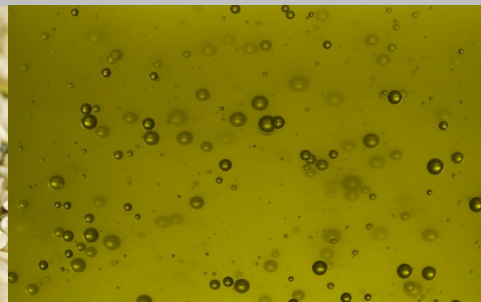


New Data on Hemp Food Market

EIHA Conference, May 2015



Hemp as Foodstuff

Main Statement

The turnover with hemp foodstuff and corresponding raw material is increasing strongly worldwide. Hempseeds, hulled hempnuts, hempoil and hemp protein powder are becoming more presentable – both in retail as well as in food industry.



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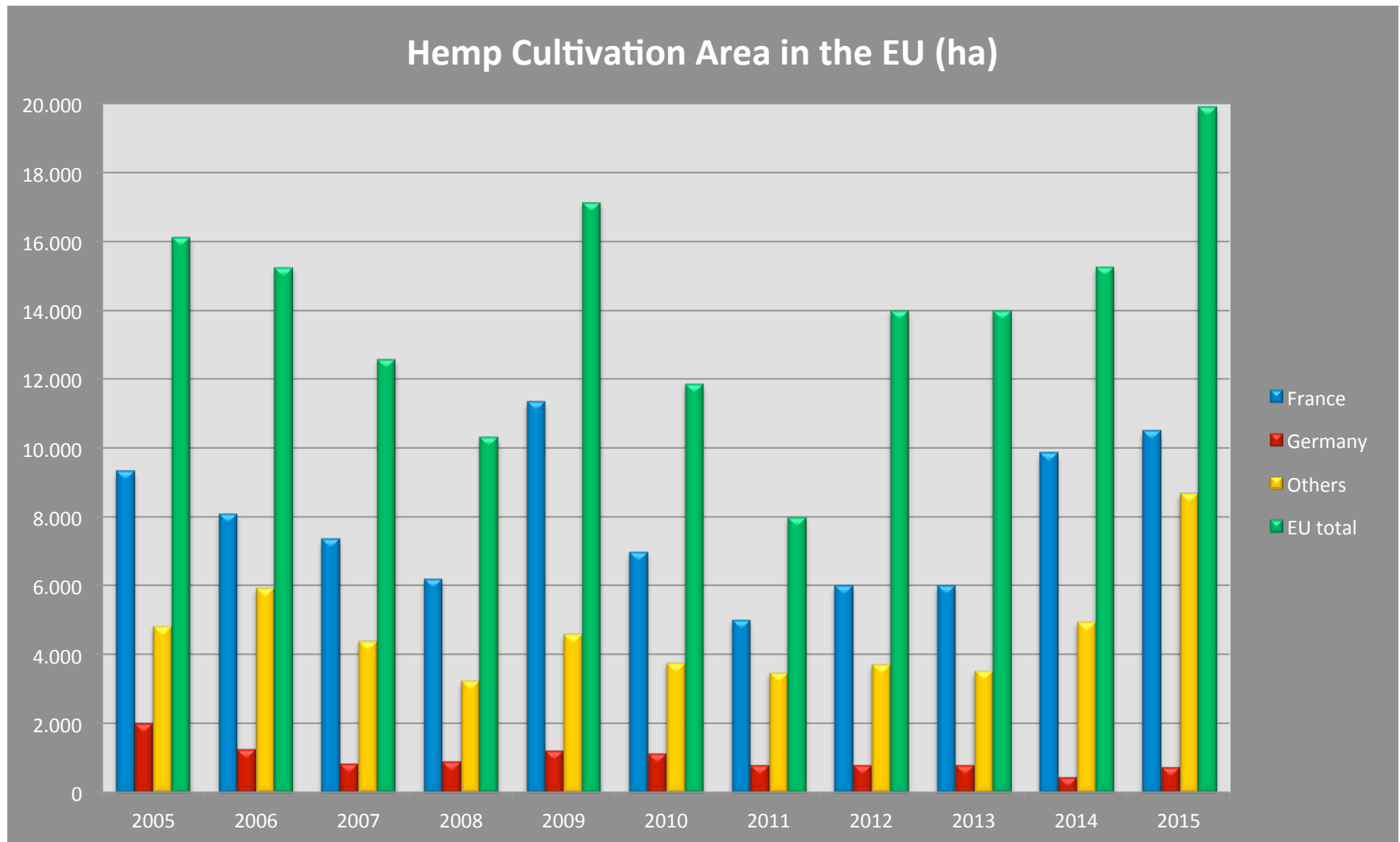


The Hemp Market EU

Status EU:

- Problem: no actual statistics for hempseed used as raw material
- EU has a lot of small different countries with a variety of statistic data. Not all collected data from EU government is correct and/or complete.
- 2002-2011 estimated around 5 - 15% of hempseed production for food production, 85 - 95% for animal feed
- Since 2012 estimated around 15 - 20% of hempseed production for food production, 80 - 85% for animal feed
- Hempseed production for food increases strongly since 2007

The Hemp Market EU



Source: nova-Institut (2011), EIHA (2015)

The Hemp Market EU

mt hemp seeds p.a.	2008	2009	2010	2011	2012	2013	2014	est. 2015
EU production	6.000	7.000	6.000	5.500	7.000	9.000	9.000	11.500
- France	n/a	6.500	4.500	4.000	5.000	7.000	6.500	7.000
- others	n/a	500	1.500	1.500	2.000	2.000	3.000	3.500
EU imports*	10.000	9.700	10.800	11.500	10.000	9.000	9.000	9.000
EU exports**	500	900	800	500	300	100	100	100
EU consumption	15.500	15.800	16.000	16.500	16.700	17.900	18.400	19.400
- Food	600	700	1.800	2.500	2.700	3.200	6.400	7.900
- Feed	14.900	15.100	14.200	14.000	14.000	14.700	12.000	11.500

Source: nova-Institut (2011), Eurostat (2011), EIHA (2015), Hempro Int. estimates (2015)

Table 1: Development of the European hemp seed market 2008-2015.

*Mainly from China, ** Exports of processed hemp seeds to North-America.

