

New Frontier[®] data



NINE FOUNDATIONAL PILLARS OF CANNABIS MARKETS: BUILDING A SUSTAINABLE FUTURE

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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.



InterCannAlliance

THE INTERCANNALLIANCE

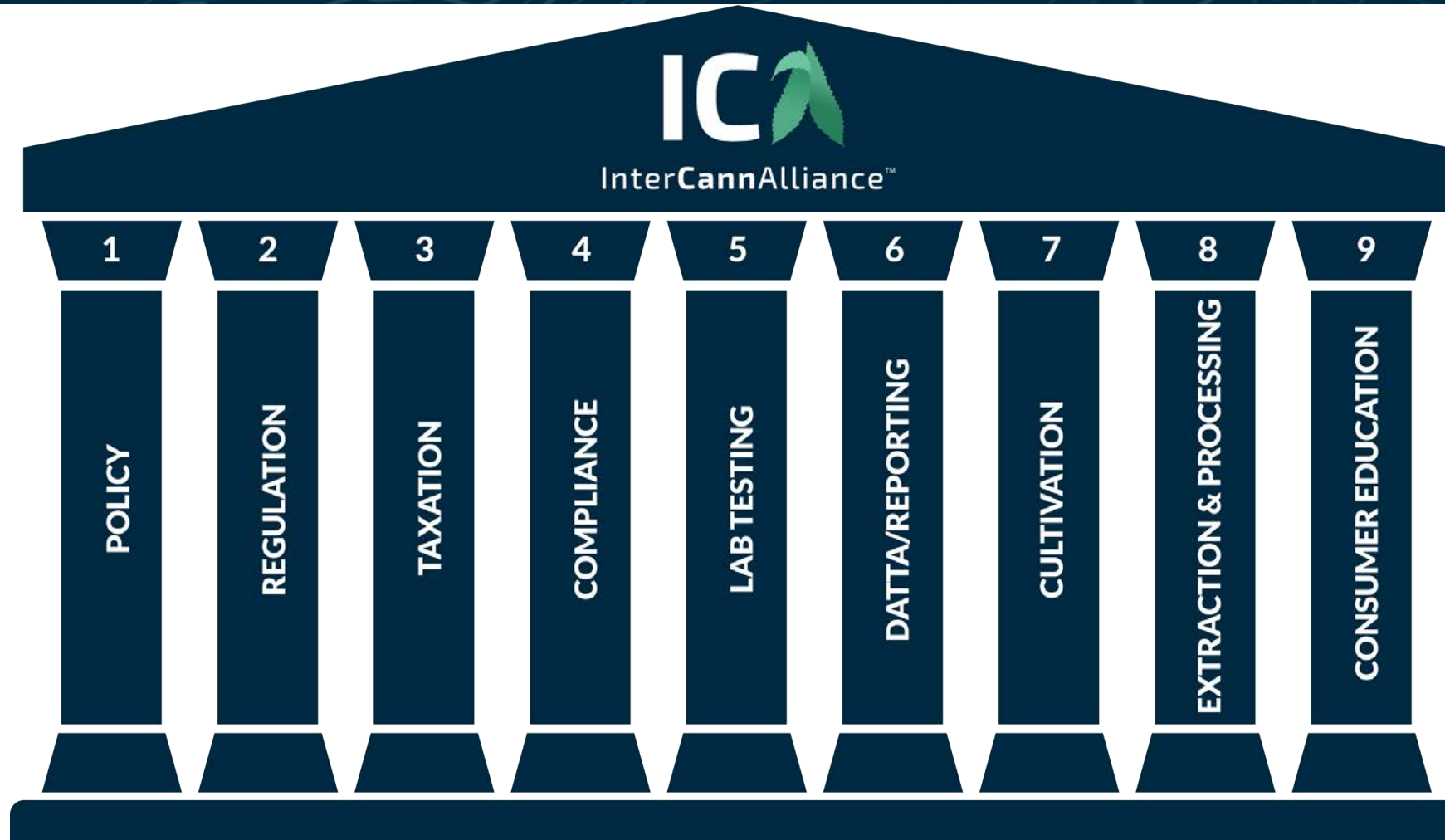
OUR MISSION

The International Cannabis Alliance (InterCannAlliance) was created in March of 2018 to bring advancements from existing legal cannabis markets to new and evolving legal cannabis markets around the globe.

