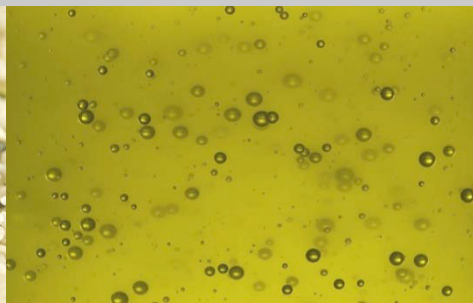


New Data on Hemp Food Market

EIHA Conference, June 2016



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.



Hemp “Super Food”



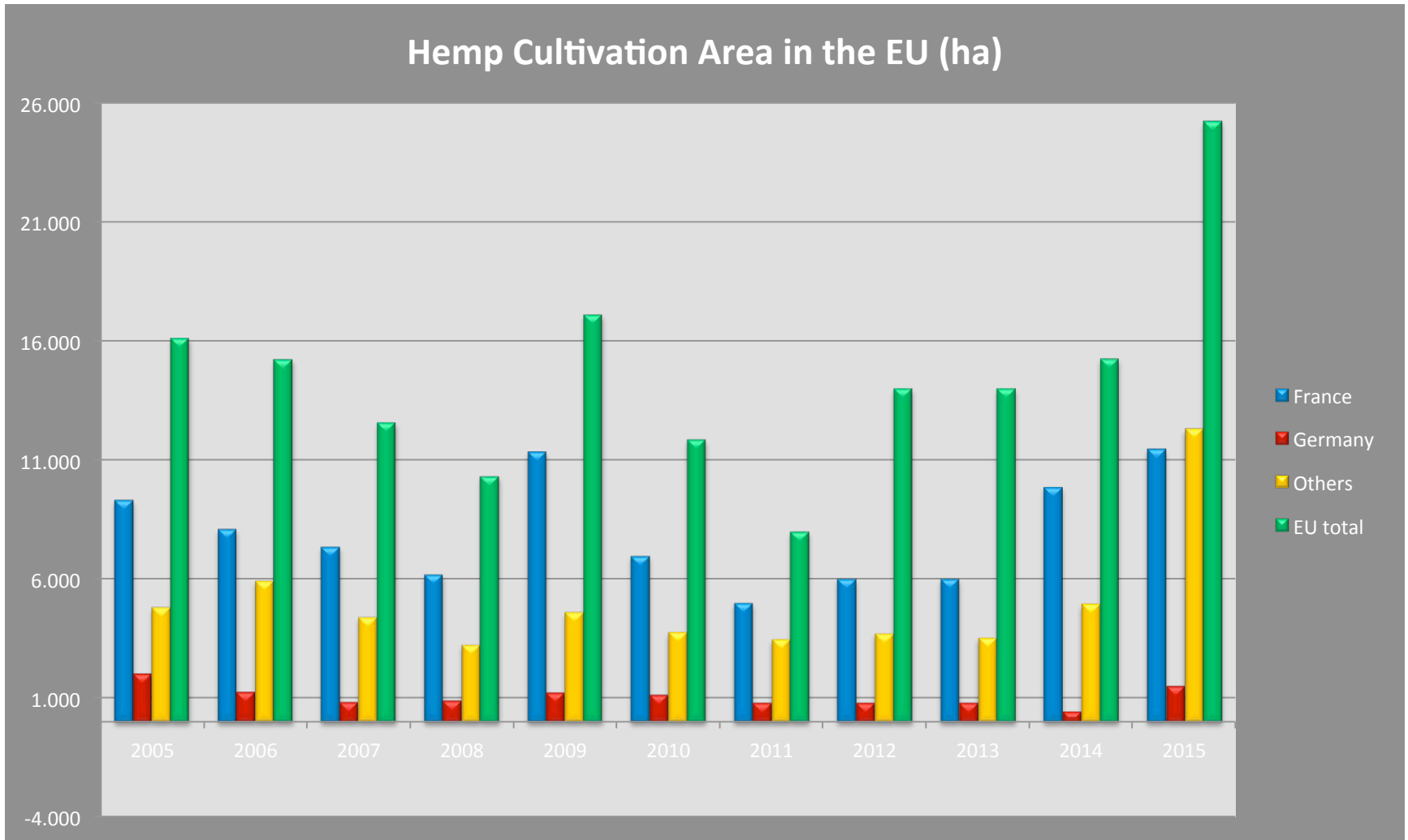
- Hemp food is a growing sector with a double digit market expansion expected globally.
- This is due to more dietary conscious consumers who increasingly demand more high value nutritious foods, also known as ‘super foods’.
- Hempseeds are particularly sought after due to their high content of Omega 3 and 6, at an exquisite balance for human well-being, along with highly digestible proteins comprised of all essential amino acids in a balanced ratio that satisfies the protein dietary needs of adults.
- Big supermarkets and discounter selling hemp food products (2015): Albert Heijn (The Netherlands) and ALDI (Germany).

Status EU:

- 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
- EU hempseed production for food increases strongly since 2007.
- EU hemp cultivation area is growing again.
- 2015: 25.224 ha (largest area since 50 years)

Source: Hempro Int. (2016), EIHA (2016)

The Hemp Market EU



Source: Hempro Int. (2016), EIHA (2016)

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
- Relevant production in Europe 2015:

Country	Area (ha)
The Netherlands	1.842
Germany	1.486
Austria	367
France	11.450
Italy	2.070
Romania	817
Baltic	2.390
Ukraine	400
Others	4.402
TOTAL ca.	25.224

The Hemp Market EU



Hempseed Consumption EU

mt hemp seeds p.a. (estimated)	2008	2009	2010	2011	2012	2013	2014	2015
EU production (from previous year/harvest)	6.000	7.000	6.000	6.000	7.000	9.000	11.500	12.500
- France	n/a	6.500	4.500	4.500	5.000	7.000	9.000	8.500
- others	n/a	500	1.500	1.500	2.000	2.000	2.500	4.000
EU imports*	10.000	9.700	10.800	11.000	10.000	9.000	9.500	10.000
EU exports**	500	900	800	500	300	100	100	200
EU consumption	15.500	15.800	16.000	16.500	16.700	17.900	20.900	22.300
- Food	600	700	1.800	2.500	2.700	3.800	8.000	8.500
- Feed	14.900	15.100	14.200	14.000	14.000	14.100	12.900	13.800

Source: Eurostat (2011), Hempro Int. (2016), EIHA (2016)

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

* Mainly from China

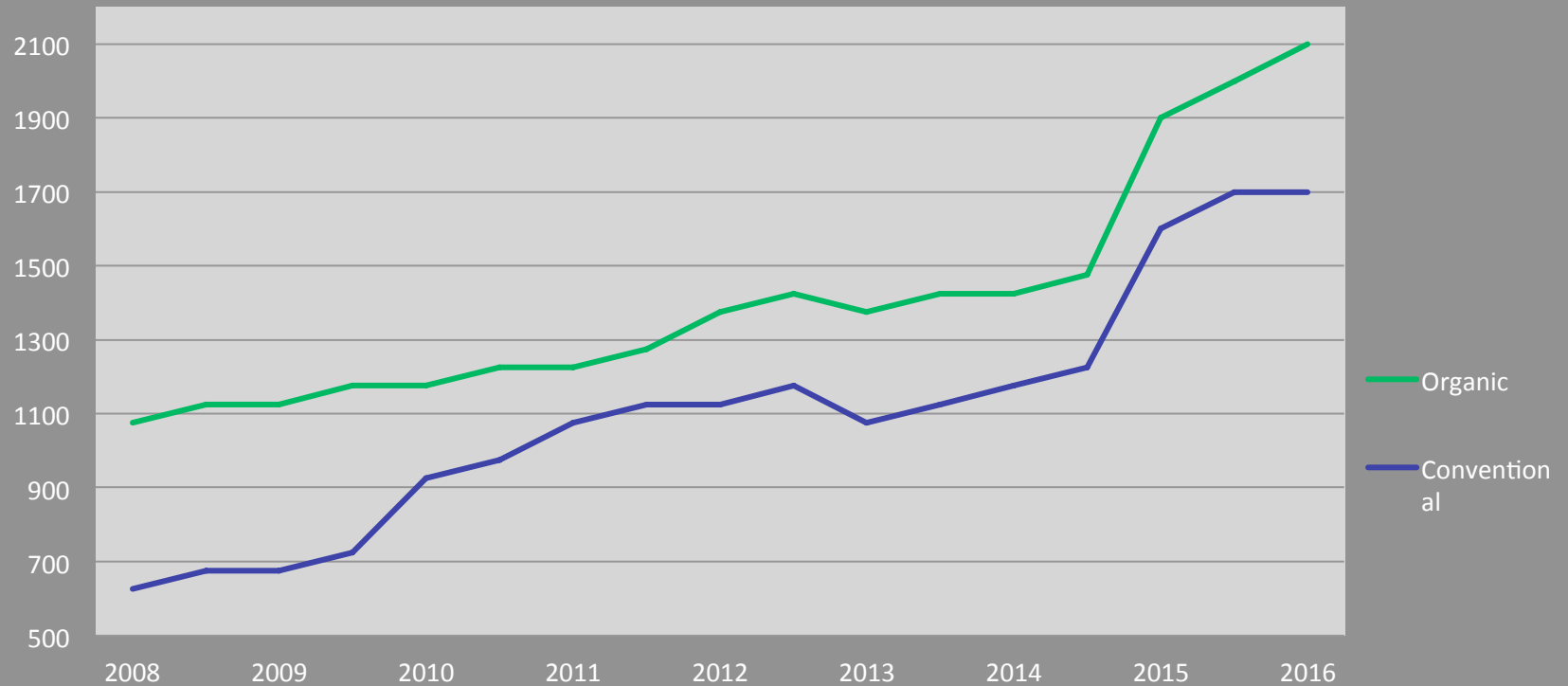
** Exports of processed hemp seeds to North-America.