The Hemp Market EU

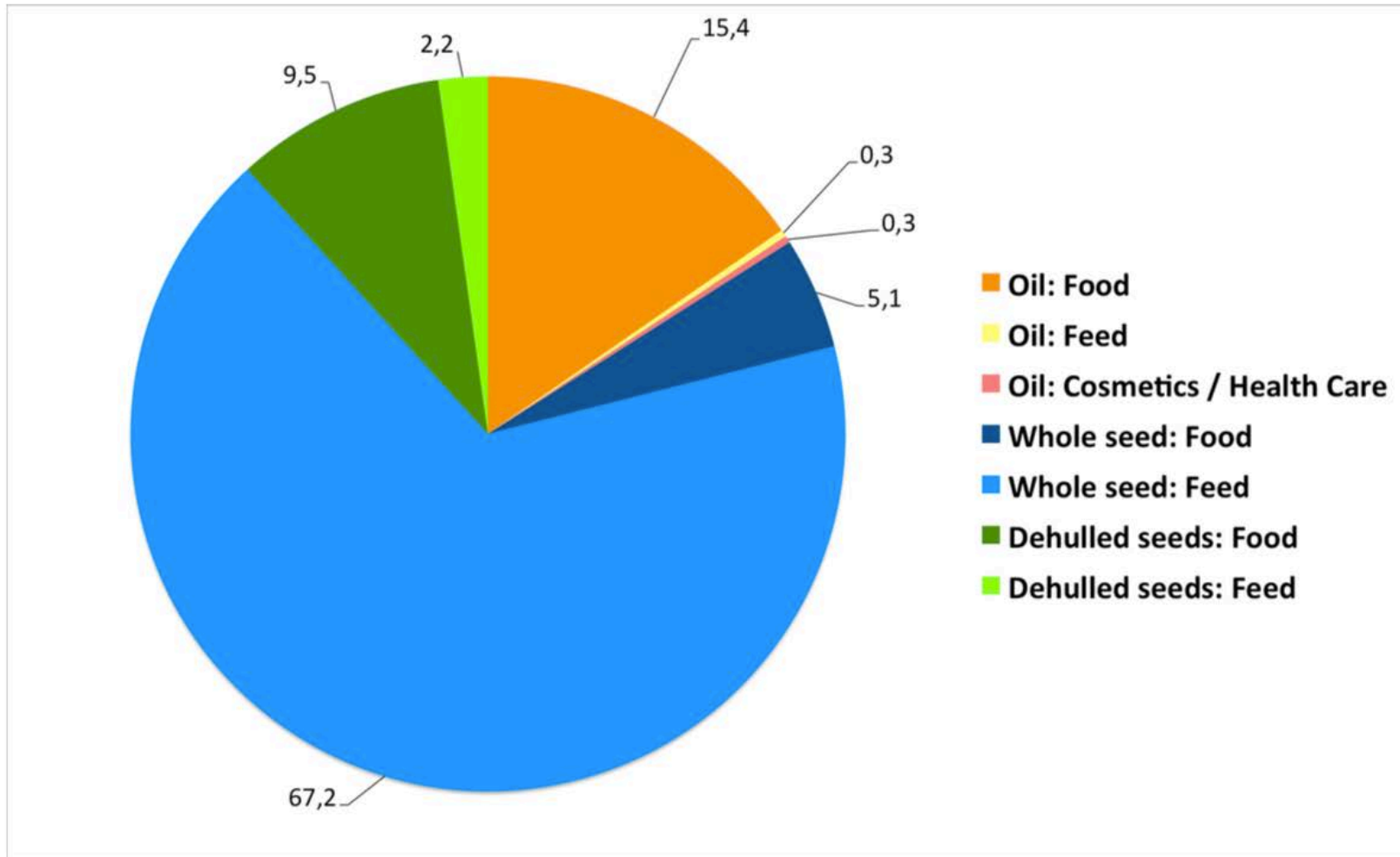
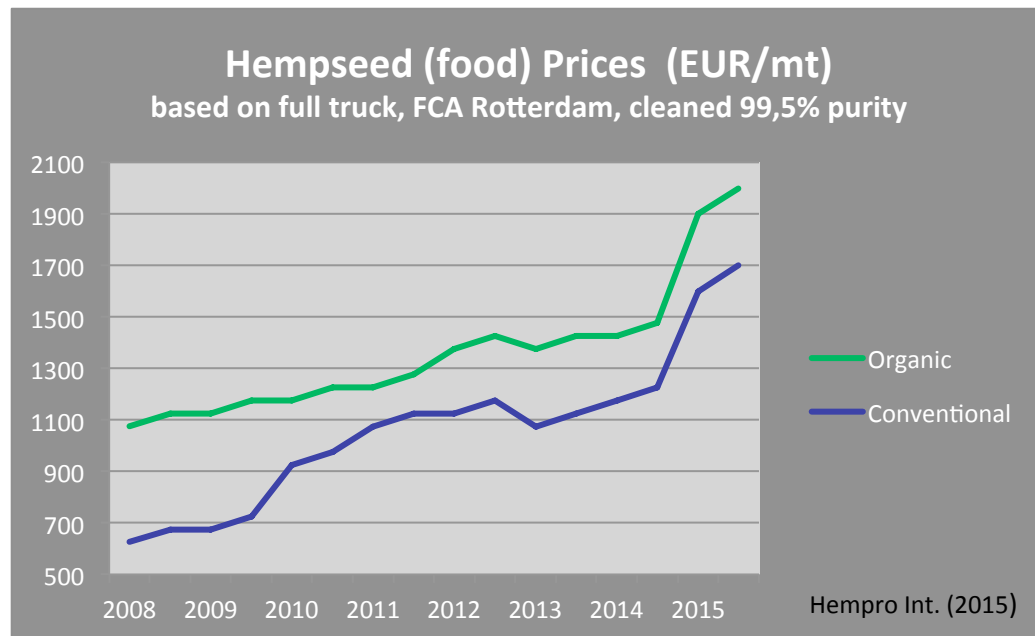


Figure 6: Applications for European Hemp Seeds from harvest 2010, in total 6,000 metric tonnes (EIHA 2012)

The Hemp Market EU

- In 2010-2012 supply decreased due to lower acreages in France (lower demand from the cigarette paper industry); in 2013/2014 slightly increasing supply due to larger acreages in France
- Currently, relevant production in Eastern Europe only takes place in Ukraine, Romania, Hungary, Baltic States and is very likely to increase.
- Recently strong increasing demand in the food market
- Price development of hempseed (China imports):