InterCannAlliance unites recognized leaders from industry segments considered to be critical building blocks for any cannabis market. It seeks to simplify the complex and inconsistent regulatory environments being implemented across, and within nations, to help emerging markets capitalize on lessons learned elsewhere.

The InterCannAlliance conducts one-day, invitation-only regional symposia to foster collaboration among governments, non-governmental organizations and commercial enterprises to educate stakeholders about opportunities, risks, and challenges in these markets.

THE 9 PILLARS



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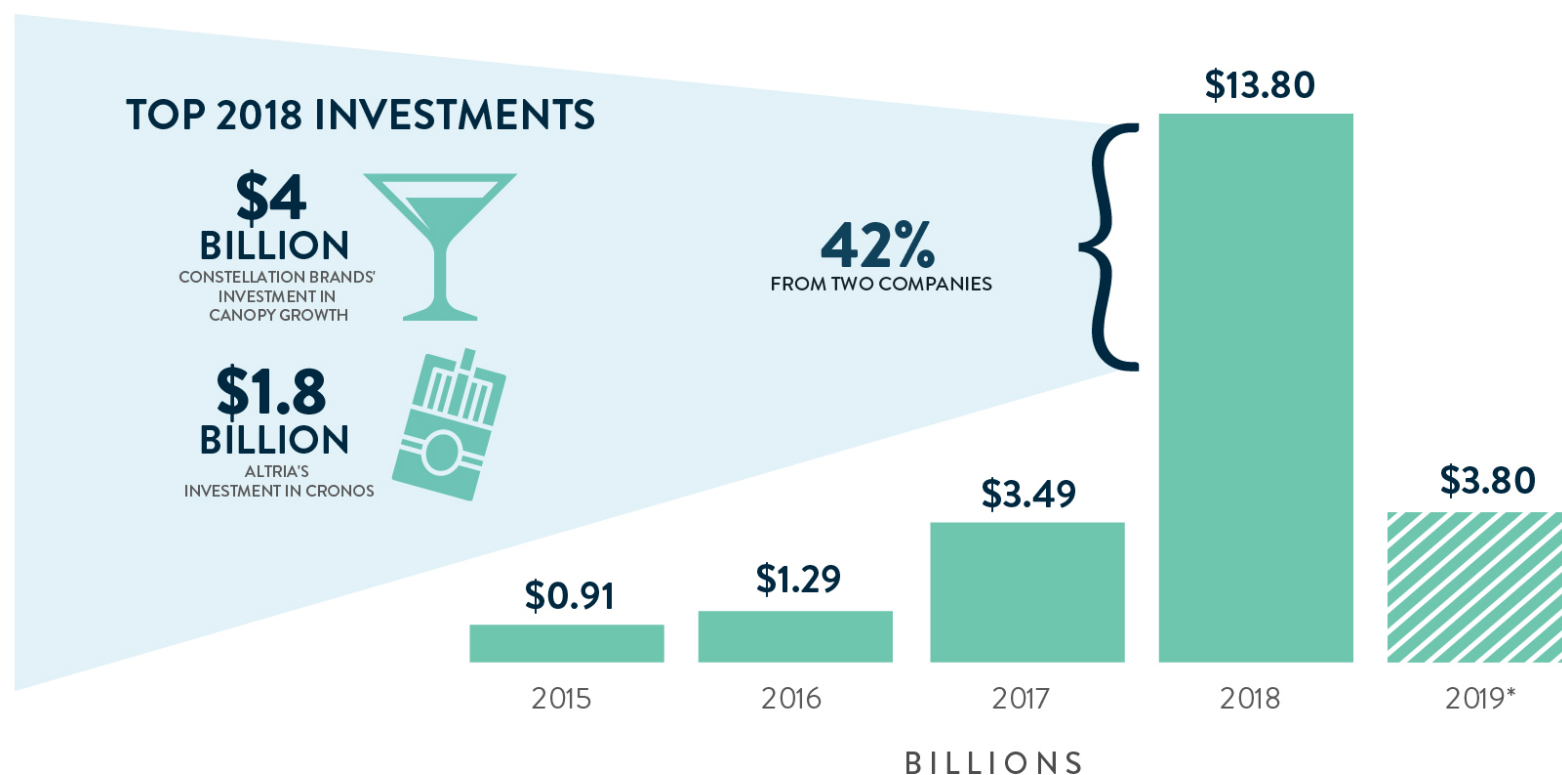
WHY AFRICA

