

CURRENT SITUATION AND NEW TRENDS OF THAILAND CANNABIS INDUSTRY

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ABSTRACT

In 2018, Thailand became the first country in Asia to legalize the use of medicinal cannabis and the fourth countries globally that freely legalize cannabis after Uruguay, Canada and Mexico. In the midst of the problem and negative rumors of cannabis spreading, especially as a political discourse that addresses the issue of misuse of cannabis results in confusion and paranoia among the public. So our **objective** in this study are to review, analyze and understand the current legal framework surrounding medical cannabis in Thailand for further implementation of medical cannabis policies and identify the emerging trends, challenges, and opportunities in the Thai medical cannabis industry from the perspectives of stakeholders including policymakers, medical professionals, patients, and industry representatives. **Type of Study** Employed a qualitative methods by literature review to analyze trends in medical cannabis consumption, market size, and regulatory compliance and interviews with key informants to obtain in-depth insights into their perspectives on medical cannabis, its current status, and future trends Focus groups discussion was done among stakeholders regarding their experiences, challenges, and recommendations related to medical cannabis. **Finding that** there are great development and gain in 8 fields: Medical Cannabis Legalization, Cultivation and Production, Export Opportunities, Regulatory Framework, Research and Development, Tourism and Wellness, Domestic Market Growth, Social Impact and Equity. New trends of Thailand cannabis industry and Innovative recommendations described in this study. **Overall**, Thailand's cannabis industry is poised for continued growth, driven by supportive government policies, favorable climate conditions, and increasing interest from domestic and international investors. However, challenges such as regulatory complexity and the need for further research and development remain significant.

Keywords: legalize cannabis, Thai medical cannabis, cannabis industry Cultivation and Production, Export Opportunities, Regulatory Framework, Research and Development, Tourism and Wellness, Domestic Market Growth, Social Impact and Equity.

INTRODUCTION

The Ministry of Public Health has been assigned the task of becoming “the hub of wellness and medicine of the world since 2003”. Cannabis is considered a plant that Thailand has registered as a Class 5 narcotic substance under the Narcotic Act, B.E. 2522 (1979). Cannabis

extracts and cannabis products (including edibles, food supplements, cosmetics, etc.) containing more than 0.2% THC by dry weight are still categorized as a Category 5 narcotic. As of June 9, 2022 private recreational use of cannabis is legal if THC content is below 0.2% by weight, but Recreational cannabis in public places, often referred to as marijuana, is still illegal according to Thai law. In the midst of the problem and negative rumors of cannabis spreading, especially as a political discourse that addresses the issue of misuse of cannabis. Neglect of compulsion good regulation results in confusion and paranoia among the public about the use of cannabis in food, beverages, cosmetics and even medicines used to treat diseases

In 2018, Thailand, it is very gratifying to be the first country in ASEAN to legalize the use of cannabis. For medical benefits and scientific research since the beginning of February 2019 after the promulgation of the Narcotic Act (No. 7), B.E. 2562 (2019).

In June 2022, the most recent legislation, Thailand has decriminalized cannabis means that health providers and clinics can now more easily offer and advertise their cannabis treatment services. A number of cannabis-based medicines are now included in the list of national drugs which means that public hospitals in Thailand can prescribe cannabis remedies to patients under the universal healthcare scheme. Thai authorities believe that the removal of cannabis from Thailand's banned narcotics list will mean a boost for local agriculture. It's also thought that the relaxation in laws could provide a boost for tourism. However, there are some caveats that visitors to Thailand should be aware of before buying or using cannabis.

Legally, after unlocking cannabis from the category 5 narcotic drug list, cannabis flower is also used freely as recreation. The government had proposed a law to control the use of cannabis under the new cannabis act. However, it has not been proposed through the parliament council because of political reasons. Therefore, there is a gap for marijuana to be widely misused, causing a great impact on society. The researcher was curious about the positive and negative effects of unlocking marijuana in terms of medicine and the country's economy, and what policy proposals were made to the government.

OBJECTIVE

1. To review, analyze and understand the current legal framework surrounding medical cannabis in Thailand.
2. To identify the emerging trends, challenges, and opportunities in the Thai medical cannabis industry from the perspectives of stakeholders including policymakers, medical professionals, patients, and industry representatives for further implementation of medical cannabis policies.

METHODOLOGY

This research study employed a qualitative method using in depth interview key informants to obtain in-depth insights into their perspectives on medical cannabis, its current status, and future trends. N = 20, they are 5 Policymakers, 5 Medical professionals (doctors, pharmacists), 5 Patients using medical cannabis, 5 Industry representatives.

