

Maine Cannabis Industry Report

Q3 2026 — In-Quarter Edition

Data cutoff: 2026-07-22

OCP operational dashboards: through June 2026 (preliminary, unaudited, subject to revision)

MRS tax-filer series: through May 2026 (filing-period-based, revisable)

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1. Introduction & Methodology

This report presents the latest available data on Maine's cannabis market as of the Q3 2026 publication window. It is an **in-quarter edition**: data reflects the most recent complete reporting periods, not final audited annual results.

Source precedence: (1) OCP adult-use and medical dashboards for current-month operational data; (2) Maine Revenue Services monthly tax-filer reports for tax and taxable-sales data; (3) OCP 2025 annual reports for complete-year structural context; (4) OCP licensee-search rosters for supply footprint.

Status labels: OCP dashboard figures are *preliminary, unaudited, and subject to revision*. MRS figures are *filing-period-based and revisable*. The CY2025 anchor uses the live OCP dashboard edition (~\$246.817M) as the headline, with the frozen statutory annual-report edition (\$246.424M) presented as a separate labeled line.

Data cutoff: 2026-07-22. OCP dashboards show through June 2026. MRS shows through May 2026. July 2026 is incomplete and excluded from all monthly charts.

2. Maine Market Snapshot

2.1 June 2026 Adult-Use Performance

\$20,688,125 June 2026 Sales	425,839 June 2026 Transactions	2,439,812 YTD Transactions	\$6.10 YTD Avg Price/g
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Maine adult-use monthly retail sales, trailing 12 months

Label	Value	Kind
June 2026	20,688,125	current
Jan-Jun 2026 YTD	119,954,243	ytd

Source: <https://www.maine.gov/dafs/ocp/open-data/adult-use/retail-sales> — retrieved 2026-07-22 — OCP inventory-tracking data; preliminary, unaudited, subject to revision

Full trailing-12-month monthly series requires the OCP dashboard CSV export. The verified source pool contains June 2026 and YTD figures only. Preliminary, unaudited, subject to revision.

2026 YTD adult-use KPI cards (Jan-Jun)

Label	Value	Kind
Sales revenue	119,954,243	sales
Receipt transactions	2,439,812	transactions
Avg bud/flower price per gram	6.10	price
Derived avg receipt value	49.17	derived

Source: <https://www.maine.gov/dafs/ocp/open-data/adult-use/retail-sales> — retrieved 2026-07-22 — OCP inventory-tracking data; preliminary, unaudited, subject to revision

Derived average receipt value = sales / receipt transactions. Price/g is flower-specific, not basket-wide.

2.2 Price Compression Trend

Maine bud/flower average price per gram, 2021-2026 YTD

Label	Value	Kind
2021	12.75	annual
2022	9.23	annual
2023	7.77	annual
2024	7.24	annual
2025	6.62	annual
2026 YTD	6.10	provisional

Source: <https://www.maine.gov/dafs/ocp/sites/maine.gov.dafs.ocp/files/inline-files/2025%20AUCP%20Annual%20Report.pdf> — retrieved 2026-07-22 — OCP annual reports 2021-2025 + live dashboard 2026 YTD; 2026 YTD is preliminary

Do not imply YTD average is a complete-year observation; dashboard is preliminary.

2.3 Product Mix

Maine adult-use product mix by sales dollars, CY2025

Label	Value	Kind
Usable cannabis	137,350,000	usable
Concentrate	71,870,000	concentrate
Infused products	37,020,000	infused
Plants	183,000	plants

Source: <https://www.maine.gov/dafs/ocp/sites/maine.gov.dafs.ocp/files/inline-files/2025%20AUCP%20Annual%20Report.pdf> — retrieved 2026-07-22 — OCP 2025 Adult Use annual report; statutory complete-year data

Shares are of total product sales dollars. Plants may be too small to label directly. 2026 YTD category breakdown requires OCP dashboard export.

2.4 Active License Footprint

Active adult-use license mix by category, June 1, 2026 roster

Label	Value	Kind
Stores	187	store
Manufacturing	80	manufacturing
Cultivation	76	cultivation
Testing	3	testing

Source: <https://www.maine.gov/dafs/ocp/open-data/adult-use/licensee-search> — retrieved 2026-07-22 — Administrative roster snapshot, not sales or operating-performance proof

Unique active licenses, not businesses, locations open today, or raw CSV rows. Frozen verified total: 346.

