

New Frontier[®] data



2019 INDUSTRY UPDATE: GLOBAL MARKETS

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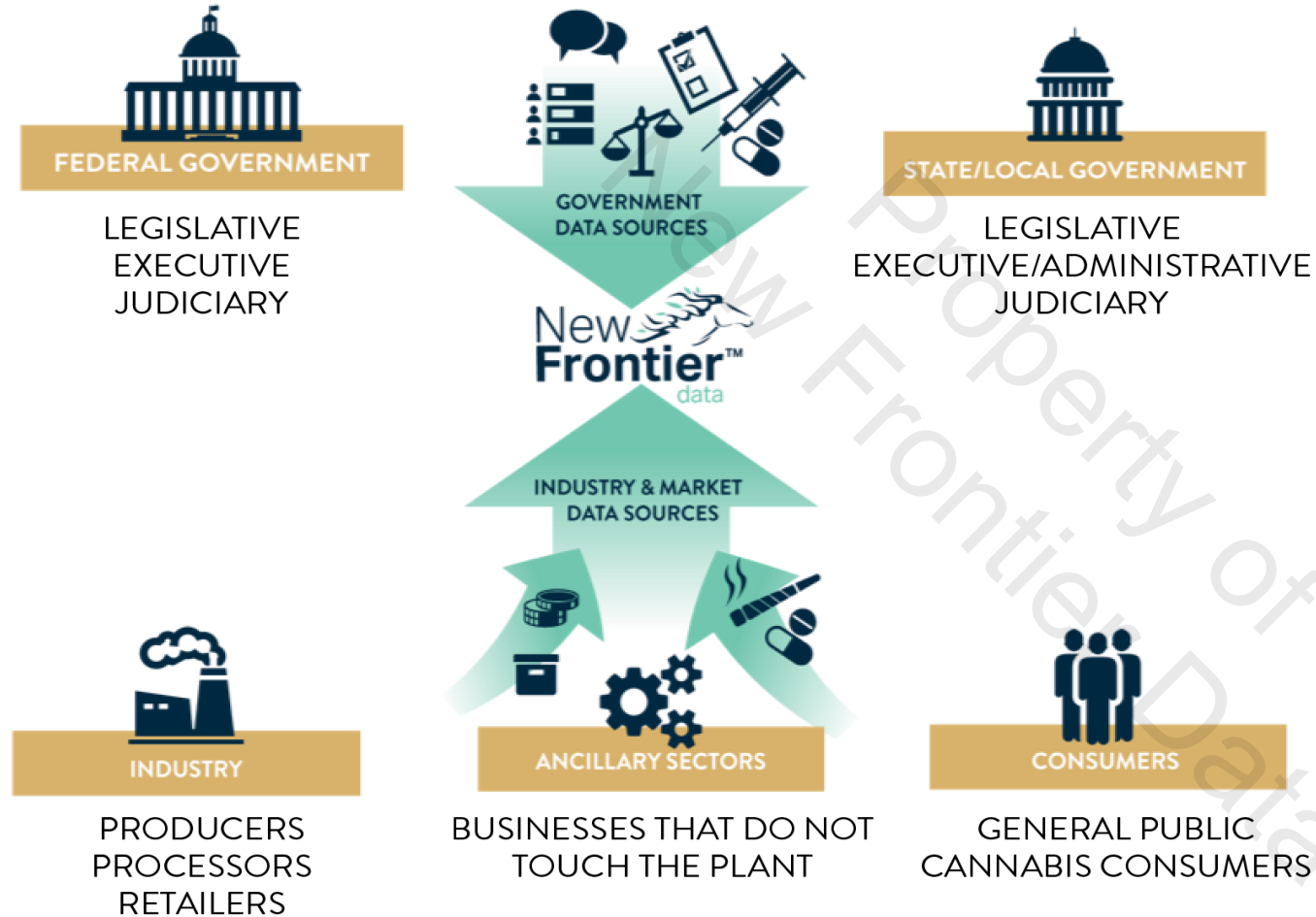
MISSION

New Frontier Data strives to be the cannabis data analysis and industry reporting authority by collecting reliable data, applying rigorous analysis, and producing actionable intelligence. We are committed to the highest level of objectivity and transparency as we endeavor to equip our customers with the knowledge necessary to increase profits, identify opportunities, and navigate this nascent and still underserved market space.

VISION

To be the World's Big Data Authority for the Cannabis Industry.