The Hemp Market Canada

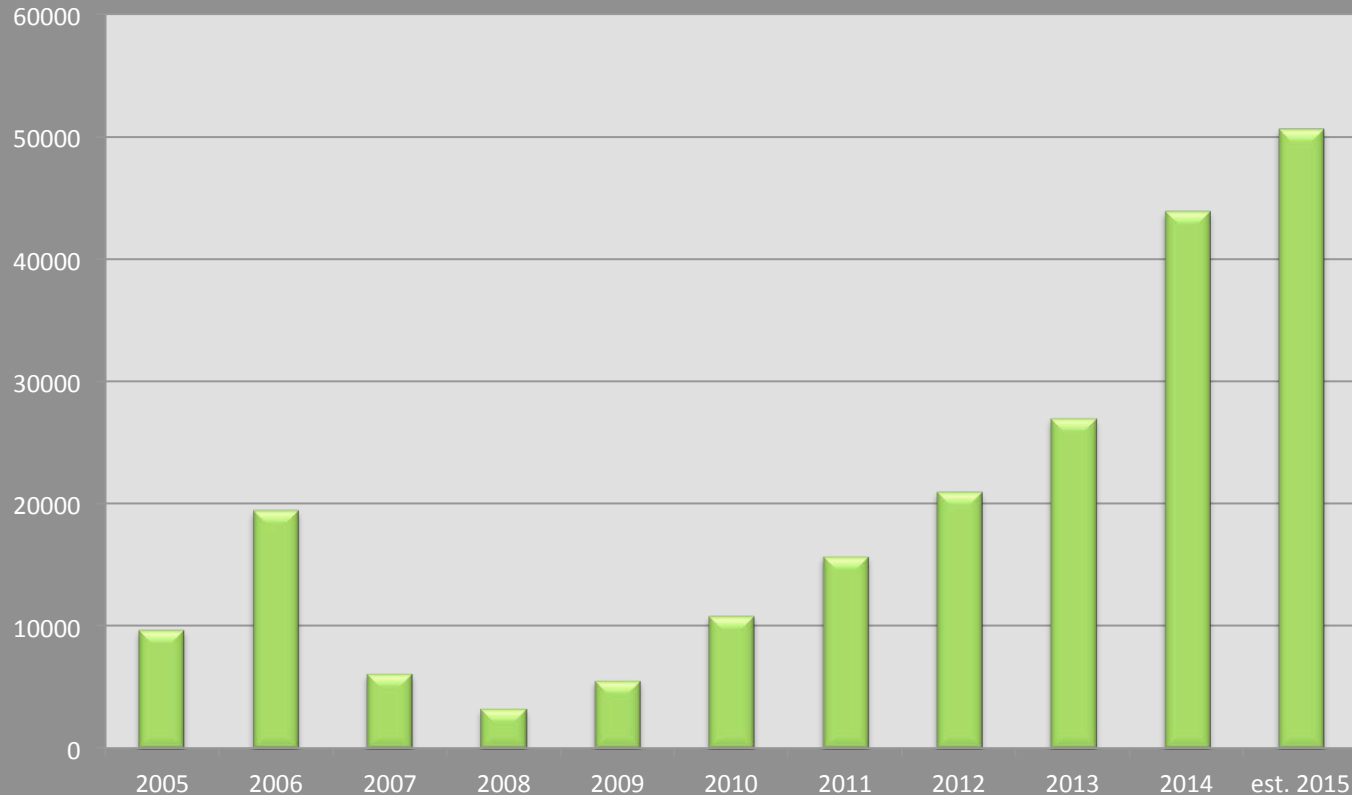


Licensed Acreage Summary

- 2013: 66,670 acres = 26,982 ha
- 2014: 108,462 acres = 43,912 ha (+62%)
- est. 2015: +125,000 acres = 50,600 ha (+15%)

The Hemp Market Canada

Canada Hemp Cultivation Area (ha)

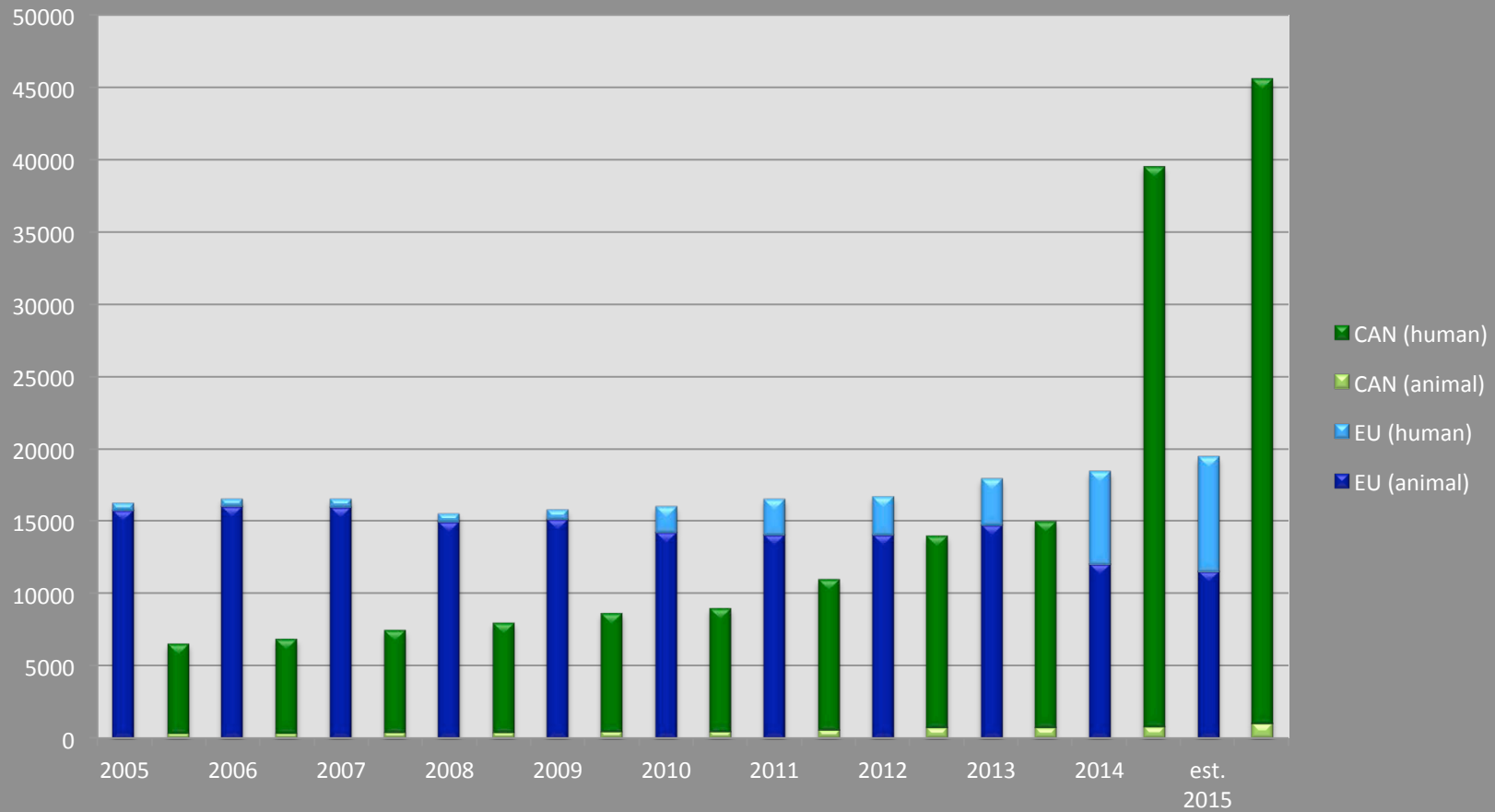


Source: CHTA (2015), Hemp Oil Canada Inc. (2015)

The Hemp Market Comparison EU/NA



Hempseed Consumption EU+NA (mt)



Source: Estimates nova-Institut (2014), EIHA (2014), Hempro Int. (2015)

Future Prospects

- North American data shows very high sales turnover and EU sales start to pick up strongly
→ very good future perspectives for the EU market
- In Great Britain, as well as in Canada and USA, hemp already belongs to the standard range in supermarkets
- Example: If only 10% of the population in Germany would integrate 10 ml of hemp oil in their daily nutrition, a yearly requirement of approx. 30 million litres of hemp oil e.g. 100.000 mt of hempseed would result.

