

San Francisco Office of Cannabis

Public Safety & Neighborhood Services
Committee – 05/25/2022



Office of Cannabis
City and County of San Francisco
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Presentation Outline

- The Retail Market
- The Permitting Pipeline
- Recommendations



The Retail Market



**Permanent Cannabis
Businesses**

- **33 Businesses**
 - **31 Storefront Retail**
 - **2 Delivery-Only Retail**



**Temporary Cannabis
Businesses**

- **15 Businesses**
 - **All Delivery-Only Retail**



**Medicinal Cannabis
Dispensaries**

- **32 Businesses**
 - **All Storefront Retail**

Retail Permitting Pipeline: Verified Equity Applicants

- Currently there are ~100 applications from verified equity applicants that include a retail component:
 - 63 → Storefront Retail
 - 9 → Delivery-Only Retail
 - 28 → Microbusiness (including Retail or Delivery-Only Retail)

Retail Permitting Pipeline: Active Legacy Businesses

- There are 71 pending applications for retail from other non-Verified Equity Applicants:
 - ~24 are inactive and very unlikely to pursue a permit from the OOC
 - 47 are currently legally operating businesses with provisional permits from other agencies. They are very likely to pursue a permanent permit from the OOC
 - 32 are active Medical Cannabis Dispensaries
 - 15 are active Delivery only operations
 - The majority of these applications are waiting to start the permitting process or in the early stages (per permitting Tiers in Article 16)

Retail Permitting Pipeline: Processing Timelines*

- Verified Equity Applicants:
 - Processing Average Since May 2018: ~18 months
 - More Recent Processing Speed: ~9-12 months
- Legacy Businesses
 - Dependent on the progress of applications submitted by VEAs

** These timelines are just for the OOC; they do not include processing times for other City departments*

Recommendations from OOC

- Include of a sunset date for a future point in time (2-3 years)
- Provide all Verified Equity Applicants and those seeking to become verified with an additional six months after the date of enactment to submit a cannabis business application for retail activity.
 - Currently, there are 292 Verified Equity Applicants and 5 in the process of being verified who have not submitted cannabis business permit applications.

Thank You!

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