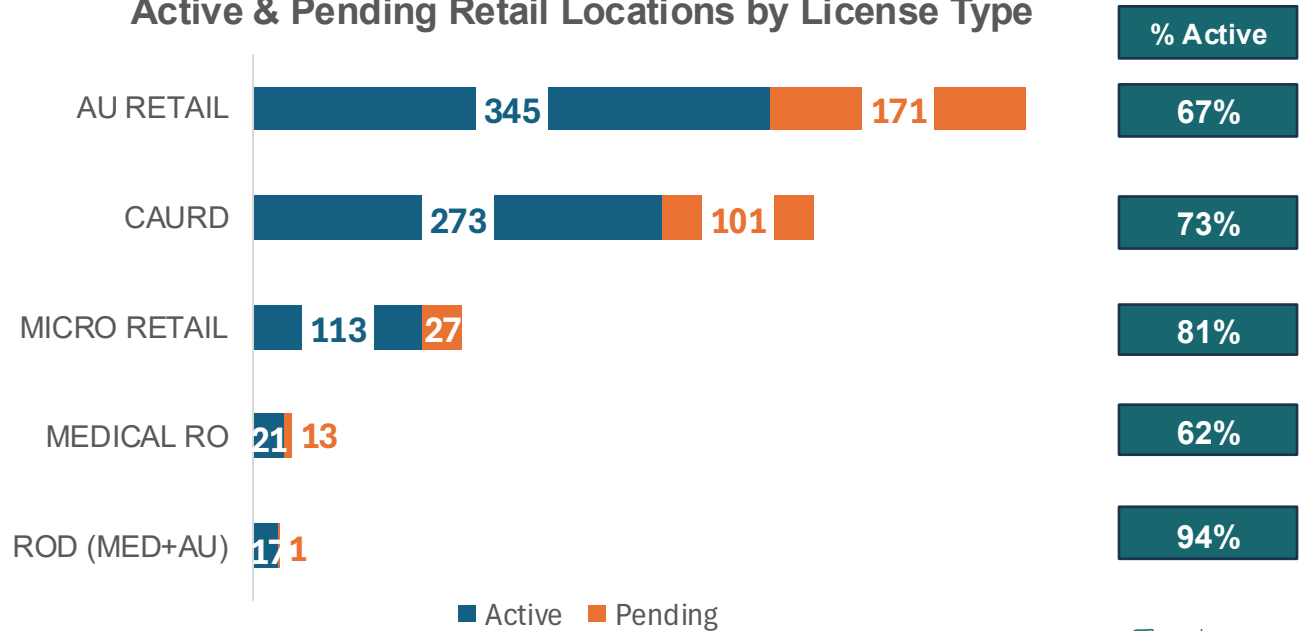
^Note: Microbusiness Licensees that include a Retail Dispensary: 96.

NEARLY THREE-QUARTERS OF LOCATIONS SUBMITTED/CURRENTLY IN REVIEW ARE NOW ACTIVE

(AMONG APPLICATIONS PROCESSED BY THE OFFICE)