Organize focus group discussions with representatives from different sectors involved policymakers, medical professionals (doctors, pharmacists, Thai traditional doctors), patients using medical cannabis and the medical cannabis industry.

Time Frame of the study was conducted over a period of 6 months from October 2023 to March 2024

By using a purposive sampling method to select key informants including policymakers, medical professionals, patients, and industry experts.

Data Analysis: Semi-Structured Interviews: Transcribe interviews verbatim and perform thematic analysis to identify recurring themes and patterns and use coding to categorize responses into themes such as experiences with medical cannabis, perceptions of the current system, challenges faced, and suggestions for improvement to identify key issues, perspectives, and trends.

Expected Outcomes: Comprehensive understanding of the current state of medical cannabis, identification of key trends, challenges, and opportunities in the industry and recommendations for policymakers, healthcare professionals, and industry stakeholders to optimize the implementation of medical cannabis policies and practices in Thailand.

RESULT FINDING

Current situation

Thailand's cannabis industry was experiencing significant growth and regulatory changes. The country had legalized medical cannabis in 2018, becoming one of the first in Southeast Asia to do so. Here's an overview of the current situation and potential new trends in Thailand's cannabis industry:

1. Medical Cannabis Legalization

Thailand continues to focus on the medical cannabis sector. The government has been supportive of research and development efforts in this area, aiming to establish Thailand as a leader in medical cannabis production and research in the region.

The possession, cultivation, sale, and use of cannabis was criminalized by the Cannabis Act, B.E. 2477 (1935) and again by the Narcotics Act, B.E. 2522 (1979). In 2018, Thailand became the first Asian nation to legalize the use of medical cannabis. Around 4,200 prisoners were released as a result of the decriminalization on the same day

Although medicinal cannabis was decriminalized, consumption, in particular smoking or vaping in public places is still subject to punishment under the Public Health Act B.E. 2535 (1992) as a public nuisance infraction and can lead to a 25,000 Baht fine. Medicinal cannabis, with no THC restrictions, was made legal in 2018 but required patients to obtain a prescription from a medical practitioner.

Cannabis medicine declare in 2019 is one of alternative medicine in Thailand. Medicine and declare legalization on June 9, 2022 for medical purposes, as well as allowing household and commercial cultivation

Cannabis dispensaries were available as early as April 2022. [15]. On June 9, 2022 cannabis extracts containing less than 0.2% THC, referred to as industrial hemp, was decriminalized.

In June 2022, Thailand decriminalized cannabis. Thai authorities believe that the removal of cannabis from Thailand's banned narcotics list will mean a boost for local agriculture. It's also thought that the relaxation in laws could provide a boost for tourism.

The most recent legislation in June 2022 means that health providers and clinics can now more easily offer and advertise their cannabis treatment services.

A number of cannabis-based medicines are now included in the list of national drugs

which means that public hospitals in Thailand can prescribe cannabis remedies to patients under the universal healthcare scheme.

Healthcare Infrastructure Growth Installed Base and New Technology Penetration

The Thailand medical cannabis market also provides you with detailed market analysis for every country growth in healthcare expenditure for capital equipment, installed base of different kind of products for Thailand medical cannabis market, impact of technology using life line curves and changes in healthcare regulatory scenarios and their impact on the Thailand medical cannabis market.

Product, source, species, derivatives, application, treatment type, route of administration, end user, and distribution channel are the factors on which the Thailand medical cannabis market research is based.

Cannabis legalized countries are

Group 1: 33 countries that legalize cannabis for medical use: Greece, Canada, Croatia, Colombia, Jamaica, Chile, Czech, San Marino, Zimbabwe, Cyprus, Denmark, Turkey, Norway, Netherlands, Peru, Portugal, Poland, Finland, Malta, Maldives, Germany, Luxemburg, Vanuatu, Sri Lanka, Switzerland, United States, United Kingdom. Australia, Argentina, Italy, Israel, Uruguay and South Africa

Group 2: 6 countries that legalize recreational marijuana: Canada, Georgia, Sri Lanka, Spain, Uruguay, and South Africa.

Thailand, it is very gratifying to be the first country in ASEAN to legalize the use of cannabis. For medical benefits and scientific research since the beginning of February 2019 after the declaration of the Narcotic Act (No. 7), B.E. 2562 (2019).

