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FIRST-YEAR WHITEPAPER

Cannabis Regulation in Transition

*One year of international monitoring, knowledge exchange and
practical analysis*

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SECTION

Executive summary

Cannabis policy is undergoing a fundamental but uneven transformation. Cannabis remains the most commonly used illicit drug in Europe, while legal responses now range from prohibition and reduced penalties to home cultivation, non-commercial associations, pilot projects, tolerated retail and nationally regulated commercial markets.

The international debate is therefore no longer limited to whether possession should be punished. Governments increasingly face questions of market design: how legal access should be organised, how consumers should be protected, how illicit supply can be reduced, how existing participants should be treated and how outcomes should be measured.

Europe has not developed one common cannabis model. Instead, it has produced a fragmented landscape of partial reforms. Germany permits private cultivation and non-commercial associations but no general retail market. Malta uses licensed non-profit associations. Luxembourg and Czechia have expanded private-use legality. Switzerland combines scientific pilots with work towards national legislation. The Netherlands is testing regulated production and supply through existing coffeeshops.

Outside Europe, Canada and Uruguay operate national regulated systems, while the United States combines extensive state-level markets with continuing federal complexity. South Africa permits private use without a general lawful commercial supply route. Thailand illustrates the risks of rapid liberalisation before a complete regulatory framework is operational. Australia continues to develop through state and territorial variation.

This publication is limited to the Foundation's public knowledge activities and to developments that can be documented through public sources. It does not describe private discussions, internal organisational matters or confidential relationships.

The main conclusions are:

- Legal reform and market regulation are not the same. Decriminalising possession does not create a controlled supply chain.
- Implementation determines whether reform can meet its objectives. Licensing, accessibility, product availability, price, transition and consumer confidence affect whether legal channels displace illicit supply.
- Public-health objectives and illicit-market reduction are connected. Product standards protect only consumers who actually use the regulated system.
- Evaluation is becoming central, but meaningful evaluation requires baseline data, clear objectives and sufficient time.
- The Dutch experience remains internationally relevant because it demonstrates both the value of accountable retail and the structural consequences of leaving production and wholesale supply unregulated.

SECTION

At-a-glance status overview

This overview summarises the legal status as of 20 July 2026. Market model and procedural phase are separate data points: an adopted act is not automatically operational, and decriminalising possession does not create a legal supply channel. The colour coding reflects solely the availability of a lawful adult-use access channel, not political desirability.

Netherlands

PARTIAL REFORM

- Coffeeshop model
- Operational experiment since 7 April 2025; evaluation under way

[Amber — partial, experimental or conditional]

Germany

OPERATIONAL

- Non-profit association model
- Act in force; operational implementation and statutory evaluation under way

[Green — permitted and operational]

Malta

OPERATIONAL

- Non-profit association model
- Operational non-commercial model

[Green — permitted and operational]

Luxembourg

PARTIAL REFORM

- Private use and home cultivation only
- Private-use reform in force since July 2023

[Amber — partial, experimental or conditional]

Czechia

PARTIAL REFORM

- Private use and home cultivation only
- Act no
- 270/2025 in force since 1 January 2026

[Amber — partial, experimental or conditional]

Switzerland

PARTIAL REFORM

- Scientific pilot model
- Pilots operational; draft act being revised following consultation

[Amber — partial, experimental or conditional]

United Kingdom

PARTIAL REFORM

- No legal adult-use supply channel
- Reform proposals and policy advice published; no national adult-use reform adopted

[Red — no legal adult-use access channel]

Italy

PARTIAL REFORM

- No legal adult-use supply channel
- No adult-use reform; restrictive direction for hemp flower

[Red — no legal adult-use access channel]

Austria

PARTIAL REFORM

- No legal adult-use supply channel
- No adult-use reform; adjacent fiscal and distribution-law uncertainty

[Red — no legal adult-use access channel]

Canada

OPERATIONAL

- Regulated commercial retail
- Operational national commercial model since 17 October 2018

[Green — permitted and operational]

Uruguay

OPERATIONAL

- Pharmacy, club and home-cultivation model
- Operational national model

[Green — permitted and operational]

United States

MIXED

- Mixed federal or subnational model
- Operational state-level markets; federal rescheduling procedure not concluded at the cut-off date

[Grey — mixed federal or subnational regime]

South Africa

PARTIAL REFORM

- Private use and home cultivation only
- Constitutional protection operational
- Cannabis for Private Purposes Act no
- 7 of 2024 adopted and signed, but formal commencement to be proclaimed
- Draft implementing regulations published but not yet final

[Amber — partial, experimental or conditional]

Thailand

PARTIAL REFORM

- No legal adult-use supply channel
- Restrictive reorientation towards controlled and medical use

[Red — no legal adult-use access channel]

Australia

MIXED

- Mixed federal or subnational model
- Regional variation; no national operational adult-use supply model

[Grey — mixed federal or subnational regime]

Greece

PARTIAL REFORM

- No legal adult-use supply channel
- Restrictive product framework; no adult-use market

[Red — no legal adult-use access channel]

Slovenia

PARTIAL REFORM

- No adult-use market
- Consultative referendums of 2024 approved medical cannabis and personal cultivation; implementing legislation pending

[Amber — partial, experimental or conditional]

Ukraine

PARTIAL REFORM

- Medical channel only
- Law No
- 3528-IX in force since 16 August 2024

[Red — no lawful adult-use supply channel]

Denmark

PARTIAL REFORM

- Medical channel only
- Permanent prescription-based scheme since 2022

[Red — no lawful adult-use supply channel]

Belgium

PARTIAL REFORM

- No adult-use market
- Possession remains an offence; small adult quantities have low prosecution priority

[Red — no lawful adult-use supply channel]

Spain

PARTIAL REFORM

- No adult-use market
- Private consumption is not criminalised, but cannabis associations have no statutory basis

[Amber — partial, experimental or conditional]

Portugal

PARTIAL REFORM

- Medical channel only
- Decriminalisation since 2001; no adult-use supply

[Red — no lawful adult-use supply channel]

Mexico

PARTIAL REFORM

- No adult-use market
- Judicial permits for personal use without implementing legislation

[Amber — partial, experimental or conditional]

Colombia

PARTIAL REFORM

- No adult-use market
- Personal dose constitutionally protected; adult-use reform not adopted

[Amber — partial, experimental or conditional]

Morocco

PARTIAL REFORM

- No adult-use market
- Licensed medical, pharmaceutical and industrial cultivation under ANRAC

[Red — no lawful adult-use supply channel]

New Zealand

PARTIAL REFORM

- Medical channel only
- The 2020 adult-use referendum was rejected

[Red — no lawful adult-use supply channel]

Colour coding. Green: lawful adult-use access channel that is operational (commercial or non-commercial). Amber: partial, experimental or conditional access without a general national supply channel. Red: no lawful adult-use supply channel. Grey: material differences between national and subnational law.

Adult use is defined in this whitepaper as non-medical cannabis use by adults. Cannabis associations are not a separate category alongside commercial sales but one possible form of a regulated adult-use access channel.

Introduction

Cannabis is widely available under almost every legal model. Prohibition has not eliminated production, trade or consumption. Reform does not remove government responsibility; it changes its form. Once possession, cultivation or access is permitted, authorities must make choices about production, distribution, products, age limits, quality, retail, taxation, advertising, monitoring and enforcement.

The central question has shifted from whether cannabis should remain prohibited to which regulatory arrangements can protect public health, reduce illicit activity and function under real market conditions.

This whitepaper has two purposes. First, it records the public work developed during the first year of the Recreational Cannabis Foundation. Second, it provides a comparative analysis of the state of cannabis regulation in Europe and selected jurisdictions worldwide as of 20 July 2026.

The report uses “regulation” broadly to describe legal frameworks governing non-medical adult cannabis. It distinguishes regulation from decriminalisation, depenalisation and tolerance. Those distinctions are essential because possession may be lawful while production and sale remain prohibited.

Purpose and methodology

2.1 Public purpose

The Foundation was established to improve access to reliable information about recreational cannabis regulation and to make Dutch practical knowledge accessible in an international context. Its public activities are monitoring, interpretation, documentation and knowledge exchange.

2.2 Source basis and verification

Factual and legal conclusions in this whitepaper rely solely on legislation, official gazettes, parliamentary documents, government and regulator publications, judicial decisions, and official publications of recognised intergovernmental organisations.

Media reports, industry figures, lobbying publications, commercial analyses and unofficial summaries do not constitute evidence of the legal status of a country or measure.

Research commissioned by a government or public institution may be used as evaluative context. Such research is clearly distinguished from binding legislation, policy decisions and operational implementation.

For every development the following is verified:

- which authority is responsible;
- which formal document has been published;
- when the document was adopted;
- when it entered into force;
- whether additional legislation or implementing rules are required;
- whether the framework is actually operational;
- and whether an announced measure is legally binding.

The country sections are not legal advice. They describe the formal architecture, the applicable access model and the procedural status at the cut-off date of this publication.

2.3 Analytical distinctions

The analysis repeatedly applies six distinctions:

- Political announcement versus adopted law.
- Entry into force versus practical implementation.
- Lawful possession versus lawful supply.
- Private or non-commercial access versus commercial retail.
- Experimental frameworks versus permanent national law.
- Medical, industrial and non-medical cannabis channels.

2.4 Limitations

Cannabis policy changes quickly. Some systems are still being implemented or evaluated. Early data may reflect transition rather than long-term effects. Direct comparisons are also limited by differences in population, enforcement, existing markets, data collection and policy objectives.

The Foundation's first year

3.1 Continuous international monitoring

During the first year, the Foundation followed legislative and regulatory developments across Europe, North America, Africa, Asia and Australia. The work included proposed laws, adopted rules, parliamentary inquiries, government responses, court decisions, scientific evaluations, consultations and implementation guidance.

Monitoring was structured around procedural status. Each development was assessed by asking what had changed formally, which authority was responsible, whether further approval was required, when implementation would occur and which questions remained unresolved.

3.2 Primary-source reporting

The public updates were regularly linked to original documents. This is important in cannabis policy because media summaries frequently collapse different stages of reform into a single claim that a country has “legalised” cannabis.

Primary-source reporting makes it possible to state more precisely whether a measure concerns personal possession, cultivation, distribution, scientific research, licensed supply, medical access, hemp or product standards.

3.3 Following complete policy processes

Several dossiers were followed through multiple stages. These included the Dutch controlled supply-chain experiment, Germany's implementation and evaluation process, Switzerland's movement from pilots towards proposed national legislation, reforms in Czechia, Australian parliamentary inquiries, South African implementing regulations, Thailand's reorientation towards medical control and the development of the European drugs-policy framework.

3.4 International knowledge community

An international knowledge community was developed to share legal developments, official documents, research findings and practical observations. The public value of the network lies in its cross-jurisdictional exchange. This whitepaper does not identify individual participants or describe private discussions.

3.5 Comparative knowledge base

The work produced a comparative knowledge base covering home cultivation, non-commercial associations, tolerated retail, experimental supply chains, licensed retail, public-health pilots, product standards, advertising controls, medical–recreational boundaries and international-law questions.

Appendix A records the substantive content of the public updates included in the full timeline of monitored developments.