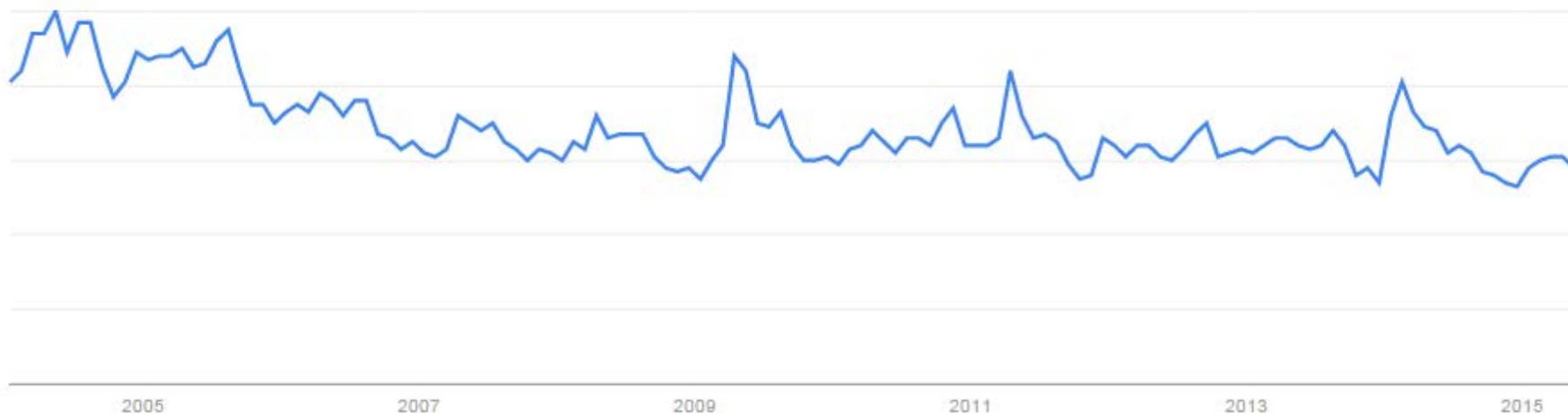
Google search trends

Search item: *hemp*

Category: *all*

Time period: 2004 – 2015

Region: *worldwide*



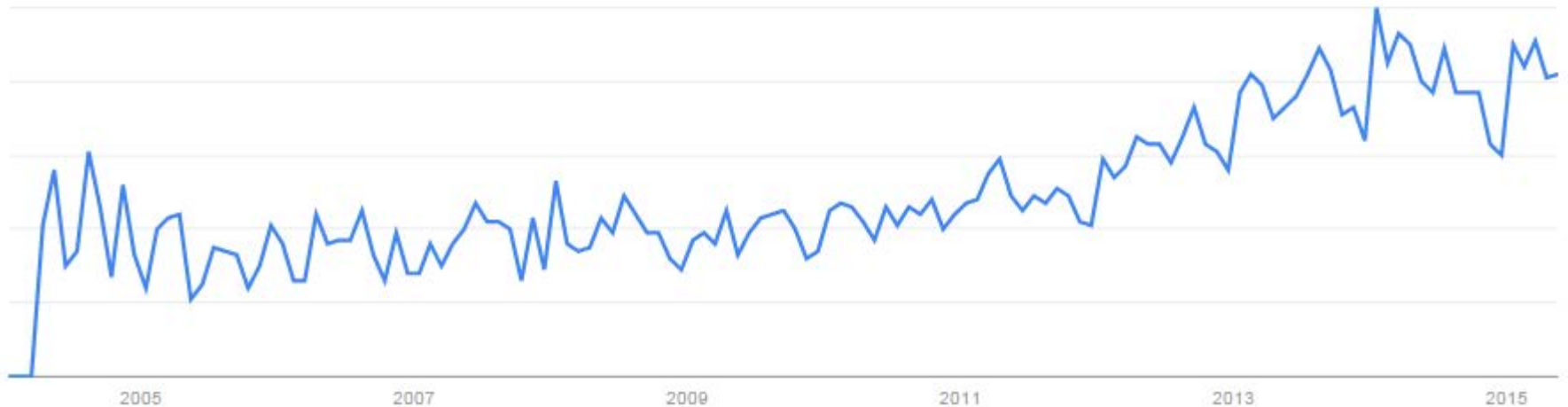
Google search trends

Search item: *hemp*

Category: *foods and drinks*

Time period: 2004 – 2015

Region: *worldwide*

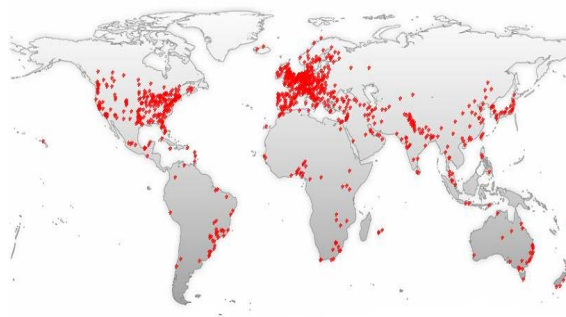
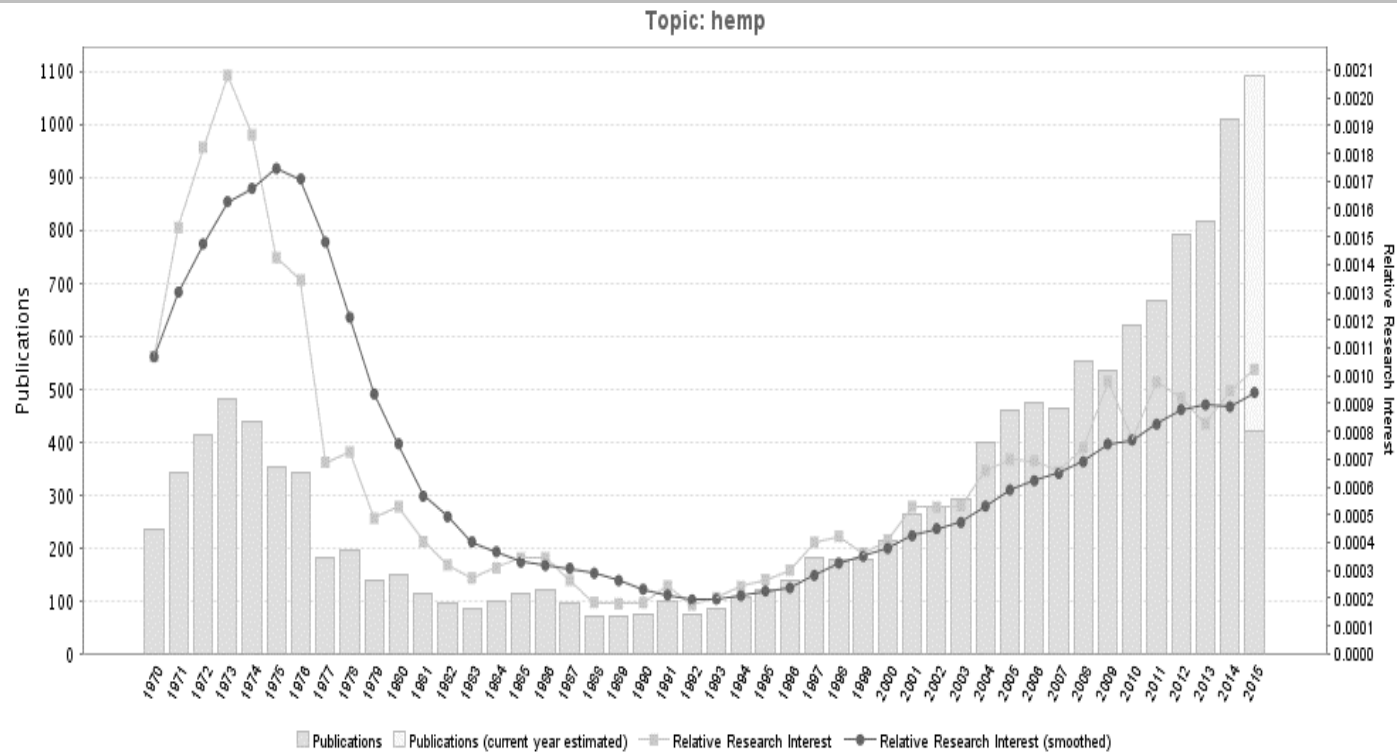