The Hemp Market EU

Price development of hempseed (China imports):

Hempseed (food) prices (EUR/mt)

Based on full truck, FCA Rotterdam, cleaned 99,5% purity



Hempro Int. (2016)

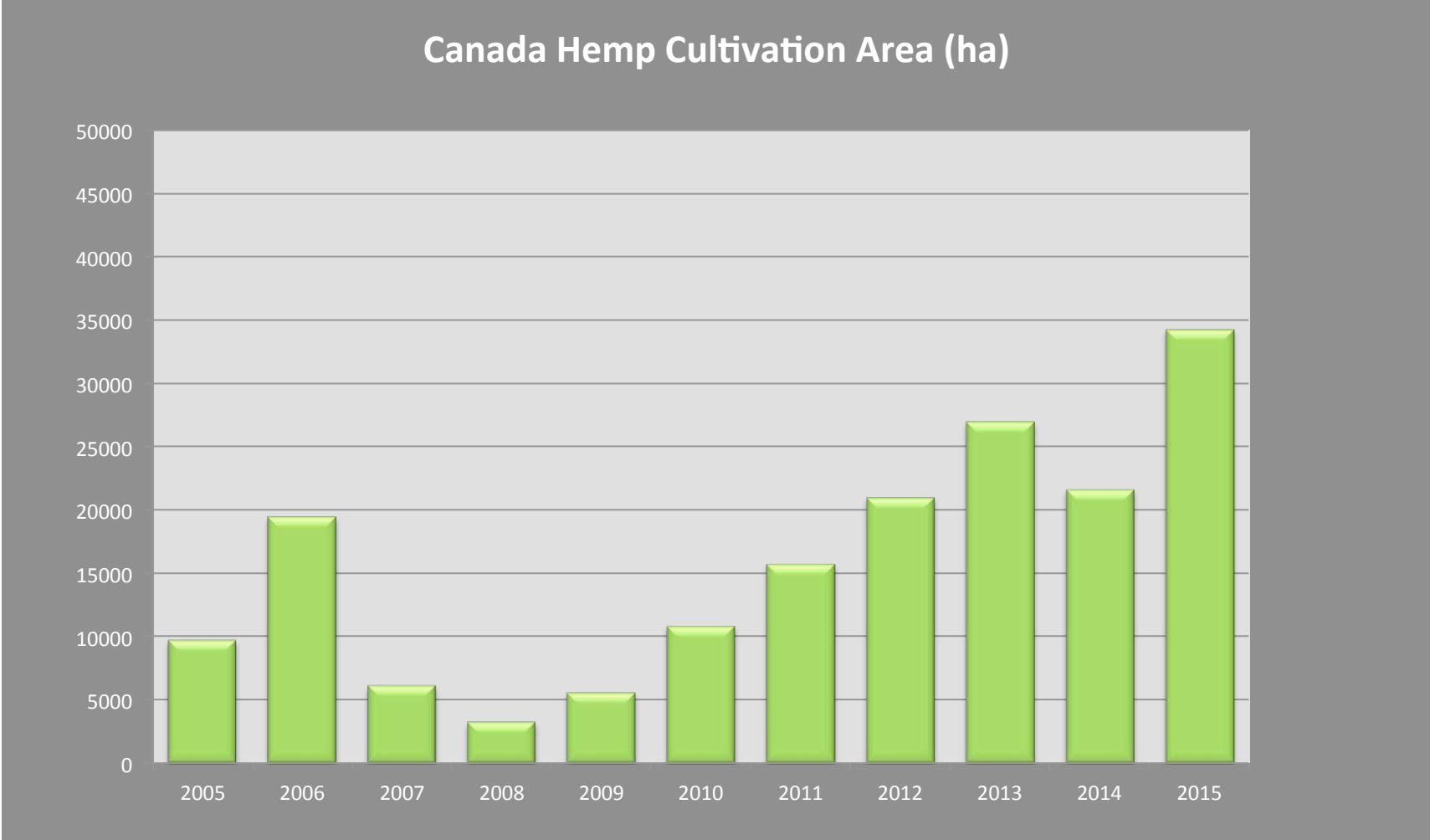
The Hemp Market Canada

Licensed Acreage Summary

- 2013: 66,670 acres = 26,982 ha
- 2014: 53,398 acres = 21,609 ha (-20%)
- 2015: 84,665 acres = 34,263 ha (+59%)

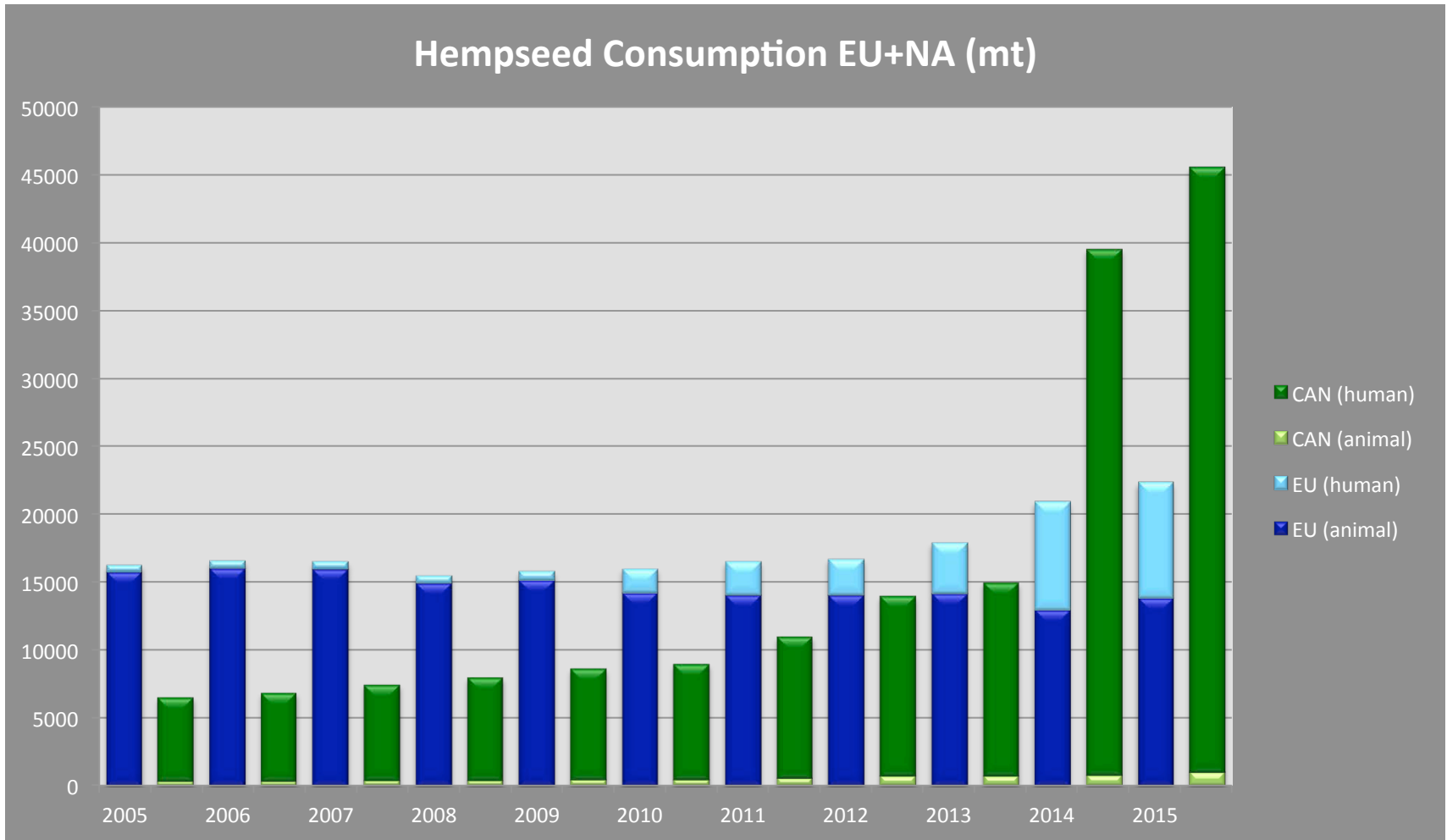


The Hemp Market Canada



Source: Hemp Oil Canada Inc. (2016), CHTA (2016)