Europe: a fragmented transition

4.1 European overview

Cannabis remains Europe's most widely consumed illicit drug^[5] and is associated with a large share of drug-law offences. At the same time, national laws increasingly diverge. EUDA now treats cannabis policy as a distinct field of comparative analysis^{[6][56]} and emphasises that European responses range from criminal prohibition to controlled forms of legal access.

The EU does not operate a common adult-use cannabis market. Criminal law, public health and licensing largely remain national matters, while European rules may still affect agriculture, food, medicines, consumer products, services and cross-border trade.

4.2 The Netherlands: regulated retail meets experimental supply

The Netherlands has tolerated retail sale through coffeeshops for decades while commercial cultivation and wholesale supply remained prohibited. This produced the structural “back-door problem”: the retail outlet could operate under conditions, but its ordinary supply could not be lawfully produced and purchased.

The Controlled Cannabis Supply Chain Experiment tests whether production, distribution and sale of quality-controlled cannabis can be regulated and what effects this has on crime, safety and public health.

The experimental phase began on 7 April 2025^[14] and is scheduled for four years, with a possible extension of up to eighteen months.^[12] All coffeeshops in participating municipalities are required to take part.

The framework regulates growers, transport, traceability, packaging, quality, inventory, retail and consumer information. Existing coffeeshop requirements, including the age limit and advertising restrictions, continue to apply.

The early transition exposed the importance of product availability, especially hashish. Enforcement of the exclusive regulated-supply requirement for hash was postponed until 1 September 2025^[14] because the regulated offer was not yet sufficiently broad.

The experiment's international significance lies in its starting point. It is not creating a retail market from nothing; it is attempting to connect regulated production to an established retail structure and existing consumer demand.

4.3 Germany: private and collective access without general retail

Germany's Cannabis Act introduced legal private cultivation by adults and collective, non-commercial cultivation through associations^[17]. The reform did not create a general licensed retail market.

This design reduces criminal exposure for defined private conduct and creates a lawful collective supply channel. It also leaves open practical questions about accessibility, association capacity, enforcement and the continuing scale of illicit purchasing.

Germany embedded staged evaluation in the law. The first evaluation addressed consumption restrictions, youth protection, possession quantities and association distribution. The second interim evaluation, published in April 2026^[17], considered organised crime, health protection, youth protection and developments in medical cannabis.

Germany is therefore a major test of whether a large national market can be redirected through home cultivation and tightly controlled non-commercial associations without conventional retail.

4.4 Malta: regulated non-profit associations

Malta established a dedicated authority and permits licensed Cannabis Harm Reduction Associations^[19] to cultivate and distribute dried cannabis flower to adult members. Associations must operate on a non-profit basis and are regulated from seed to distribution.

Membership is closed and the model is not designed for tourist access or open retail. Marketing is restricted and surplus income must be used for the association's needs.

The Maltese model shows that legal supply can be organised outside both state retail and commercial business. Its long-term performance depends on accessibility, capacity, compliance burden and the extent to which members move away from illicit suppliers.

4.5 Luxembourg: private cultivation without a retail system

Luxembourg's Act of 10 July 2023^[20] permits adults to cultivate up to four cannabis plants per domestic community and allows personal consumption in the private sphere. It also reduced the response to certain small quantities in public.

The reform creates lawful private conduct but no general regulated retail market. It therefore illustrates the gap between legal possession and a lawful source of supply for adults who cannot or do not wish to cultivate.

4.6 Czechia: expanded personal-use legality from 2026

Czech Act No. 270/2025^{[21][22]} amended the Criminal Code and related legislation with effect from 1 January 2026. The reform permits defined personal cultivation and possession thresholds while retaining administrative and criminal consequences above those limits.

Czechia has also examined broader alternatives including home cultivation, cannabis clubs and specialised regulated retail.

The current framework therefore represents a substantial personal-use reform but not a complete regulated commercial market.

4.7 Switzerland: evidence-led movement towards national legislation

Switzerland permits scientific cannabis pilot trials^[25] designed to generate evidence on health, consumption and different distribution models.

A parliamentary committee subsequently developed a draft Cannabis Products Act^[23] intended to regulate adult access nationally, with public health and youth protection at its centre. The draft includes licensed cultivation and manufacturing, controlled sales, product standards, neutral packaging and restrictions on promotion.

The consultation results published on 24 June 2026^[24] provide an unusually detailed picture of stakeholder responses to a proposed European national framework.

Switzerland is important because it links scientific pilots, formal evaluation, public consultation and legislative design. It may become a leading European example of moving from evidence generation to permanent regulation.

4.8 United Kingdom: reform debate without national change

The United Kingdom continues to classify cannabis as a controlled drug, but reform debates have become more structured. The London Drugs Commission's 2025 final report^[26] recommended a public-health-oriented change including decriminalisation of personal possession and consideration of regulated home cultivation.

The report did not itself change national law. It is nevertheless significant as a major subnational review combining international comparison, policing concerns, health evidence and racial-disparity analysis.

4.9 European policy and adjacent regulation

Cannabis policy is also shaped outside adult-use legislation. Relevant developments occur through medical-cannabis law, hemp and agricultural rules, food regulation, pharmaceutical standards, road-traffic law, taxation, tobacco legislation and court decisions.

The European drugs-policy framework continues to combine public health, demand reduction, harm reduction, security and international cooperation. The 2025 call for evidence and subsequent strategy process^[7] placed renewed emphasis on preparedness, criminal networks, synthetic drugs, community resilience and evidence-based responses.

4.10 Summary of principal European models

Netherlands — possession tolerated under conditions; home cultivation not generally legal; no associations; coffeeshop retail with regulated supply tested only in the experiment. Status: experiment.

Germany — possession legal within statutory limits; home cultivation permitted; non-commercial associations permitted; no general retail. Status: national law, evaluation ongoing.

Malta — possession legal within statutory framework; limited private cultivation; licensed non-profit associations; no open retail. Status: operational national model.

Luxembourg — private use permitted; up to four plants per household; no associations; no retail. Status: partial national reform.

Czechia — legal within thresholds from 2026; limited home cultivation; no operational national association scheme; no retail. Status: partial national reform.

Switzerland — pilot participants and limited general rules; draft allows limited cultivation; associations not the core model; pilots plus proposed national regulated sales. Status: legislative process.

4.11 Other European jurisdictions monitored

This section covers the European jurisdictions that were monitored during the first year but did not produce a change of legal category. Their inclusion matters because comparative analysis is only reliable when jurisdictions without reform are described as precisely as jurisdictions with reform.

Slovenia. Two consultative referendums held on 9 June 2024 approved medical cannabis and cultivation for personal use.^[43] The result is advisory: the Production and Trade in Illicit Drugs Act remains unchanged and personal use is still a minor offence.^[44] Slovenia is therefore an example of a democratic mandate without a legal category change.

Ukraine. Law No. 3528-IX entered into force on 16 August 2024 and regulates the circulation of cannabis plants for medical, industrial and scientific purposes.^[45] There is no adult-use component; implementation is proceeding under wartime administrative conditions.

Denmark. The medical cannabis pilot programme was made permanent with effect from 1 January 2022 and remains prescription-only.^[46] No adult-use proposal was tabled during the monitoring period.

Belgium. Possession remains an offence under the Drugs Act of 24 February 1921. Prosecution policy assigns the lowest priority to possession of small quantities by adults, which produces a tolerance practice without a supply framework.^[47]

Spain. Private consumption is not a criminal offence, while public consumption and possession are administrative offences under Ley 17/1967.^[48] Cannabis associations operate without a statutory basis, and medical access is limited to standardised preparations dispensed through hospital pharmacies.^[49] Spain is the clearest European example of a large tolerated practice that has never been converted into a regulated supply chain.

Portugal. Personal possession has been decriminalised since 2001 and medical products have been regulated since 2019.^[50] No adult-use supply framework exists, which confirms the finding that decriminalisation and supply regulation are separate policy decisions.

Global developments

5.1 Global context

Cannabis remains the world's most widely used controlled drug. Legal production now coexists with large illicit markets, while national and subnational systems differ sharply in commercialisation, access and public-health controls.

5.2 Canada: national commercial regulation under review

Canada's Cannabis Act entered into force on 17 October 2018^[31] and established a national control framework. Federal law regulates production, products and promotion, while provinces and territories organise distribution and retail.

The 2024 legislative review^[31] found that the framework had created a licensed industry, expanded access to quality-controlled products, reduced possession charges and supported movement towards the legal market. It also identified continuing problems concerning illicit-market displacement, Indigenous participation, small businesses, regulatory burden, medical access and research.

Canada demonstrates that a national legal market can capture a large share of demand, but that displacement is gradual and depends on retail access, product range, pricing, taxation and regulatory efficiency.

5.3 Uruguay: state-led national regulation

Uruguay's Law No. 19.172^[32] established a national model with regulated pharmacy access, registered home cultivation and membership clubs. The IRCCA is responsible for licensing and control across the chain.

IRCCA continues to publish market data on the three adult-use access routes. The 2026 reporting^[32] illustrates the value of a dedicated regulator producing regular public indicators.

Uruguay demonstrates a model in which public-health control and state oversight take precedence over broad commercial competition.

5.4 United States: state markets under federal complexity

The United States contains extensive state-level adult-use markets, but federal treatment has remained a separate and evolving question. The Department of Justice proposed transferring marijuana from Schedule I to Schedule III in 2024^[33], and the administrative hearing process continued in 2026.

Rescheduling is not equivalent to federal adult-use legalisation. State systems continue to differ in licensing, taxation, products, social-equity measures, local control, home cultivation and retail access.

The United States demonstrates both the scale at which regulated markets can operate and the instability created when state commercial systems coexist with a different federal framework.

5.5 South Africa: constitutional privacy and incomplete supply regulation

The Constitutional Court protected private adult use and cultivation in 2018^[37]. The Cannabis for Private Purposes Act 7 of 2024^[37] subsequently created the statutory framework, while draft implementing regulations were published in February 2026.

The model does not establish a general lawful commercial retail channel. South Africa therefore illustrates how private-use reform can resolve criminal and constitutional questions while leaving supply, clubs and commercial boundaries unsettled.

5.6 Thailand: rapid liberalisation followed by restriction

Thailand's removal of cannabis from narcotics control in 2022^[38] was followed by rapid market expansion before a complete adult-use regulatory framework was established. A 2025 ministerial notification reclassified^{[38][39]} cannabis flower as a controlled herb and sought to orient use towards medical purposes.

Thailand is a cautionary example of sequencing. When legal status changes before licensing, retail, products, advertising, enforcement and health protections are settled, the market may develop faster than regulatory capacity.

5.7 Australia: federal and state variation

Australia remains nationally restrictive, while states and territories differ. The Australian Capital Territory permits limited personal possession and cultivation.

Victoria examined a bill concerning personal adult use through a parliamentary committee in 2025^[40]. New South Wales issued a government response to its own cannabis inquiry later that year^[41] and did not adopt a general legalisation model.

Australia shows how regional reform can produce experimentation without a coherent national adult-use framework.

5.8 Latin America, the Caribbean and Africa

Beyond Uruguay, reform across Latin America and the Caribbean has often developed through constitutional courts, medical frameworks, personal-use decisions and legislative proposals rather than complete adult-use markets. This creates situations in which a right to private conduct exists without an operational legal supply structure.

