

ADULT USE RETAIL UPDATE

Municipal Zoning & License Distribution

Michelle Reddish, Cannabis Office Administrator
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Cannabis
Control
Commission

STATE OF RHODE ISLAND

Municipal Zoning

Status Update Following March 2

Municipal Zoning

- The Adult-Use Retail application period closed on December 29, 2025.
- October 2025, the Commission voted to extend the application requirement to demonstrate municipal zoning compliance.
- The extension only applied to zoning compliance, while all other components of the adult-use retail license application remained due on December 29, 2025.
- Applicants requiring additional time to finalize municipal zoning were permitted to submit evidence of final zoning approval by March 2, 2026.
- The following summary reflects the status as of March 2, 2026.

Municipal Zoning Status Summary Following March 2

Status	Total
Total Number of Adult-Use Retail License Applications Submitted	97
Total Number Marked as Requiring Evidence of Final Zoning (given until March 2, 2026)	32
Total Number Submitted Evidence of Final Zoning	15
Total Number Requesting an Extension	12
Total Number Submitted Evidence of Final Zoning but Require Additional Review	4
Total Number Submitted Neither Evidence of Final Zoning Nor Requested an Extension	1

License Distribution

Recap | Market Data | Next Steps

February 2026 Recap

- During the February 2026 meeting, the Commission discussed feedback regarding the potential impacts of distributing all available retail licenses at once on Rhode Island's cannabis market.
- The option to implement a systematic rollout of retail licenses would provide time between license issuances to evaluate market conditions and administrative operations, monitor industry data, conduct additional research, and make informed adjustments.
- Important note, the Commission has the received the recent analysis published by Whitney Economics: Rhode Island Retail Saturation Analysis and is reviewing it as part of information and comments received by the public.

Key Terms and Definitions

- **Supply Demand Balance:** The relationship between the amount of product available for sale (supply) and the level of consumer demand. When supply exceeds demand, prices tend to fall; when demand exceeds supply, prices tend to rise
- **Retail Density:** The number of licensed retail stores relative to population size, commonly expressed as the number of stores per 100,000 residents. Retail density is used to measure consumer access and the level of market competition.
- **Market Saturation:** A market condition in which the number of businesses or level of supply meets or exceeds consumer demand, often resulting in increased competition and downward pressure on prices.
- **Price Compression:** Price compression in the cannabis industry refers to a sustained decline in the wholesale and retail prices of cannabis products, largely driven by oversupply, market saturation, and high competition.

Rhode Island Cannabis Market Structure

- Licensed Cultivators: **57** (A cultivator moratorium in effect.)
- Licensed Compassion Center / Hybrid Retailers: **8**
- Adult-Use Retailers: Up to **20 of 24** available licenses have been applied for (as of March 13, 2026).
- Note: Applications are currently under review. The final number of licenses awarded may be lower if applications contain deficiencies identified during the review process or if applicants fail to meet final licensing requirements.

Regional Market Comparison: Retail Density

State	Population	Adult-Use Retail Outlets	Stores per 100K Residents	Residents per Store
Rhode Island	~1.1 million	8	0.7	~137,500
Massachusetts	~7 million	403	5-6	~17,360
Connecticut	~3.6 million	72	2.0	~50,000

Source: State cannabis regulatory market data and public reports.

Regional Market Comparison: Retail Flower Price

2025 Average Retail Flower Price	
State	Average Retail Flower Price Per Gram
Rhode Island	\$5.67
Massachusetts	\$4.17
Connecticut	\$9.28

Source: State cannabis regulatory market data and public reports.

Rhode Island Cannabis Pricing Data

2025 (RI) Industry Average Retail Sales Price for Pre-packaged Bud	
Unit Weight	Average Price Per Unit
1g (gram)	\$5.67
3.5g (eighth)	\$23.35
7g (quarter)	\$36.54
14g (half-ounce)	\$61.98
28g (ounce)	\$109.22

Regional Retail Density and Pricing Trends

- These regional comparisons highlight differences in retail density and pricing across Rhode Island's neighboring states and provide additional market context as Rhode Island's cannabis market continues to expand and evolve.
- This information will continue to be monitored over time. The Cannabis Data webpage has also been updated to include Cannabis Pricing Data.

Next Steps

- The Commission has received significant feedback since the February meeting, which staff are using to help shape potential options for consideration.
- These may include continuing forward without phased selection, or implementing phasing based on zones with the fewest retail outlets, zones with the most retail applicants, or license type.
- Staff will continue reviewing feedback and refining these concepts for future discussion with the Commission.

Cannabis Control Commission

Website: <https://ccc.ri.gov/>

Email: cccinquiry@ccc.ri.gov

Phone: 401-921-3010

