

Key Markets, Key Indicators Data for a Growing Industry



**15th International Conference
of the European Industrial
Hemp Association (EIHA)
June 2018, Cologne**

Daniel Kruse
HempConsult GmbH
Germany

OUR VISION

HempConsult wants to help to make hemp and its various applications affordable and sustainable to use for society. Together with our partners and clients we strive for continuous optimization of products and processes with the aim of:

The sensible combination of ecology and economy – for sustainable and economic growth.



ABOUT US

Consulting

- Advice in all matters related to starting a hemp business, product range expansion, product placement
- Mentoring from development of strategic objectives all the way to successful and sustainable implementation
- Assistance in handling important operational processes
- Market positioning of hemp companies and products

Market Data

- Data exchange with network partners
- Market surveys and analysis
- Research and studies
- Trend observation
- Collection and evaluation of data
- Market observation



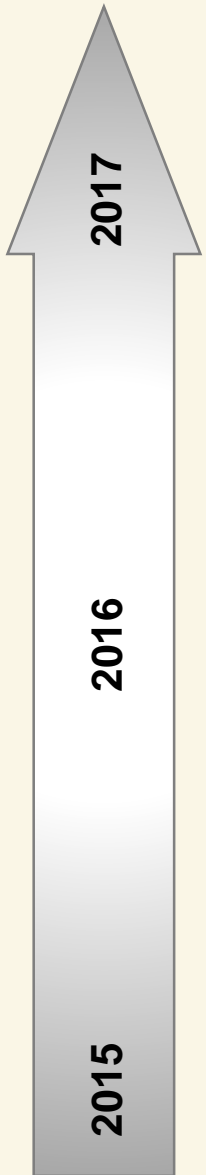
DATA EXCHANGE IN NETWORK

Together with our international network partners, HempConsult is actively collecting data:

- Research and studies
- International market data
- Cultivation areas
- Consumption quantities
- New technologies
- New products
- Price levels of hemp commodities



RESEARCH AND STUDIES



- Reasonable guidance values for THC (Tetrahydrocannabinol) in food products
- THC (in Food) Legal Opinon
- CBD Legal Opinion
- Decarboxylation of THCA to THC
- Uncertainty Factors (UF) for Plant Ingredients in Food
- CBD Position Paper
- Safety and Side Effects of Cannabidiol
- THC regulations regarding industrial hemp in the EU
- Scientifically Sound Guidelines for THC in Food in Europe