FIVE DIMENSIONS OF CANNABIS DATA

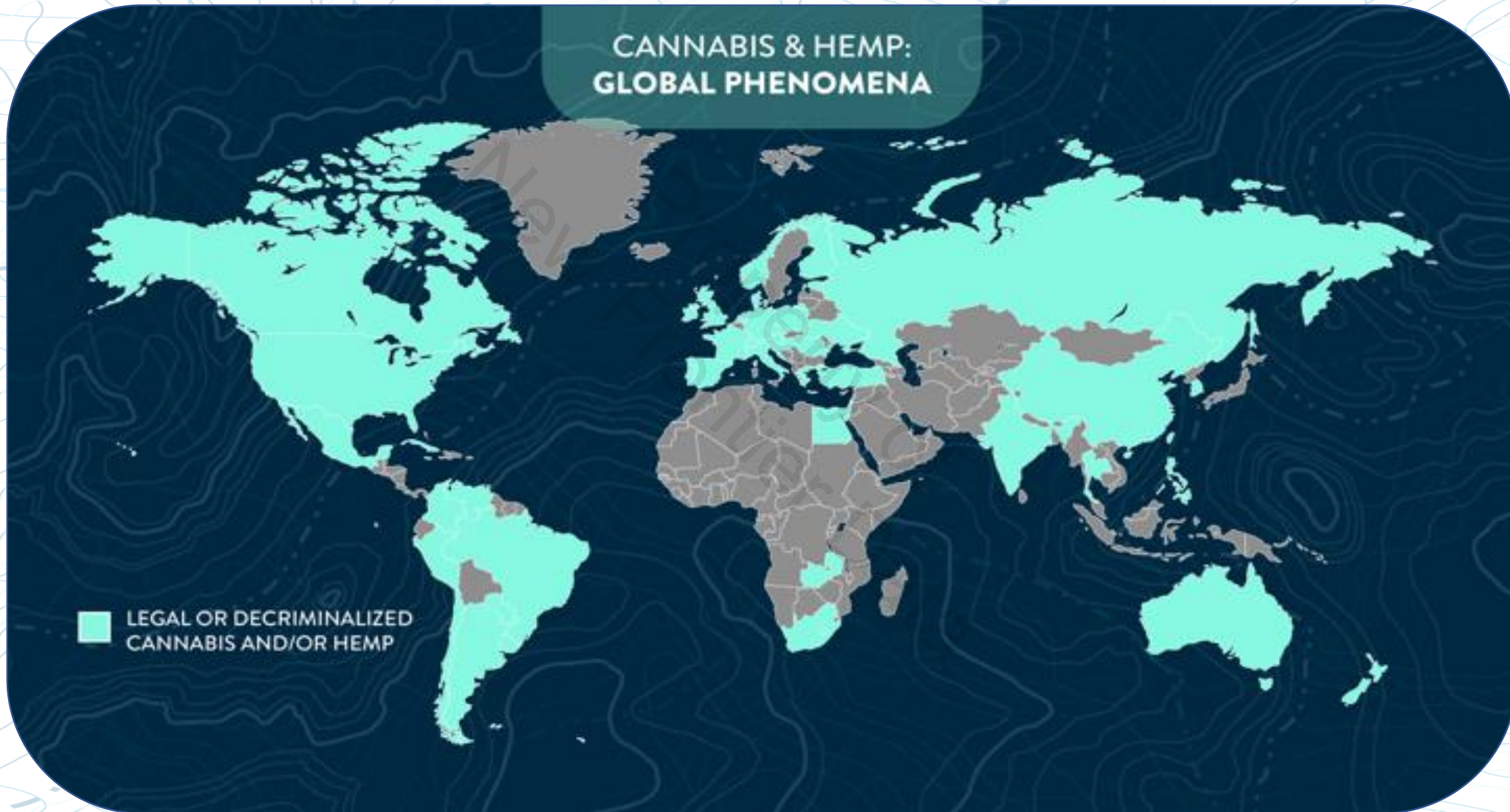


DATA ACROSS ALL FIVE
DIMENSIONS IS
CRITICAL TO
UNDERSTAND AND
EVALUATE THIS NEW
SECTOR.