Future Prospects

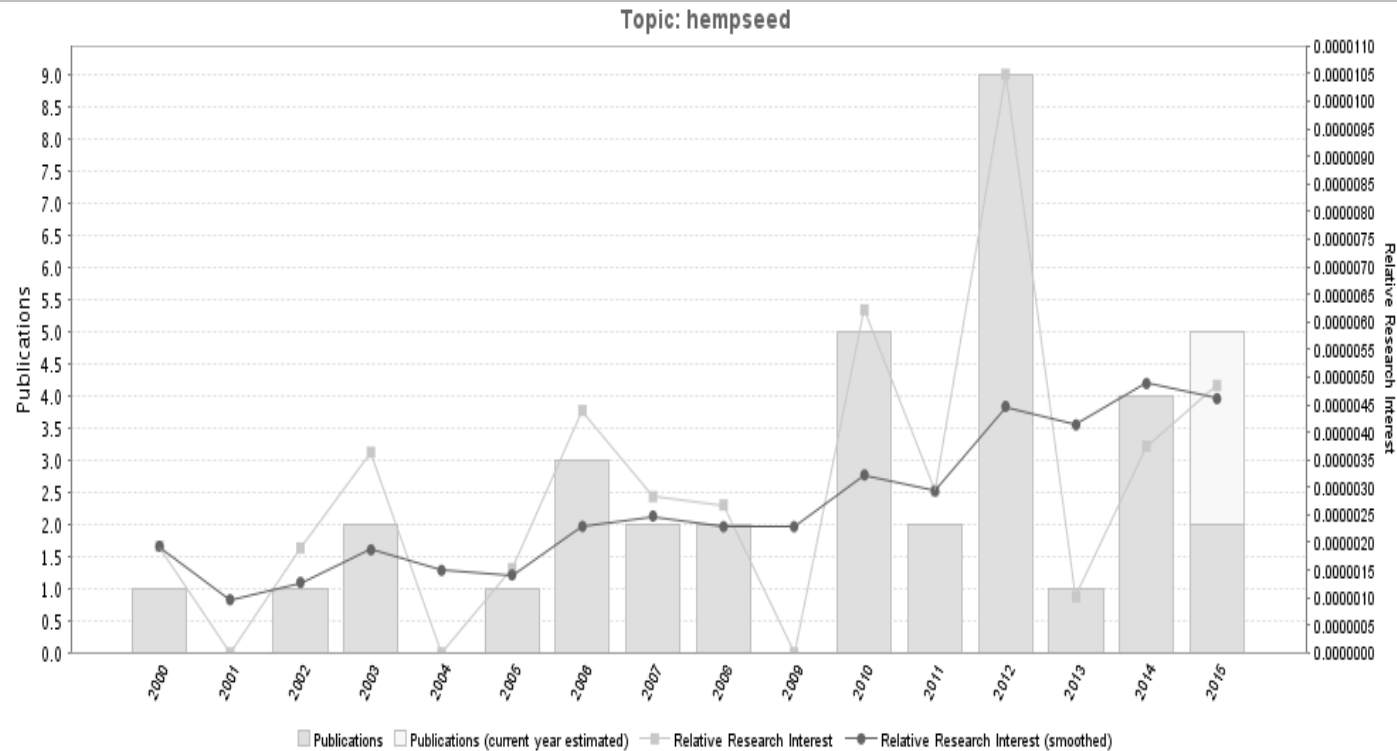
Hemp food in Europe, e.g. Germany, has mainly been sold via the internet and small independent stores. However, larger stores and special organic or non-gmo supermarkets are adding hemp food products to their portfolio. Producers are confident that this trend will continue and larger retail chains will enter the hemp food market as well.