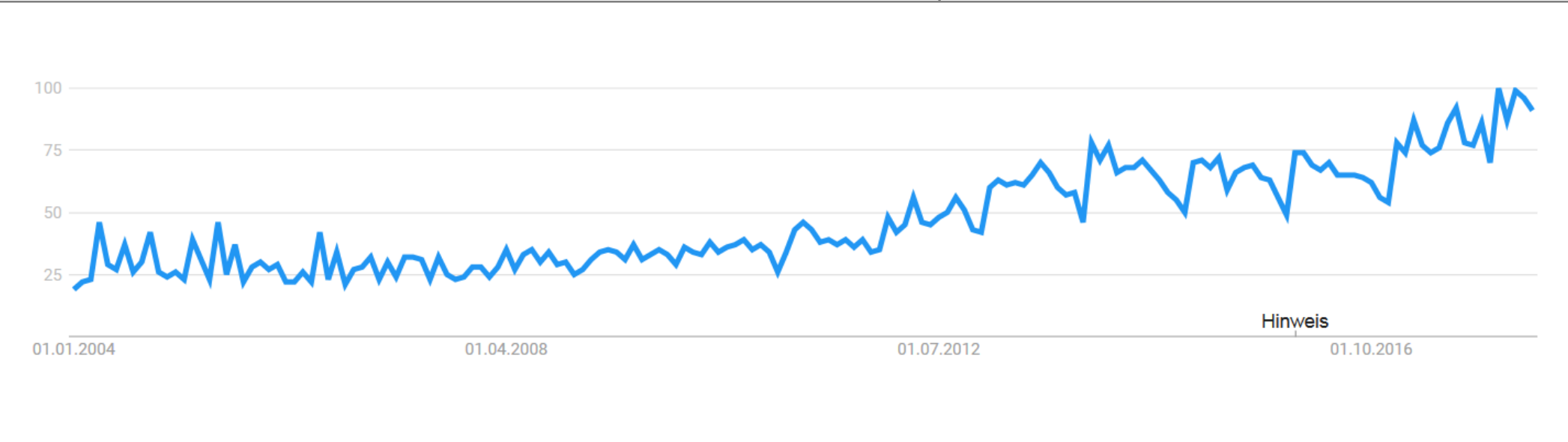
TREND OBSERVATION

Search item: *Hemp*

Category: *Foods and Drinks*

Time period: *2004 – today*

Region: *Worldwide*



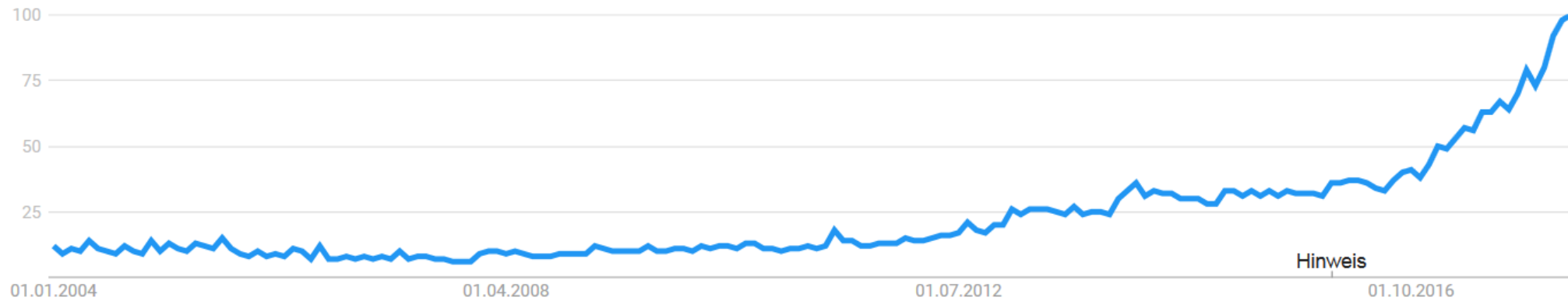
TREND OBSERVATION

Search item: *Hemp Oil*

Category: *All*

Time period: *2004 – today*

Region: *Worldwide*



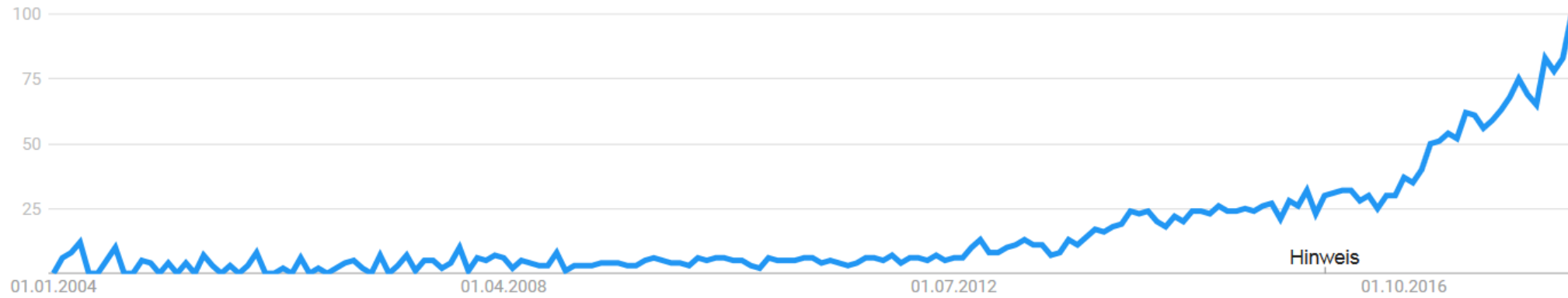
TREND OBSERVATION

Search item: *Cannabidiol*

Category: *Health*

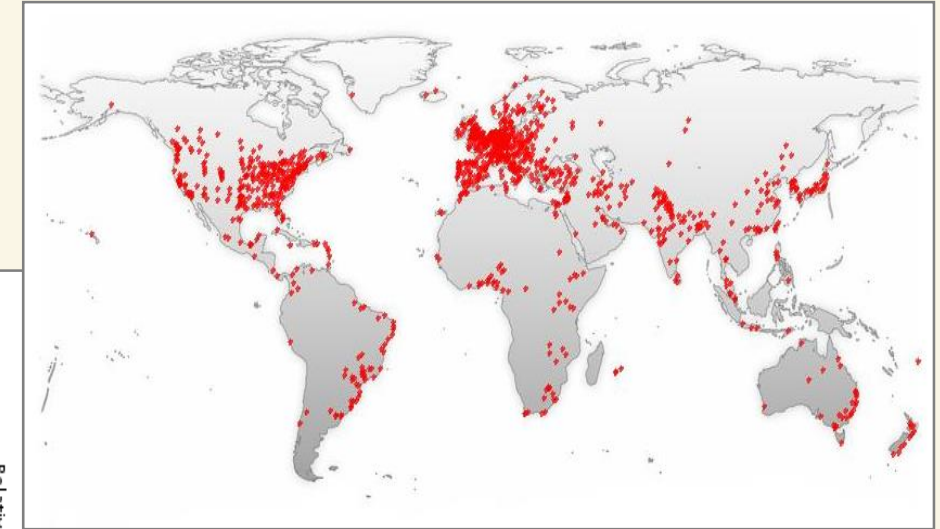
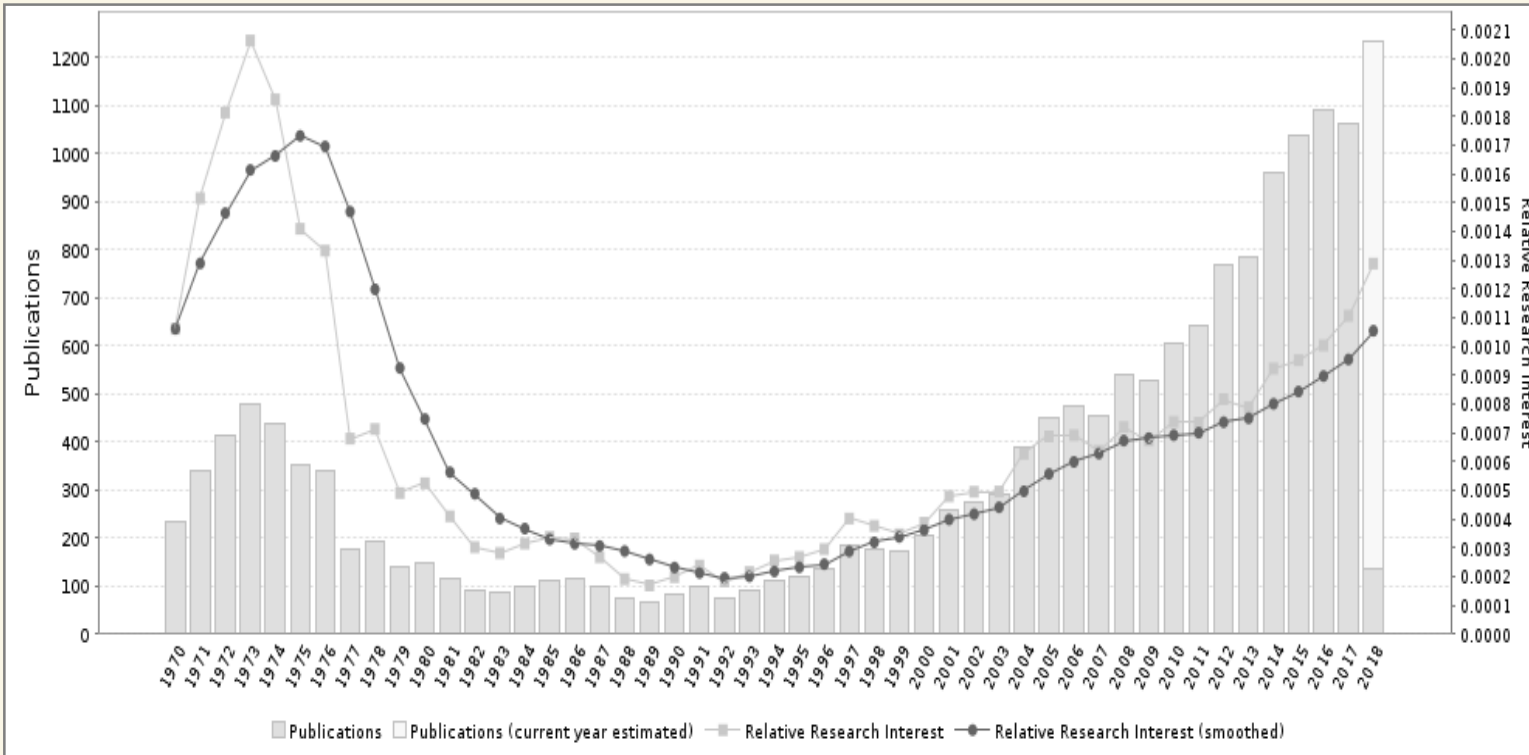
Time period: *2004 – today*