The Hemp Market Comparison EU / NA



Source: Hempro Int. (2016), EIHA (2016)

Future Prospects

- North American data shows very high sales turnover and EU sales start to pick up strongly
→ excellent 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. On mainland Europe this is just starting.
- Example: If only 10% of the population in Germany would integrate 10 ml of hemp oil in their daily nutrition, a yearly requirement of approximately 30 million litres of hemp oil e.g. 100.000 mt of hempseed would result.

Source: EIHA (2015)

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.



Market Study on Hemp Food



HempConsult

Produced by
nova-Institute
in cooperation with
HempConsult GmbH.

A large, semi-transparent image of a hemp leaf with serrated edges, serving as a background for the central text.

Market Study on Hemp Food

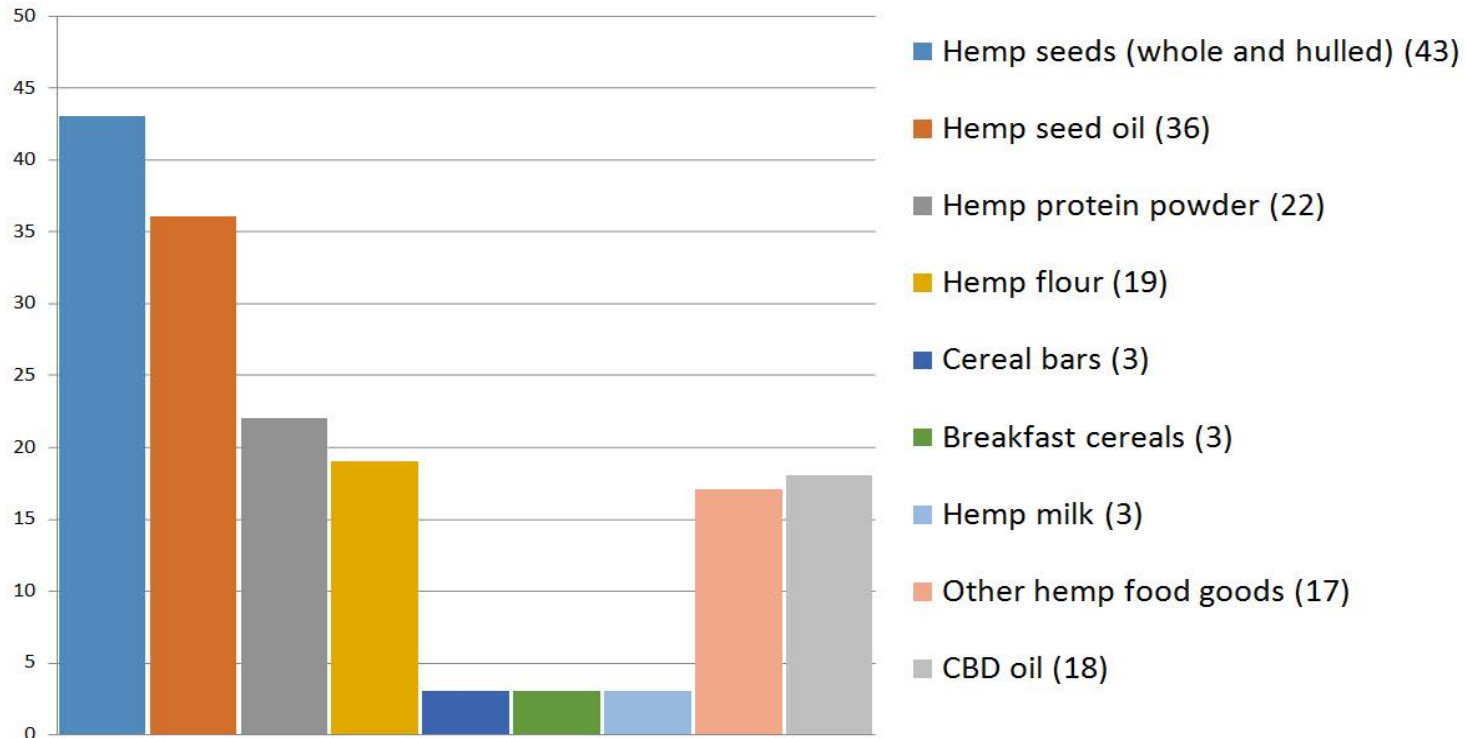
Hürth, 4th November 2015

nova-Institut GmbH, Hürth (Cologne), Germany
&
HempConsult GmbH, Düsseldorf, Germany

The study is based
on a survey
regarding turnovers
per product
and existing sales
channels for the
past three years.
It was answered by
171 participants.

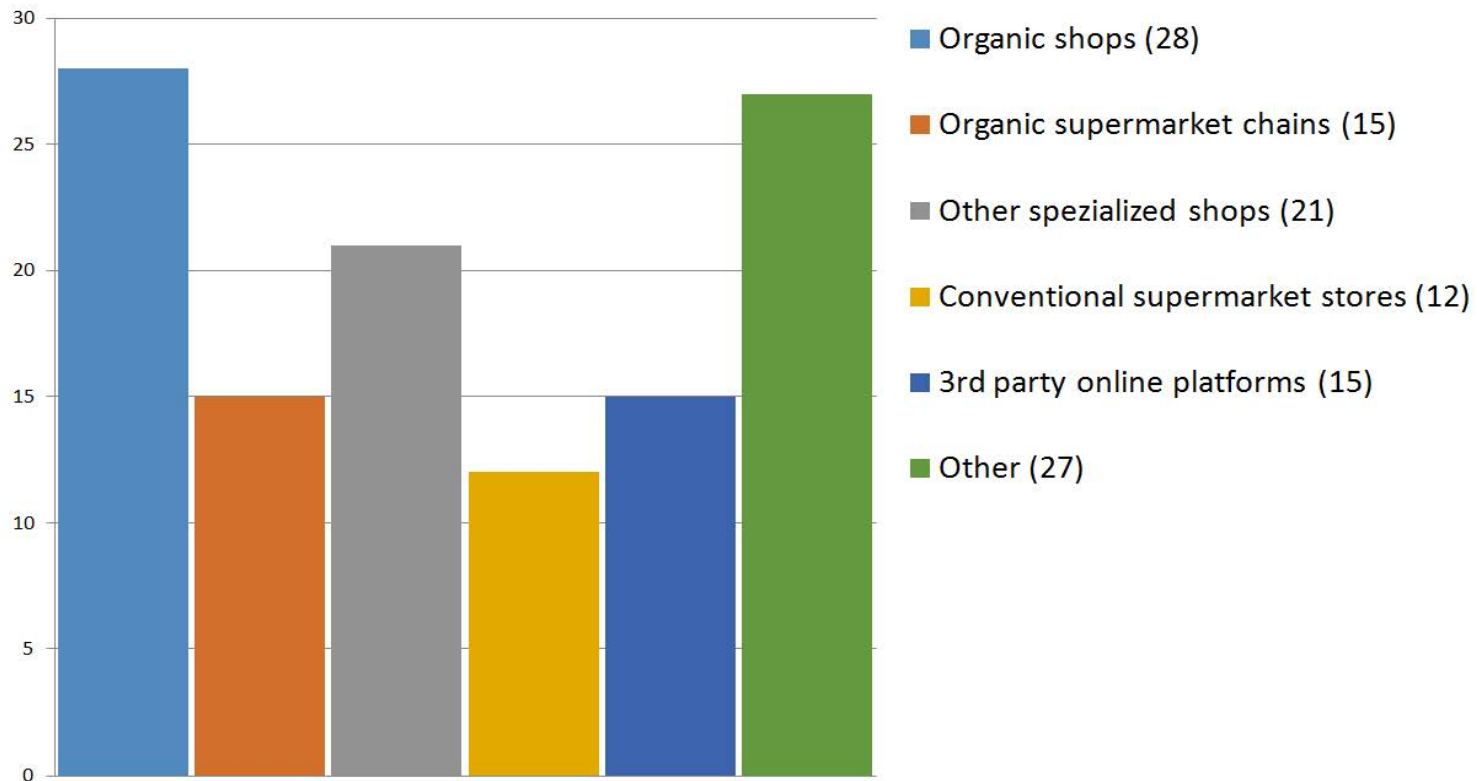
Market Study on Hemp Food

Figure 2 – Distribution of participants among hemp food products
(in absolute values)