Across Africa, several countries permit licensed medical or export cultivation while retaining criminal restrictions on local non-medical use. This creates questions about access to licences, traditional cultivation, rural livelihoods, local value creation and the distribution of economic benefits.

5.9 Additional jurisdictions monitored

Mexico. The Supreme Court issued a general declaration of unconstitutionality in 2021 concerning the prohibition of adult personal use.^[51] Access therefore runs through individual judicial permits

rather than a regulated market, because Congress has not adopted implementing legislation. Mexico shows that judicial legalisation without legislative follow-through does not create a supply chain.

Colombia. The personal dose is constitutionally protected and medical and industrial cultivation are licensed, but successive constitutional amendments to create an adult-use market were not adopted.^[52]

Morocco. Loi n° 13-21 permits licensed cultivation for medical, pharmaceutical and industrial purposes under the supervision of ANRAC, while recreational use remains prohibited.^[53] Morocco is significant because it is a historic production country converting part of an existing illicit supply base into a licensed one.

New Zealand. The binding referendum of 17 October 2020 rejected the Cannabis Legalisation and Control Bill by a narrow margin, and the framework was never enacted.^[54] The Medicinal Cannabis Scheme, in force since 2019, remains the only regulated channel.^[55]

International legal context

Cannabis remains under international control by virtue of the 1961 Single Convention on Narcotic Drugs^{[1][2][3]}. The convention limits production, manufacture, export, import, distribution, trade, use and possession of scheduled substances in principle to medical and scientific purposes. The international drug conventions require states to render certain conduct outside authorised channels criminal, having regard to the convention texts and the national constitutional order. The 2020 change to the international classification reduced the level of international control but did not terminate that control.

The World Health Organization's review led to changes^[4] in the international scheduling position of cannabis in 2020, but did not remove cannabis from international control.

Countries have responded to treaty tension in different ways: scientific pilots, cautious non-commercial models, constitutional reasoning, explicit acknowledgment of non-compliance or treaty procedures.

International law has therefore influenced the form and pace of reform, especially in Europe. It has not prevented national experimentation, but it contributes to fragmented and legally cautious models.

Comparative findings

7.1 Decriminalisation does not regulate supply

Reducing penalties changes the legal position of the consumer, not necessarily the producer or supplier. Where possession is legal but supply is not, the system remains dependent on home cultivation, informal transfer, tolerated supply or illicit purchase.

7.2 Legal access must be practically accessible

A legal channel cannot displace illicit supply if it is geographically limited, administratively burdensome, costly, privacy-sensitive or unable to meet demand.

7.3 Product diversity matters

Consumers distinguish between flower, resin, potency, cultivar, production method and format. A narrow regulated offer may fail to replace an established illicit market. Diversity must nevertheless be balanced against health risks and commercial incentives.

7.4 Transition is substantive policy

Licensing, construction, cultivation, testing, transport, retail systems and consumer adaptation require time. A rigid transition can create shortages, price increases and renewed illicit demand.

7.5 Licensing determines market structure

The number, scale and type of licences shape competition, concentration, accessibility, product availability and resilience. Too few licences may create shortages; uncontrolled expansion may create oversupply and promotional pressure.

7.6 Existing markets must be understood

Every jurisdiction already has consumers, products, prices, trusted suppliers and distribution practices. Regulation designed without market analysis risks operating alongside rather than replacing illicit supply.

7.7 Retail is a regulatory function

Retail is where age controls, refusal of sales, consumer information, purchase limits and local public-order responsibilities meet the consumer. Production regulation alone cannot deliver responsible access.

7.8 Public health and market displacement are connected

Quality standards and warnings protect only consumers who use the regulated channel. A public-health system must therefore also be credible and accessible enough to attract existing users.

7.9 Evaluation must be designed in advance

Meaningful evaluation requires baseline data, explicit objectives, consistent indicators, adequate comparison and sufficient time. Early results should not be treated as final evidence.

7.10 Models cannot simply be copied

Legal traditions, administrative capacity, existing markets, geography and political objectives differ. International comparison is essential, but transplantation without adaptation is unlikely to succeed.

7.11 A democratic mandate is not a legal category

Referendums and court rulings can create political and constitutional pressure, but they do not by themselves create a lawful supply chain. Slovenia's consultative referendums, Mexico's declaration of unconstitutionality and South Africa's Constitutional Court judgment all produced strong mandates that have not yet been converted into an operating market.^{[43][51][37]} The determining variable is whether a legislature subsequently adopts and commences an implementing statute.

7.12 Adoption and commencement are different dates

Several jurisdictions in this review have adopted legislation that is not yet in operation. South Africa assented to the Cannabis for Private Purposes Act on 28 May 2024, but its substantive provisions still await a commencement proclamation.^[37] Czechia adopted its personal-use reform in July 2025 with effect from 1 January 2026.^[22] Comparative tables that record only an adoption date therefore systematically overstate how much has actually changed on the ground.

7.13 Medical frameworks do not converge with adult-use frameworks

Ukraine, Denmark, Portugal, New Zealand, Morocco and Spain all regulate medical or licensed industrial cannabis while maintaining prohibition of adult-use supply. Across the jurisdictions monitored, a medical framework was never observed to develop into an adult-use framework by itself; the two are adopted through separate legislative decisions.

The Dutch experience

8.1 What tolerated retail demonstrates

The coffeeshop system demonstrates that identifiable retail outlets can separate cannabis consumers from some other illicit drug markets, apply age restrictions, operate under local conditions, provide consumer information and create accountable points of sale.

8.2 What the system did not resolve

The separation between tolerated retail and prohibited commercial supply produced persistent problems: no lawful purchasing chain, limited origin transparency, restricted product control, stock constraints, legal vulnerability and continuing dependence on illicit production.

8.3 Why the experiment matters

The controlled supply-chain experiment tests whether this structural contradiction can be replaced by regulated production and traceable distribution while retaining existing retail knowledge.

8.4 Why practical retail knowledge matters internationally

New regulatory systems often devote greater attention to cultivation than to retail. Dutch experience adds evidence about consumer demand, product substitution, hashish, staff training, age verification, local licensing, consumer information and the effects of shortages.

The Netherlands does not offer a completed model for export. It offers a long-running case study containing both transferable practices and clear warnings about partial regulation.

Outlook

9.1 Europe

Europe is unlikely to adopt one adult-use model in the near future. The more probable direction is continued differentiation: expansion of home cultivation in some countries, non-commercial associations in others, scientific pilots, limited permanent frameworks and continuing prohibition with reduced penalties elsewhere.

The next phase of European debate will focus less on legal principle and more on operational performance: lawful supply, illicit-market displacement, youth protection, regulator capacity, product standards and evaluation.

9.2 Worldwide

National commercial systems will continue to produce evidence on legal-market displacement, taxation and public health. Private-use and non-commercial systems will test whether access can function without ordinary retail. Federal systems will continue to expose conflicts between national and regional law.

Lower- and middle-income countries will increasingly face distributional questions: who receives licences, whether traditional growers can enter legal markets, where value is created and whether reform benefits communities previously affected by prohibition.

9.3 The core future question

The relevant comparative question is no longer whether a country has “legalised cannabis”. It is: what conduct was legalised, for whom, through which supply channel, under what conditions and with what measurable effects?

Priorities for the next phase

- Continue monitoring legislation, implementation, evaluations and court decisions.
- Publish comparative thematic papers on retail, associations, home cultivation, transition and evaluation.
- Document Dutch retail practice systematically, including age controls, consumer information and product categories.
- Maintain accessible primary-source reporting that distinguishes proposals, adopted law and implementation.
- Follow long-term outcomes rather than only launch announcements.
- Develop a public archive of official sources and comparative summaries.
- Produce periodic updates to this whitepaper as the European landscape changes.

Organisational basis and funding

During its first year, the Foundation developed an international knowledge network, a monitoring structure, a growing archive of primary materials and the organisational basis needed for continued public-interest work.

The Foundation has no structural source of income. Its public activities depend on donations and project-based contributions. Funding supports research, monitoring, translation, publications, international knowledge exchange, public conferences and information infrastructure.

The Foundation safeguards the independence of its public work. Donations and project-based contributions do not determine the conclusions of its research, monitoring or publications.

SECTION

Conclusion

Cannabis regulation has entered a new phase. Governments are no longer dealing only with criminal-law exceptions. They are designing systems of production, distribution, access, health protection, enforcement and evaluation.

No single model resolves every issue. Commercial markets can provide broad access but require strong controls. Non-commercial associations can limit promotional incentives but may have limited capacity. Home cultivation protects private autonomy but cannot serve every consumer. Scientific pilots produce evidence but do not themselves resolve general access. Tolerated retail can reduce some harms while leaving major problems unresolved if supply remains illegal.

The central lesson is that cannabis regulation must be assessed as a complete system. Production, distribution, retail, consumer protection, enforcement, public health and evaluation cannot be designed independently.

By monitoring official developments, comparing regulatory approaches and documenting practical experience, the Recreational Cannabis Foundation aims to contribute to a better-informed international understanding of what regulation requires in practice.

SECTION

Comparative legal status at a glance

This table is built from the same central data model as the status overview in Chapter 3. The Adult use / recreational column always shows a fixed market-model label in bold with a short legal explanation below. Market model and procedural phase are strictly separated.

Jurisdiction	Possession / private use	Home cultivation	Adult use / recreational: model and access channel	Current phase
Netherlands	No general legalisation. Possession of small quantities and coffeeshop sales tolerated under defined conditions.	Not generally legal.	Coffeeshop model Tolerated coffeeshop sales. Regulated production and supply exclusively within the closed-coffeeshop-chain experiment in ten municipalities.	Operational experiment since 7 April 2025; evaluation under way.
Germany	Permitted within statutory limits: up to 25 grams in public and 50 grams in the private residence.	Up to three plants per adult.	Non-profit association model Licensed cultivation associations may distribute cannabis exclusively to their own members. No open commercial adult-use retail.	Act in force; operational implementation and statutory evaluation under way.
Malta	Not fully legalised. Possession of up to 7 grams in public and up to 50 grams in the residence is partly decriminalised.	Up to four plants per household.	Non-profit association model Legal access through licensed Cannabis Harm Reduction Associations for registered adult members. No open retail and no access for tourists.	Operational non-commercial model.
Luxembourg	Private consumption permitted. Possession, transport and acquisition in public remain prohibited; a simplified procedure with reduced sanctions applies to quantities up to 3 grams.	Up to four plants per household.	Private use and home cultivation only No legal general sales or distribution channel.	Private-use reform in force since July 2023.
Czechia	For persons aged 21 and over, up to 100 grams in the residence and 25 grams outside the residence.	Up to three plants for personal use.	Private use and home cultivation only No operational legal commercial or association-based supply channel.	Act no. 270/2025 in force since 1 January 2026.
Switzerland	No general national legalisation. Lawful acquisition is available to participants in approved scientific pilots.	Not generally permitted. Limited home cultivation is part of the draft act but is not yet applicable national law.	Scientific pilot model Controlled sales within approved scientific pilots. A permanent national framework is being prepared through the proposed Cannabis Products Act.	Pilots operational; draft act being revised following consultation.