Region: *Worldwide*



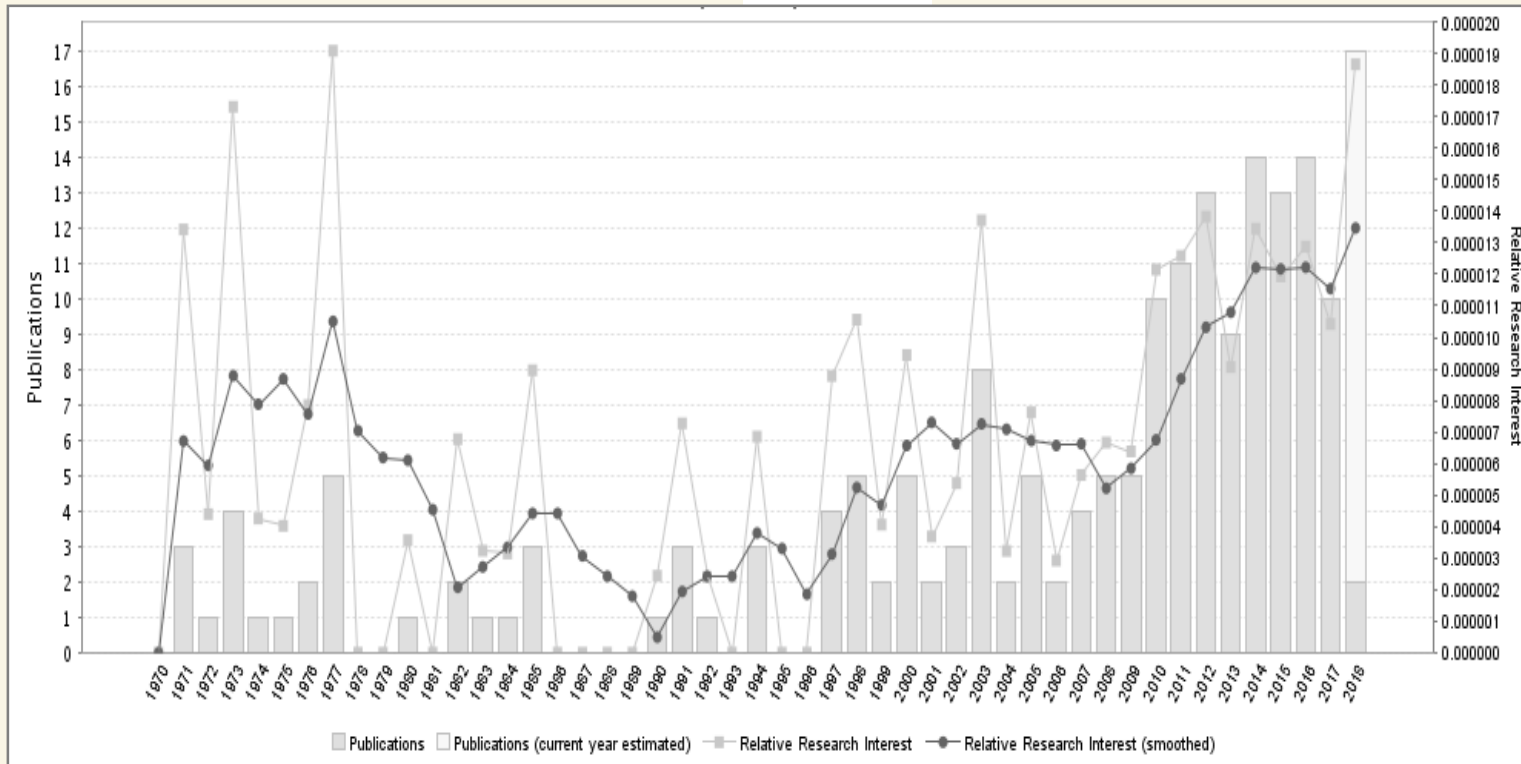
RESEARCH AND PUBLICATIONS

Topic: Hemp



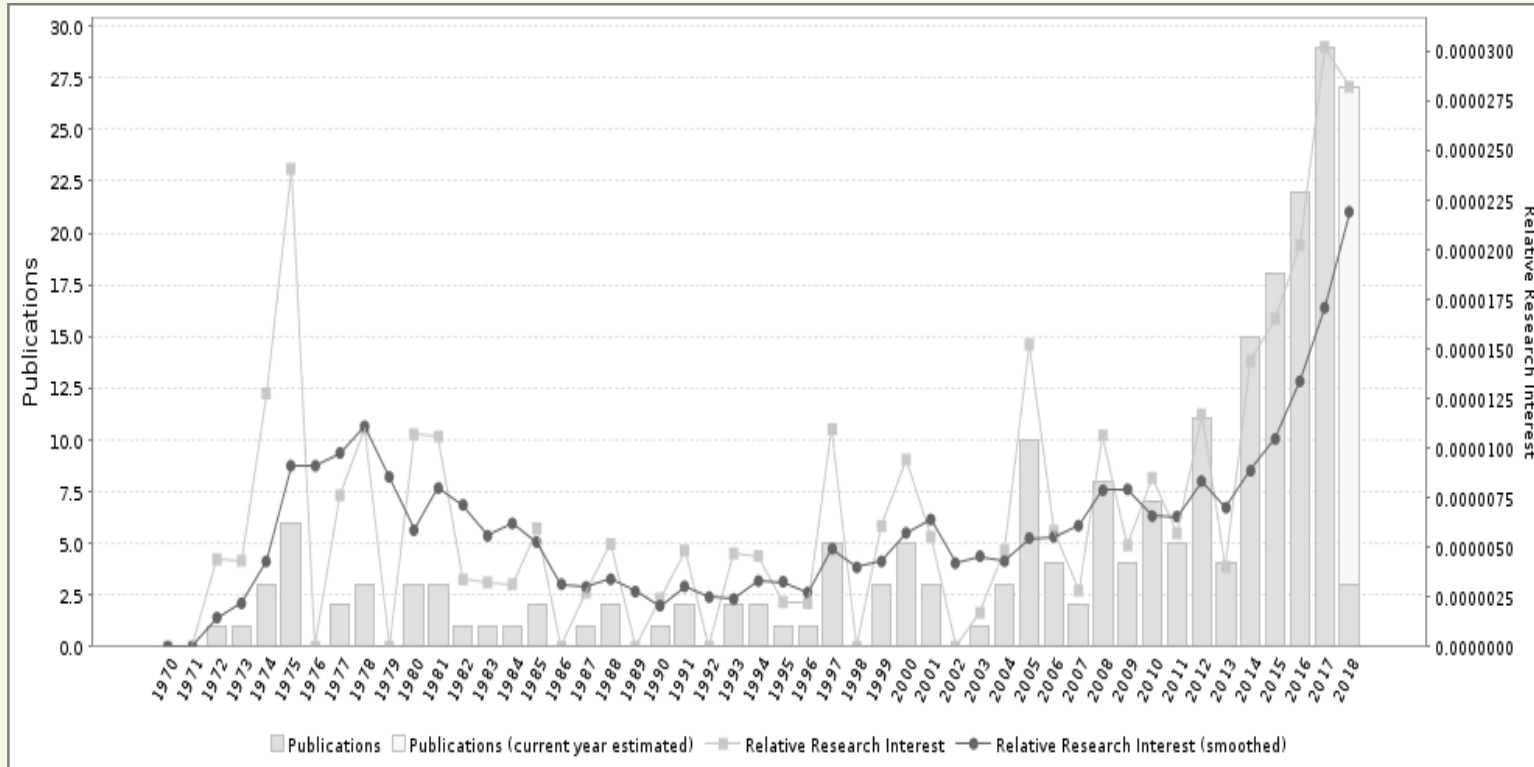
RESEARCH AND PUBLICATIONS

Topic: Hemp seeds



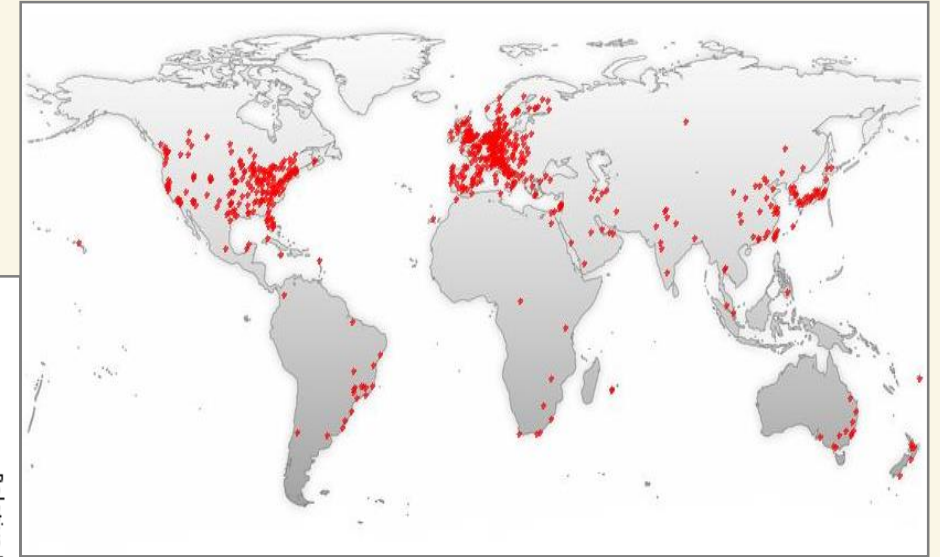
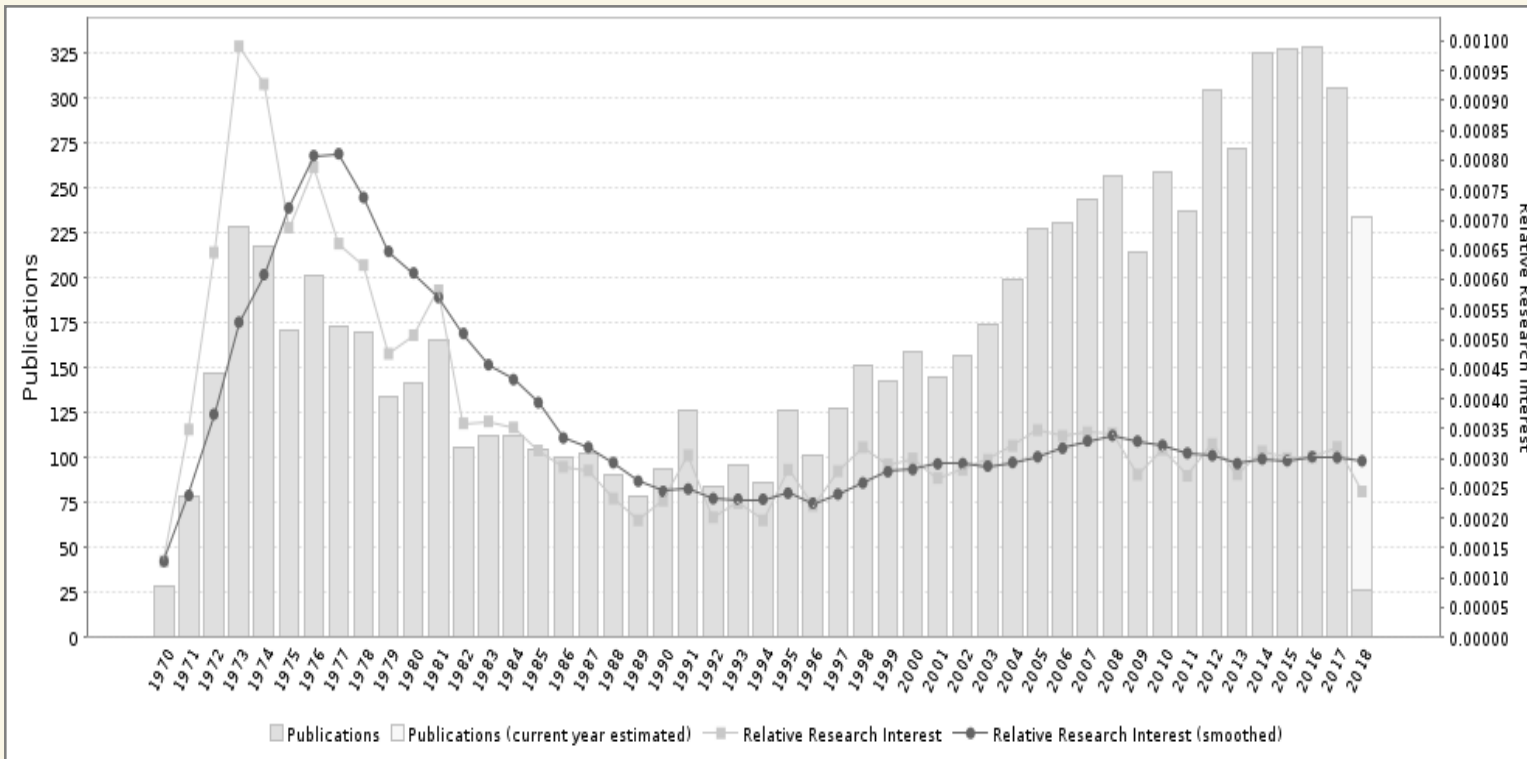
RESEARCH AND PUBLICATIONS