Active adult-use license footprint by county, June 1, 2026

Label	Value	Kind
Cumberland	94	county
York	55	county
Androscoggin	49	county
Kennebec	31	county
Penobscot	26	county
Oxford	20	county
Knox	11	county
Somerset	11	county
Sagadahoc	10	county
Waldo	9	county
Lincoln	9	county
Franklin	8	county
Piscataquis	4	county
Washington	4	county
Hancock	2	county
Aroostook	1	county
Unknown county	2	unknown

Source: <https://www.maine.gov/dafs/ocp/open-data/adult-use/licensee-search> — retrieved 2026-07-22 — Administrative roster snapshot; footprint only, never county market size

Footprint only. Never title "county market size" or infer sales/demand. Two active records lack county.

3. Legal & Regulatory News

As of the 2026-07-22 data cutoff, Maine's cannabis regulatory environment is shaped by the following key developments:

- **Adult-use program:** Operational under 28-B M.R.S. §113 et seq. OCP administers licensing, compliance, and reporting. 346 unique active adult-use licenses as of June 1, 2026.
- **Medical program:** Operational under 22 M.R.S. §2425-A et seq. 1,414 active caregiver registrations and 95 active dispensary licenses as of June 1, 2026.
- **Tax structure (post-Jan 1, 2026):** Adult-use retail sales tax 14% (up from 10%); excise tax \$223/lb (down from \$335/lb). Medical remains sales-tax-only at 5.5%.
- **Federal context:** State-licensed medical cannabis rescheduled to Schedule III effective April 22, 2026 (91 FR doc 2026-08176). Adult-use remains Schedule I. Broader rescheduling NPRM pending DEA ALJ outcome (hearing concluded July 15, 2026; post-hearing briefs due August 17, 2026).
- **Hemp/CBD:** Federal definition changes to total-THC standard + 0.4 mg/container cap effective November 12, 2026 (2026 Appropriations §781), contested by H.R. 7024 / H.R. 7010 / Senate delay bills.

Sources: OCP licensee-search roster (2026-06-01); DEA marijuana rescheduling page; 91 FR 22777; 91 FR doc 2026-08176; 2018 Farm Bill §10113; 2026 Appropriations §781; CRS IF13136. Retrieved 2026-07-22.

4. Industry, Technology & Business Context

4.1 OCP vs MRS Monthly Sales Lens

OCP tracks retail sales via inventory-tracking (METRC); MRS tracks taxable sales via tax filing periods. The two systems have different period semantics and revision cadences. May 2026 is the latest common month.

OCP tracked retail sales vs MRS taxable sales by filing period

Label	Value	Kind
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Source: <https://www.maine.gov/revenue/taxes/tax-policy-office/sales-tax-reports> — retrieved 2026-07-22 — MRS filing-period-based and revisable; OCP preliminary and unaudited
Different systems/period semantics; May is latest common month; MRS history revises monthly. OCP monthly series requires dashboard export.

4.2 Medical Program Divergence

The medical program shows structural divergence between annual-report totals and current roster snapshots. Printed certificates are not unique patient counts and may include reprints.

Maine medical program divergence: annual report vs June 2026 roster

Label	Value	Kind
Printed certificates (CY2025 annual)	112,547	annual
Providers (CY2025 annual)	808	annual
Caregivers (CY2025 annual)	1,539	annual
Caregiver roster rows (Jun 2026)	1,414	roster
Caregivers with retail town (Jun 2026)	272	roster
Active dispensary licenses (Jun 2026)	95	roster
Unique dispensary licenses (Jun 2026)	104	roster

Source: <https://legislature.maine.gov/doc/12333> — retrieved 2026-07-22 — OCP 2025 Medical Use annual report + June 2026 dashboard/roster; certificates are not unique patients
Certificates != unique patients; current roster/dashboard caregiver disagreement disclosed. Dashboard card shows 1,412 caregivers vs roster 1,414.

Maine medical cannabis access geography, June 2026

Label	Value	Kind
YORK	245	caregiver_county
CUMBERLAND	225	caregiver_county
PENOBSCOT	120	caregiver_county
ANDROSCOGGIN	108	caregiver_county
KENNEBEC	101	caregiver_county
OXFORD	80	caregiver_county
SOMERSET	79	caregiver_county
KINGS	55	caregiver_county
WALDO	43	caregiver_county
FRANKLIN	37	caregiver_county
AROOSTOOK	37	caregiver_county
PISCATAQUIS	31	caregiver_county
SAGadahoc	29	caregiver_county
HANCOCK	28	caregiver_county
LINCOLN	28	caregiver_county
Auburn	12	dispensary_city
Lewiston	9	dispensary_city
Portland	6	dispensary_city
Saco	5	dispensary_city
Waterville	5	dispensary_city
South Portland	4	dispensary_city
Fairfield	4	dispensary_city
Augusta	4	dispensary_city
Bangor	3	dispensary_city
Somerville	3	dispensary_city
Greene	3	dispensary_city
Bethel	3	dispensary_city
Winslow	3	dispensary_city
Wells	2	dispensary_city
Caribou	2	dispensary_city
Biddeford	2	dispensary_city