Jurisdiction	Possession / private use	Home cultivation	Adult use / recreational: model and access channel	Current phase
United Kingdom	Cannabis remains prohibited and is classified as Class B.	Not permitted without applicable licence.	No legal adult-use supply channel No nationally regulated adult-use model.	Reform proposals and policy advice published; no national adult-use reform adopted.
Italy	No statutory adult-use framework.	No general statutory home-cultivation model.	No legal adult-use supply channel The restrictions on hemp flower are adjacent hemp and product regulation and do not constitute adult-use reform.	No adult-use reform; restrictive direction for hemp flower.
Austria	No statutory adult-use framework.	No generally permitted adult-use home-cultivation model.	No legal adult-use supply channel The proceedings on low-THC hemp flower concerned application of the Tobacco Excise Act and do not constitute adult-use reform.	No adult-use reform; adjacent fiscal and distribution-law uncertainty.
Canada	Nationally permitted within the federal statutory framework.	Federally up to four plants per household, subject to provincial, territorial and local restrictions.	Regulated commercial retail Production federally regulated; retail and distribution organised by provinces and territories.	Operational national commercial model since 17 October 2018.
Uruguay	Registered access for adult residents within the national system.	Registered home cultivation.	Pharmacy, club and home-cultivation model Three regulated access routes: pharmacies, membership clubs and registered home cultivation.	Operational national model.
United States	Varies by state.	Varies by state.	Mixed federal or subnational model Operational adult-use regimes in multiple states while the federal prohibition remains in force.	Operational state-level markets; federal rescheduling procedure not concluded at the cut-off date.
South Africa	Private use and possession by adults constitutionally protected since the 2018 ruling.	Private cultivation for personal use protected.	Private use and home cultivation only No general legal buying or selling channel.	Constitutional protection operational. Cannabis for Private Purposes Act no. 7 of 2024 adopted and signed, but formal commencement to be proclaimed. Draft implementing regulations published but not yet final.

Jurisdiction	Possession / private use	Home cultivation	Adult use / recreational: model and access channel	Current phase
Thailand	No statutory adult-use model.	No general right to private cultivation for adult use. Commercial activities are subject to licensing and control.	No legal adult-use supply channel Cannabis flower falls under the controlled-herb framework. Sale, processing, export and commercial activities are regulated; medical use remains available to authorised practitioners.	Restrictive reorientation towards controlled and medical use.
Australia	Varies by state and territory. The Australian Capital Territory provides exceptions for limited quantities by adults.	In the ACT up to two plants per person and four per household under the local exception. No national home-cultivation right.	Mixed federal or subnational model No national adult-use retail market. Regional variation and reform proposals.	Regional variation; no national operational adult-use supply model.
Greece	No adult-use legalisation.	No general adult-use home-cultivation model.	No legal adult-use supply channel The 2026 prohibition on retail sales and distribution of dried cannabis flower is adjacent product and hemp regulation and does not constitute adult-use reform.	Restrictive product framework; no adult-use market.
Slovenia	Minor offence	Not permitted	No adult-use market Consultative referendum approved personal cultivation; no statute yet	Advisory mandate
Ukraine	Criminal offence	Not permitted	Medical channel only Licensed medical, industrial and scientific circulation since 2024	Medical implementation
Denmark	Criminal offence	Not permitted	Medical channel only Permanent prescription-only medical cannabis scheme	No adult-use reform
Belgium	Criminal offence, low priority	Not permitted	No adult-use market Prosecution policy tolerates small adult quantities in practice	No reform
Spain	Administrative offence in public	Permitted in private, unregulated	No adult-use market Private consumption not criminalised; associations lack a statutory basis	Legal grey zone
Portugal	Decriminalised	Not permitted	Medical channel only Decriminalisation since 2001; medical framework since 2019	No adult-use reform
Mexico	Not criminal for personal use	Permitted by judicial permit	No adult-use market Court-ordered permits without an implementing statute	Judicial route only
Colombia	Personal dose protected	Permitted for personal use	No adult-use market Medical and industrial licensing only; adult-use reform not adopted	Reform blocked
Morocco	Criminal offence	Licensed cultivation zones only	No adult-use market Licensed medical, pharmaceutical and industrial production under ANRAC	Licensed supply build-out

Jurisdiction	Possession / private use	Home cultivation	Adult use / recreational: model and access channel	Current phase
New Zealand	Criminal offence	Not permitted	Medical channel only Medicinal Cannabis Scheme; 2020 adult-use referendum rejected	No adult-use reform

SECTION

Timeline of monitored developments

Chronological overview of the substantive legal, regulatory, research and implementation developments monitored during the Foundation's first year.

Date	Jurisdiction	Development	Status	Next step	Source
10 December 2013	Uruguay	Ley 19.172 created the first national state-regulated adult-use market	In force	IRCCA licensing and continuous evaluation	[[n:uy-ircca-programme]]
17 October 2018	Canada	Cannabis Act (S.C. 2018, c. 16) entered into force	In force	Follow-up to the 2024 legislative review	[[n:ca-cannabis-act]]
17 October 2020	New Zealand	Referendum rejected the Cannabis Legalisation and Control Bill	Not adopted	Medicinal scheme remains the only regulated channel	[[n:nz-cannabis-referendum]]
28 June 2021	Mexico	Supreme Court issued a general declaration of unconstitutionality on adult personal use	Judgment in force	Implementing legislation still absent	[[n:mx-scjn-declaration]]
14 December 2021	Malta	Authority on the Responsible Use of Cannabis Act (Cap. 620) adopted	In force	ARUC licensing of harm-reduction associations	[[n:mt-arucm-framework]]
1 January 2022	Denmark	Medical cannabis pilot programme made permanent	In force	No adult-use framework under consideration	[[n:dk-medical-cannabis-scheme]]
18 July 2023	Luxembourg	Law of 18 July 2023 legalised private cultivation and home consumption	In force	Supply channel still to be designed	[[n:lu-private-cultivation-law]]
1 April 2024	Germany	Konsumcannabisgesetz entered into force	In force	Interim evaluations and possible amendment	[[n:de-kcang-consolidated]]
28 May 2024	South Africa	Cannabis for Private Purposes Act 7 of 2024 assented to	Adopted, not yet in operation	Commencement proclamation required	[[n:za-cppa]]
9 June 2024	Slovenia	Consultative referendums approved medical cannabis and cultivation for personal use	Advisory result	Implementing legislation pending	[[n:si-referendum-2024]]

Date	Jurisdiction	Development	Status	Next step	Source
16 August 2024	Ukraine	Law No. 3528-IX on medical, industrial and scientific cannabis entered into force	In force	Licensing and supply build-out	[[n:ua-medical-cannabis-law]]
21 November 2024	Austria	VwGH (Ro 2024/16/0006) brought low-THC hemp flowers within tobacco excise	Judgment in force	Ministerial implementation and legal uncertainty	[[n:at-vwgh-hemp-tobacco]]
21 March 2025	Netherlands	Growers' waiting list extended until 7 April 2027	Adopted and in force	Available for replacement of designated growers	[[n:nl-growers-waitlist-extension]]
29 March 2025	Netherlands	Government confirmed launch conditions for the controlled supply-chain experiment	Final implementation preparation	Experimental phase began 7 April 2025	[[n:nl-experiment-implementation]]
7 April 2025	Netherlands	Experimental phase formally started	Operational	Four-year evaluation period, extendable by 18 months	[[n:nl-experiment-implementation]]
10 April 2025	Germany	Coalition agreement retained the 2024 cannabis framework	Political continuity confirmed	Statutory evaluations	[[n:de-ckang-consolidated]]
11 April 2025	Italy	Emergency measure restricted hemp flowers and derivatives	Entered into force through emergency decree	Parliamentary conversion and legal challenges	[[n:it-hemp-emergency-decree]]
7 May 2025	Italy	Administrative guidance clarified THC and driving rules	Guidance in effect	Application by police and judicial authorities	[[n:it-thc-driving-circular]]
28 May 2025	United Kingdom	London Drugs Commission published final reform report	Recommendation only	No national reform adopted	[[n:uk-london-drugs-commission]]
28 May 2025	United States	National Drug Threat Assessment published	Federal assessment	Continued federal enforcement and monitoring	[[n:us-dea-ndta-2025]]
30 May 2025	Czechia	Chamber of Deputies approved personal-use reform	Legislative process	Senate approval and presidential signature	[[n:cz-chamber-approval]]

Date	Jurisdiction	Development	Status	Next step	Source
June 2025	Spain	Medical access remained limited to standardised hospital-dispensed preparations	No reform	Royal decree implementation still pending	[[n:es-a-emp-medical]]
June 2025	Portugal	Decriminalisation and the medical framework continued without adult-use reform	No reform	Monitoring of EU-level developments	[[n:pt-medical-decree]]
June 2025	Belgium	Possession remained an offence with low prosecution priority for small adult quantities	No reform	No legislative proposal tabled	[[n:be-drug-law]]
June 2025	Morocco	Licensed cultivation for medical, pharmaceutical and industrial use continued to expand under ANRAC	In force	Recreational use remains prohibited	[[n:ma-law-13-21]]
June 2025	Colombia	Constitutional amendment for an adult-use market again failed to pass Congress	Not adopted	Personal dose remains constitutionally protected	[[n:co-constitutional-framework]]
5 June 2025	European Union	European Drug Report 2025 published	Official annual monitoring report	Continued data collection	[[n:eud-a-report-2025]]
25 June 2025	Thailand	Cannabis flower reclassified as a controlled herb	Formally in force	Transitional implementation	[[n:th-cannabis-flower-notification]]
26 June 2025	United Kingdom	First CBD isolate novel-food safety assessment published	Scientific safety opinion	Ministerial authorisation process	[[n:uk-fsa-cbd-isolate]]
27 June 2025	Thailand	Enforcement of key requirements temporarily delayed	Transitional period	Final prescription procedure and GACP implementation	[[n:th-transitional-enforcement]]
3 July 2025	Czechia	Senate approved personal-use reform	Adopted subject to final formalities	Entry into force 1 January 2026	[[n:cz-senate-approval]]
9 July 2025	European Union	Cannabis-flower herbal-monograph procedure discontinued	Draft public statement issued	Consultation closed 31 October 2025	[[n:em-a-cannabis-flower-discontinuation]]
14 July 2025	Germany	Draft restrictions on medical cannabis flower published	Draft legislation	Parliamentary process	[[n:de-medical-cannabis-tightening-draft]]