Topic: Hemp Oil



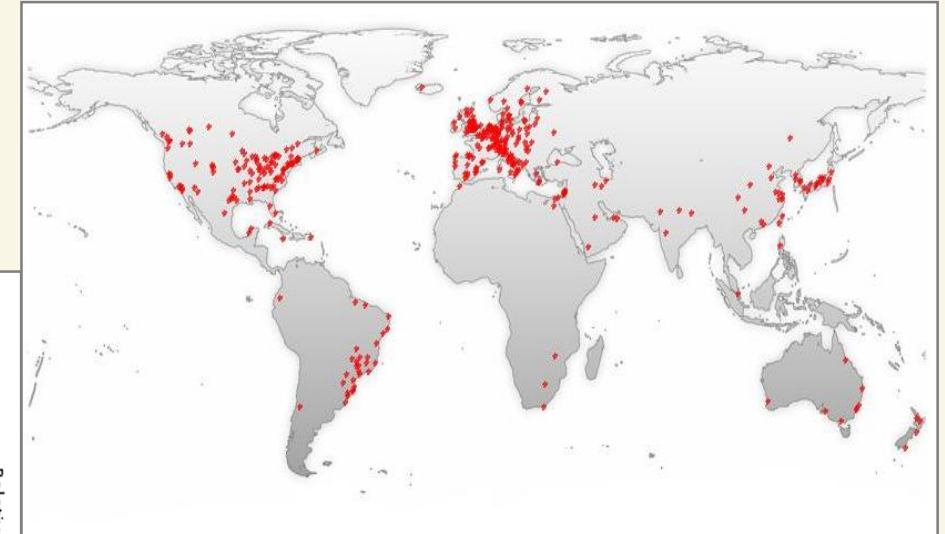
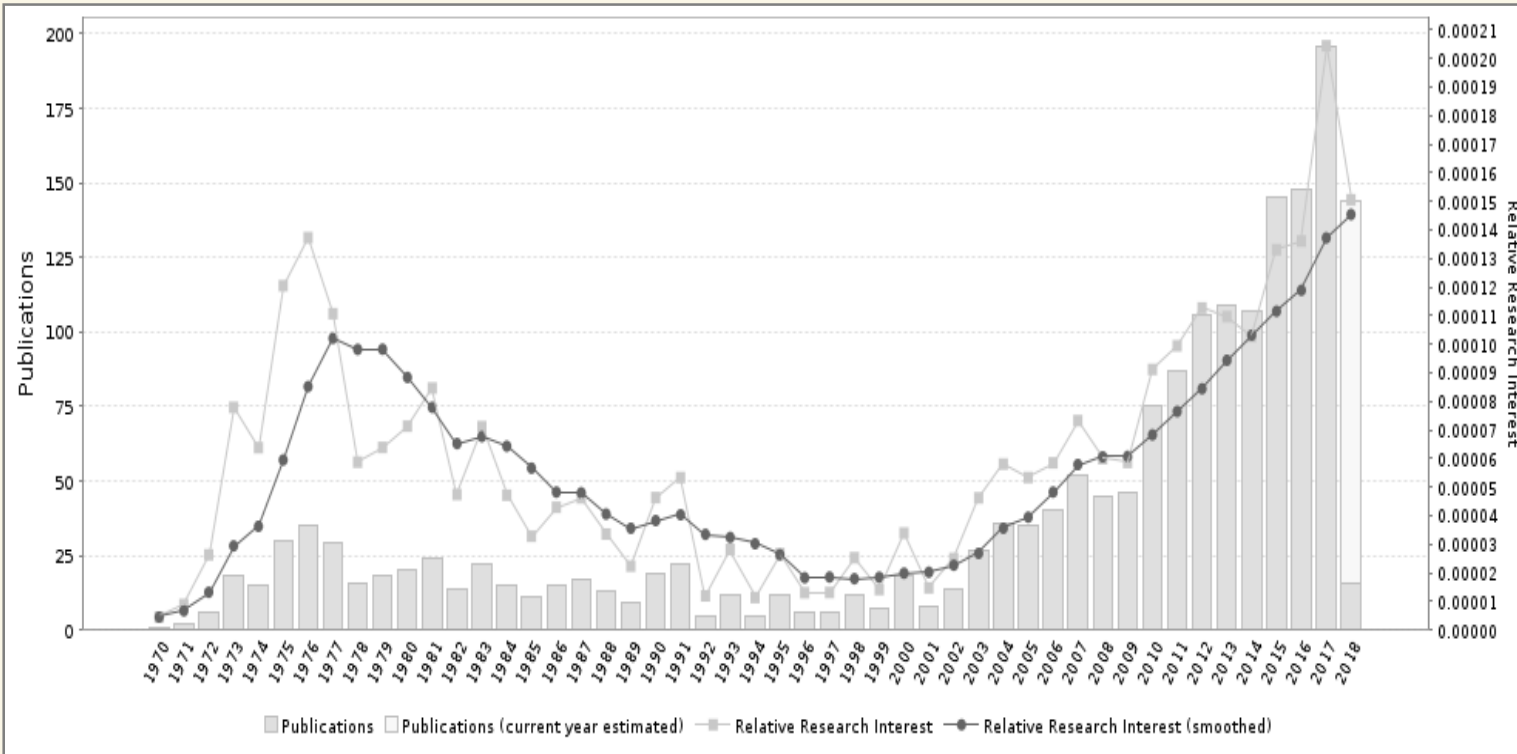
RESEARCH AND PUBLICATIONS