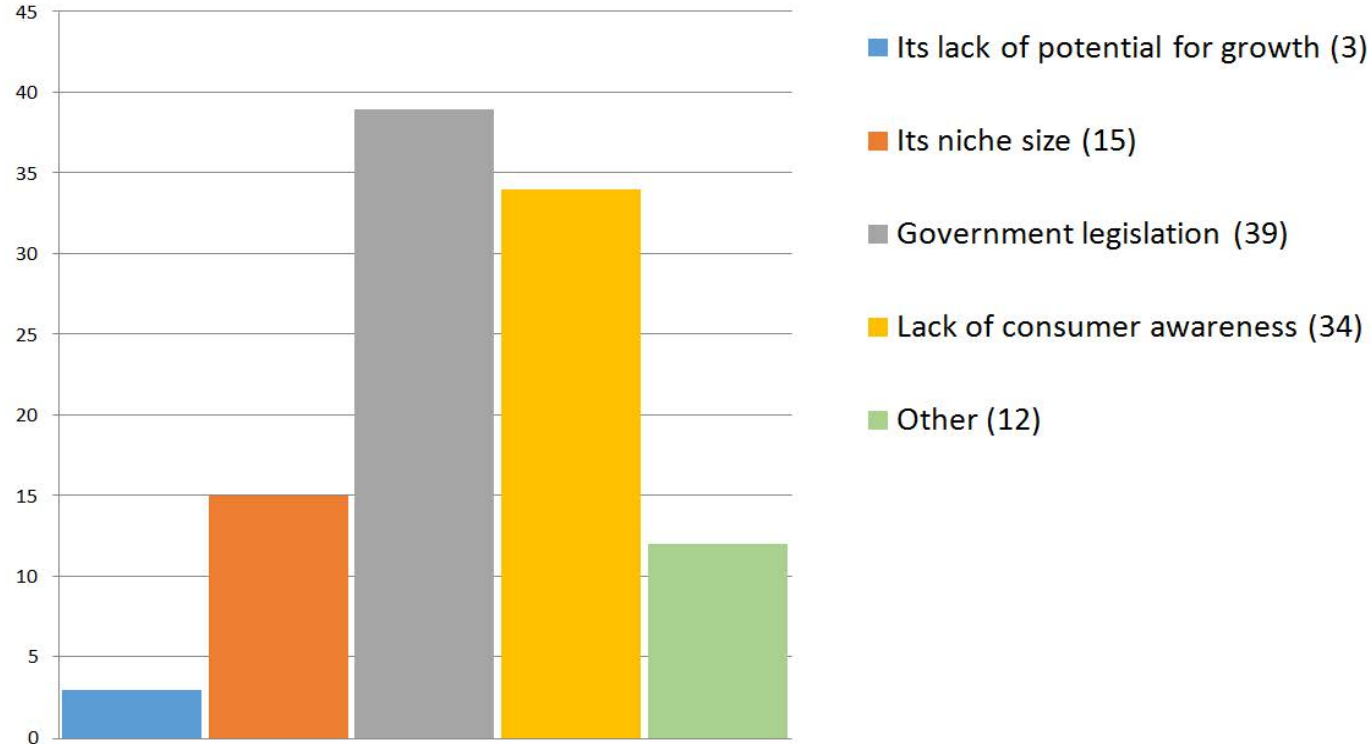
Market Study on Hemp Food

Figure 5 – Distribution channels for Hemp Food (in absolute terms)



Market Study on Hemp Food

Figure 8 – Identified weaknesses of the Hemp Food market (in absolute terms)