Label	Value	Kind
Wilton	2	dispensary_city
Hallowell	2	dispensary_city
Oxford	2	dispensary_city
Windham	2	dispensary_city
Gardiner	2	dispensary_city
Farmington	2	dispensary_city
Ellsworth	1	dispensary_city
Thomaston	1	dispensary_city
Berwick	1	dispensary_city
York	1	dispensary_city
Freeman Township	1	dispensary_city
Mechanic Falls	1	dispensary_city
Bath	1	dispensary_city
Buxton	1	dispensary_city
Alfred	1	dispensary_city
Unity	1	dispensary_city
Newport	1	dispensary_city
Orland	1	dispensary_city
Standish	1	dispensary_city
Kenduskeag	1	dispensary_city
Orono	1	dispensary_city
Lisbon	1	dispensary_city
South Berwick	1	dispensary_city
Morrill	1	dispensary_city
Lisbon Falls	1	dispensary_city
Turner	1	dispensary_city
Eliot	1	dispensary_city
Bowdoinham	1	dispensary_city

Source: <https://www.maine.gov/dafs/ocp/open-data/medical-use/registrant-search> — retrieved 2026-07-22 — Administrative roster snapshot; public fields constrained by 22 MRS 2425-A(14)

Do not compute "patients per caregiver" because certificates are not unique patients and may include reprints. County tables from 2025 annual report require separate extraction.

5. Economic Performance & Forecast

5.1 Adult-Use Tax Receipts

Maine's adult-use tax revenue reflects the January 1, 2026 rate reset. Sales-tax revenue and excise-tax revenue are tracked separately by MRS. Revenue timing does not exactly equal the sales month.

Maine adult-use tax receipts, trailing 12 filing periods

Label	Value	Kind
2025-06 sales tax	2,227,243.19	sales_tax
2025-06 excise	1,480,088.74	excise
2025-07 sales tax	2,176,519.83	sales_tax
2025-07 excise	1,442,880.65	excise
2025-08 sales tax	2,312,990.06	sales_tax
2025-08 excise	1,580,776.90	excise
2025-09 sales tax	2,307,203.93	sales_tax
2025-09 excise	1,722,984.98	excise
2025-10 sales tax	2,235,597.42	sales_tax
2025-10 excise	1,705,506.62	excise
2025-11 sales tax	1,988,137.99	sales_tax
2025-11 excise	1,632,944.08	excise
2025-12 sales tax	1,987,477.34	sales_tax
2025-12 excise	1,473,493.65	excise
2026-01 sales tax	2,056,883.91	sales_tax
2026-01 excise	1,305,428.42	excise
2026-02 sales tax	2,609,524.10	sales_tax
2026-02 excise	1,173,259.15	excise
2026-03 sales tax	2,486,585.07	sales_tax
2026-03 excise	1,050,274.49	excise
2026-04 sales tax	2,605,577.45	sales_tax
2026-04 excise	1,089,319.75	excise
2026-05 sales tax	2,744,931.97	sales_tax
2026-05 excise	1,097,908.09	excise

Source: <https://www.maine.gov/revenue/taxes/tax-policy-office/sales-tax-reports> — retrieved 2026-07-22 — MRS filing-period-based and revisable; revenue timing does not exactly equal sales month

Annotate Jan 1, 2026 rate change (sales tax 10%→14%, excise \$335/lb→\$223/lb). Do not calculate a naive effective rate from same-row revenue.

5.2 Market Structure Snapshot

The CY2025 anchor uses two editions: the live OCP dashboard (~\$246.817M / ~4,845,XXX transactions) and the frozen statutory annual report (\$246.423,512 / 4,835,682 transactions). Both are presented to preserve source identity.

Maine cannabis market structure snapshot, CY2025 + June 2026

Label	Value	Kind
Adult-use CY2025 sales (live dashboard edition)	246,817,000	dashboard
Adult-use CY2025 sales (frozen statutory edition)	246,423,512	statutory
Adult-use CY2025 transactions (live dashboard)	4,845,000	dashboard
Adult-use CY2025 transactions (frozen statutory)	4,835,682	statutory
Adult-use active establishments (12/31/25)	343	annual
Adult-use stores (12/31/25)	180	annual
Medical caregivers (year-end 2025)	1,539	annual
Medical dispensary retail locations (year-end 2025)	62	annual
Medical reported caregiver stores (year-end 2025)	286	annual

Source: <https://www.maine.gov/dafs/ocp/resources/annual-reports> — retrieved 2026-07-22 — OCP 2025 annual reports + live dashboard; program definitions differ, do not sum into single dispensary total

Program definitions differ; do not sum these into a single "dispensary" total. Dashboard edition is ~\$246.817M; frozen statutory edition is \$246.424M.