2. Cultivation and Production

The growing cannabis industry has had an impact on marketing, wellness tourism, medical cannabis clinic, hospital, education research and all kind of products.

While Thai Traditional and Conventional Medicine are using the cannabis recipes such as Suksaiyard, oil, tinctures, balm, cream, drink and over hundred items.

Licensed cultivation and production of medical cannabis have been expanding, with both domestic and international companies investing in facilities and partnerships. Thailand has ideal climate conditions for cannabis cultivation, which could make it a significant player in the global market.

In order to cultivate cannabis, individuals must register with the country's Food and Drug Administration. There are currently no restrictions on how many plants each individual can cultivate. The specific law regulating cannabis is still pending in Thai parliament as of 2023. However, the government urges people to register their cannabis plantation on the website or the application "Plookganja" (meaning "Let's grow cannabis") in case that the future cannabis law may require the license

Cultivation, consumption, distribution and sales of cannabis products is legal, although some restrictions remain in place More information on usage and registration can be found on PR Thai Government.

There is tremendous growth as Thailand a fourth country in the world (after Uruguay, Mexico and Canada) and the first country in Asia that have legalized Cannabis Medicine which now are for medicinal purposes. This growth is being driven by increased public acceptance, technological advancements in cultivation and extraction processes, and a surge of interest from investors.

There are million experience growers which have grown good grade cannabis enough for supplying the whole country and for export.

3. Import-Export Opportunities

The Thai government has been exploring opportunities for exporting medical cannabis products to other countries where it is legal.

This includes both raw materials and finished pharmaceutical products. Establishing export channels could be a significant driver of growth for the industry.

Thai law essentially excludes all foreign companies as well as foreign majority companies incorporated in Thailand from producing, selling, importing, exporting, and processing cannabis.

The move has been viewed as an effort to protect local companies from the onslaught of highly resourceful and modern technology equipped foreign actors, however "imported" strains are widely available and dominated the market.

4. Regulatory Framework

While Thailand has made progress in legalizing medical cannabis, the regulatory framework is still evolving. Continued updates to regulations and licensing requirements will be crucial for the industry's development and attracting further investment.

The production and consumption of cannabis permitted for medical and health purposes. Also permitted for private recreational use if the THC content is below 0.2% by weight. Using cannabis for medical purposes was approved in 2018, but under the new laws it is still illegal to sell or supply any extracts containing more than 0.2% of THC (tetrahydrocannabinol).

Households can cultivate a small amount of cannabis (initially up to six potted plants) at home if they register with authorities. Companies can also farm the plant with a permit.

Regulatory Support for Quality Control are strong regulatory frameworks for medical cannabis production, distribution, and quality control instill trust in patients and healthcare providers, strengthening market growth.

Compliance ensures safety and efficacy, vital for widespread acceptance and utilization in medical settings. Regulatory clarity fosters confidence, encouraging investment and participation in the evolving medical cannabis industry.

Importation of Products containing Cannabis and Hemp extracts, including any parts of them

1. Can I bring the finished products containing Cannabis and Hemp extracts and Hemp Derived Products into Thailand?

Answer : It is **illegal** to transport the finished products containing Cannabis and Hemp extracts and Hemp Derived Products across the Thai border.

2. Can I bring any parts of Cannabis and Hemp into Thailand?

Answer : It is **illegal** to transport any parts of Cannabis and Hemp across the Thai border.

As of 9 June 2022

กระทรวงสาธารณสุข
Ministry of Public Health
FDA
Food and Drug Administration

produced by Public and Consumer Affairs Division /FDATHAI

5. Research and Development

Thailand has been investing in research and development related to cannabis, including studies on its medical efficacy, cultivation techniques, and product development.

Collaboration between government agencies, research institutions, and private companies is driving innovation in the sector.