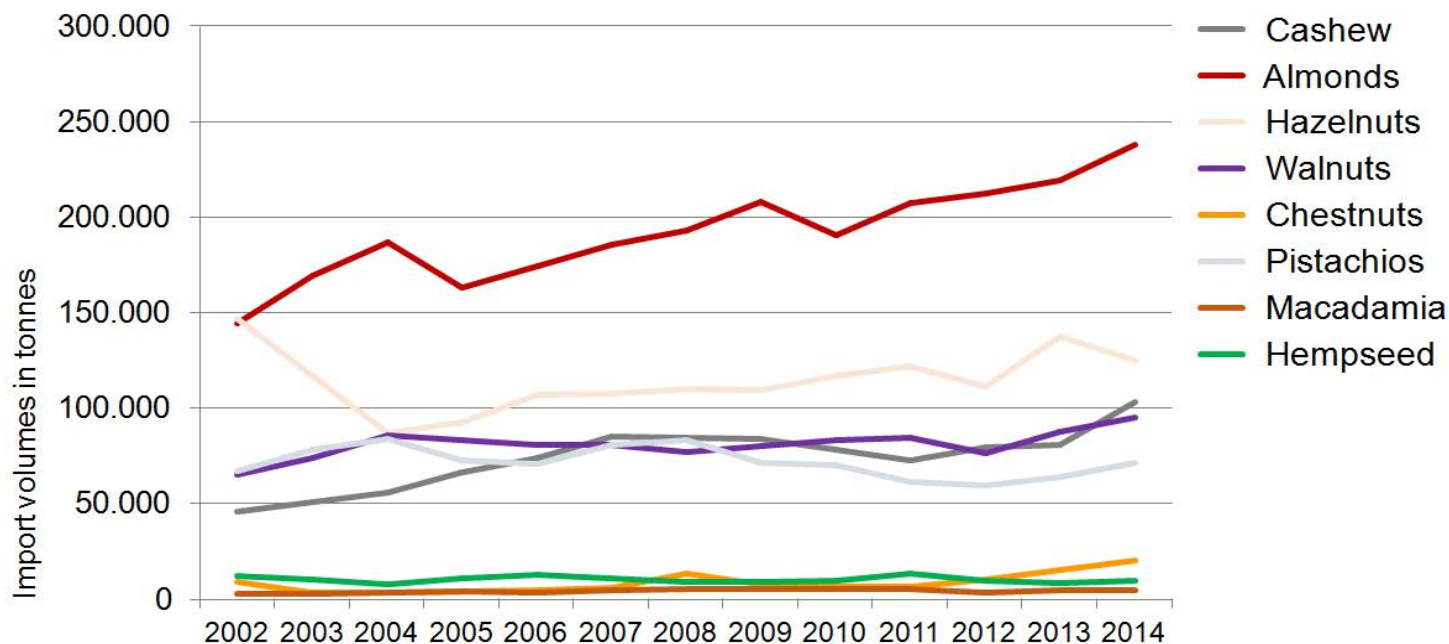
Market Study on Hemp Food



Volumes of hemp and other nuts

HempConsult

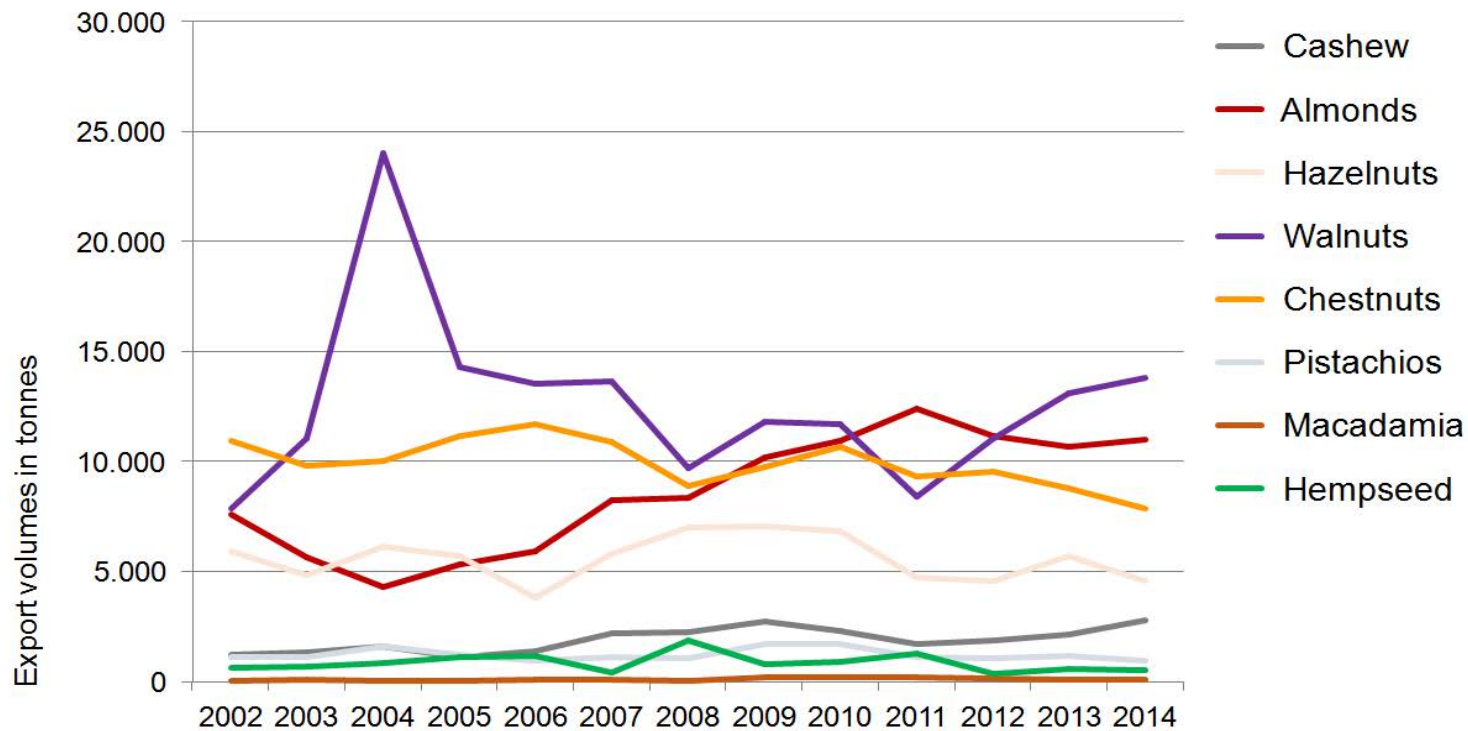
Figure 10 – Import volumes into the EU-28 of the most important nuts