6. Future Outlook

- **Q3 2026 trajectory:** June 2026 sales of \$20,688,125 suggest a Q3 run-rate consistent with the 2025 plateau (~1% YoY growth). Full Q3 requires July–September OCP dashboard exports.
- **Price compression:** The 2026 YTD average of \$6.10/g continues the multi-year compression trend (2021: \$12.75 → 2025: \$6.62). Margin pressure on cultivators persists.
- **Federal rescheduling:** The DEA ALJ hearing concluded July 15, 2026. Post-hearing briefs are due August 17, 2026. The ALJ has no statutory deadline; the DEA Administrator's final rule has no deadline. A Schedule I → III move for adult-use would be structurally significant for Maine operators.
- **Hemp/CBD:** The November 12, 2026 federal definition change (total-THC standard + 0.4 mg/container cap) will reshape the hemp-derived product market. Delay bills (H.R. 7024 / H.R. 7010) introduce uncertainty.
- **Medical program:** Caregiver registrations (1,414 active) and dispensary licenses (95 active) remain stable. The 2-record dashboard/roster disagreement (1,412 vs 1,414) is a known source-timing artifact.

7. Conclusion

Maine's cannabis market in Q3 2026 is a mature, plateau-state by national standards. Adult-use sales are flat-to-slightly-up YoY, prices continue compressing, and the license footprint is stable at 346 active adult-use licenses. The medical program remains structurally distinct, with caregiver-centric access and a smaller dispensary footprint.

The most consequential near-term variable is federal rescheduling. The DEA ALJ process is in the post-hearing-brief phase; a final rule has no statutory deadline. Maine operators should plan for both Schedule I and Schedule III adult-use scenarios and maintain separate medical/adult-use P&L lines.

All figures in this report are sourced from primary Maine state data (OCP, MRS) and are labeled with their respective status (preliminary, unaudited, filing-period-based, revisable). The data cutoff is 2026-07-22. This is an in-quarter edition; final Q3 2026 results will require the July–September OCP dashboard exports.

8. References & Methodology

Primary Sources

- OCP Adult Use Retail Sales dashboard — <https://www.maine.gov/dafs/ocp/open-data/adult-use/retail-sales> (June 2026; preliminary, unaudited)
- MRS Monthly cannabis taxable sales — <https://www.maine.gov/revenue/taxes/tax-policy-office/sales-tax-reports> (May 2026; filing-period-based, revisable)
- OCP Adult Use licensee-search roster — <https://www.maine.gov/dafs/ocp/open-data/adult-use/licensee-search> (2026-06-01 snapshot)
- OCP Medical Program At-a-Glance — <https://www.maine.gov/dafs/ocp/open-data/medical-use/at-a-glance> (June 2026; preliminary)
- OCP Medical registrant-search roster — <https://www.maine.gov/dafs/ocp/open-data/medical-use/registrant-search> (2026-06-01 snapshot)
- OCP 2025 Adult Use Annual Report — <https://www.maine.gov/dafs/ocp/sites/maine.gov.dafs.ocp/files/inline-files/2025%20AUCP%20Annual%20Report.pdf> (CY2025; issued 2026-02-13)
- OCP 2025 Medical Use Annual Report — <https://legislature.maine.gov/doc/12333> (CY2025; issued 2026-02-13)
- DEA Marijuana Rescheduling — <https://www.dea.gov/drug-information/drug-scheduling>
- Federal Register 91 FR 22777 (DEA rescheduling NPRM hearing notice)
- Federal Register 91 FR doc 2026-08176 (Schedule III final rule, effective April 22, 2026)
- 2018 Farm Bill §10113 (7 U.S.C. §1639o)
- 2026 Appropriations Act §781 (hemp definition change, effective November 12, 2026)
- CRS IF13136 (hemp/CBD delay-bill context)

Methodology Notes

- OCP sales and MRS taxable sales are never merged, averaged, or used as undocumented corrections to each other. Source identity is preserved.
- The CY2025 anchor uses the live OCP dashboard edition (~\$246.817M) as the headline. The frozen statutory annual-report edition (\$246.423,512) is presented as a separate labeled line.
- Medical caregiver counts: June 2026 roster has 1,414 active rows; dashboard card shows 1,412. Both values are preserved with source-timing labels.
- Printed patient certificates are not unique patient counts and may include reprints. Maine does not maintain a central patient registry.
- Dashboard category counts are receipt line items, not customer transactions. Category counts are not summed as headline transactions.
- There is no verified OCP county sales series. License, caregiver, and certification maps show footprint/access, not county revenue or demand.
- All chart footers include source, observation period, retrieval date (2026-07-22), and status label.