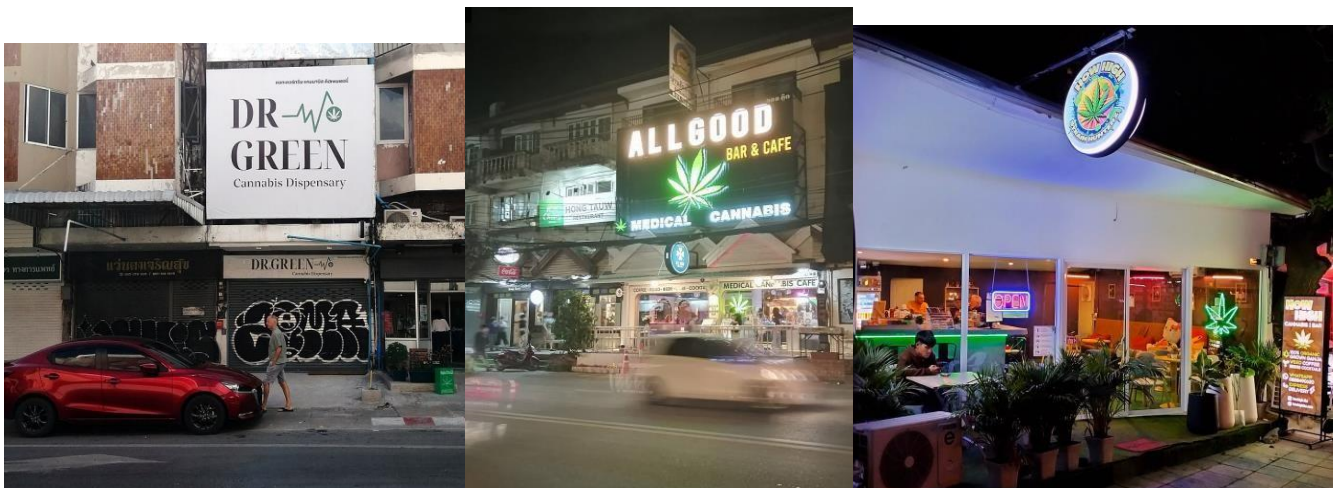
MOPH policy to Promote medical research 2019-2023

bureau	The operation is finished.	During the period of operation.
Medical Department	14	11
Department of Thai Traditional Medicine	17	6
Department of Medical Sciences	16	9
Department of Mental Health	8	6
Pharmaceutical Organization	4	4
NSTDA.	1	1
FDA	8	-
Office of the Permanent Secretary	2	-
8th Health District	1	-

Total 110 papers from department of Cannabis Medicine Ministry of Public Health

6. Tourism and Wellness

There is potential for Thailand to develop cannabis-related tourism and wellness industries. With the country already being a popular tourist destination, the integration of cannabis-based wellness products and experiences could attract a new segment of visitors.



7. Domestic Market Growth

While the focus has primarily been on medical cannabis, there could be potential for growth in the domestic market for recreational or wellness-related cannabis products. However, regulations would need to be adjusted to accommodate such a market. Domestic Market Growth is an important step in the implementation of a liberal cannabis policy is not only to be used medically to treat patients but it can also be processed to create a lot of added value. Allied Market Research website reported cannabis-related food and beverage businesses in 2018 were

valued globally at US\$427 million and are expected to reach US\$2,632 million by 2026. The highest growth in cannabis food industries were CBD drink, cannabis café, bakery, etc.

Products for Cannabis Massage and Spa



GPO Cannabis oil.



Relaxation and skin care
Reduce pain and sleep well



Suan Sunandha Cannabis products

Suan Sunandha Cannabis oil

Products for Cannabis Massage and Spa

For Thailand after the liberalization of cannabis can generate income for farmers and entrepreneurs. According to the Chamber of Commerce of Thailand, free cannabis help drive the Thai economy. It is estimated that the cannabis market for pleasure will be worth 14 billion baht. By 2025

Thailand Medical Cannabis Market is Expected to Register A Growth of 25.16%
During the Forecast Period 2021 - 2028



Data bridge market research reported Thailand Medical Market is expected to register the growth of 25.16 percent. During the forecast period 2021-2028

8. Social Impact and Equity

Ensuring that the benefits of the cannabis industry are distributed equitably and that marginalized communities have opportunities to participate will be important considerations for policymakers and industry stakeholders.



From BMC Public Health journal, report in 2023 by Rasmon and Suriyan say that the prevalence of cannabis use in the past year had increased from 2.2% in 2019 to 2.5% and 4.2% in 2020 and 2021 respectively, while those of methamphetamine, alcohol, and tobacco use had decreased. Trends in past year drinking/eating cannabis products had increased, especially among the middle age group (40-49 years) from 2.1% (95% confidence interval (CI): 1.3, 3.1) in 2019 and 1.1% (95% CI: 0.6, 1.9) in 2020 to 3.8% (95% CI: 2.8, 5.0) in 2021. The younger population aged 18-19 had an increase in cannabis smoking from 0.9% (95% CI: 0.1, 3.3) in 2019 to 2.0% (95% CI: 0.5, 5.1) and 2.2% (95% CI: 0.7, 5.1) in 2020 and 2021 respectively.