Source: Eurostat

Market Study on Hemp Food

Figure 11 – Export volumes from the EU-28 of the most important nuts



Source: Eurostat

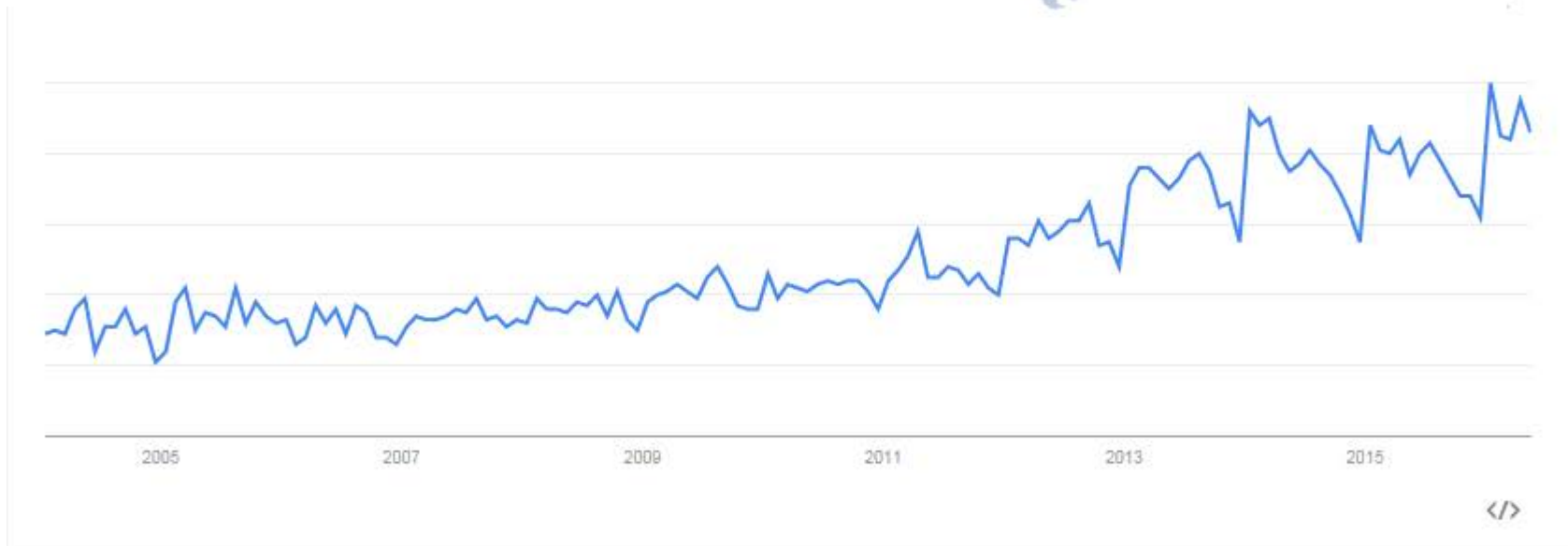
Google search trends

Search item: *hemp*

Category: *foods and drinks*

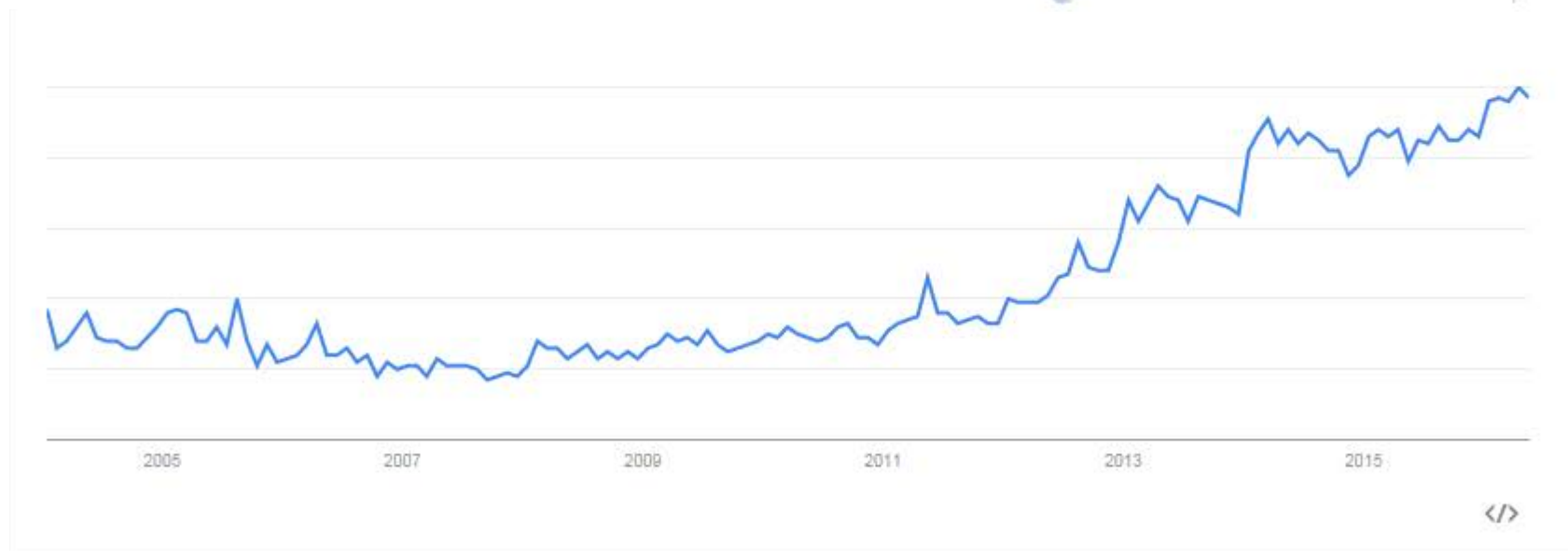
Time period: *2004 – today*

Region: *worldwide*



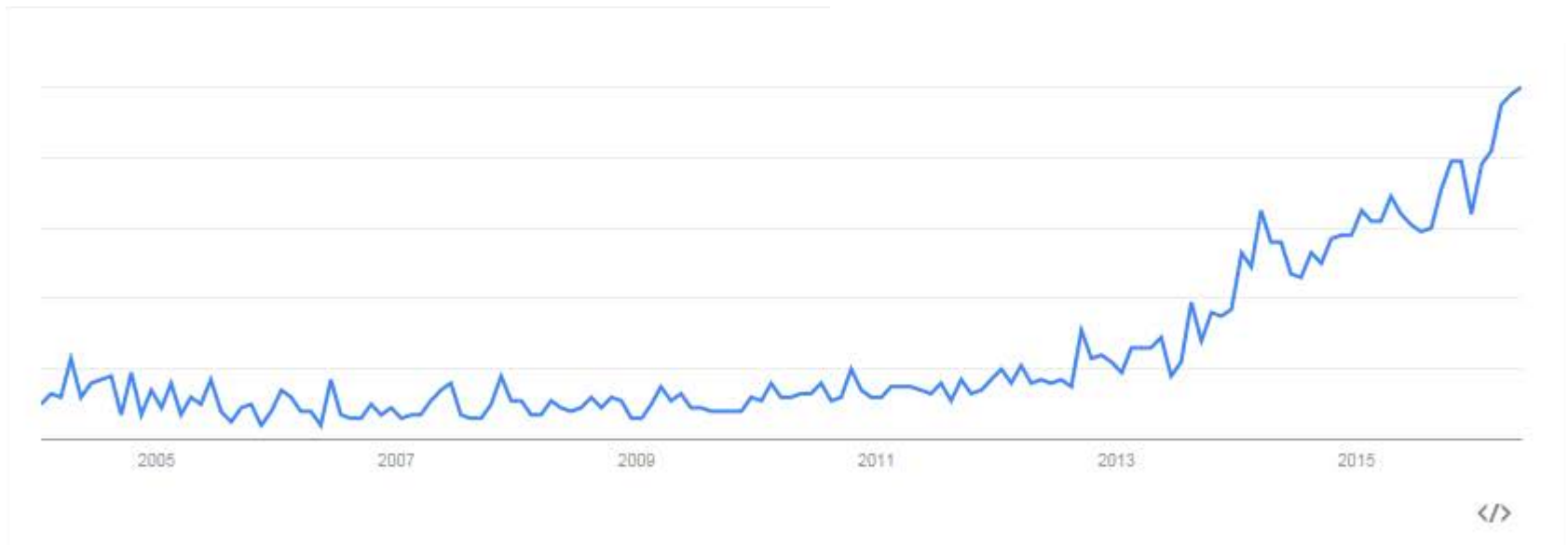
Google search trends

Search item: *hemp oil*
Category: *all*
Time period: *2004 – today*
Region: *worldwide*

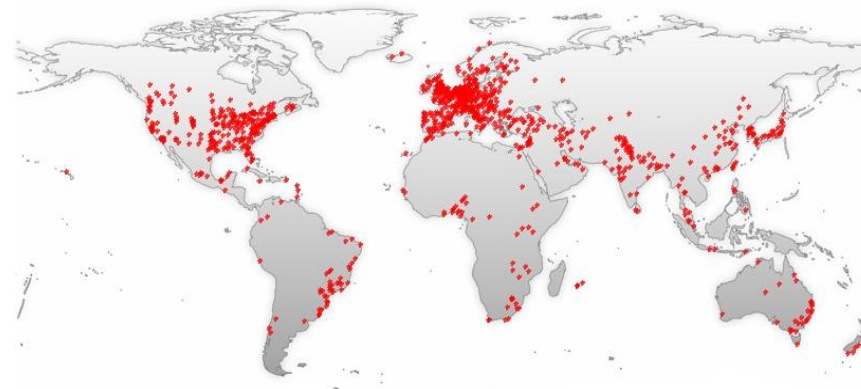
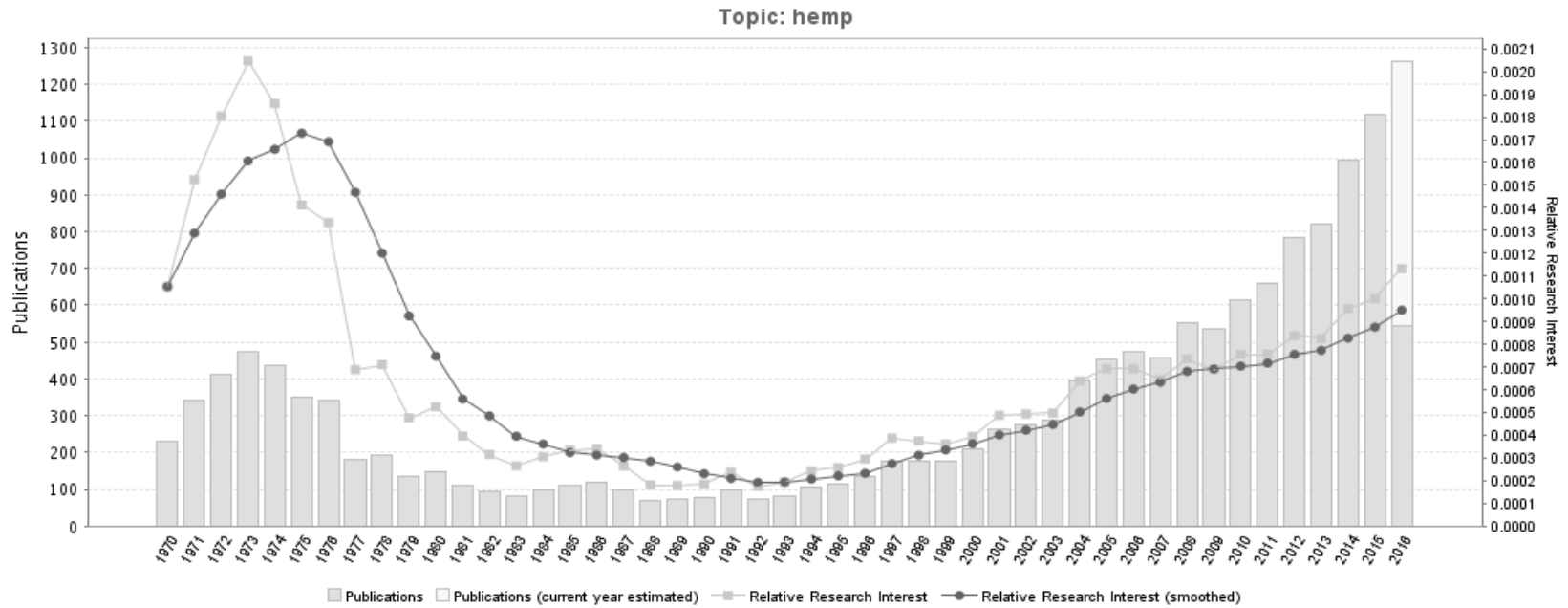


Google search trends

Search item: *cannabidiol*
Category: *health*
Time period: *2004 – today*
Region: *worldwide*