LEGAL CANNABIS IS GOING GLOBAL

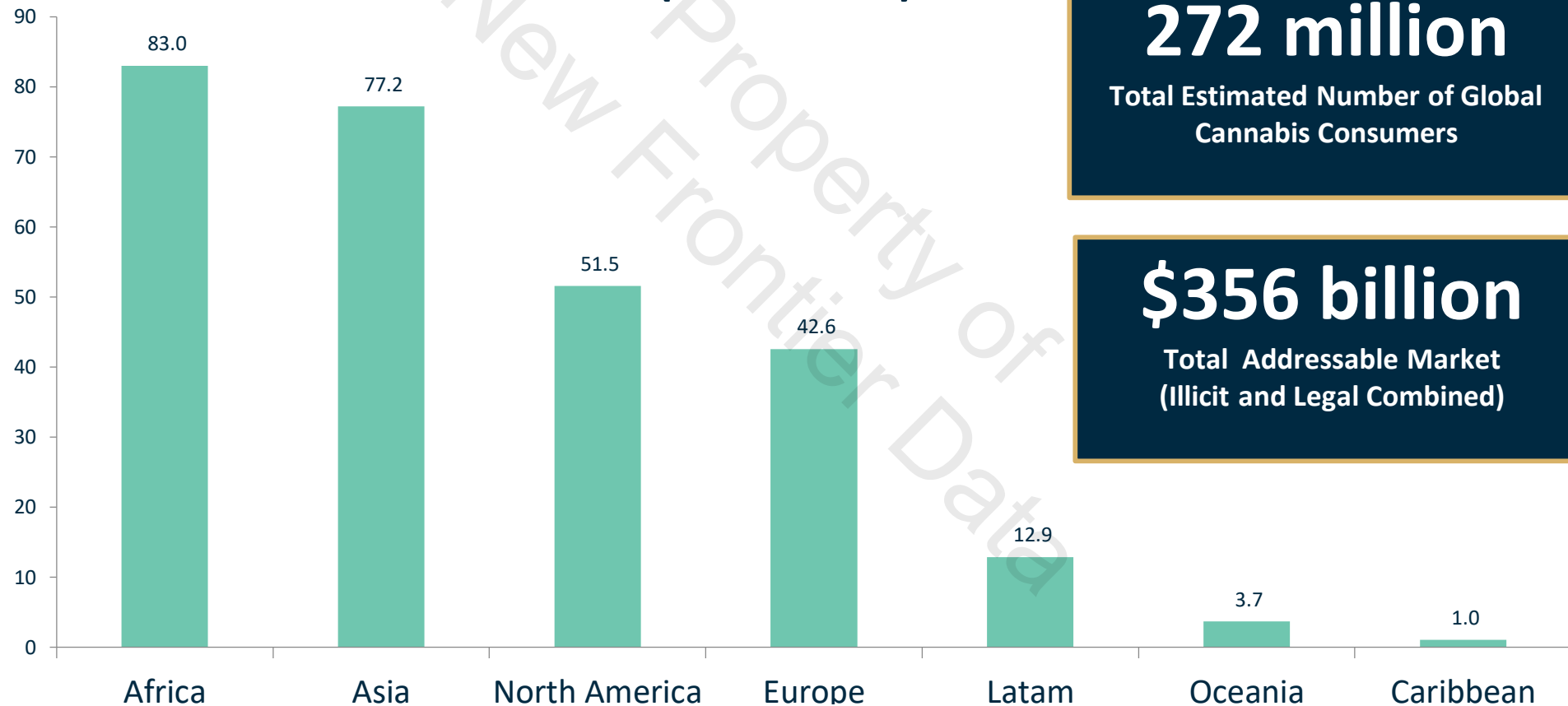
CANNABIS & HEMP: GLOBAL PHENOMENA

LEGAL OR DECRIMINALIZED
CANNABIS AND/OR HEMP



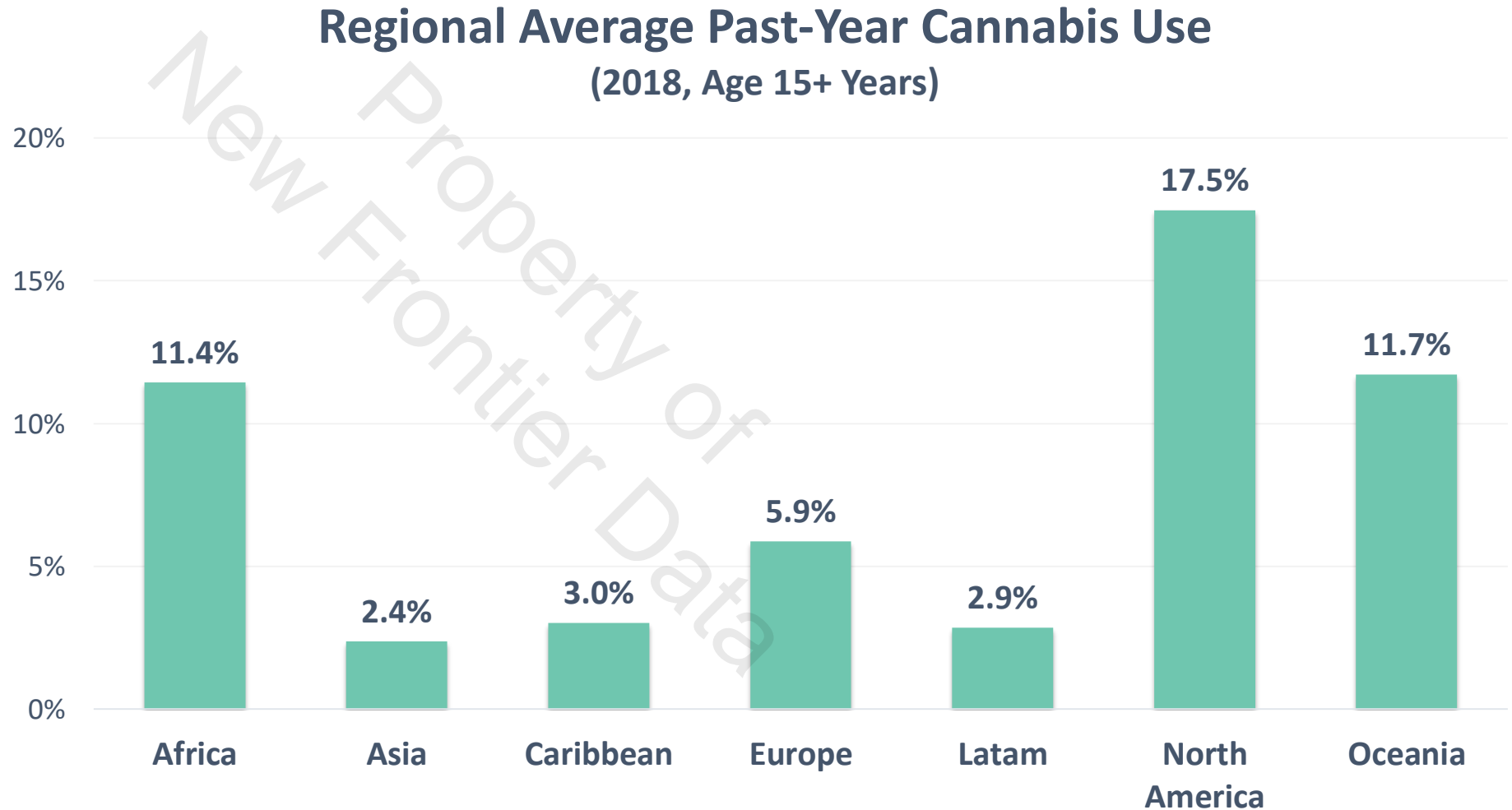
A GROWING NUMBER OF GLOBAL CANNABIS CONSUMERS

Estimated Number of Cannabis Consumers by Region
(in millions)



THERE ARE MILLIONS OF CANNABIS CONSUMERS, BUT USE VARIES WIDELY ACROSS REGIONS

6.2%
Global average past-year cannabis users
(15+ years)



NORTH AMERICA IS LAYING THE FOUNDATION FOR A GLOBAL INDUSTRY

CANADA

Population: 36.3 million

Cannabis Consumers: 4.2 million

2018 Legal Market: USD \$1.3 billion

U.S.