WHY YOU

THE 6TH PILLAR

WHY IS DATA & REPORTING CRITICAL?

DATA DRIVES INSIGHT INTO CANNABIS INDUSTRY INVESTMENT DEAL FLOW



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*Q1 of 2019

The entrance of CPG companies into the industry will increase industry investments by an order of magnitude, propelling innovation across all sectors of the industry. Infused beverages, effect-based rather than strain-based marketing, and “CBD-everywhere” will be trends to watch over the coming year.

DATA DRIVES INSIGHT INTO GLOBAL PREVALENCE OF KEY MEDICAL CONDITIONS

Condition	Rate (Mid)	Rate (Low)	Rate (High)
Lower Back and Neck Pain	11.75%	10.49%	13.04%
Cancers	1.00%	0.94%	1.08%
Alzheimer's Disease and Other Dementia	0.61%	0.54%	0.68%
Opioid Use Disorders	0.55%	0.46%	0.65%
HIV/AIDS	0.50%	0.47%	0.53%
Epilepsy	0.37%	0.29%	0.45%
Rheumatoid Arthritis	0.27%	0.24%	0.30%
Parkinson's Disease	0.12%	0.10%	0.14%
Glaucoma	0.08%	0.07%	0.09%
Multiple Sclerosis	0.02%	0.02%	0.03%
Total Global Prevalence Rate	15.27%	13.63%	16.99%
Total Number of People w/ Conditions	1,171,892,267	1,046,481,843	1,304,021,879