Research & Publications

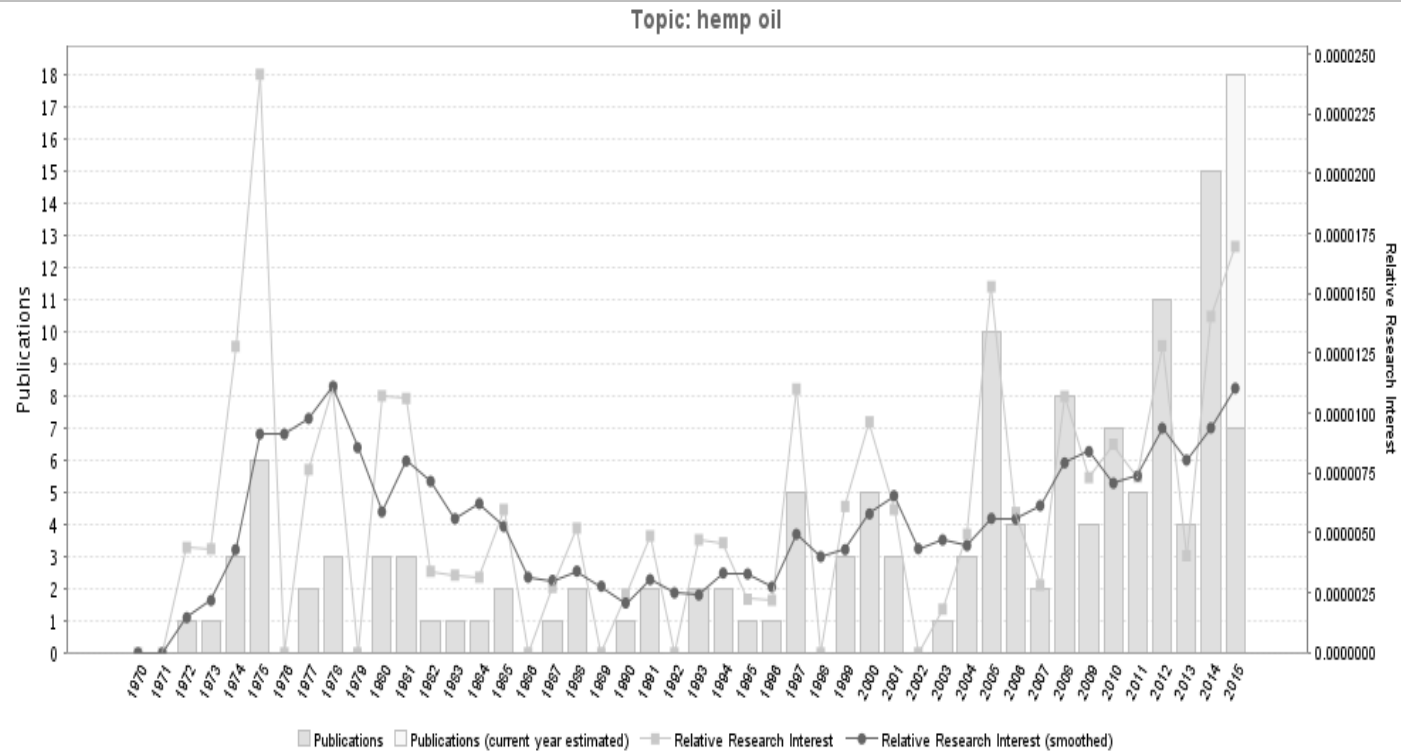


Research & Publications



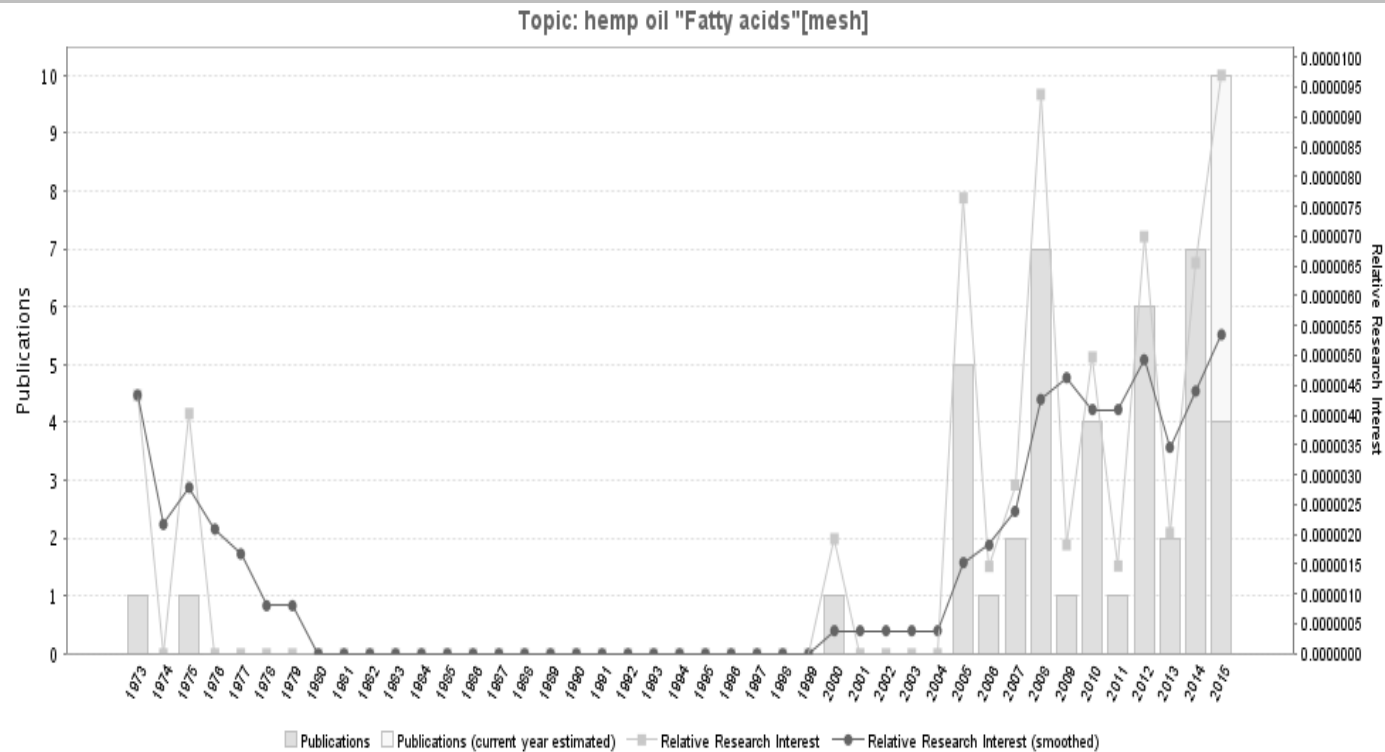
Source: <http://www.gopubmed.com/web/gopubmed/>, Hempro Int. (2015)