Population: 325.7 million

Cannabis Consumers: 22.4 million

2018 Legal Market: USD \$ 10.3 billion

**TOTAL
LEGAL MARKET
2018-2025**

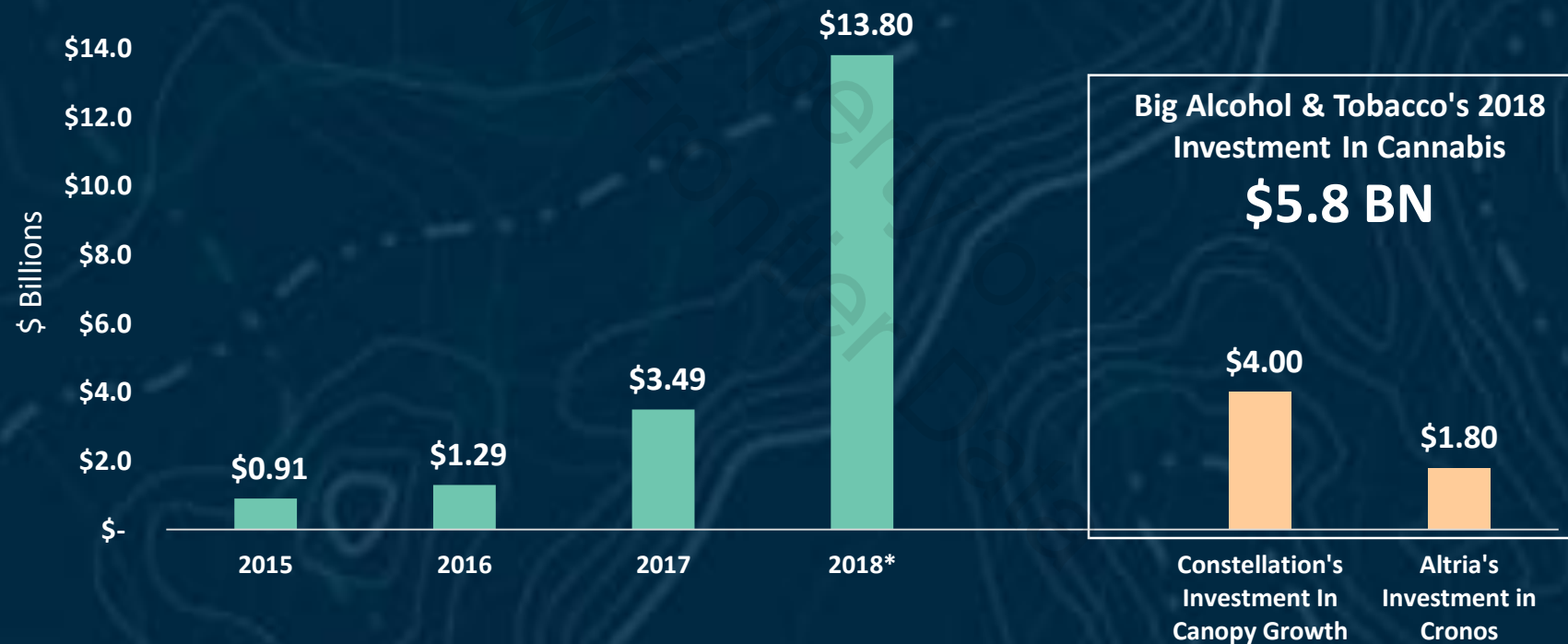
Canada: \$36 Billion

US: \$136 Billion

Total: \$173 Billion

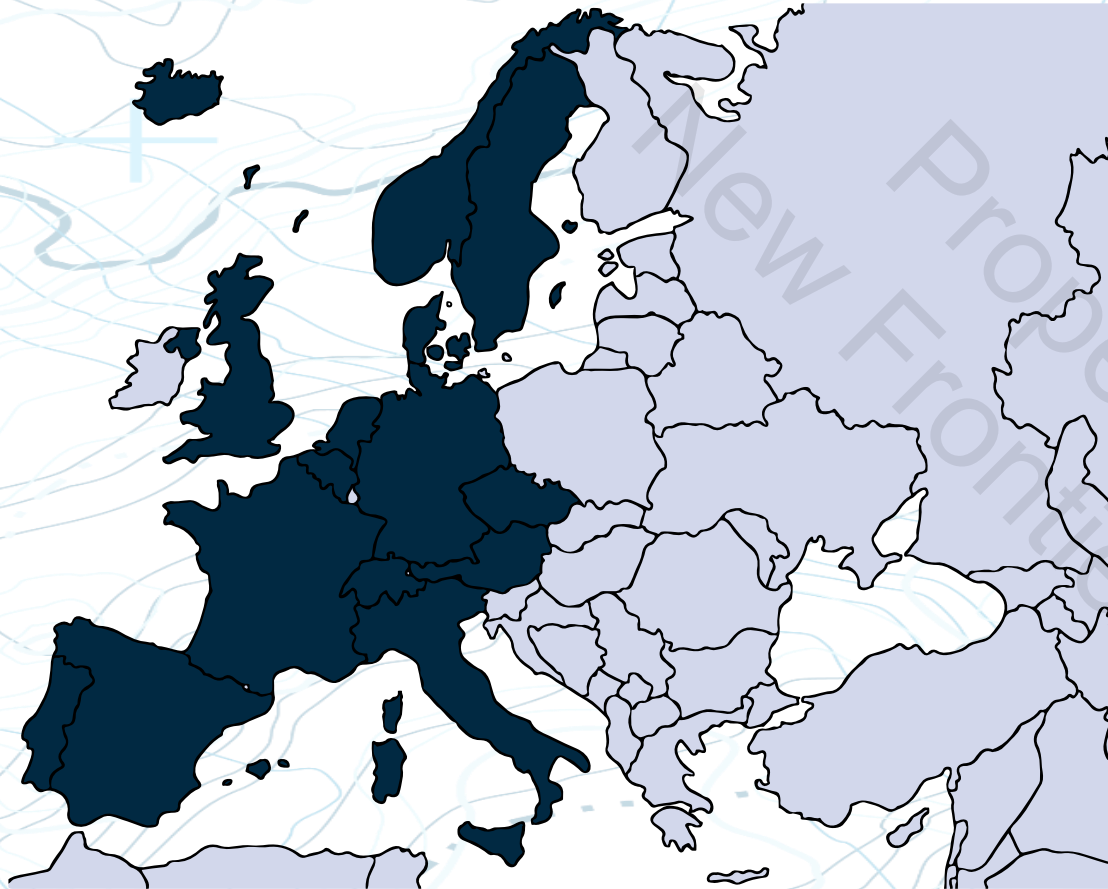
SURGING INVESTMENT IS FUNDING EXPANSION & SCALE

Big Alcohol & Tobacco's Accounted for Nearly Half of 2018's Total Cannabis Investments