Topic: Tetrahydrocannabinol



RESEARCH AND PUBLICATIONS

Topic: Cannabidiol



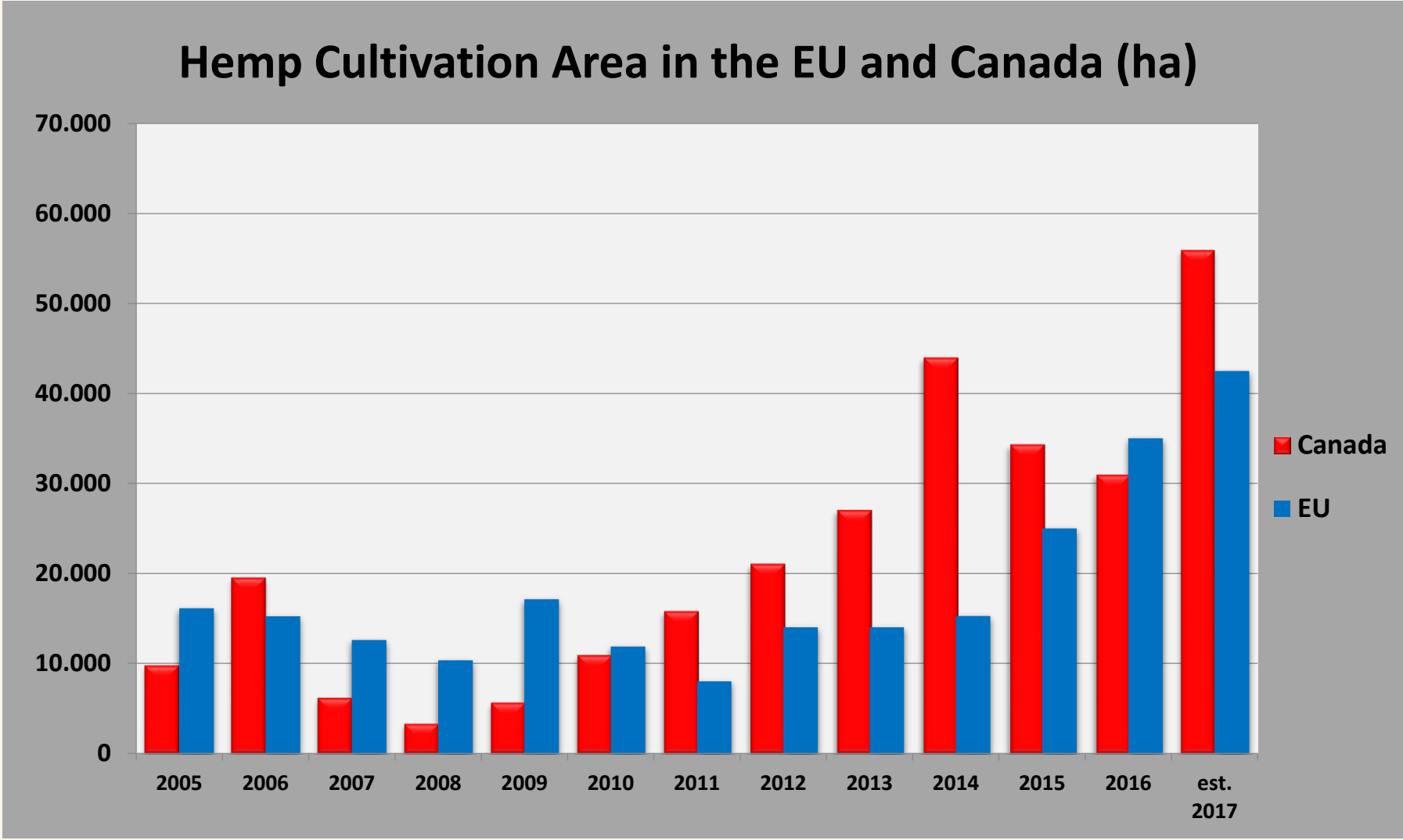
COLLECTION OF MARKET DATA

Hemp as foodstuff

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.



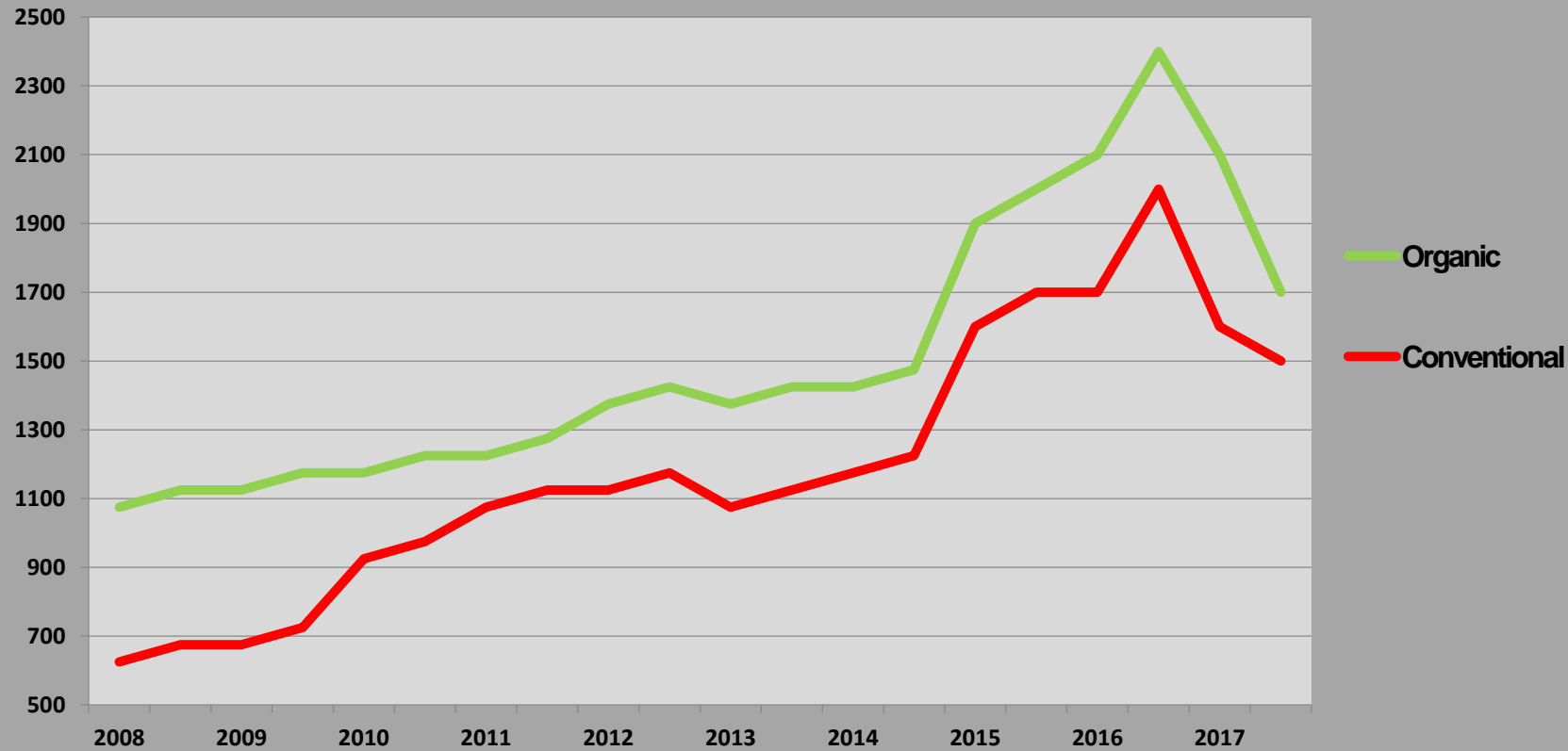
COLLECTION OF MARKET DATA



Source: EIHA (2018), CHTA (2018), Hempro Int. (2018)

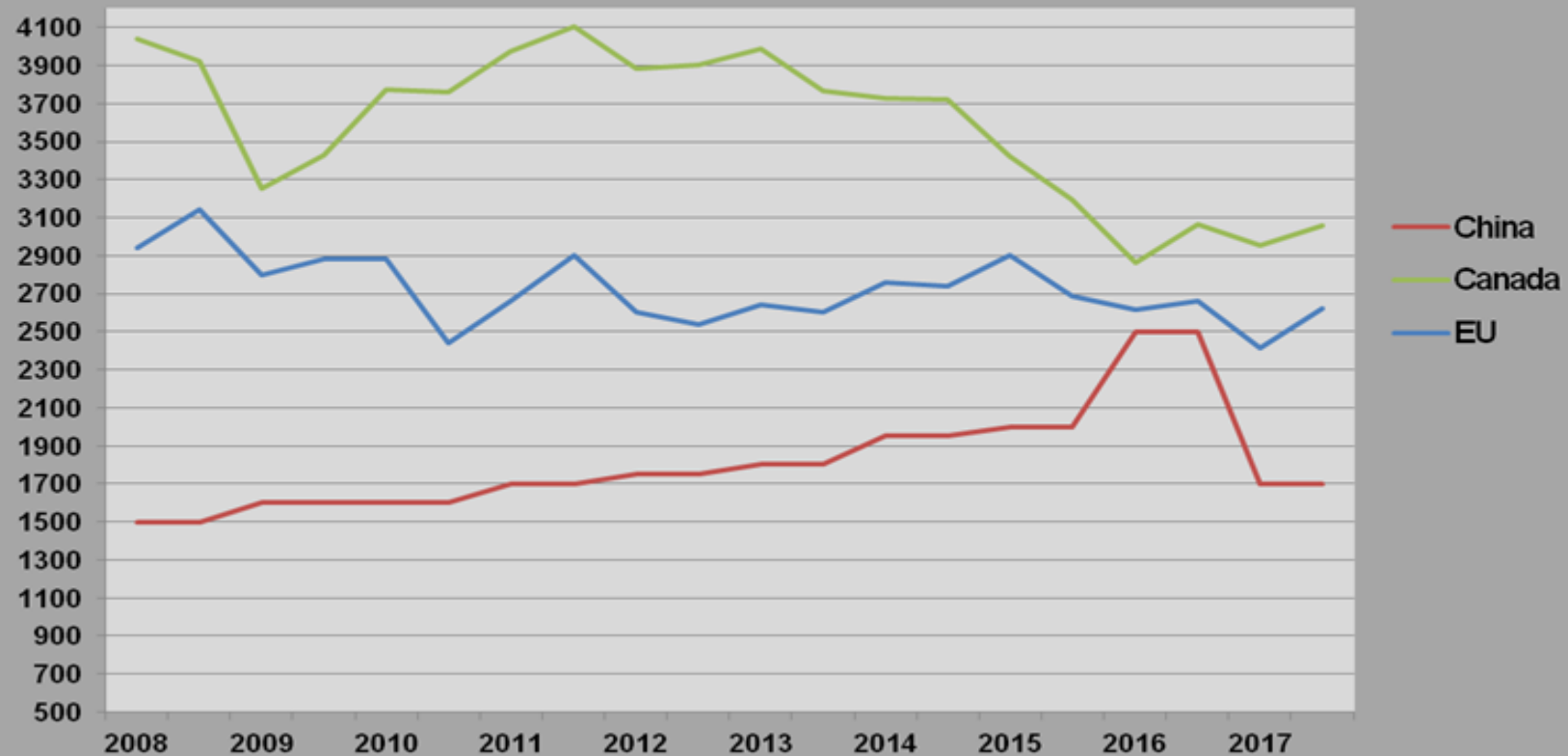
COLLECTION OF MARKET DATA

**Price development of hempseed (China imports):
Hempseed (food) prices (EUR/mt)
Based on full truck, FCA Rotterdam, cleaned 99,5% purity**