Research & Publications

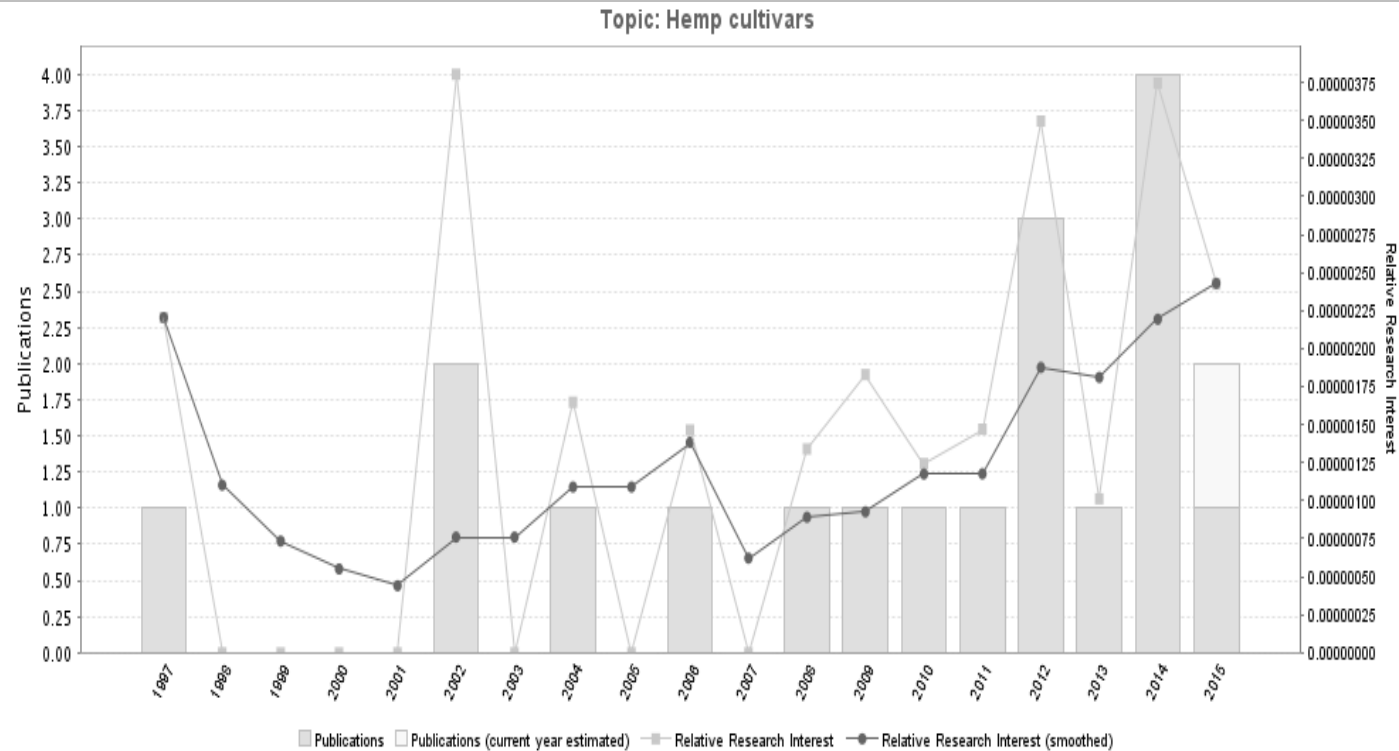


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Research & Publications

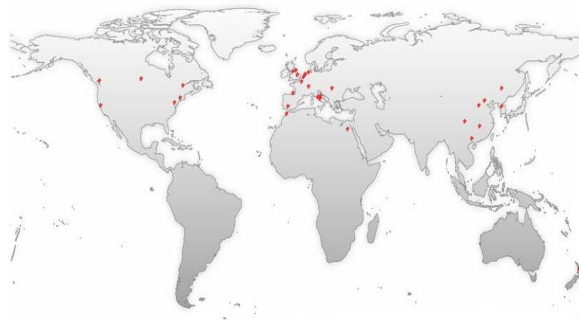
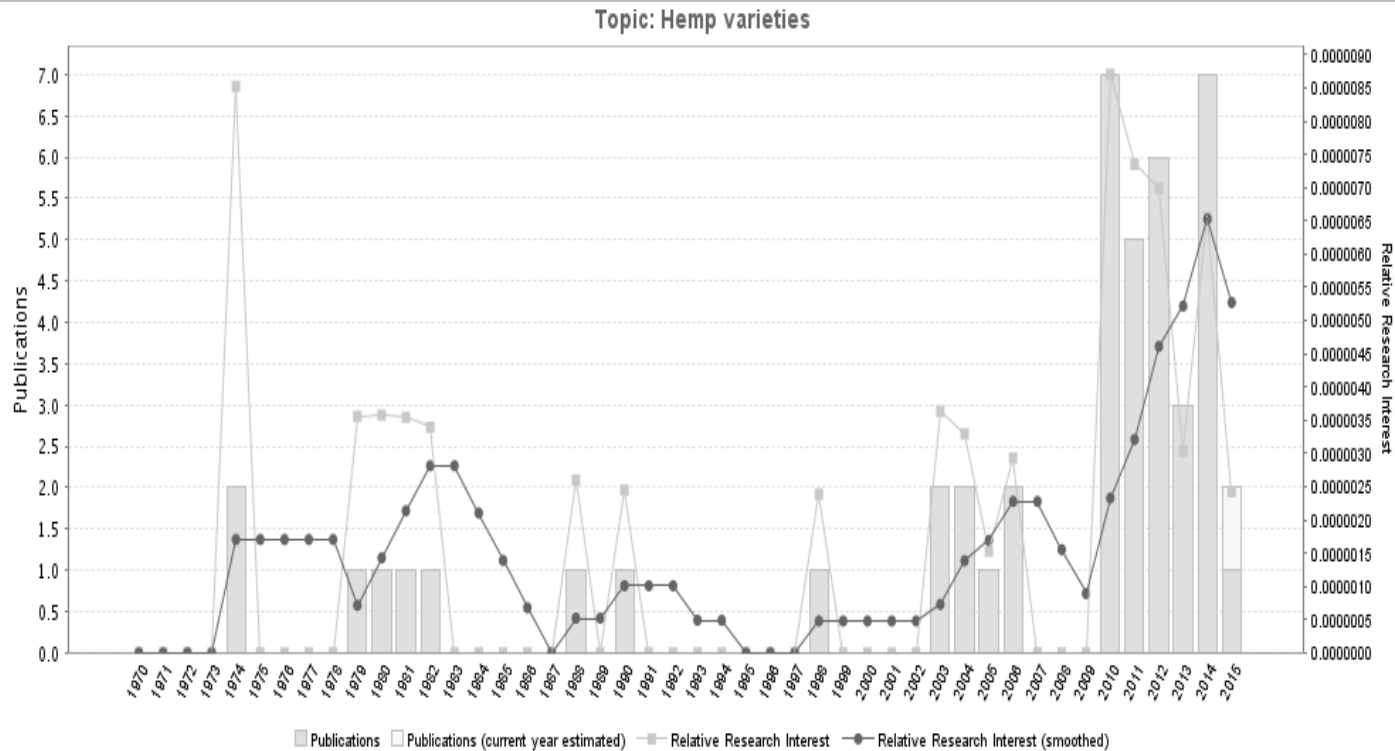