SOURCE: VIRIDIAN CAPITAL ADVISORS

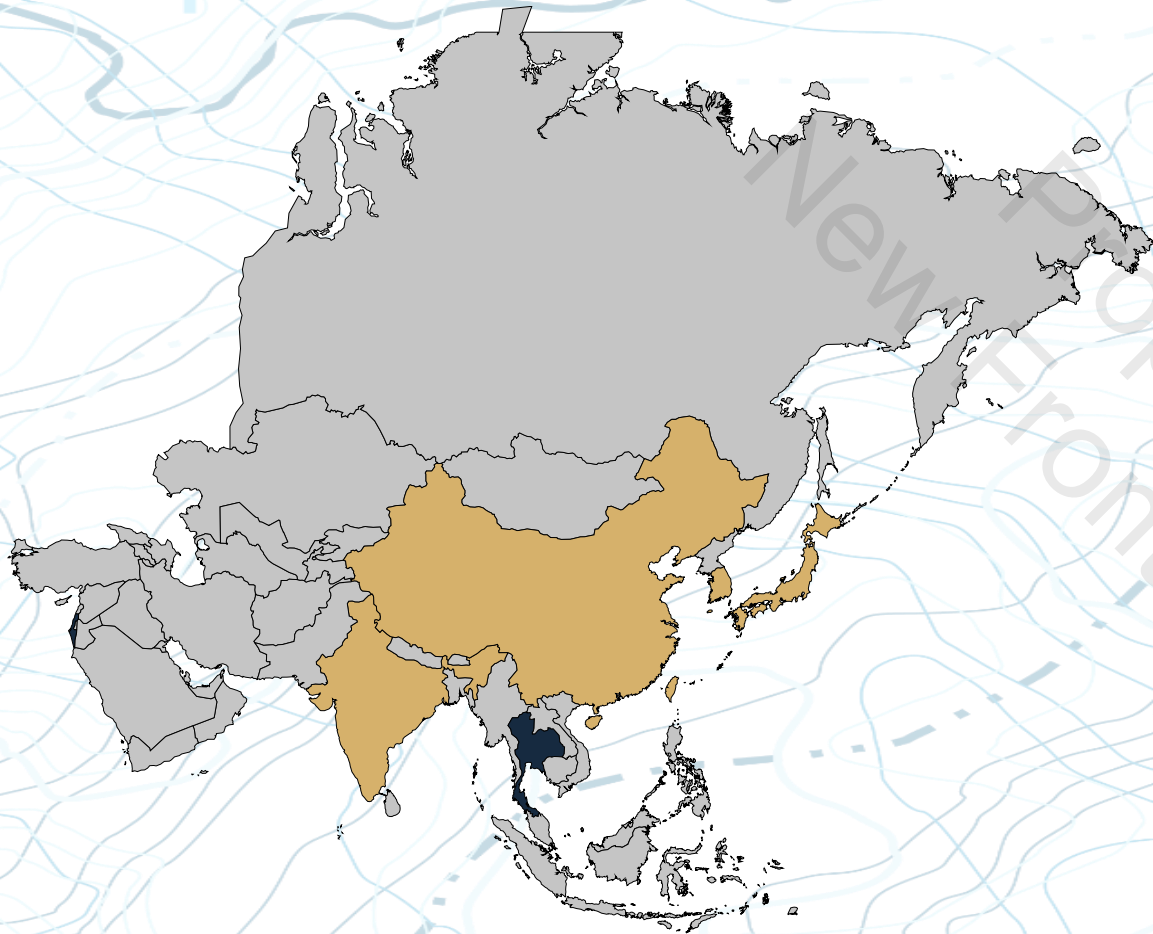
EUROPE: IS A CENTRAL FOCUS OF CANNABIS EXPORTS



■ Medical Use

- Largest wave of cannabis reform & legalization in the world.
- 29 countries allow some form of medical cannabis use, but rules vary widely
- Products allowed range from flower to Sativex & Epidiolex
- Pharmacies (not dispensaries) are the primary distribution channel