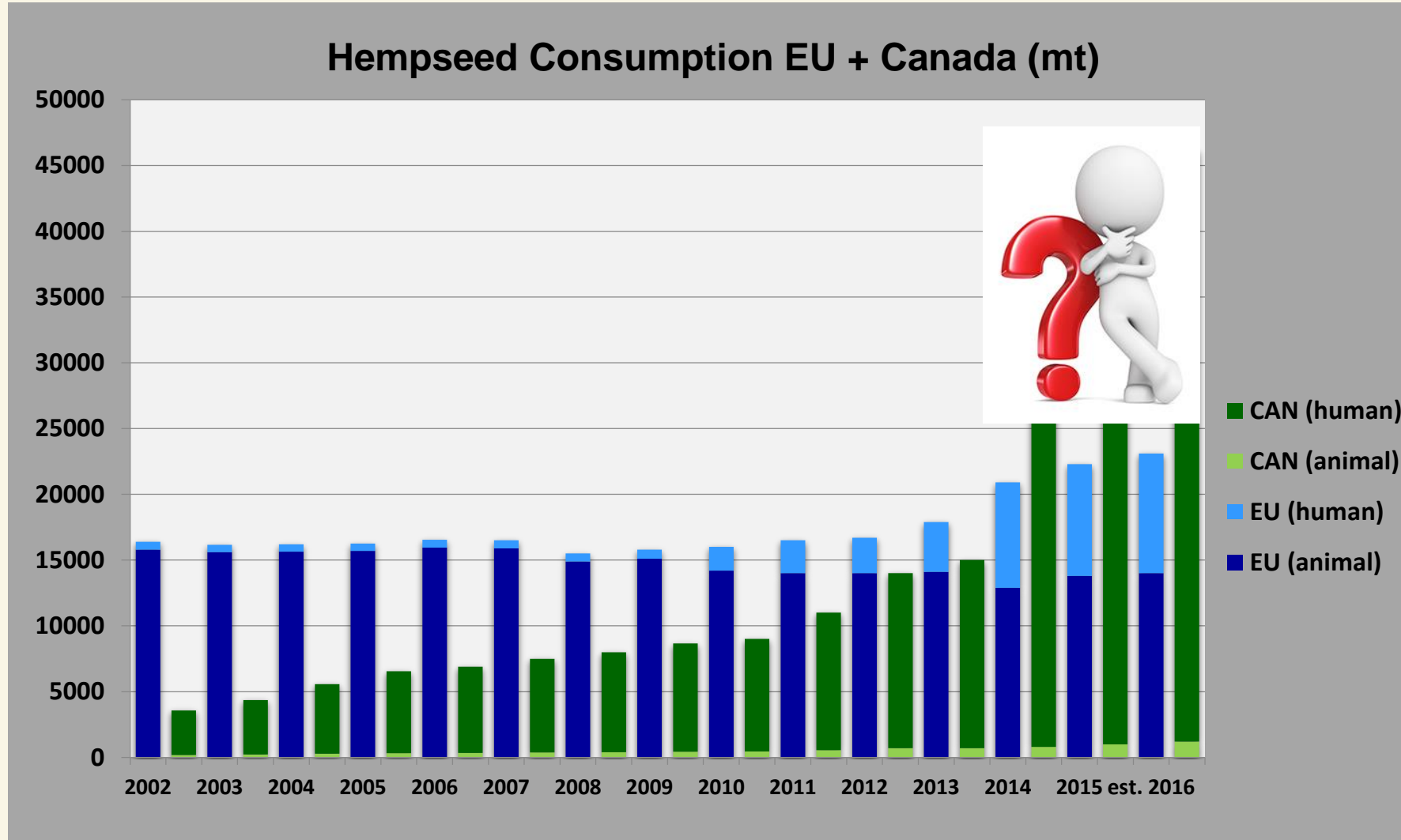


COLLECTION OF MARKET DATA

Price development of hempseed (food) prices (US\$/mt)
based on FCL, EXW origin, cleaned 99,5% purity




COLLECTION OF MARKET DATA



- Reliable data is unavailable
- Collection of data on consumption is highly important
- Consumption of hemp food and growth of market strongly depend on food quality

TREND OBSERVATION




 **Hempro Int. GmbH & Co. KG** 20. April · 🌐

Zum Veröffentlichen dieser Schokolade konnte kein besserer Zeitpunkt gewählt werden 😊

#vierhundertzwanzig #schokotrip #limitededition #hemp #gras #weed #weedday

<http://www.horizont.net/.../Schokotrip-statt-Einhorn-Hype-Rit...>



HORIZONT.NET
#Schokotrip statt Einhorn-Hype: Ritter Sport bringt die Gras-Schokolade zum "Weed Day"

 **Hempro Int. GmbH & Co. KG** 🥰 fantastisch. 21. April · 🌐

Eine deutsche Schokolade wird weltberühmt 😊😊

Sogar HempToday bricht nun über den großartigen Erfolg der Ritter Sport #limitededition Schoko & Gras 😊😊

<https://hemptoday.net/hemp-seed-chocolate/>



HEMPTODAY.NET
'Schoko & Gras' bar aims to raise hemp's profile
German confectionary maker Alfred Ritter GmbH & Co. KG produced a...