Date	Jurisdiction	Development	Status	Next step	Source
15 July 2025	European Union	Whole-hemp-plant clarification proposed under agricultural rules	Legislative proposal	Consideration by Parliament and Council	[[n:ec-hemp-ca-p-proposal]]
29 August 2025	Switzerland	Consultation on the Cannabis Products Act opened	Public consultation	Consultation closed 8 May 2026	[[n:ch-cpa-consultation]]
September 2025	European Union	Call for evidence on the new EU Drugs Strategy launched	Non-legislative consultation	Adoption of strategy and action plan	[[n:ec-drugs-strategy-preparatory]]
September 2025	European Pharmacopoeia	Revised Cannabis flos quality monograph entered consultation	Technical consultation	Consultation closed 31 December 2025	[[n:edqm-cannabis-flos-monograph]]
September 2025	Victoria	Parliamentary process on personal adult-use bill remained unresolved	Committee report completed	Government and parliamentary consideration	[[n:au-vic-cannabis-report]]
18 September 2025	New South Wales	Government response to cannabis inquiry published	General reform rejected	Possible consideration through wider drug-policy process	[[n:au-nsw-drug-summit-response]]
October 2025	Germany	First interim evaluation of partial legalisation published	Interim evaluation	Second evaluation due in 2026	[[n:de-kcang-consolidated]]
October 2025	California / New York	State authorities addressed local implementation conflicts	Administrative and legal intervention	Continued implementation of state retail frameworks	[[n:us-state-implementation]]
1 December 2025	Switzerland	Consultation on the Cannabis Products Act closed	Adopted (consultation phase)	Processing of results and bill drafting	[[n:ch-cpa-consultation]]
4 December 2025	European Union	Commission proposal for a new EU drugs strategy and drug-trafficking action plan	Proposed	Council decisions 5 March and 4 June 2026	[[n:ec-drugs-strategy-preparatory]]
January 2026	Netherlands	2025 THC Monitor published	Annual research report	Continued monitoring during the experiment	[[n:nl-thc-monitor]]
1 January 2026	Czechia	Personal-use reform entered into force	Operational	Monitoring and enforcement guidance	[[n:cz-senate-approval]]

Date	Jurisdiction	Development	Status	Next step	Source
February 2026	European Union	New CBD safety and possession materials published	Scientific and comparative guidance	Further regulatory assessment	[[n:efsa-cbd-novel-food]]
February 2026	South Africa	Implementing regulations under the Cannabis for Private Purposes Act remained unpublished	Adopted, not yet in operation	Commencement proclamation and regulations	[[n:za-cppa]]
March–May 2026	Switzerland	Pilot projects published measurable interim outcomes	Interim evaluation	Continued pilots and legislative process	[[n:ch-pilot-programmes]]
April 2026	Germany	Second interim evaluation of partial legalisation published	Interim evaluation	Continued statutory evaluation	[[n:de-kcang-consolidated]]
21 May 2026	Greece	Law 5302/2026 adopted: cannabis-flower restrictions and licensing framework (Government Gazette A' 78)	Adopted and in force	Implementing rules	[[n:gr-law-5302-2026]]
25 May 2026	South Africa	Private-use framework still awaiting a commencement proclamation	Adopted, not yet in operation	Proclamation of the substantive provisions	[[n:za-cppa]]
9 June 2026	European Union	European Drug Report 2026 published	Official annual monitoring report	Continued data collection	[[n:eud-a-report-2026]]
16 June 2026	Virginia	Virginia announced a licensed adult-use retail framework	Adopted	Market launch planned for 1 July 2027	[[n:us-v-a-retail-law]]
24 June 2026	Switzerland	Consultation-results report published	Draft under revision	Parliamentary consideration	[[n:ch-cpa-consultation-results]]
29 June – 15 July 2026	United States	DEA hearings on the proposed rescheduling of cannabis to Schedule III	Federal proceedings ongoing	DEA final decision and federal review	[[n:us-dea-nprm-rescheduling]]
18 July 2026	Germany	Further legislative step on medical cannabis flower	Legislative process ongoing	Parliamentary consideration	[[n:de-medical-cannabis-tightening-draft]]

SECTION

Appendix A. Developments monitored during the first year

This appendix provides further detail on the substantive developments listed in the preceding timeline. It covers the Foundation's public monitoring from March 2025 through 20 July 2026.

29 March 2025 — The Dutch experiment prepared to enter its operational phase

The government confirmed that the experimental phase would begin on 7 April 2025. Seven licensed growers were expected to supply participating coffeeshops. The official material acknowledged that regulated herbal cannabis was available in sufficient quantities, but that the quality, character and diversity of regulated hashish did not yet match the established market. Five growers were subject to a statutory start requirement: failure to begin production by 6 May 2025 could lead to withdrawal of their designation. The experiment was fixed in legislation for at least four years, with the possibility of an extension of up to eighteen months.

Comparative significance. The update identified product diversity and production capacity as implementation conditions, not secondary commercial concerns. It also showed that a regulated market cannot be assessed separately from the products consumers already use.

29 March 2025 — The Dutch growers' waiting list was extended until 2027

A ministerial amendment extended the waiting list of eligible cultivation applicants until 7 April 2027. Keeping it active allowed the government to replace a designated grower without restarting the full selection and lottery procedure. The two-year extension was shorter than an earlier four-year proposal because a grower admitted late in the experiment would have insufficient time to develop a viable operation.

Comparative significance. This was a concrete example of regulatory resilience. A controlled market requires contingency arrangements for the loss or failure of licensed suppliers.

7 April 2025 — The Dutch controlled supply-chain experiment formally started

Participating coffeeshops began operating within the experimental chain on 7 April 2025. Because regulated hashish remained insufficient in volume and diversity, enforcement against the continued sale of tolerated hashish was temporarily deferred. The initial deadline was subsequently extended to 1 September 2025. Herbal cannabis supply was considered more advanced than hashish supply.

Comparative significance. The start demonstrated why transition arrangements must be product-specific. A system may have enough cannabis in aggregate while still failing to replace an important product category.

10 April 2025 — Germany's new coalition retained the partial legalisation framework

The coalition agreement did not announce repeal of the 2024 Cannabis Act. Adults could continue to possess up to 25 grams in public and 50 grams at home, cultivate up to three plants and participate in non-commercial cultivation associations subject to statutory conditions. Associations remained limited to 500 members and consumption on their premises remained prohibited. The agreement maintained the legally required evaluation process.

Comparative significance. The update distinguished political continuity from completion of reform. Germany had legalised defined private and collective conduct, but had not created ordinary adult retail access.

11 April 2025 — Italy moved to prohibit the commercial use of hemp flowers (Decree-Law 48/2025)

Official basis: Decree-Law 48/2025, subsequently converted into Law 80/2025[[n:it-hemp-emergency-decree]]. An emergency security measure sought to prohibit the import, processing, possession, transfer, distribution and sale of hemp inflorescences and products containing them, irrespective of low THC content. Legal objections concerned proportionality, legal certainty, EU free-movement rules and the distinction between industrial hemp and narcotic cannabis.

Comparative significance. The Italian case showed how adult-use, industrial hemp and low-THC consumer markets can become entangled even where intoxicating cannabis is not being legalised.

Legal criticism focused on the principle of legal certainty under the Italian Constitution, the distinction between industrial hemp and narcotic cannabis, the free movement of lawful agricultural products under European Union law, proportionality of a blanket prohibition irrespective of actual THC content, and compatibility with the international exclusion of industrial hemp cultivated for non-drug purposes.

The measure was immediately effective as an emergency decree but required parliamentary conversion within 60 days, creating a period in which businesses had to comply before the final parliamentary position was known. The Italian dossier shows that regulatory uncertainty itself can cause economic disruption and how a restriction presented as a drug-control measure can affect agriculture, processing, retail and cross-border trade simultaneously.

7 May 2025 — Italy clarified the application of new drug-driving rules

A joint administrative circular clarified that the presence of THC in a biological sample should not by itself establish the offence of driving after drug use. Authorities were instructed to demonstrate a relevant temporal relationship between consumption and driving.

The guidance also addressed people receiving authorised treatment, including patients prescribed medical cannabis. Their legal position could not be assessed in the same way as unauthorised cannabis consumption.

Comparative significance. Cannabis-related road safety is increasingly divided between two approaches: sanctioning the presence of THC and sanctioning recent use or actual impairment. This distinction is particularly important for medical patients and for jurisdictions in which cannabis use is no longer generally prohibited.

21 November 2024 — Austria brought low-THC cannabis flowers within tobacco taxation (VwGH Ro 2024/16/0006)

Official basis: Verwaltungsgerichtshof (VwGH) judgment Ro 2024/16/0006 of 21 November 2024[[n:at-vwgh-hemp-tobacco]]. An Austrian high-court ruling held that low-THC hemp flowers fell within the Tobacco Tax Act and were subject to a 34 per cent excise duty.

The judgment directly concerned tax classification. Its practical effect was broader because taxed tobacco products are normally distributed through Austria's protected network of licensed tobacco retailers. Authorities and market participants consequently interpreted the ruling as excluding specialist CBD shops from the sale of taxed hemp flowers.

Legal commentators disputed whether the judgment itself required that conclusion. Nevertheless, enforcement of the restrictive interpretation reportedly contributed to closures and uncertainty among existing businesses.

Comparative significance. The Austrian example shows how administrative practice may extend the practical effect of a judgment beyond the precise legal question decided. It also demonstrates that taxation and distribution law can determine cannabis-related market access as decisively as drug legislation.

28 May 2025 — The United States federal threat assessment continued to treat cannabis as an illicit-market issue

The 2025 National Drug Threat Assessment described marijuana as the most commonly used federally illicit drug. It linked excess production in legal states to diversion into jurisdictions where supply remained prohibited.[32]

The assessment also identified illicit imports, the involvement of transnational criminal networks in large-scale unauthorised cultivation, rising potency in parts of the illicit market and growing use of social media and messaging services for distribution. Some illicit flower was reported in the 25–30 per cent THC range.

Adult-use cannabis was legalised or decriminalised in 24 states and the District of Columbia during the reporting period, while federal prohibition remained in force.

Comparative significance. State legalisation does not automatically remove illicit production or interstate diversion. The report also demonstrates that federal authorities may classify cannabis activity as illicit even where related conduct is authorised under state law.

30 May – 3 July 2025 — Czechia moved from parliamentary approval to final adoption

The reform permitted adults over 21 to cultivate up to three cannabis plants, possess up to 100 grams of dried cannabis at home and possess up to 25 grams in public.[19][20]

Possession above the lawful limits but up to 200 grams would be treated administratively, while quantities above 200 grams would remain subject to criminal law.

The Senate approved the amendment on 3 July 2025 with 47 votes in favour and no votes against among the votes cast. Presidential signature and official publication followed before the reform entered into force on 1 January 2026.

The law did not authorise ordinary commercial sales. Discussion of a wider regulated market therefore remained separate from the adopted personal-use provisions.

Comparative significance. Czechia demonstrates the use of graduated legal thresholds rather than a single division between lawful and criminal possession. It is a substantial personal-use reform, but not a complete regulated supply model.

28 May 2025 — The London Drugs Commission recommended a health-led reform model

The Commission recommended moving cannabis outside the main criminal-drug framework for personal possession while retaining offences for trafficking and commercial production. It also recommended consideration of limited home cultivation, ending the use of cannabis smell as the sole basis for stop and search, improving medical access, expanding treatment and public education, and conducting a five-year impact assessment.

Comparative significance. The report showed how a major city can develop an evidence-based reform proposal even where legislative authority remains national.

5 June 2025 — The European Drug Report documented a diverse and potent cannabis market

The 2025 European report estimated that around 8 per cent of EU adults aged 18-64 had used cannabis in the previous year.[5] Average THC content was reported at approximately 23 per cent for resin and 11 per cent for herbal cannabis. The market increasingly included oils, edibles and vaping products.

Comparative significance. The data reinforced that cannabis regulation concerns a changing product market, not a single traditional substance category.

25–27 June 2025 — Thailand reoriented cannabis flower towards medical control

A ministerial notification classified cannabis flower as a controlled herb and required medical justification for use. The measure restricted advertising, online sales, vending machines and consumption at retail premises, introduced traceability and cultivation standards and prohibited sales to persons under 20.