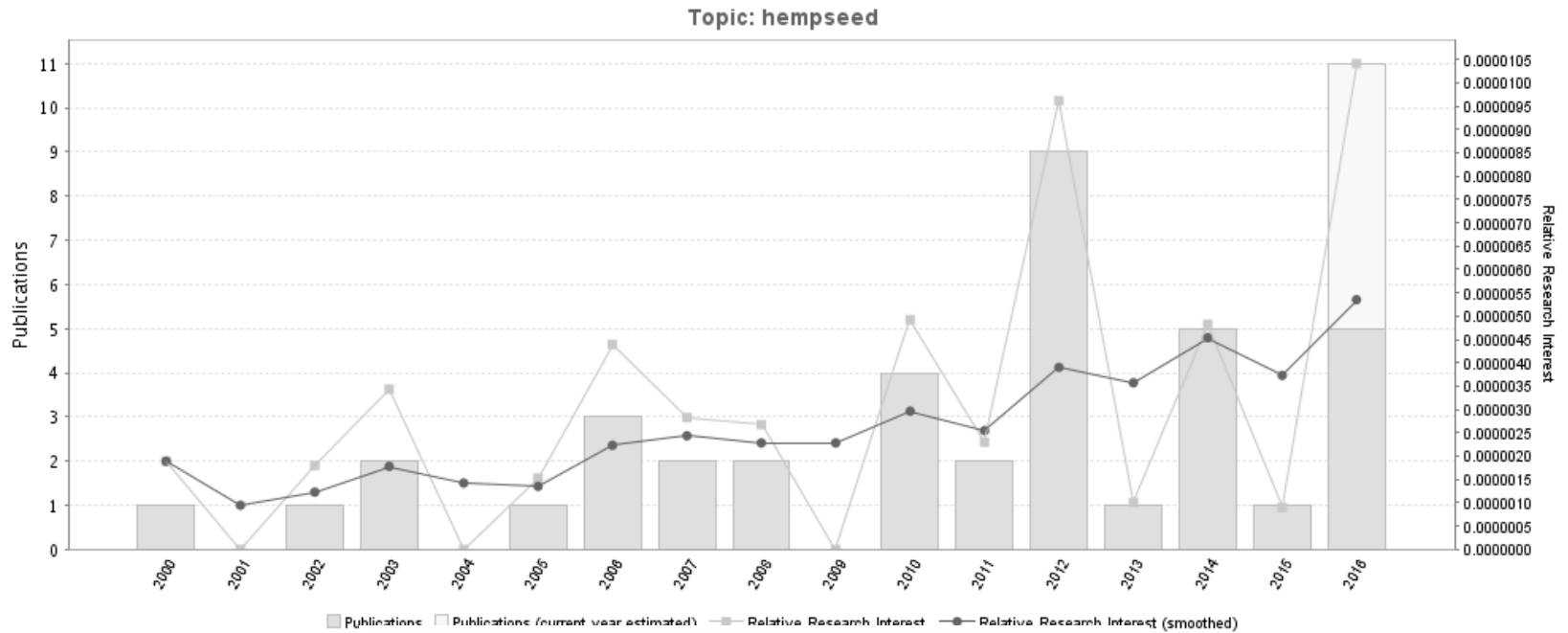


Research & Publications



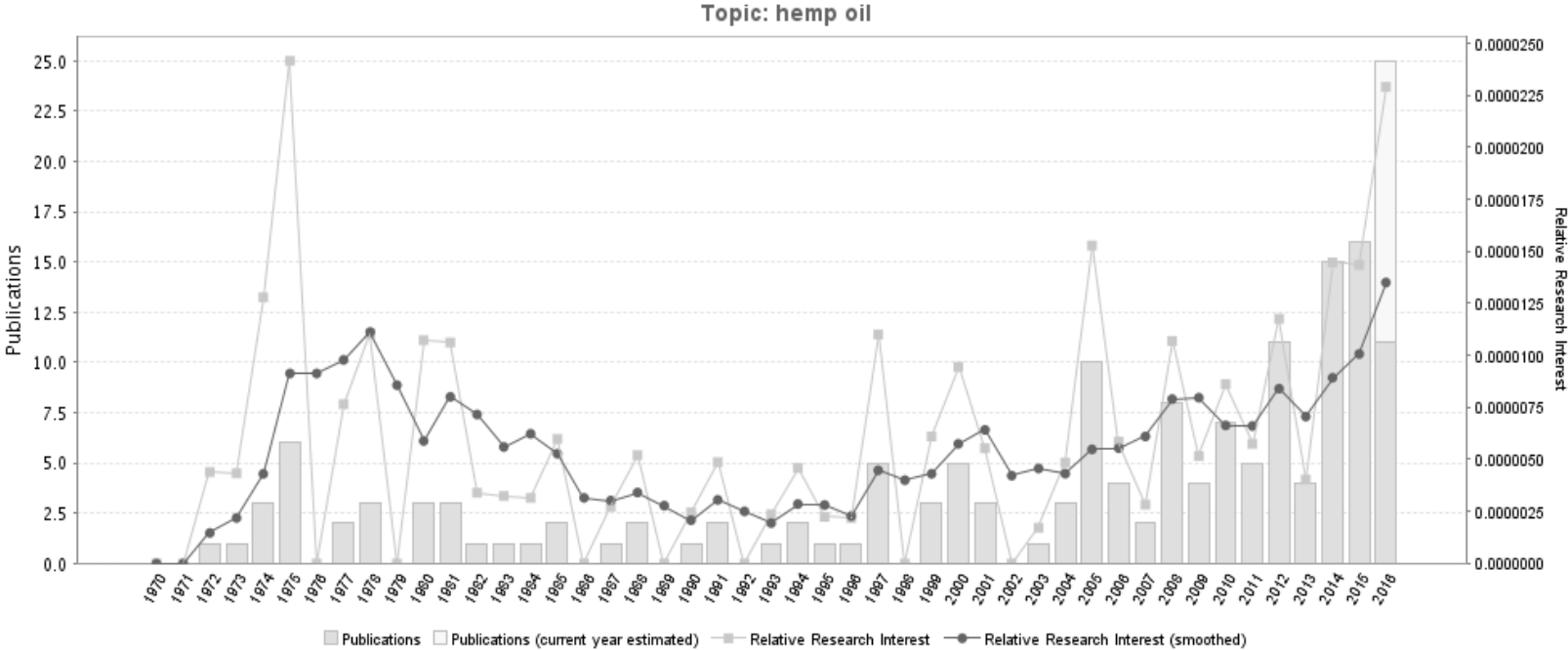
Source: <http://www.gopubmed.com/web/gopubmed/>, HempConsult (2016)

Research & Publications



Source: <http://www.gopubmed.com/web/gopubmed/>, HempConsult (2016)

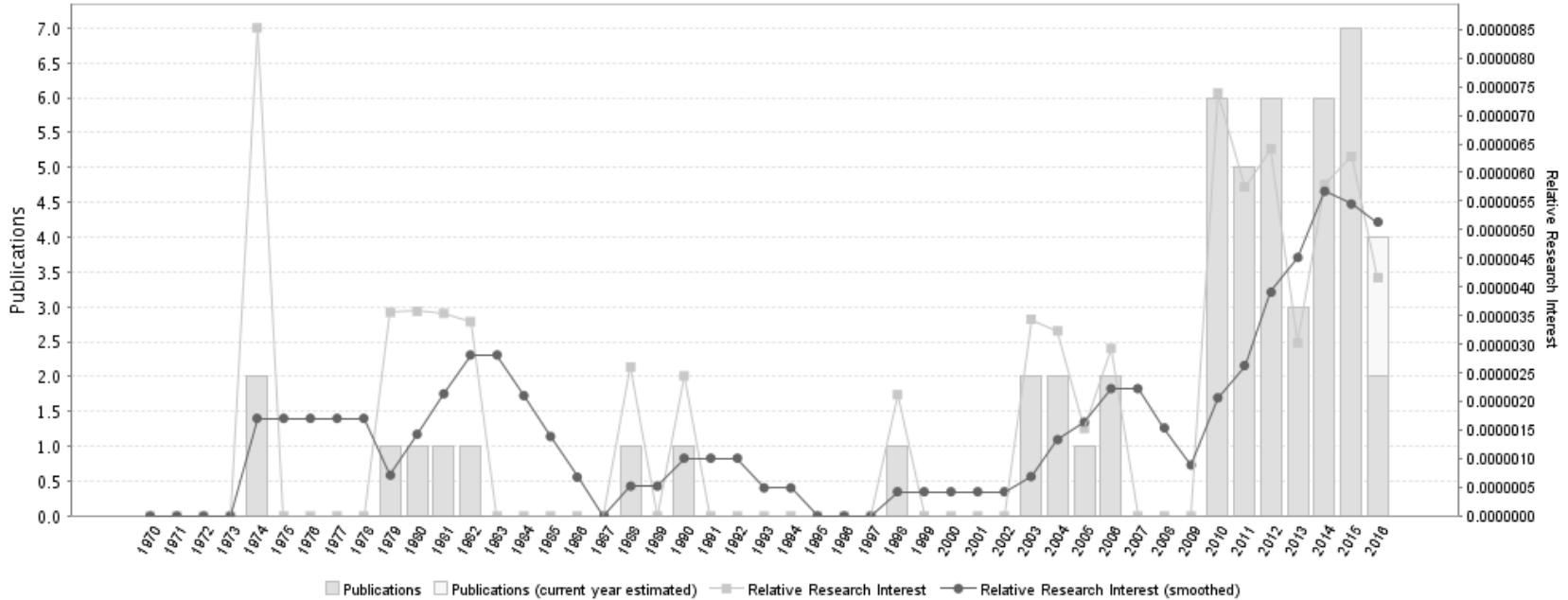
Research & Publications



Source: <http://www.gopubmed.com/web/gopubmed/>, HempConsult (2016)