Symptoms of cannabis use disorder among cannabis users increased from 2019 to 2020 and then reversed afterwards in 2021. Thais had greater health knowledge about the benefits and harms of cannabis and had attitudes toward more harm of cannabis in 2021; however, 35.6% or a third of the sample in 2021 truly believed that cannabis was a cure for cancer, and 23.2% or one fourth were uncertain or did not believe that cannabis was addictive.

New trends of Thailand cannabis industry

1. Cannabis, in its new definition, is no longer a dangerous plant, but a cultivatable tree. Edible, earn money, exported according to the legal framework". Far from the original definition that led people to see cannabis as a dangerous drug". Thailand medical cannabis market has witnessed new growth due to increased business expansion in the forecast year of 2021-2028 at 25 percent.

2. International trade restrictions on cannabis may hinder Thailand's medical cannabis market by limiting its ability to import advanced products or export locally produced ones. So, we need to keep up with international technological and knowledge advancements and collaborations.

3. When new political party come, some mysterious experience found in patients. The issue of cannabis has remained both a hope, a question and a challenge for Thai society and often leads to new debates when it comes to the issue surrounding cannabis. It is undeniable that allowing the medical use of cannabis will bring both positive and negative benefits and

impacts depending on the detailed determination of practical measures. This has resulted in uncertainty for the domestic cannabis industry.

4. With indications that new legislation will be introduced to regulate growers and sellers of businesses involved in the cultivation and sale of cannabis will have to comply with comprehensive reporting requirements, which will involve providing detailed information on the number of cannabis plants grown and sold.

5. It's like an obstacle, but that's also a great opportunity to develop

1) Million on experience cannabis grower

2) Become Good Agricultural and Collection Practices standard (GACP)

3) Up standard of all herbal medicine no matter growing standard, database, extracting, measuring, producing quality medical products, doing research, all kind of good experience that never happen before.

4) Allowing growers to control the quality of their cannabis products. This ensures that pharmacies and vendors have access to medical cannabis-quality cannabis.

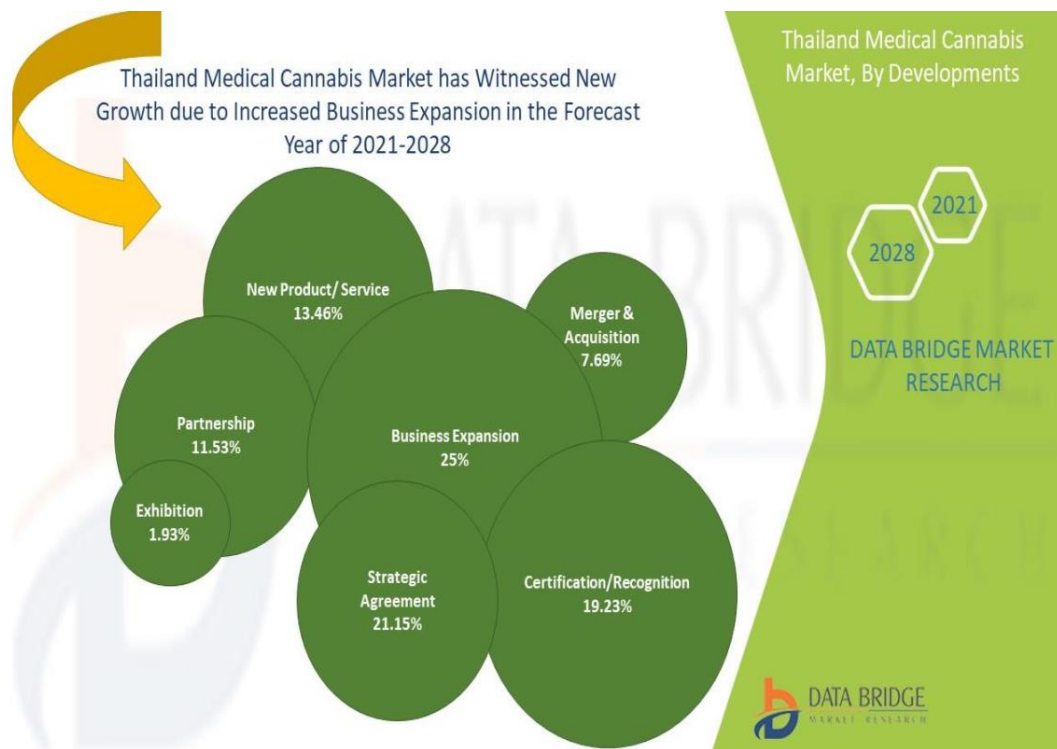
5) Having an industrial character in a form that centralizes production can lead to trade monopolies and result in higher product prices due to lack of market competition to lower the cost and accessibility of patients.