Comparative significance. Thailand illustrated the regulatory instability that can follow rapid market opening without an agreed long-term model. The reversal also showed that formal entry into force and operational enforcement can occur on different dates.

27 June 2025 — Enforcement of Thailand's new cannabis rules was temporarily delayed

Although the ministerial notification entered into force on 26 June 2025, the Ministry of Public Health subsequently announced a transitional period before full enforcement of several key requirements. Enforcement of the medical-prescription requirement and Thai GACP certification was expected to be delayed for approximately 30 to 60 days, and the precise adjustment period could differ between provinces.

During the transition, existing cannabis venues could continue operating under the earlier framework, provided that they complied with reporting obligations concerning the origin and sale of cannabis. Edibles, gummies and the in-house mixing of cannabis products remained prohibited. A further implementation problem concerned the medical-prescription form: the Ministry was still consulting the relevant medical professional bodies, and the final prescription procedure had not yet been completed. The new rules also envisaged criminal penalties for non-medical use once enforcement became operational, including a possible prison sentence of up to one year or a fine of up to THB 20,000.

Comparative significance. The Thai case demonstrates that publication, legal entry into force and practical enforcement are three separate stages. It also shows the risks of introducing a medical-access requirement before the administrative instruments needed to operate that requirement are available.

26 June 2025 — The United Kingdom published its first CBD isolate novel-food safety assessment

The assessment applied to highly purified CBD isolate used in food supplements, oils, beverages and bakery products. It did not establish a general safety conclusion for full-spectrum or broad-spectrum cannabis extracts.[25]

The assessment proposed a maximum daily intake of 10 mg CBD for healthy adults and maximum THC exposure of 0.007 mg per kilogram of body weight per day. The toxicological review considered potential liver and reproductive-health effects.

The opinion was a scientific safety assessment rather than a marketing authorisation. Final authorisation would still require a ministerial decision, and only products included in the relevant application process could proceed.

Comparative significance. CBD regulation is developing product by product. Purity, accompanying cannabinoids, intended use and exposure levels may produce different regulatory outcomes.

14 July 2025 and 18 July 2026 — Germany advanced tighter controls on medical cannabis flower

The proposal followed a marked increase in imports of medical cannabis flower after cannabis was removed from Germany's narcotics framework in April 2024. According to the government's explanation, this increase was not matched by a corresponding increase in prescriptions reimbursed through statutory health insurance, suggesting that much of the growth was associated with privately paid prescriptions.[16]

Particular concern focused on telemedicine platforms issuing prescriptions without an in-person examination and on subsequent delivery through mail-order pharmacies.

The proposed restrictions concerned cannabis flower specifically and included a requirement for direct medical contact and restrictions on mail-order delivery to end users. A further legislative step followed in July 2026.

Comparative significance. Where ordinary adult-use access remains limited, demand may shift towards a more accessible medical channel. Regulatory pressure is then transferred to prescribing and pharmacy law.

15 July 2025 — The European Commission proposed recognising use of the whole hemp plant under agricultural rules

A proposed amendment to the Common Agricultural Policy framework clarified that all parts of an eligible hemp variety, including flowers and leaves, could be used in products receiving agricultural support, provided the variety was listed in the common catalogue and remained within the legal THC limit.

Comparative significance. The proposal separated agricultural eligibility from downstream product legality. Whole-plant recognition does not by itself authorise every consumer use.

9 July – 31 October 2025 — The European medicines committee discontinued work on a cannabis-flower monograph

The committee concluded that the available evidence did not support an EU herbal monograph for *Cannabis sativa* flowering tops under either traditional-use or well-established-use pathways.

Comparative significance. The decision did not prohibit medical cannabis flower. It showed the limits of fitting existing cannabis practice into the EU herbal-medicines monograph system.

29 June – 15 July 2026 — The US DEA held hearings on the proposed rescheduling of cannabis to Schedule III

Official basis: DEA hearing, 29 June – 15 July 2026, on the proposed transfer of cannabis from Schedule I to Schedule III[[n:us-dea-nprm-rescheduling]]. The proposed transfer of cannabis from Schedule I to Schedule III remained under federal administrative review. Rescheduling would recognise accepted medical use and could remove the federal tax restriction on state-legal cannabis businesses, but would not legalise adult-use cannabis federally.

Comparative significance. The update emphasised that rescheduling and legalisation are legally different reforms, despite frequent public confusion between them.

What Schedule III would and would not change. Transferring cannabis from Schedule I to Schedule III would recognise accepted medical use under federal law and reduce the formal assessment of abuse and dependence risk. It could also have significant tax consequences: Section 280E of the Internal Revenue Code prevents businesses trafficking in Schedule I or II substances from deducting ordinary business expenses, so placement in Schedule III could remove this restriction for state-legal cannabis businesses. Rescheduling could also reduce some barriers to medical and scientific research. It would not legalise adult-use cannabis federally, automatically authorise interstate trade, replace state licensing systems, resolve every conflict between state and federal law, or convert state-legal adult-use products into federally approved medicines. Rescheduling concerns the federal classification of cannabis; legalisation concerns whether production, possession and sale are authorised. The two processes should not be treated as interchangeable.

29 August – 1 December 2025 — Switzerland consulted on a national Cannabis Products Act

Official basis: public consultation of the Federal Department of Home Affairs, 29 August – 1 December 2025[[n:ch-cpa-consultation]]. The draft proposed licensed cultivation and manufacturing, sales through authorised outlets, private cultivation of up to three female plants per adult, mandatory product testing, neutral packaging, health warnings and restrictions on advertising and promotion.[21][22]

The proposed excise duty would be linked to THC content, with revenues intended for prevention and public-health measures. The framework also provided for continued monitoring of consumption and market developments.

The consultation involved cantons, political parties, professional organisations, public-health bodies, researchers, civil-society organisations and market participants. It closed on 8 May 2026. The results were published on 24 June 2026, after which the draft entered a revision phase before parliamentary consideration.

Comparative significance. Switzerland is designing a low-commercialisation regulated market in which licensing, taxation, product rules and advertising controls are explicitly connected to public-health objectives.

4 December 2025, 5 March 2026 and 4 June 2026 — The European Union adopted a new drugs strategy and drug-trafficking action plan

Official basis: Commission proposal COM(2025) of 4 December 2025 and Council decisions of 5 March 2026 and 4 June 2026[[n:ec-drugs-strategy-preparatory]]. The proposed framework combined preparedness, public health, harm reduction, community engagement, security and international cooperation. A separate action plan focused on trafficking routes, synthetic production, precursors, information exchange and operational cooperation.

Comparative significance. The process confirmed that EU drugs policy remains broader than cannabis reform. Cannabis regulation develops within a strategic framework still strongly shaped by organised crime and high-risk drug markets.

The Commission's preparatory document described a worsening European drugs landscape characterised by record seizures at major ports; criminal infiltration of legitimate economic structures; use of artificial intelligence and digital technologies by criminal networks; corruption and violence offered as criminal services; closer links between European and Latin American trafficking networks; increasingly complex patterns of polydrug use; growing cocaine use; the emergence of highly potent synthetic opioids such as nitazenes; and increased risks of drug-induced deaths and mental-health harm. The proposed strategy was intended to combine preparedness and early warning, evidence-based prevention and treatment, harm reduction, mental-health responses, community engagement, public-health resilience, protection against organised crime, and international cooperation. A separate action plan against drug trafficking was intended to address maritime, land and air trafficking routes; synthetic-drug production; precursor chemicals; dismantling of production sites; cooperation between police, customs and judicial authorities; and violence, youth recruitment and environmental damage associated with drug markets. The initiative was non-legislative: it would guide European and national priorities but would not itself amend cannabis law or create an EU adult-use framework. European cannabis reform is therefore developing within a drugs-policy environment still dominated by organised crime, synthetic drugs, port security and high-risk substance use.

18 March – 18 September 2025 — Australian states produced sharply different policy responses

A Victorian parliamentary report examined a bill that would have allowed adults to possess up to 50 grams and cultivate two plants per person. In New South Wales, the government rejected legalisation and decriminalisation, retained the cautioning scheme for small possession cases and deferred broader reform.

Comparative significance. The contrast demonstrated how federal systems can generate materially different policy directions between neighbouring states.

Different reform directions in Victoria and New South Wales. In Victoria, a parliamentary committee examined a bill proposing possession of up to 50 grams of dried cannabis; consumption in private; home cultivation of up to two plants per adult; a household maximum of four plants; continued prohibition of commercial sale; and continued enforcement against trafficking and quantities above the legal limits. The proposal therefore concerned personal adult use rather than a commercial market. In New South Wales, the government's formal response rejected general legalisation and decriminalisation. It retained the Cannabis Cautioning Scheme for eligible small-possession cases and stated that future reform would be considered in light of the state's wider drug-policy process. The two processes show that regional governments operating under the same federal framework can reach very different conclusions about personal use, enforcement and reform.

September 2025 — A European cannabis-flower quality monograph entered consultation

A revision of the European Pharmacopoeia monograph addressed specifications for THC and CBD, pesticides, heavy metals, microbiological contamination, moisture and analytical methods.

Comparative significance. The development showed the gradual standardisation of cannabis quality even where adult-use laws remain nationally fragmented.

The proposed revision concerned European quality standards for cannabis flower and included more precise specifications for THC and CBD content; stricter limits for pesticides; stricter limits for heavy metals; microbiological contamination requirements; refined moisture specifications for stability during storage; and updated analytical methods for cannabinoid identification and quantification. The consultation was coordinated within the European Pharmacopoeia system and was open until 31 December 2025. European adult-use law remains fragmented, but technical quality requirements for cannabis are becoming more standardised — standards that may affect producers and laboratories beyond the medical market because they shape accepted testing methods and quality expectations.

🕒 **October 2025 and April 2026 — Germany published staged evaluations of partial legalisation (Bundestagsdrucksache 21/3061)**

Official basis: Bundestagsdrucksache 21/3061 and the official evaluation reports of the Federal Ministry of Health[[n:de-kcang-consolidated]]. The first interim evaluation examined early implementation, consumption restrictions, youth protection, possession limits and association distribution. The second evaluation reported a mixed picture. It found no simple basis for describing the reform as either a clear success or failure and stressed the limitations of short-term data.

Comparative significance. The German process reinforced that evaluation should distinguish transitional effects from mature outcomes and should not reduce a complex reform to one indicator.

🕒 **October 2025 — California and New York addressed local implementation conflicts**

California reaffirmed the public purposes of its legal framework while balancing symbolic measures with the operational needs of a mature market. In New York, state action overrode local measures in two municipalities that had blocked lawful cannabis retail beyond the powers provided by state law.

Comparative significance. These developments showed that legalisation at a higher level does not guarantee practical access where local zoning, permitting or political resistance can prevent retail operation.

🕒 **January 2026 — Dutch testing documented potency and price differences (2025 THC Monitor)**

The annual monitor compared cannabis and hashish products purchased from coffeeshops. It examined THC and CBD content, prices and differences between regulated and tolerated products during the transition to the controlled supply experiment.

Comparative significance. The monitor underlined that market substitution depends on measurable product and price characteristics, not only on legal status.