ASIA: THE EPICENTER OF GLOBAL HEMP PRODUCTION



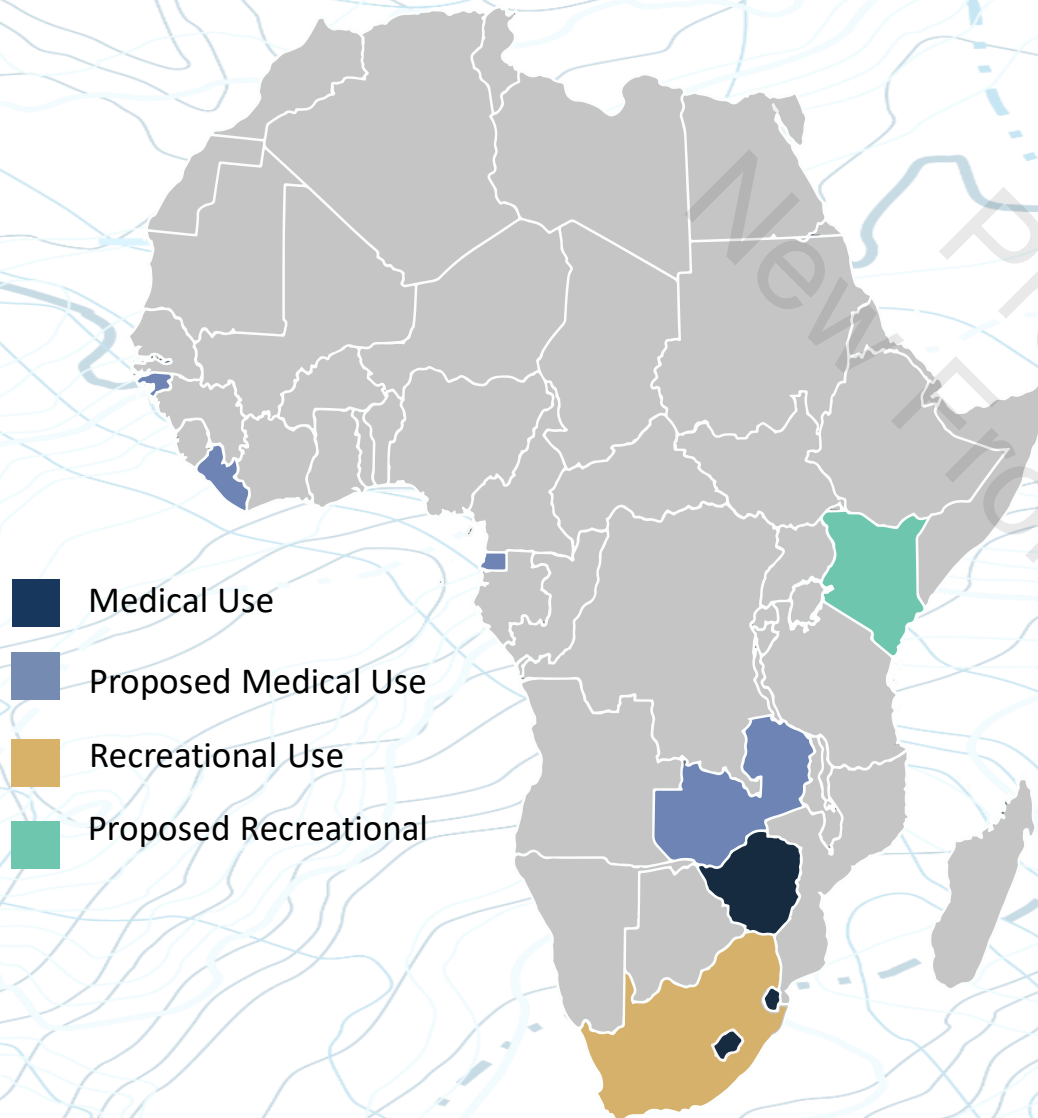
Medical Use



CBD/Hemp

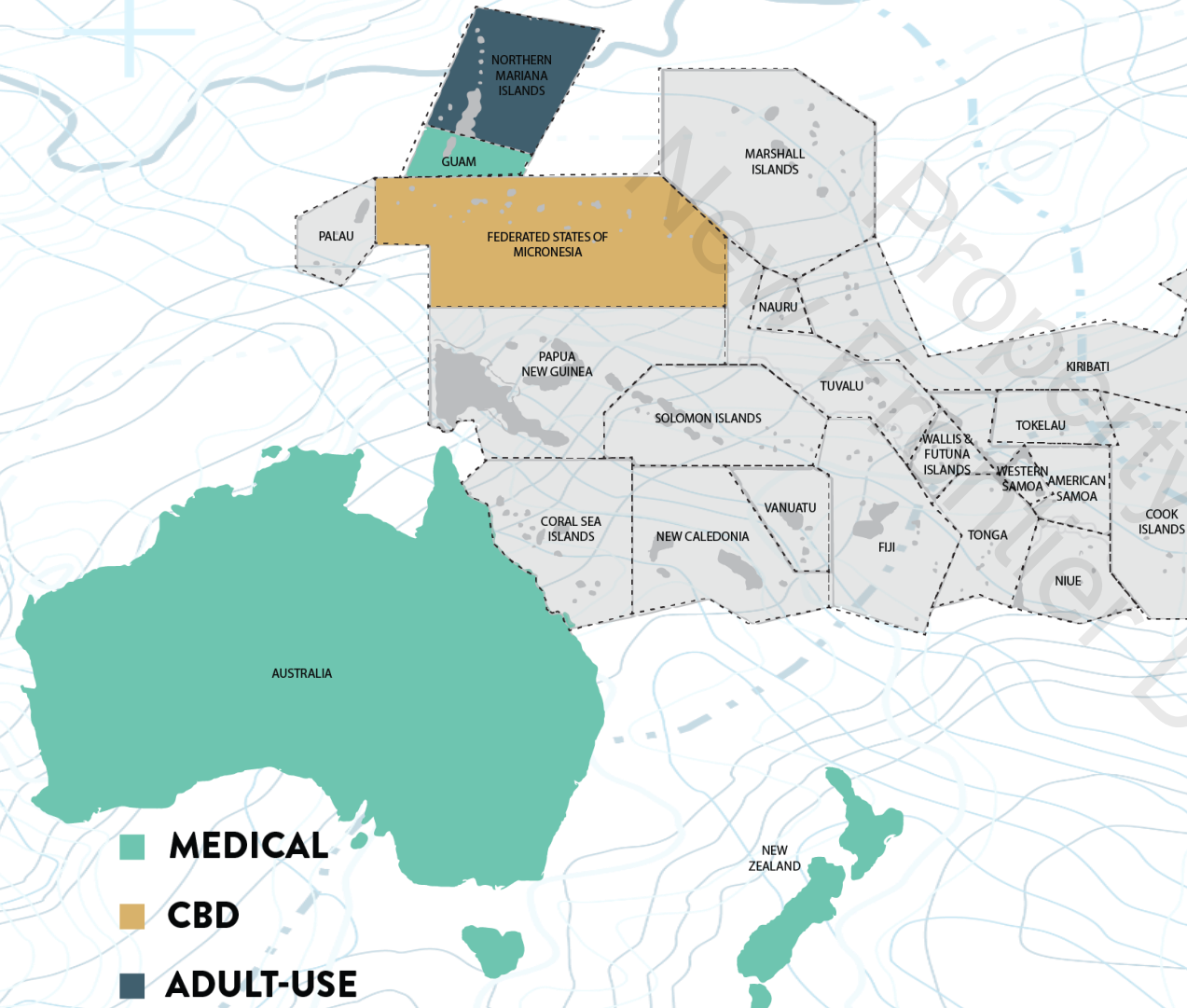
- The world's most populous nations, India and China, are major hemp producers
- Thailand is developing a medical cannabis program; aims to be a leading low-cost high quality cannabis exporter
- The CBD markets in Japan in Korea will represent significant opportunities for nutraceuticals and cosmetics

AFRICA: BUILDING MOMENTUM FOR LOW COST PRODUCTION



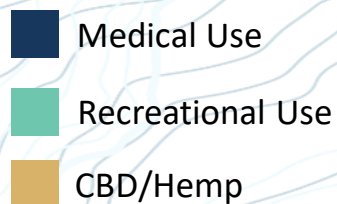
- Southern Africa is leading cannabis legalization in Africa
- The South African Supreme Court ruled cannabis prohibition violates South Africans' human rights. Laws and regulations due by October 2020.
- Lesotho and Zimbabwe have legalized medical use.
- A bill to legalize adult use in Kenya was just introduced
- Zambia, Equatorial Guinea, Liberia, Guinea Bissau are all exploring industrial hemp/medical use

OCEANIA: A REGIONAL HUB FOR LEGALIZATION IN THE PACIFIC



- Australia and New Zealand anchor Oceania's cannabis markets, with the highest usage rates in the region.
- Australia is a leading importer, but wants to become a global exporter
- New Zealand is on track to be the next Oceanic nation to legalize adult use

LATIN AMERICA: A STRATEGIC CENTER FOR CANNABIS TRADE



- Latin American is at the forefront of cannabis legislation reform.
- Uruguay was the first nation to fully legalize recreational use
- Many countries in the region, including Columbia, Panama, and Uruguay are investing heavily in building export capacity
- Brazil, Latin America's highest Total Addressable Market, remains an import only, CBD-only market

KEY TAKEAWAYS

- The entrance of big pharma, alcohol and tobacco is funding expansion & scale
- Courts are now starting to define the rights of cannabis consumers, and laws are consequently evolving
- Countries like Georgia, Mexico and South Africa are some of the first examples where human rights helped shape cannabis policy
- The global cannabis market is evolving quickly, and Canada (and the U.S.) are paving the way
- International markets are opening quickly, but regulations vary widely as do the opportunities
- Data will be central to understanding how the market's behavior today will influence performance tomorrow
- Plan for where the market is going, not where it is today

This is the beginning of a global socio-economic revolution, and you are its vanguard

THE GLOBAL REPORT

2019 INDUSTRY OUTLOOK



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