6) The cost of managing and monitoring compliance with the law will be borne by the government.

To determine the management of political Policies

Important step in the implementation of a liberal marijuana policy is not only to be used medically to treat patients but it can also be processed to create a lot of added value.

Allied Market Research website reported cannabis-related food and beverage businesses in 2018 were valued globally at US\$427 million and are expected to reach US\$2,632 million by 2026. The highest growth in cannabis food types were bakery, chocolate and confectionery, respectively. For Thailand after the liberalization of cannabis can generate income for farmers and entrepreneurs. According to the Chamber of Commerce of Thailand, free cannabis help drive the Thai economy. It is estimated that the cannabis market for pleasure will be worth 14 billion baht By 2025.



There are also seven major issues that need to be considered:

1. problems with knowledge,
2. understanding and beliefs about medical cannabis,
3. impact on the medical care system,
4. the spread of fake news and false advertising,
5. the rapid expansion of the cannabis trading business,
6. problems with the system of creating official knowledge about cannabis,
7. social problems from medical cannabis policy

Growing Acceptance and Awareness Among Public

Increasing public acceptance and awareness of cannabis's therapeutic benefits for various medical conditions fuel the demand for medical cannabis products. As understanding grows, the desire for alternative treatments, propelling the market forward with heightened interest in its potential health benefits.

Focus on Patient-Centric Approach for Personalized Treatment

The patient-centric approach prioritizes personalized treatment plans, prompting healthcare providers to integrate medical cannabis into comprehensive therapeutic strategies. This emphasis on individualized care drives demand for cannabis-based therapies, fueling growth in the medical cannabis market as it becomes increasingly recognized as a valuable component of patient-centered healthcare.

Rising Prevalence of Chronic Diseases Creates Demand

The increasing prevalence of chronic diseases such as cancer, multiple sclerosis, epilepsy, and chronic pain fuels demand for alternative treatments such as medical cannabis. With its potential to alleviate symptoms and enhance quality of life, medical cannabis is sought after as a promising therapeutic option for patients facing these challenging health conditions.

DISCUSSION

Innovative recommendations

For control management, monitoring and supervising the implementation of the medical cannabis policy for Thailand consists of key measures such as developing a system for managing and disseminating health information on cannabis and cannabis extracts used for medical purposes, analyzing the situation of the health service system in both modern and alternative medicine, and planning for standardization of medical cannabis treatment and research.

For internationally recognized evidence-based medicine, integrate work and develop plans for prevention. Control and tackle the spread of fake news and fake advertisements for commercial and other purposes, develop policies and surveillance systems. For control management, monitoring and supervising the implementation of the medical cannabis policy for Thailand consists of key measures such as doctors should start studying how to use cannabis properly, and most importantly, such as SLE, reduce The cost of immunosuppressants, Alzheimer's disease and Parkinson's disease that can be combined with modern medicines for treatment.

It is important that the use of the 30-baht gold card to treat all diseases should also cover the use of cannabis. New professional cannabis personal is extremely necessary to be trained for covering the neglected, uncured, palliative care and terminal stage patients.

CONCLUSION

The medical use of cannabis in Thailand still has a lot of room for further development. In order to analyze and research more on other substances that are important components of cannabis and the extraction of substances with medicinal properties for research in use for medical effects or that affect physiology or treatment of diseases or conditions of the body in order to expand the coverage and properties of medical cannabis. To be used in the treatment of diseases that have not been researched to confirm the treatment. Research has also been conducted to extract many of the key substances of cannabis to see if they can be used to treat any disease more effectively and may be used as a substitute for current chemical drugs. This will reduce the cost of prescribing medicines from abroad and may reduce the burden of medical expenses on patients in the future.

Overall, Thailand's cannabis industry is poised for continued growth, driven by supportive government policies, favorable climate conditions, and increasing interest from domestic and international investors.

However, challenges such as regulatory complexity and the need for further research and development remain significant. The rising prevalence of chronic diseases creates demand & regulatory support for quality control are the growth drivers of the Thailand medical cannabis market The Thailand medical cannabis market size will be worth USD 132.05 billion by 2031. The growth rate of the Thailand medical cannabis market is 25.16% in the forecast by 2031.

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