Research & Publications



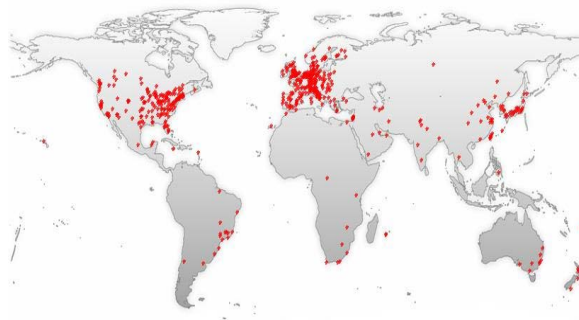
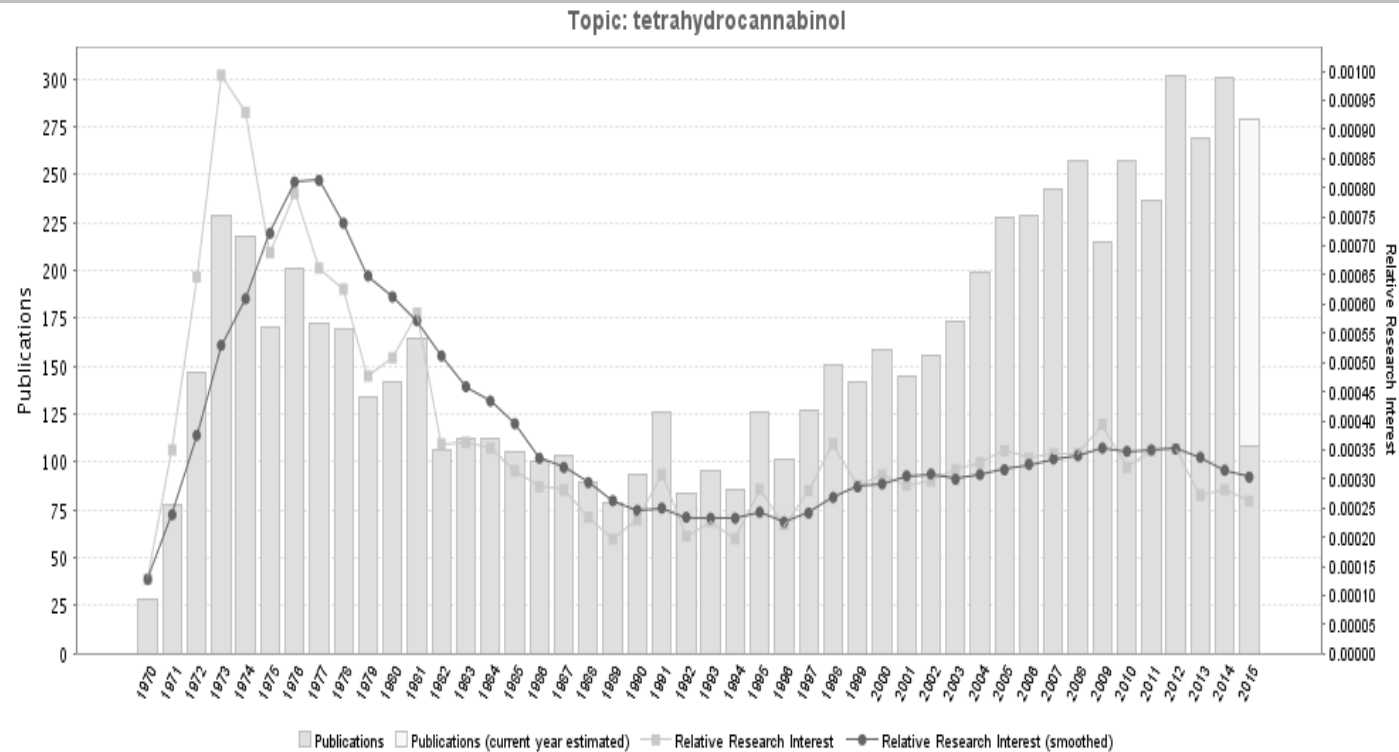
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Research & Publications



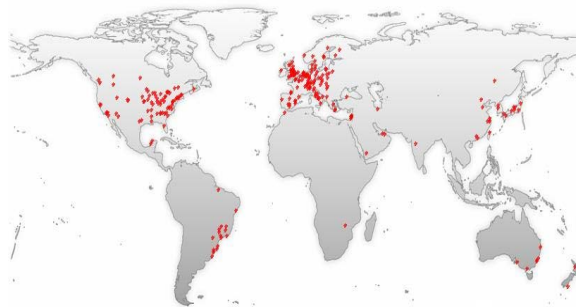
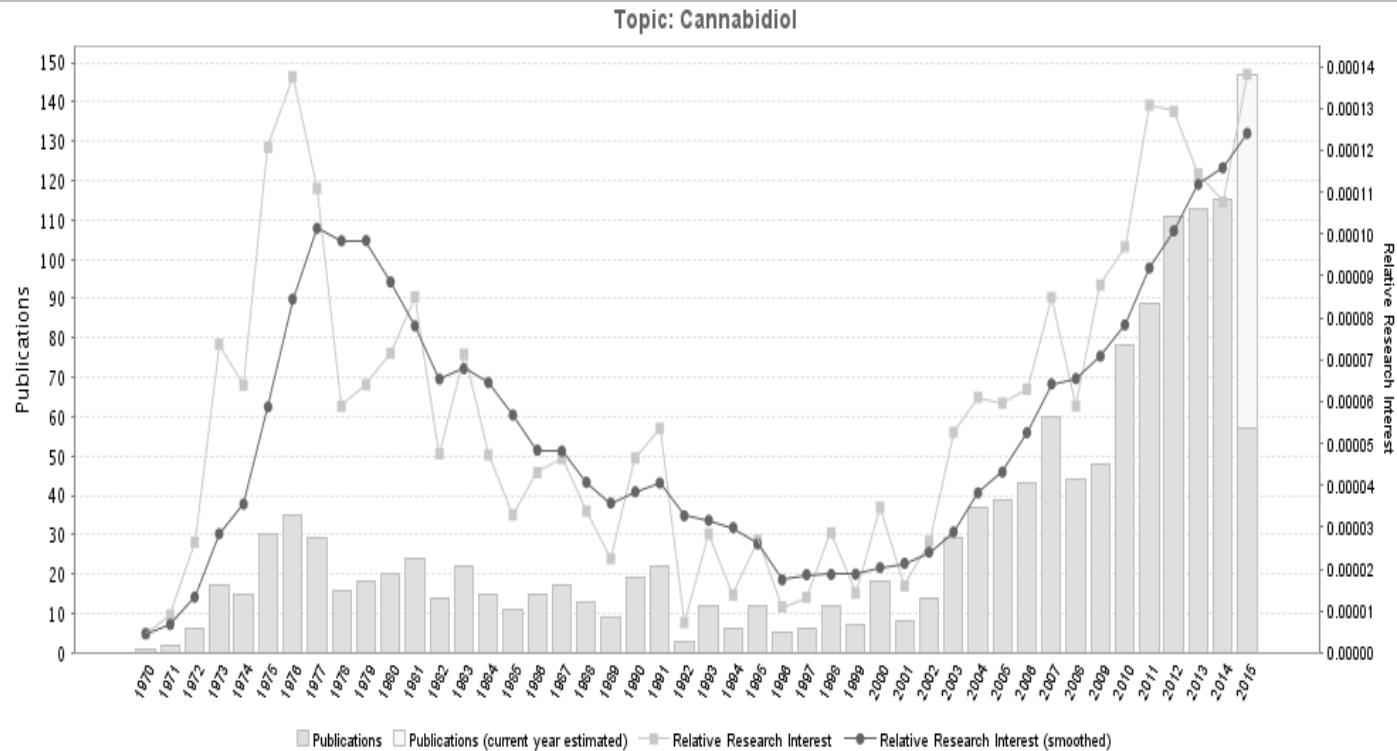
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Research & Publications



Thank you for your attention!