Total Active & Pending Locations
1,082
 % Active
71%

Active & Pending Retail Locations by License Type



SOCIAL & ECONOMIC EQUITY (SEE) UPDATE

SEE STATUS

68% OF ADULT-USE LICENSES ISSUED TODAY ARE SEE OWNED



***Please Note:** Licenses may be counted multiple times if they are approved for multiple types of SEE categories

SEE STATS OVERALL

52% OF ALL ADULT-USE LICENSES ISSUED ARE SEE OWNED

Minority-Owned
Business

46%

Women-Owned
Business

56%

CDI

14%

SDV

7%

Distressed
Farmer

8%

***Please Note:** Licenses may be counted multiple times if they are approved for multiple types of SEE categories

SEE ACROSS THE SUPPLY CHAIN



Adult-Use
Cultivators

38%



Adult-Use
Processors

47%



Adult-Use
Distributors

42%



Adult-Use
Microbusiness

59%

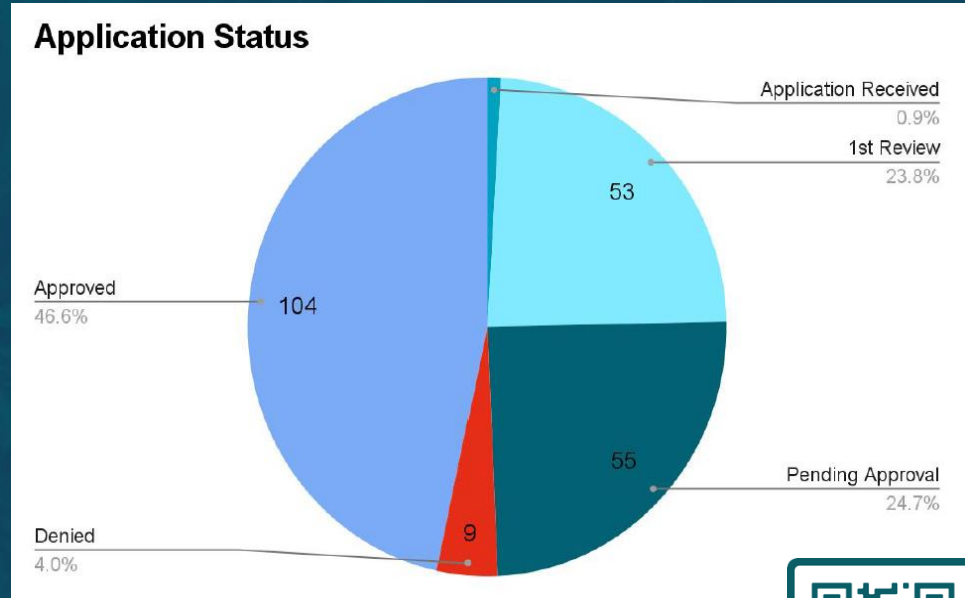


Adult-Use
Retail Dispensary

79%

UPDATES: CAURD GRANT PROGRAM

- 223 Applications Received
- **104 Approved to Date**
- The 104 Approved CAURD applicants received notification of Approval and will receive a prompt from Forward in the coming weeks for ACH information to initiate payment
- Reviews still in process for remaining applicants
- **Questions about the opportunity should be sent to the grant administrator: Support@forwardplatform.zendesk.com or by calling 1(855) 933-5556.**



Scan QR code or visit cannabis.ny.gov/equity for more information on the grant.

CHIP ACADEMY

EDUCATIONAL TRAINING PROGRAM FOR LICENSEES

- Part 4 took place from **Tuesday, April 8** to **Tuesday, May 13**
- SEE Team partnered with licensees (research lab and cultivators) and subject-matter experts to provide both instruction and Q&A for each webinar.
- Sessions covered the Certificate of Analysis, Cannabis Accounting & Taxes, Insights and Resources from the Department of Labor (DOL), and seed-to-sale integration across the supply chain.
- Resources from CHIP Academy (video recordings and slide decks) will be available to licensees. We will reach out to all licensees with these resources once they are available.

HIGHLIGHTS FROM CHIP ACADEMY 4

- **Total number of webinars:** 7
- **Total registered:** over 200
- **Highest attendance:** 116
- **Webinar with highest attendance:** Retail Ready: Dispensary Setup & Inventory Tips Before Seed-to-Sale Goes Live (presented by BioTrack)
- **Total questions addressed:** 78
- **Highest number of questions in one webinar:** 45
- **Number of licensees requesting resources (video recordings and/or slide decks):** 31

PUBLIC HEALTH & EDUCATION UPDATE

LISTEN & LEARN SERIES:

YOUNG PEOPLE & THEIR TRUSTED ADULTS

- OCM is kicking off a series of Statewide listening sessions for young people and their parents, guardians, and other trusted adults in their lives at local, accessible community spaces to discuss cannabis and cannabis-related concerns.
- Listening sessions are scheduled May through August 2025.
- These two-hour listening sessions will be facilitated in collaboration with staff from community-based organizations.
- This series will help inform the development of tailored educational materials that meet young people and the trusted adults in their lives where they're at with the information they need the most.



AVAILABLE NOW!

CANNABIS EDUCATION LIBRARY

OCM provides limited quantities of **free printed educational materials** to New York State residents, community organizations, and licensed cannabis businesses.

KNOW THE LAW

Resources to help you understand the cannabis laws and protections in New York.

SAFER & MORE RESPONSIBLE CANNABIS CONSUMPTION

Resources to help adults 21+ understand how to consume cannabis more safely—no matter the product or method.

Your Guide to Safer Cannabis Starts Here.

Scan to explore the New York State Cannabis Education Library.



 Office of Cannabis Management

cannabis.ny.gov/education

MEDICAL CANNABIS PROGRAM RESOURCES

From certification to safe access, these resources support patients, caregivers, and providers every step of the way.