TREND OBSERVATION



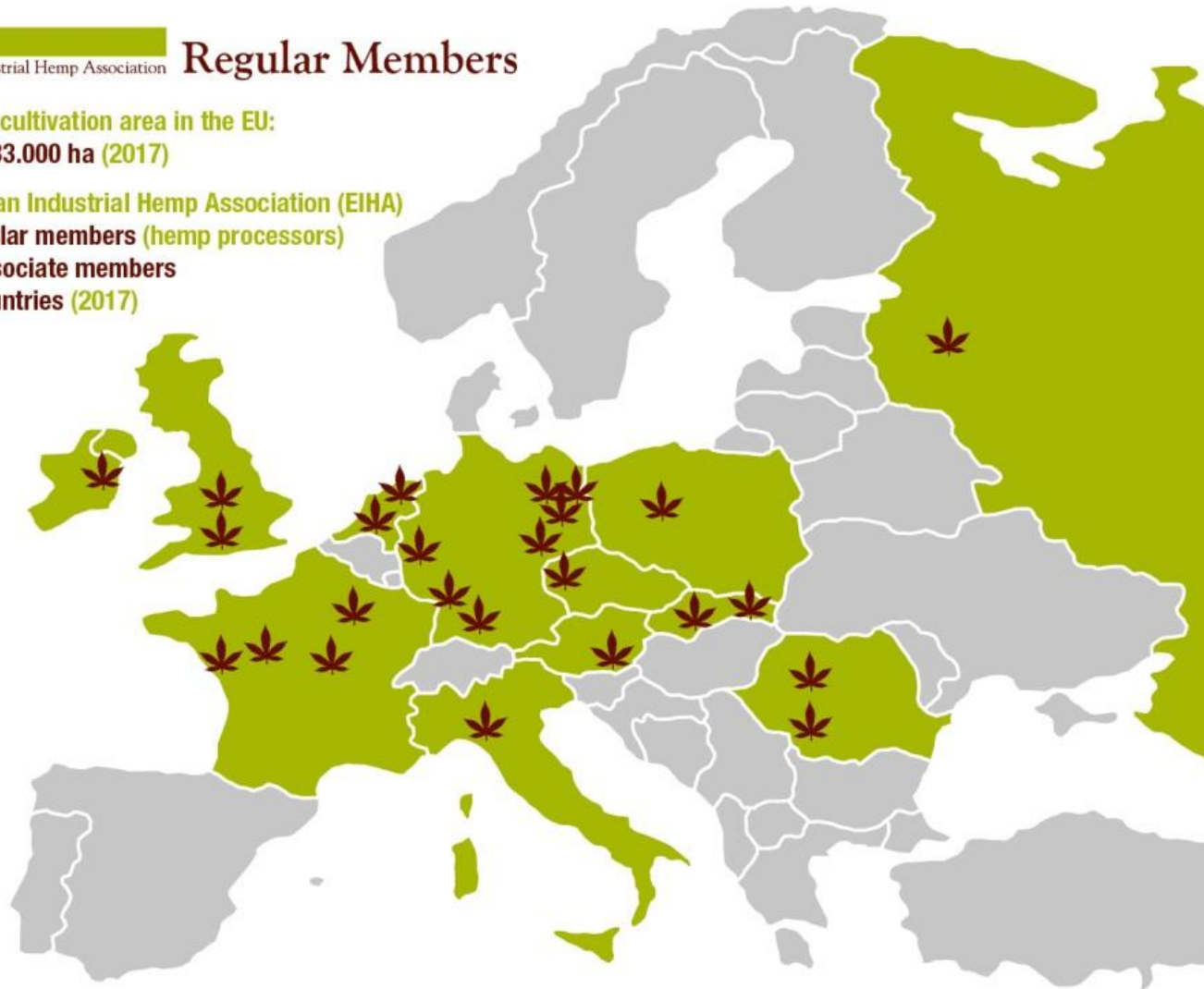
COLLECTION OF MARKET DATA



Regular Members

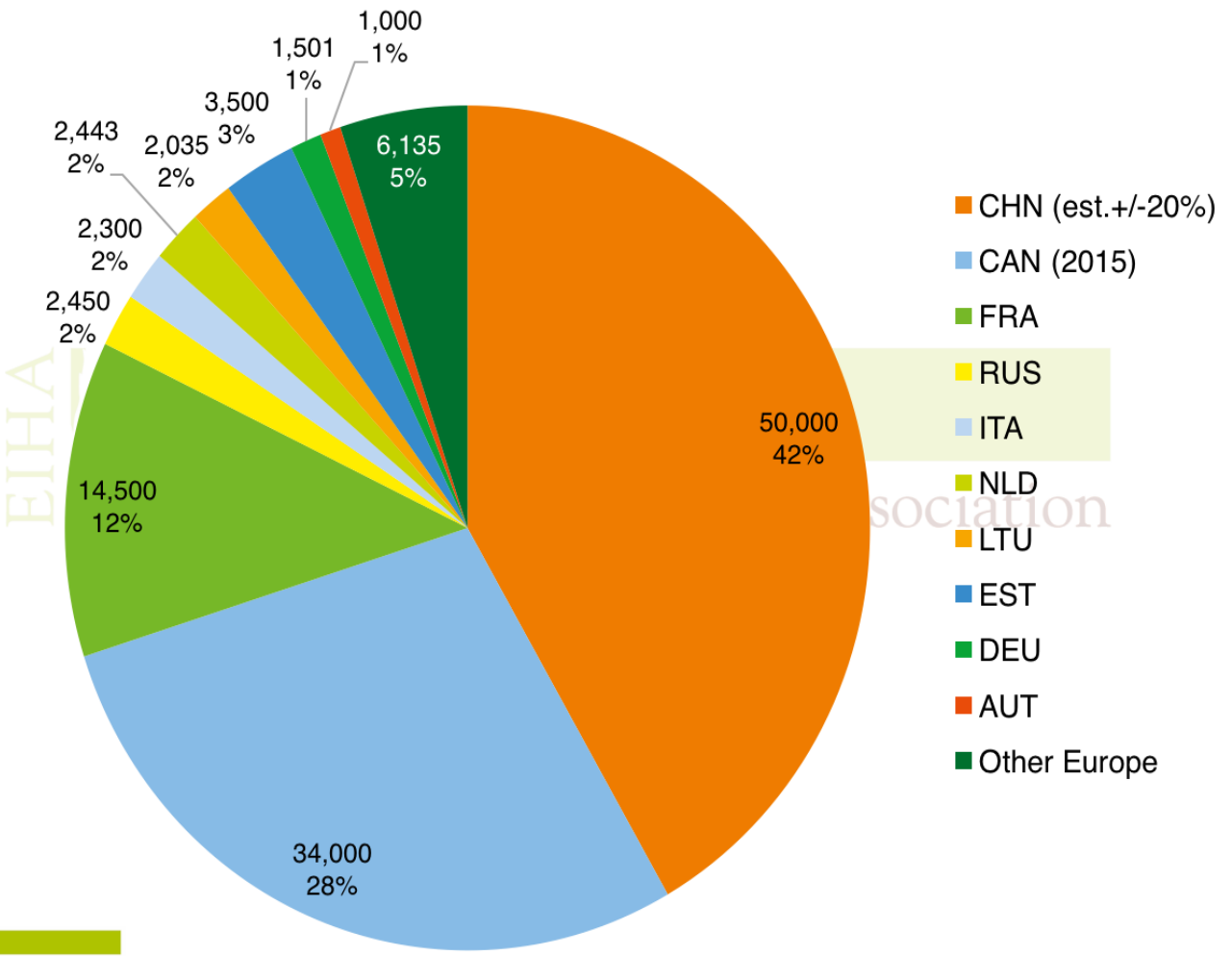
**Total Hemp cultivation area in the EU:
more than 33.000 ha (2017)**

**The European Industrial Hemp Association (EIHA)
has 25 regular members (hemp processors)
and 100 associate members
from 36 countries (2017)**



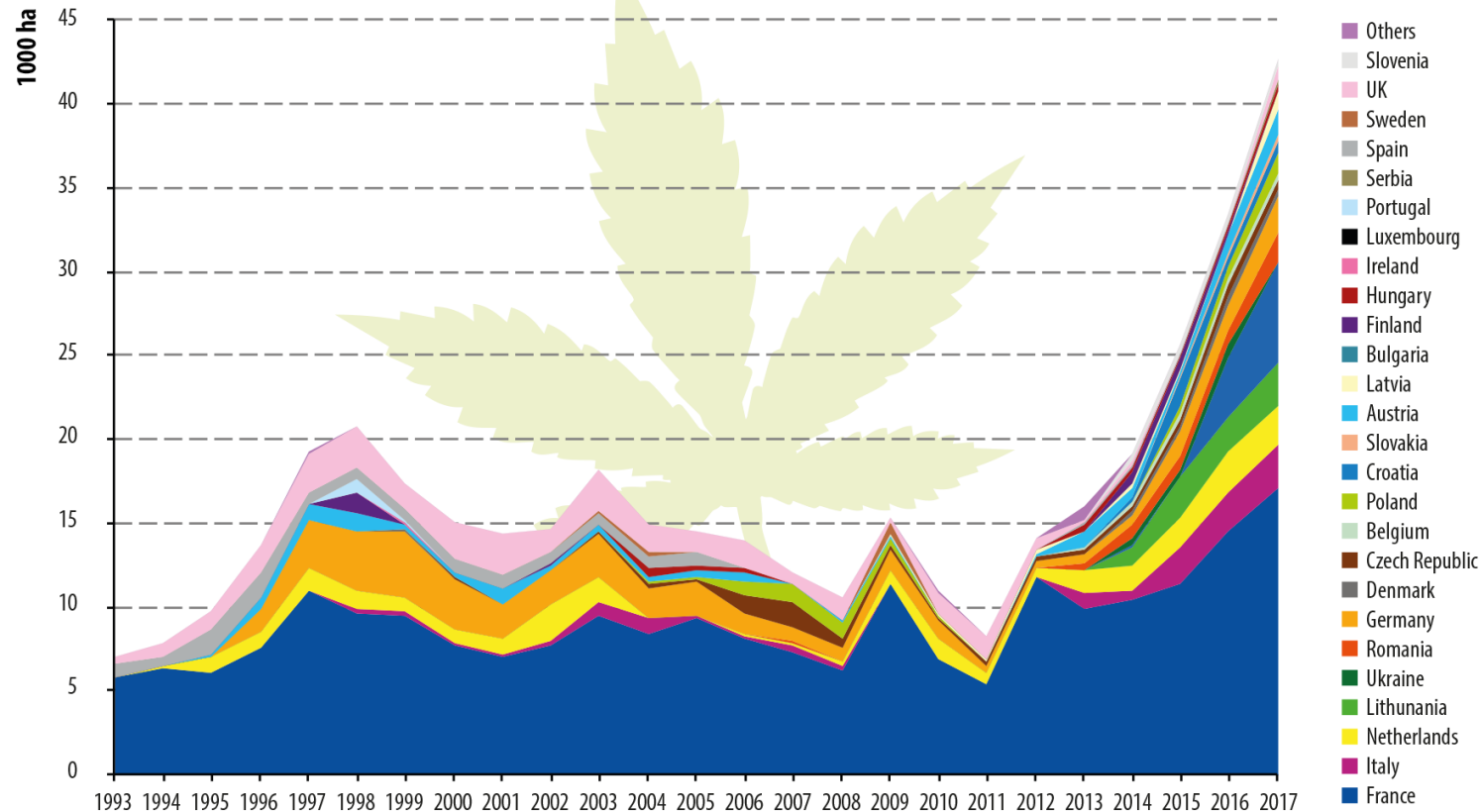
COLLECTION OF MARKET DATA

Global harvested area industrial hemp 2016 (Total 120,000 ha)