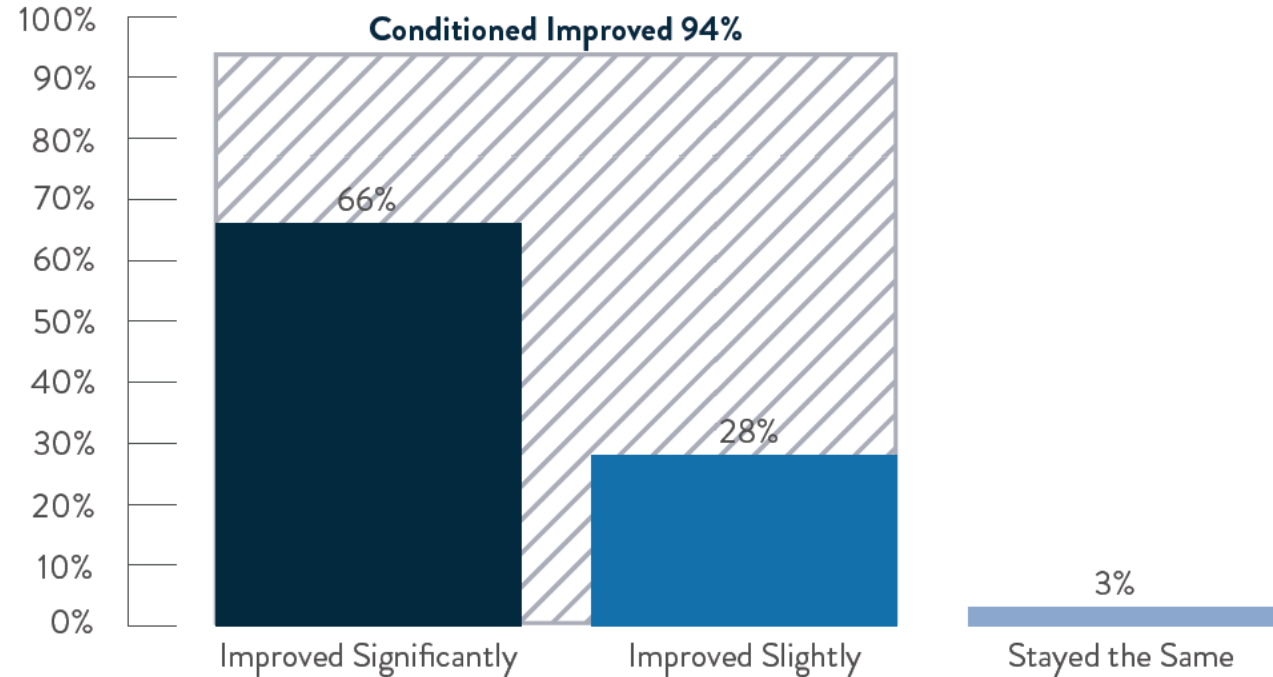
DATA DRIVES INSIGHT INTO EFFICACY OF MEDICAL CANNABIS TREATMENT

73%

Have used cannabis as a substitute
or alternative to other medicines
(Among medical cannabis
patients)



IMPROVEMENT OF MEDICAL CONDITIONS AMONG MEDICAL CONSUMERS



Demand for therapeutic and pharmaceutical cannabis will grow significantly as more countries legalize medical use, clinical research advances, and new delivery methods are developed.

DATA DRIVES INSIGHT INTO A NEW CANNABIS CONSUMER

HEAVY CONSUMERS

TRADITIONAL LIFESTYLERS

14% of consumers

The classic consumer.



MODERN LIFESTYLERS

10% of consumers

The “Cannabis 2.0” consumer.



FUNCTIONAL DEPENDENTS

5% of consumers

The extreme consumer.



MODERATE CONSUMERS

MEDICAL PURISTS

12% of consumers

Cannabis for health and wellness.



WEEKEND ENTHUSIASTS

11% of consumers

Moderate leisure use.



DISCREET UNWINDERS

8% of consumers

Passionate but secret use.



LIGHT CONSUMERS

SOCIAL OPPORTUNISTS

17% of consumers

The communal sharers.



SILVER DABBLERS

14% of consumers

The occasional indulgers.



INFREQUENT CONSERVATIVES

9% of consumers

The greying traditionalists.