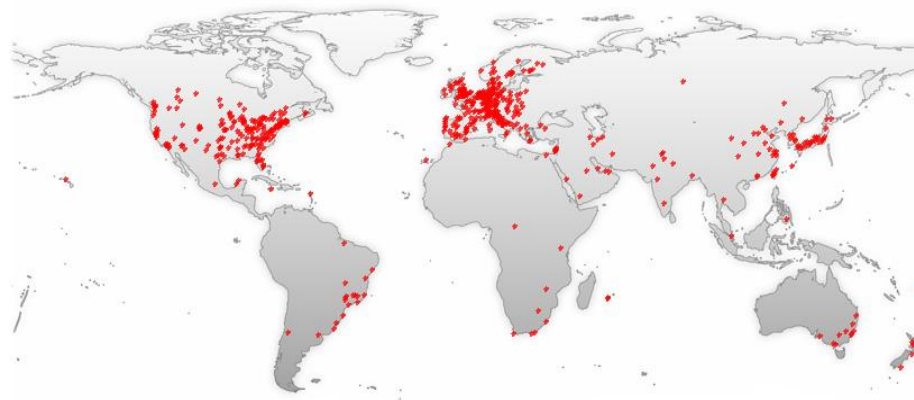
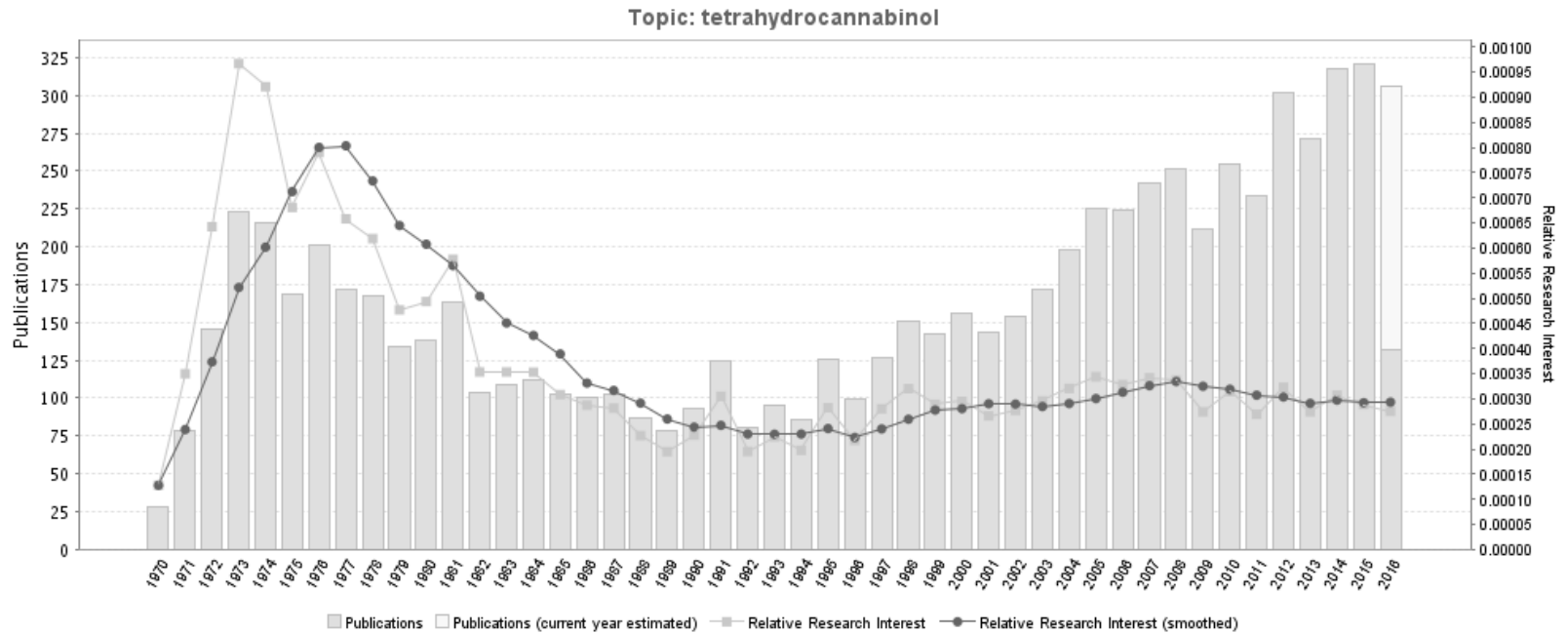
Research & Publications

Topic: hemp varieties



Source: <http://www.gopubmed.com/web/gopubmed/>, HempConsult (2016)

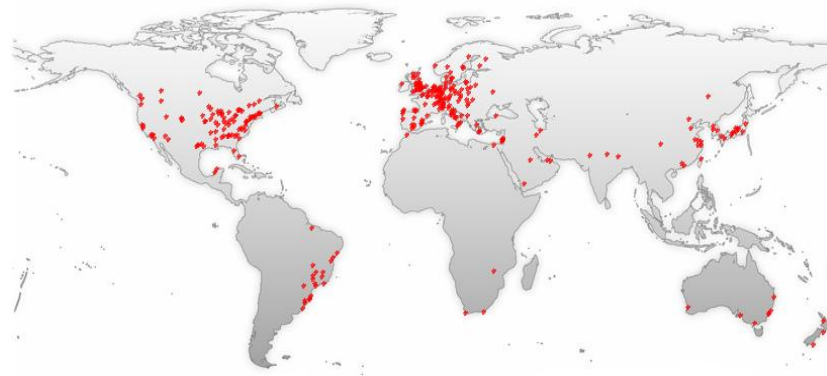
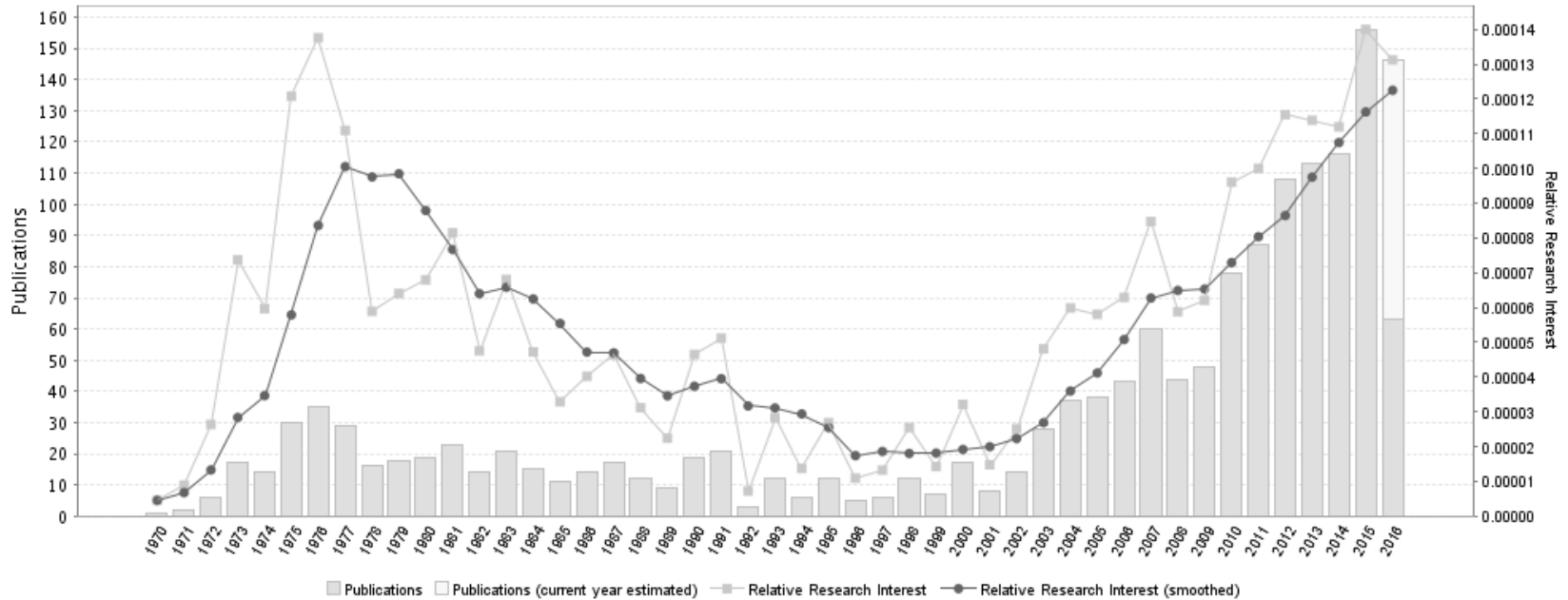
Research & Publications



Source: <http://www.gopubmed.com/web/gopubmed/>, HempConsult (2016)

Research & Publications

Topic: Cannabidiol



Source: <http://www.gopubmed.com/web/gopubmed/>, HempConsult (2016)

Thank You for Your Attention!