SPECIAL POPULATIONS

Resources that offer tailored guidance for individuals with unique health, age, or caregiving considerations.



To request printed materials, scan QR code or visit cannabis.ny.gov/education-catalogue

SEED-TO-SALE UPDATE

SEED-TO-SALE UPDATE

Effective June 15, 2025, all licensees must use an electronic inventory tracking system that integrates with BioTrack NY to track cannabis inventory in real-time.

- A real-time electronic inventory tracking system refers to an on-site system capable of tracking cannabis product inventory and any related adjustments—such as cultivation, processing, transport, laboratory testing, distribution, waste, sale, disposal, product return, or other activities—at the time the product is moved or adjusted.
- It is **not** acceptable to manually track the movement of cannabis product using paper records or electronic spreadsheets (e.g., Excel, QuickBooks) that cannot integrate with the Office’s backend system. Manually entering inventory movement after it occurs is also not compliant.

SEED-TO-SALE UPDATE

INTEGRATION DEADLINES BY LICENSE TYPE:

- **August 1, 2025:** Licensed Cultivators, Microbusinesses, Registered Organizations & Permitted Laboratories
- **September 1, 2025:** Licensed Processors & Distributors
- **October 1, 2025:** Licensed Retail Dispensaries

The Office will distribute an initial allotment of inventory tags to licensees at **no cost**. Each tag contains a unique identifier linked to one piece of inventory.



For more information,
scan the QR code or visit
[cannabis.ny.gov/
seed-to-sale](https://cannabis.ny.gov/seed-to-sale)



**BUY
LEGAL**

New York

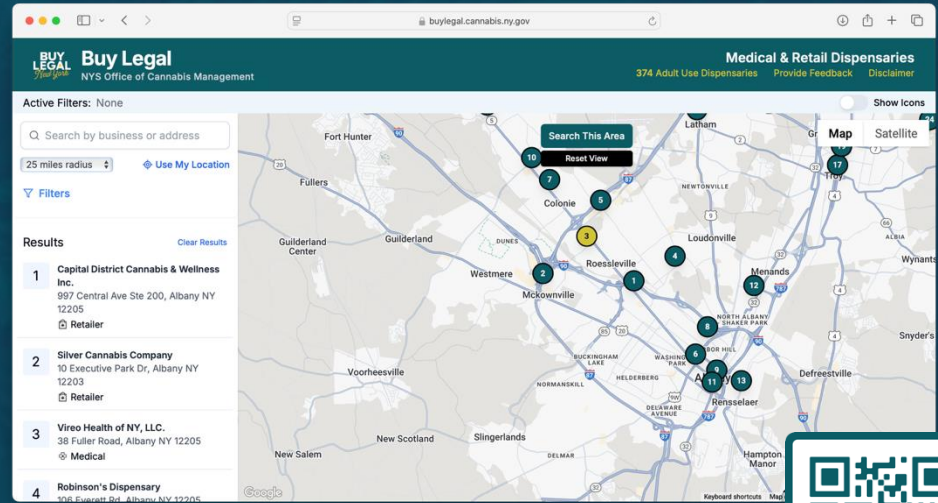
MAP LAUNCH



INTRODUCING BUY LEGAL MAP

Consumers can now easily locate licensed and open dispensaries across New York State using the **Buy Legal** map at buylegal.cannabis.ny.gov

- LOCAL and licensed cannabis businesses on Open Data will still be available for stakeholders who need more details focused on regulatory requirements and eligibility
- Useful features help shoppers navigate to nearby medical and retail dispensaries, including their address, hours of operation, and directions
- Buy Legal prioritizes mobile use, so shoppers can find dispensaries selling fully tested and safe cannabis products on the go



Scan QR code or visit buylegal.cannabis.ny.gov to access Buy Legal Map.



PUBLIC COMMENT

- Thank you to those who submitted comments online. Online comments will be captured via the meeting minutes. All online comments must be **submitted by 5 p.m. on May 25, 2025**, to be included in the Board meeting minutes. The link is available under the Cannabis Control Board page on **cannabis.ny.gov**.
- You can also reach the Office with any questions, comments, or concerns at **Regulations@ocm.ny.gov**.
- Remarks must be limited to **2 minutes or less** to allow all participants an equal amount of time to speak.

NEXT FULL CANNABIS CONTROL BOARD MEETING

Time, location, and a live stream link will be shared on the Office of Cannabis Management website in advance of the meeting: cannabis.ny.gov



Cannabis
Control Board

ADJOURN



Cannabis
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