COLLECTION OF MARKET DATA

Hemp Cultivation Area in the EU (ha)
2017: ca. 42,500 ha



MARKET OBSERVATION



HempConsult
Business & Markets



ASX
AUSTRALIAN STOCK EXCHANGE



London
STOCK EXCHANGE



trading exchange

MARKET OBSERVATION

GW PHARMACEUTICALS PLC (ISIN: GB0030544687), 5 years

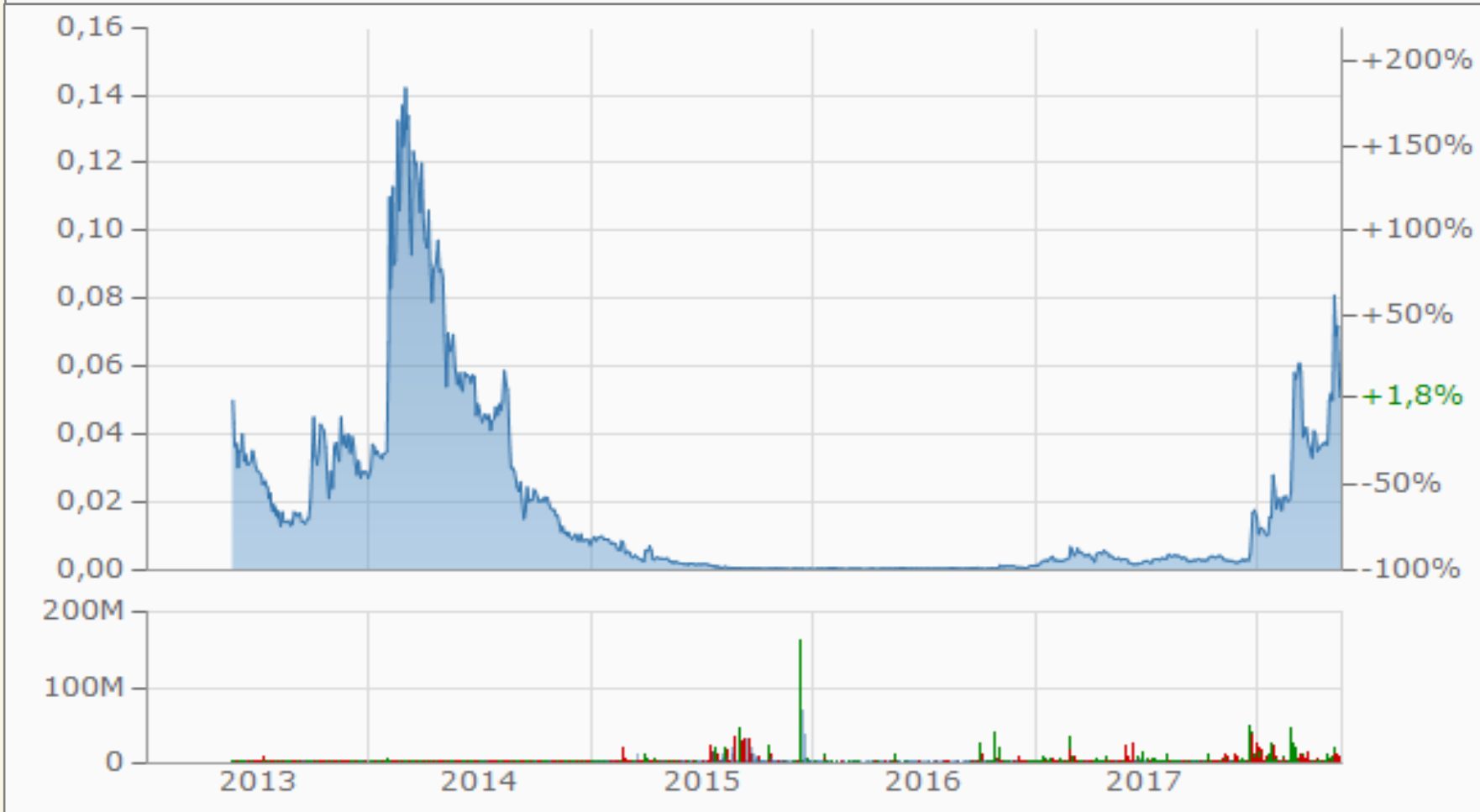


MARKET OBSERVATION



MARKET OBSERVATION

Livewire Ergogenics Inc. (ISIN: US53838A1043), 5 years



MARKET OBSERVATION



MARKET OBSERVATION

Elixinol Global Ltd (ALX: ELX)



MARKET OBSERVATION

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Pot Growers Aurora, CanniMed Agree to a **\$1 Billion Merger**

By **Scott Deveau, Kristine Owram, and Jen Skerritt**
24. Januar 2018, 14:05 MEZ Updated on 24. Januar 2018, 16:48 MEZ

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Aurora and Hempco Announce Closing of **\$3.2 Million Private Placement**

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Aphria buying Broken Coast Cannabis for **\$230M in stock and cash**

Broken Coast operates an expanding indoor cannabis production facility on Vancouver Island

The Canadian Press Posted: Jan 15, 2018 11:13 AM ET | Last Updated: Jan 15, 2018 4:34 PM ET

FINANCIAL POST

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CFDs auf: FX Forex Aktien Indizes Gold Öl *Siehe AGB. CFD-Handel birgt hohe Risiken und kann zum Totalverlust Ihres eingesetzten Kapitals führen. MEHR INFO

Canopy Growth Corporation to acquire Mettrum for **\$430M** — making a mega-company serving half Canada's medical pot users

A combined company would have some 39,730 patients as of Sept. 30 — nearly half of Canada's current medical marijuana patient base

MARKET OBSERVATION

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Compass Diversified Holdings Subsidiary, Manitoba Harvest, Acquires Hemp Oil Canada

Accretive Add-on Acquisition of Industry Pioneer, Expands Manufacturing Capacity, Grows Ingredients Business, and Diversifies and Expands Customer Base

NEWS PROVIDED BY
Compass Diversified Holdings →
Dec 15, 2015, 16:15 ET

SHARE THIS ARTICLE

WESTPORT, Conn., Dec. 15, 2015 /PRNewswire/ -- Compass Diversified Holdings (NYSE: CODI) ("CODI" or the "Company"), an owner of leading middle market businesses, announced today that its subsidiary, Fresh Hemp Foods Ltd. ("Manitoba Harvest"), has acquired **Hemp Oil Canada, Inc. ("HOCI")** for a purchase price of **C\$42 million**, not including working capital and certain other adjustments.

June 16, 2017 - 9:18 PM EDT

PRINT EMAIL SMALL LARGE

Hempco Food And Fiber Inc. - Private Placement Offering Further Details

Canada NewsWire

VANCOUVER, June 16, 2017

Symbol: TSX.V – HEMP

VANCOUVER, June 16, 2017 /CNW/ - Hempco Food and Fiber Inc. (TSX.V: HEMP) ("Hempco® or the company") is pleased to provide further details on the private placement offering announced by it on June 7, 2017 and June 8, 2017.

On May 3, 2017, Hempco announced a private placement offering of up to 4,000,000 units at a unit price of \$0.40 per unit for **gross proceeds of up to \$1,600,000 (the "May Offering")**. On May 5, 2017, Hempco announced that it intended to offer the units to existing security holders. Hempco is no longer proceeding with the May Offering, and it has been discontinued.

EXL
ELIXINOL GLOBAL LIMITED

Newly Formed Elixinol Global Begins Trading on Australian Stock Exchange

Colorado-Based Elixinol LLC, joins forces with Hemp Foods Australia and Elixinol Australia to form Elixinol Global



Hemp, cannabis player Elixinol Global rockets 75pc on debut

Health

January 8, 2018 | Rachel Williamson

Pic: Getty

The hold music for Hemp Foods Australia is the Banana Boat Song, set to the lyrics "me say hemp seed, tasty hemp seed is what we all need".

It's a bit of fun for a company about to become part of Australia's eight largest listed cannabis company.

Elixinol Global (ASX:EXL) hit the market at \$1.75, up 75 per cent from its \$1 issue price.

The company raised \$20 million, giving it a pre-open market cap of \$102.8 million.

The business will roll together Hemp Foods, US nutraceuticals company Elixinol, and a new medicinal cannabis venture which was the spur for a long-planned IPO.

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Kapitalanlage: Was man sich vor

HempConsult

Business & Markets

**Thank you for
your attention!**

