

OMMA Impact Evaluation: Market Analysis

LOFT's original evaluation, published in 2022, found that Oklahoma had the greatest number of licensed medical marijuana patients, dispensaries, and growers of any state with medical marijuana at the time. In the three years since that report's publication, the supply and demand in the medical marijuana industry has normalized, with 2025 license totals at the lowest they have been since the original surge of patients and suppliers. As depicted in the table below, **every category of license experienced a reduction over the three-year period, with the most significant reduction in the number of licensed growers operating in the State.**

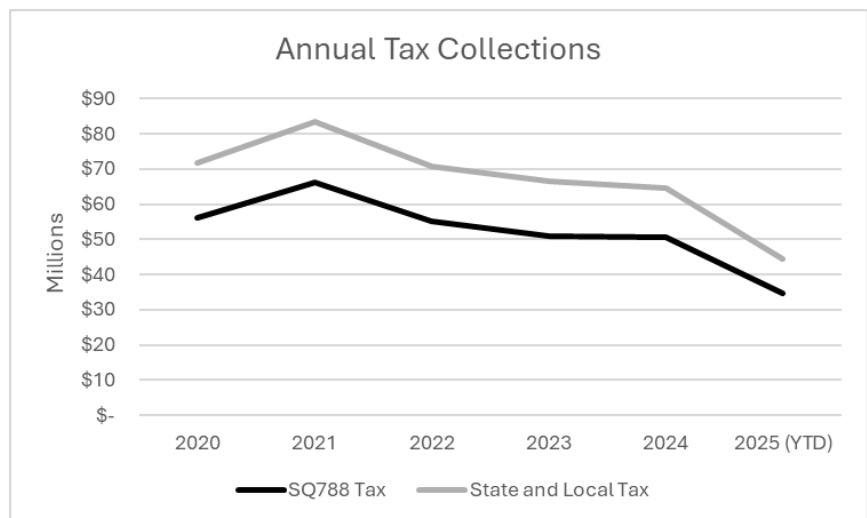
License Type	2022 license total	2025 license total	3 Year Change
Patients	386,913	322,587	-16.6%
Caregivers	2,592	1,077	-58.5%
Growers	9,402	2,520	-73.2%
Processors	1,834	785	-57.2%
Dispensaries	2,893	1,565	-45.9%

Source: LOFT analysis of OMMA data.

Notes: a caregiver is a person authorized to purchase, transport, possess, and administer medical marijuana products on behalf of a patient. Each licensed caregiver may be designated for no more than five patients.

There are two revenue streams that are directly correlated with the production and sale of medical marijuana: a dedicated seven percent excise tax created by State Question 788 to fund the regulation of medical marijuana and the sales taxes collected by the State and locality in which the product is sold. As licenses have declined, so have revenues.

Tax collections for medical marijuana peaked in 2021. Using year-to-date data as of September 2021 compared to year-to-date data for 2025, excise tax collections have declined 49 percent and sales tax is down 44 percent. Additionally, tax compliance has improved over the three year period; in 2021, the Oklahoma Tax Commission (OTC) reported approximately 40 percent of processors and dispensaries were delinquent with taxes. OTC's most recent data for 2025 reflects 14.7 percent of permits are noncompliant taxpayers.



EXCISE TAX COLLECTIONS

↓ 49%

Decline in dedicated excise tax collections from 2021 to 2025 (YTD)

SALES TAX COLLECTIONS

↓ 44%

Decline in sales tax collected on medical marijuana products (2021 to 2025)

TAX COMPLIANCE

↑ 26%

Increase in number of medical marijuana permits that are tax compliant (Nov. 2022 to Sept. 2025)