🕒 **1 January 2026 — The Czech personal-use reform entered into force**

The adopted thresholds became operational: adults over 21 could cultivate up to three cannabis plants and possess up to 100 grams at home and 25 grams in public. The reform did not authorise ordinary commercial sales.

Comparative significance. The entry into force made Czechia a significant European case of legal private conduct combined with continued restrictions on supply.

🕒 **February 2026 — European bodies published new CBD and possession material**

A provisional European food-safety assessment proposed a safe intake approach for CBD novel foods, while a separate European overview mapped penalties for cannabis possession for personal use across jurisdictions.

Comparative significance. The European cannabis landscape is shaped simultaneously by product regulation and national criminal law; neither can be analysed in isolation.

🕒 March–May 2026 — Swiss pilot projects began producing measurable outcomes

Interim results from Basel and Lausanne, together with national reporting across pilot projects, described changes in purchasing behaviour, consumption and reliance on illicit supply among registered participants. The Lausanne report indicated reduced consumption and less use of the illegal market.

Comparative significance. The pilots began to replace hypothetical debate with evidence about how regulated access changes behaviour under different distribution models.

🕒 25 May 2026 — South Africa: private legality codified, commencement to be proclaimed

Official basis: Cannabis for Private Purposes Act 7 of 2024 — commencement to be proclaimed; draft implementing rules February 2026[[n:za-cppa]]. The Cannabis for Private Purposes Act had formalised adult private possession and cultivation following the Constitutional Court judgment, but implementing regulations remained necessary. Draft regulations addressed quantities, private places, cultivation and procedural matters. General commercial buying and selling was not legalised.

Comparative significance. South Africa remained a clear example of constitutional private-use reform without a comprehensive lawful supply system.

🕒 21 May 2026 — Greece adopted restrictions on cannabis flower and a licensing framework (Law 5302/2026, Government Gazette A' 78)

Official basis: Law 5302/2026, Government Gazette A' 78, 21 May 2026[[n:gr-law-5302-2026]]. Following consultation, Greece adopted a framework restricting cannabis flower and introducing licensing controls. The measure was relevant to low-THC and adjacent cannabis-product markets rather than creating adult-use access.

Comparative significance. The development illustrated how product form can determine legal treatment even where THC content is low.

🕒 9 June 2026 — The European Drug Report 2026 identified further cannabis-market change

The 2026 report continued to describe cannabis as Europe's most commonly used illicit drug and examined increasingly diverse products, potency, treatment demand, production and policy experimentation.

Comparative significance. The annual reporting confirmed the need to analyse cannabis-specific regulation without separating it from the wider European drugs environment.

🕒 24 June 2026 — Switzerland published the detailed results of its national consultation

The consultation report showed broad engagement with the proposed Cannabis Products Act. Respondents addressed the basic decision to regulate, the public-health model, division of powers, private cultivation, licensed outlets, online access, taxation, advertising, product limits, enforcement and the relationship with pilot projects.

Comparative significance. This was an important procedural milestone because it made the areas of agreement and conflict in a proposed European national market publicly visible.

📍 16 June 2026 — Virginia announced a licensed adult-use retail framework (market launch planned for 1 July 2027)

Official basis: official announcement of 16 June 2026; planned market launch 1 July 2027[[n:us-va-retail-law]]. Virginia moved from legal possession and home cultivation towards a licensed adult-use retail system. The measure addressed the gap created when personal conduct is legalised before lawful sales exist.

Comparative significance. The development offered a direct example of a jurisdiction completing the second stage of reform: moving from private legality to regulated supply.

Taken together, these developments show the actual substance of the Foundation's monitoring work. The first year covered not only national “legalisation” announcements, but also replacement mechanisms for growers, temporary enforcement decisions, quality monographs, tax classifications, medical-channel restrictions, food-safety assessments, pilot outcomes, evaluation methodology, local implementation conflicts and the procedural stages between consultation and binding law.

SECTION

Appendix B. Source map by analytical theme

Prevalence, harms and European market — EUDA European Drug Reports 2025 and 2026; EUDA Cannabis Policy Hub.

International legal obligations — 1961, 1971 and 1988 UN conventions; WHO ECDD reviews; EUDA treaty FAQ.

Tolerated retail and regulated supply — Dutch experiment legislation, official guidance, timeline and parliamentary progress letters.

Private cultivation and associations — Germany KCanG and evaluations; Malta legislation and licensing guidance; Luxembourg 2023 Act; Czech Act 270/2025.

Pilot projects and national proposals — Swiss pilot information, draft CanPG, consultation and consultation-results report.

National commercial regulation — Canada Cannabis Act and legislative review; Uruguay Law 19.172 and IRCCA market reports.

Federal or regional fragmentation — US federal rescheduling record; Australian state and territory documents.

Private-use reform without full supply — South African Constitutional Court, 2024 Act and 2026 draft regulations.

Rapid market change and regulatory reversal — Thai ministerial notification and implementation materials.

SECTION

Appendix C. References and primary sources

The references below identify the primary or institutional sources used for the factual statements in this paper. Direct document links, formal titles and document numbers should be used wherever available. General institutional homepages are included only where no stable document-specific link was available at the time of publication. All URLs were accessed on 20 July 2026.

International conventions and international organisations

[1] United Nations

Single Convention on Narcotic Drugs, as amended by the 1972 Protocol

1961/1972 · EN

https://www.unodc.org/pdf/convention_1961_en.pdf

[2] United Nations

Convention on Psychotropic Substances

1971 · EN

https://www.unodc.org/pdf/convention_1971_en.pdf

[3] United Nations

Convention against Illicit Traffic in Narcotic Drugs and Psychotropic Substances

1988 · EN

https://www.unodc.org/pdf/convention_1988_en.pdf

[4] World Health Organization

41st Expert Committee on Drug Dependence — Cannabis and cannabis-related substances (recommendations)

24 January 2019 · ECDD/41 · EN

<https://www.who.int/publications/i/item/9789241210270>

European Union and European institutions

[5] EUDA (formerly EMCDDA)

European Drug Report 2025

2025 · EN

https://www.euda.europa.eu/publications/european-drug-report/2025_en

[6] EUDA

European Drug Report 2026

2026 · EN

https://www.euda.europa.eu/publications/european-drug-report/2026_en

[7] European Commission / Council of the EU

New EU Drugs Strategy 2026–2030 and Action Plan against drug trafficking — proposal and Council decisions

Proposal 4 December 2025 · Council decisions 5 March 2026 and 4 June 2026 · COM(2025) proposal · Council conclusions · EN

<https://data.consilium.europa.eu/doc/document/ST-6234-2026-INIT/en/pdf>

[8] European Commission

Proposal on the use of the whole hemp plant in the CAP framework

15 July 2025 · Regulation (EU) 2021/2115, Article 4(4) — 0.3 % THC threshold for industrial hemp; whole-plant clarification proposed

15 July 2025 · EN

<https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32021R2115>

[9] European Medicines Agency

Cannabis flos herbal monograph — discontinuation notice

2025 · EMA/HMPC/decision 2025 — Cannabis flos monograph withdrawal · EN

<https://www.ema.europa.eu/en/medicines/herbal/cannabis-flos>

[10] European Pharmacopoeia (EDQM)

Cannabis flos quality monograph — revision consultation

September 2025 – 31 December 2025 · Pharmeuropa 37.3 — Cannabis flos (draft monograph 3028) · EN

<https://pharmeuropa.edqm.eu/home>

[11] EFSA*Provisional opinion on cannabidiol as a novel food*

February 2026 · EFSA Journal 2022;20(7):7322 — Statement on safety of cannabidiol as a novel food; data gaps reconfirmed

February 2026 · EN

<https://www.efsa.europa.eu/en/efsajournal/pub/7322>

[12] Council of the European Union*Council Framework Decision 2004/757/JHA on illicit drug trafficking*

Minimum criminal-law provisions; conduct for personal consumption falls outside its scope

<https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32004F0757>

[13] Council of the European Union*EU Drugs Strategy 2021–2025*

Council document ST 14178/20 — the framework preceding the 2026 strategy proposal

<https://data.consilium.europa.eu/doc/document/ST-14178-2020-INIT/en/pdf>

Netherlands

[14] Ministry of Health, Welfare and Sport*Wet experiment gesloten coffeeshopketen — implementation documents*

2025–2026 · Wet experiment gesloten coffeeshopketen, Stb. 2019/238; Besluit Stb. 2020/548; Startbesluit aanwijzing gemeenten ·

EN

<https://wetten.overheid.nl/BWBR0043059>

[15] Ministerial regulation*Extension of the growers' waiting list until 7 April 2027*

21 March 2025 · Regeling van 21 maart 2025, Stcrt. 2025/9127 — verlenging wachtlijst telers · EN

<https://zoek.officielebekendmakingen.nl/stcrt-2025-9127.html>

[16] Trimbos-instituut*THC/CBD monitor of coffeeshop cannabis and hashish*

January 2026 · Trimbos-instituut — THC-monitor coffeeshopcannabis en hasjesj 2024–2025 (TRI-41-030) · EN

<https://www.trimbos.nl/kennisbank/tri-41-030-thc-monitor-2024-2025/>

Germany

[17] Deutscher Bundestag*Bericht der Bundesregierung zur Evaluation des Konsumcannabisgesetzes (KCanG) — Bundestagsdrucksache 21/3061*

April 2026 · BT-Drucksache 21/3061 · in force: KCanG in force since 1 April 2024 · DE

<https://dserver.bundestag.de/btd/21/030/2103061.pdf>

[18] Federal government*Draft law on tighter controls on medical cannabis flower*

14 July 2025 / 18 July 2026 · Medizinal-Cannabisgesetz (MedCanG), consolidated federal text; BMG amendment draft of 14 July 2025, cabinet decision 20 July 2026 · EN

<https://www.gesetze-im-internet.de/medcang/>

Malta

[19] Authority on the Responsible Use of Cannabis (ARUC)*Cannabis Harm Reduction Associations — licensing framework*

2022–2026 · Authority on the Responsible Use of Cannabis Act, Chapter 620 of the Laws of Malta; ARUC Directive 1/2022 on Cannabis Harm Reduction Associations · EN

<https://legislation.mt/eli/cap/620/eng>

Luxembourg

[20] Government of Luxembourg*Law on private cultivation and consumption of cannabis*

2023 · Loi du 18 juillet 2023 modifiant la loi modifiée du 19 février 1973 (cannabis), Mémorial A n° 460 du 27 juillet 2023 · EN

<https://legilux.public.lu/eli/etat/leg/loi/2023/07/18/a460/jo>

Czechia

[21] Chamber of Deputies of the Czech Republic*Amendment on personal cannabis use — approved 30 May 2025*

2025 · Sněmovní tisk 663 — novela zákona o návykových látkách; přijato PS PČR 30. 5. 2025 · EN

<https://www.psp.cz/sqw/historie.sqw?o=9&T;=663>**[22] Senate of the Czech Republic***Approval of amendment on 3 July 2025*

2025 · Zákon č. 270/2025 Sb. — schválen Senátem 3. 7. 2025, vyhlášen ve Sbírce zákonů · EN

<https://www.zakonyprolidi.cz/cs/2025-270>

Switzerland

[23] Federal Department of Home Affairs (Switzerland)*Bundesgesetz über Cannabisprodukte — Vernehmlassung (Cannabis Products Act, public consultation)*

29 August – 1 December 2025 · Consultation 2025/59 — Bundesgesetz über Cannabisprodukte (CanPG), 29 August – 1 December 2025 · DE

<https://www.fedlex.admin.ch/de/consultation-procedures/ended>**[24] Federal Office of Public Health (BAG)***Ergebnisbericht Vernehmlassung Bundesgesetz über Cannabisprodukte*

24 June 2026 · Ergebnisbericht — consultation results report on the Cannabis Products Act, 24 June 2026 · DE

<https://www.fedlex.admin.ch/de/consultation-procedures/ended>**[25] Cantonal pilot programmes***Interim results (Basel, Lausanne and others)*

March–May 2026 · Art. 8a BetmG — kantonale Pilotversuche (Weed Care Basel, Cann-L Lausanne, SCRIPT Zürich); Zwischenberichte 2026 · EN

<https://www.bag.admin.ch/de/pilotversuche-mit-cannabis>

United Kingdom

[26] London Drugs Commission*Final report on cannabis reform*

28 May 2025 · London Drugs Commission — Final Report (Lord Falconer, chair), 28 May 2025 · EN

<https://www.london.gov.uk/programmes-strategies/communities-and-social-justice/london-drugs-commission/final-report>**[27] Food Standards Agency (FSA)***First CBD isolate novel-food safety assessment*

26 June 2025 · Food Standards Agency — CBD business guidance and public list; first CBD isolate novel-food safety assessment (RP427), 26 June 2025 · EN

<https://www.food.gov.uk/business-guidance/cannabidiol-cbd>

Italy

[28] Government of Italy*Decreto-Legge 11 aprile 2025, n. 48 — misure urgenti in materia di sicurezza; converted into Legge 9 giugno 2025, n. 80*

11 April 2025 (DL) · 9 June 2025 (Law) · DL 48/2025 · Law 80/2025 · in force: 11 April 2025 (DL) · 10 June 2025 (Law) · IT

<https://www.gazzettaufficiale.it/eli/id/2025/04/11/25G00061/sg>**[29] Ministries of Interior and Transport***Circular on THC and driving*

7 May 2025 · Circolare congiunta Ministero dell'Interno – MIT prot. 300/STRAD/1/0000024057.U del 7 maggio 2025 · EN

<https://www.poliziadistato.it/statics/40/circolare-thc-guida-07-05-2025.pdf>

Austria

[30] Verwaltungsgerichtshof (Austria)*Judgment on low-THC hemp flowers under the Tobacco Tax Act*

21 November 2024 · Verwaltungsgerichtshof, Ro 2024/16/0006, judgment of 21 November 2024 (RIS case database) · DE

<https://www.ris.bka.gv.at/>

Canada

[31] Government of Canada*Cannabis Act (S.C. 2018, c. 16) and legislative review*

2018–2026 · Cannabis Act, S.C. 2018, c. 16 (consolidated); Health Canada legislative review final report, March 2024 · EN

<https://laws-lois.justice.gc.ca/eng/acts/c-24.5/>

Uruguay

[32] Instituto de Regulación y Control del Cannabis (IRCCA)

National regulated cannabis programme

2013–2026 · Ley N° 19.172 de 20 de diciembre de 2013; Decreto reglamentario 120/014; IRCCA — Informe anual 2025 · EN

<https://www.impo.com.uy/bases/leyes/19172-2013>

United States

[33] US Drug Enforcement Administration

Schedules of Controlled Substances: Rescheduling of Marijuana — Notice of Proposed Rulemaking and administrative hearing

Hearing 29 June – 15 July 2026 · Docket DEA-1362 · EN

<https://www.federalregister.gov/documents/2024/05/21/2024-11137/schedules-of-controlled-substances-rescheduling-of-marijuana>

[34] DEA

National Drug Threat Assessment 2025

28 May 2025 · DEA — 2025 National Drug Threat Assessment, DEA-DCT-DIR-018-25 · EN

<https://www.dea.gov/documents/2025/2025-05/2025-05-28/2025-national-drug-threat-assessment>

[35] California / New York state agencies

Local implementation guidance and enforcement notices

October 2025 · California Department of Cannabis Control — laws and regulations (Title 4 CCR § 15000 et seq.); New York OCM adult-use enforcement guidance, October 2025 · EN

<https://www.cannabis.ca.gov/cannabis-laws/laws-and-regulations/>

[36] Commonwealth of Virginia

Adult-use cannabis retail framework — official announcement

16 June 2026 · Virginia Acts of Assembly — HB 2485 / SB 970 (2026 Reg. Session); Governor's announcement 16 June 2026 · in force: planned market launch 1 July 2027 · EN

<https://lis.virginia.gov/cgi-bin/legp604.exe?261+sum+HB2485>

South Africa

[37] Government of South Africa

Cannabis for Private Purposes Act

Assented 28 May 2024 · Cannabis for Private Purposes Act 7 of 2024, assented 28 May 2024; the substantive provisions still await a commencement proclamation · in force: commencement to be proclaimed · EN

https://www.parliament.gov.za/storage/app/media/Acts/2024/Act_7_of_2024_Cannabis_for_Private_Purposes_Act.pdf

Thailand

[38] Ministry of Public Health

Notification reclassifying cannabis flower as a controlled herb

25 June 2025 · Notification of the Ministry of Public Health (No. 40) B.E. 2568 — cannabis flower as a controlled herb, Royal Gazette, 25 June 2025 · EN

<https://ratchakitcha.soc.go.th/documents/76076.pdf>

[39] Ministry of Public Health

Announcement on transitional enforcement

27 June 2025 · Royal Gazette — transitional enforcement arrangements for the cannabis flower controls, 27 June 2025 · EN

<https://ratchakitcha.soc.go.th/>

Australia

[40] Parliament of Victoria

Committee report on the Regulation of Cannabis Bill

2025 · Parliament of Victoria, Legislative Council Legal and Social Issues Committee — Inquiry into the Regulation of Cannabis Bill 2023, final report · EN

<https://www.parliament.vic.gov.au/get-involved/inquiries/regulationofcannabisbill2023>

[41] Government of New South Wales

Formal response to the Drug Summit recommendations

18 September 2025 · NSW Government Response to the NSW Drug Summit 2024 Communique, 18 September 2025 · EN

<https://www.health.nsw.gov.au/aod/summit/Publications/2024-government-response.pdf>

Greece

[42] Hellenic Republic

Nόμος 5302/2026 — Restrictions on cannabis flower and licensing framework

21 May 2026 · Law 5302/2026, Government Gazette A' 78 of 21 May 2026 (National Printing House search portal) · EL

<https://search.et.gr/el/>

Slovenia

[43] State Election Commission of the Republic of Slovenia

Consultative referendums of 9 June 2024 on medical cannabis and cultivation for personal use

Official referendum results; advisory outcome, implementing legislation pending

<https://www.dvk-rs.si/>

[44] Uradni list Republike Slovenije

Production and Trade in Illicit Drugs Act (ZPPPD), consolidated text

Statutory basis for cannabis control; personal use remains a minor offence

<https://www.uradni-list.si/glasilo-uradni-list-rs>

Ukraine

[45] Verkhovna Rada of Ukraine

Law No. 3528-IX regulating the circulation of cannabis plants for medical, industrial and scientific purposes

Adopted 21 December 2023; entered into force 16 August 2024

<https://zakon.rada.gov.ua/laws/show/3528-20>

Denmark

[46] Retsinformation (Danish official legal information portal)

Medical cannabis pilot programme, made permanent from 1 January 2022

Prescription-only medical access; no adult-use framework

<https://www.retsinformation.dk/>

Belgium

[47] Belgian Chamber of Representatives

Drugs Act of 24 February 1921 and implementing framework

Possession remains an offence; prosecution policy gives low priority to small quantities for adults

<https://www.lachambre.be/>

Spain

[48] Boletín Oficial del Estado

Ley 17/1967 on narcotic drugs, consolidated text

Private consumption is not a criminal offence; public consumption and possession are administrative offences

<https://www.boe.es/buscar/act.php?id=BOE-A-1967-16485>

[49] Agencia Española de Medicamentos y Productos Sanitarios (AEMPS)

Regulatory framework for standardised cannabis preparations for medical use

Hospital-dispensed medical access; no adult-use retail framework

<https://www.aemps.gob.es/>

Portugal

[50] Diário da República

Decreto-Lei n.º 8/2019 on medicines and preparations based on the cannabis plant

Medical framework; personal possession decriminalised under Lei 30/2000

<https://diariodarepublica.pt/dr/detalhe/decreto-lei/8-2019-118221542>

Mexico

[51] Suprema Corte de Justicia de la Nación

General declaration of unconstitutionality on the prohibition of adult personal use (2021)

Judicial route to personal-use permits; no implementing legislation adopted

<https://www.scjn.gob.mx/>

Colombia

[52] Corte Constitucional de Colombia

Constitutional case law on the personal dose and the medical/industrial licensing framework

Personal dose protected; successive constitutional amendments for adult use were not adopted

<https://www.corteconstitucional.gov.co/relatoria/>

Morocco

[53] Secrétariat Général du Gouvernement (Bulletin Officiel)

Loi n° 13-21 on the licensed use of cannabis for medical, pharmaceutical and industrial purposes

Licensed cultivation supervised by ANRAC; recreational use remains prohibited

<https://www.sgg.gov.ma/BulletinOfficiel.aspx>

New Zealand

[54] New Zealand Parliament

Cannabis Legalisation and Control Bill and the 2020 binding referendum

Referendum of 17 October 2020 rejected the bill; the framework was not enacted

<https://www.parliament.nz/en/pb/bills-and-laws/>

[55] New Zealand Legislation

Misuse of Drugs (Medicinal Cannabis) Regulations 2019

Medicinal Cannabis Scheme; prescription-only access with product quality standards

<https://www.legislation.govt.nz/regulation/public/2019/0321/latest/LMS282091.html>

Comparative and scientific literature

[56] EUDA

Cannabis policy monographs and comparative analyses

2024–2026 · EUDA country profiles and comparative drug-policy monographs · EN

https://www.euda.europa.eu/countries_en

[57] WHO Regional Office for Europe

Public-health reviews of cannabis regulation

2024–2026 · EN

<https://www.who.int/europe/>

SECTION

Appendix D. Register of monitored publications

This register lists every development published by the Foundation during the first year of monitoring. Each entry names the jurisdiction, the legal status at the closing date of 20 July 2026, the policy area, the official source and the chapter in which the development is discussed. The register is generated from the same dataset as the timeline, so the two cannot diverge.

SECTION

Appendix E. Official legal documents by jurisdiction

Every legal claim in this white paper is traceable to a primary document issued by a legislature, government, court, regulator or official gazette. This appendix lists those documents per jurisdiction with the law, case or gazette reference and a direct link. Secondary reporting is not used as a legal source anywhere in this publication.

SECTION

Colophon & ANBI

Publisher Recreational Cannabis Foundation

Website recreationalcannabisfoundation.com

Edition First-year whitepaper · July 2026

KVK 98117831

RSIN 868363881

Status ANBI (Public Benefit Organisation)

This publication reflects public developments monitored during the Foundation's first year and is intended for research, policy and educational purposes.