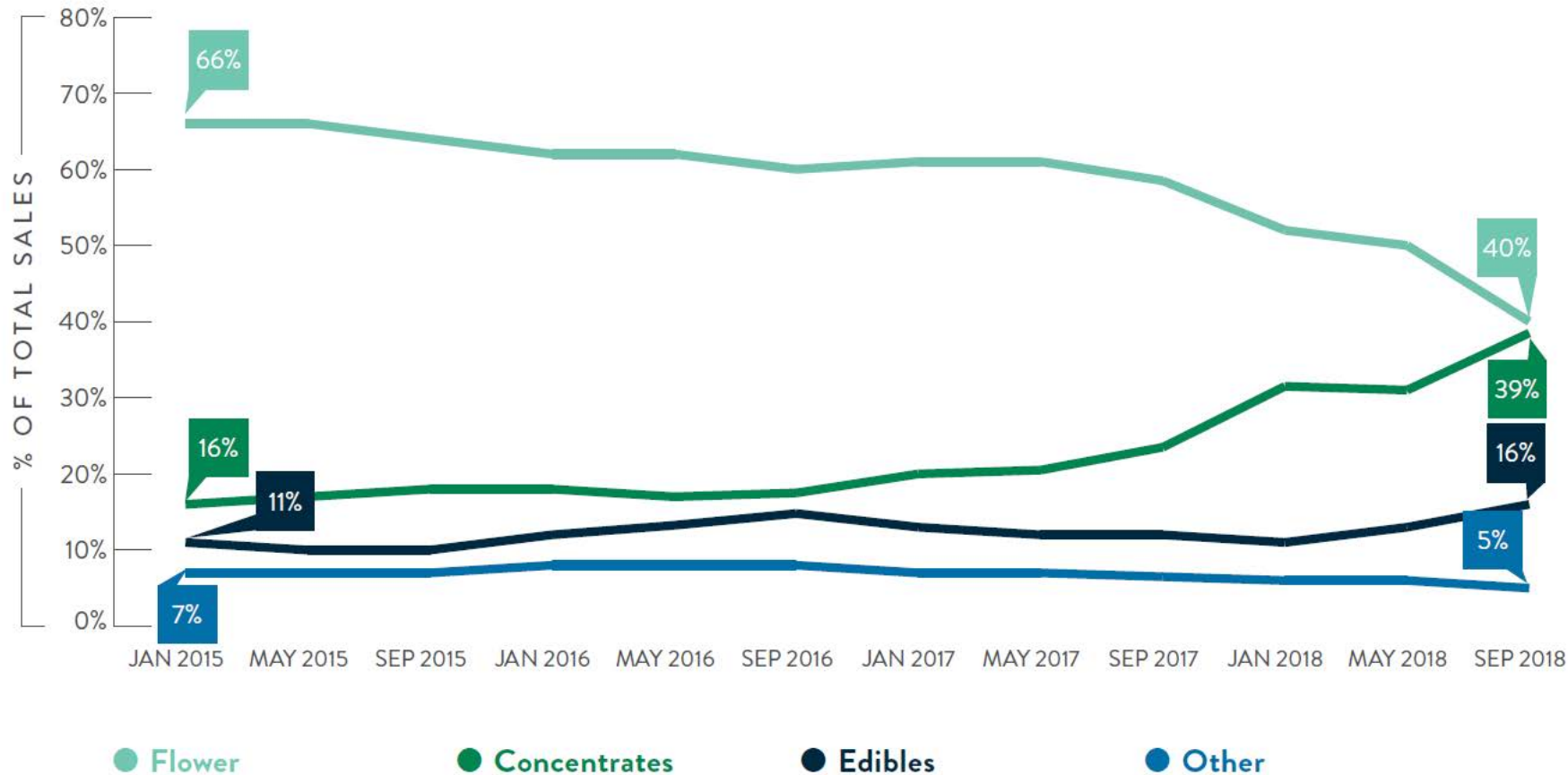


Understanding the consumer will be key to competitiveness. Going beyond the medical-recreational binary to more nuanced segmentation and aligning product development and marketing to unique segment needs is one of the areas of greatest opportunity in cannabis.

DATA DRIVES INSIGHT INTO NEW CONSUMER PREFERENCES FOR VALUE-ADDED PRODUCTS



SHARE OF U.S. CANNABIS RETAIL SALES BY PRODUCT CATEGORY
JAN 2015 - SEP 2018



Change in Market Share by Category

-39%

Decline in Flower

+144%

Growth in Concentrates

+45%

Growth in Edibles

-29%

Decline in Other

THERE ARE MANY USES FOR HEMP BEYOND CBD

INDUSTRY SECTORS BREAKDOWN



Food

- Dairy
- Bread
- Grains
- Beverages
- Snack Foods
- Packaged Foods
- Prepared Foods
- Condiments



Supplements

- Dietary Supplements with hemp that do not contain CBD



Personal Care

- Soap
- Beauty Products
- Lotions
- Balms
- Salves



Consumer Textile

- Clothing
- Uniforms
- Socks
- Blankets
- Other



Other Consumer

- Pet Food
- Pet Supplements
- Household Cleaners
- Paper
- Jewelry/Crafts
- Other



Industrial Applications

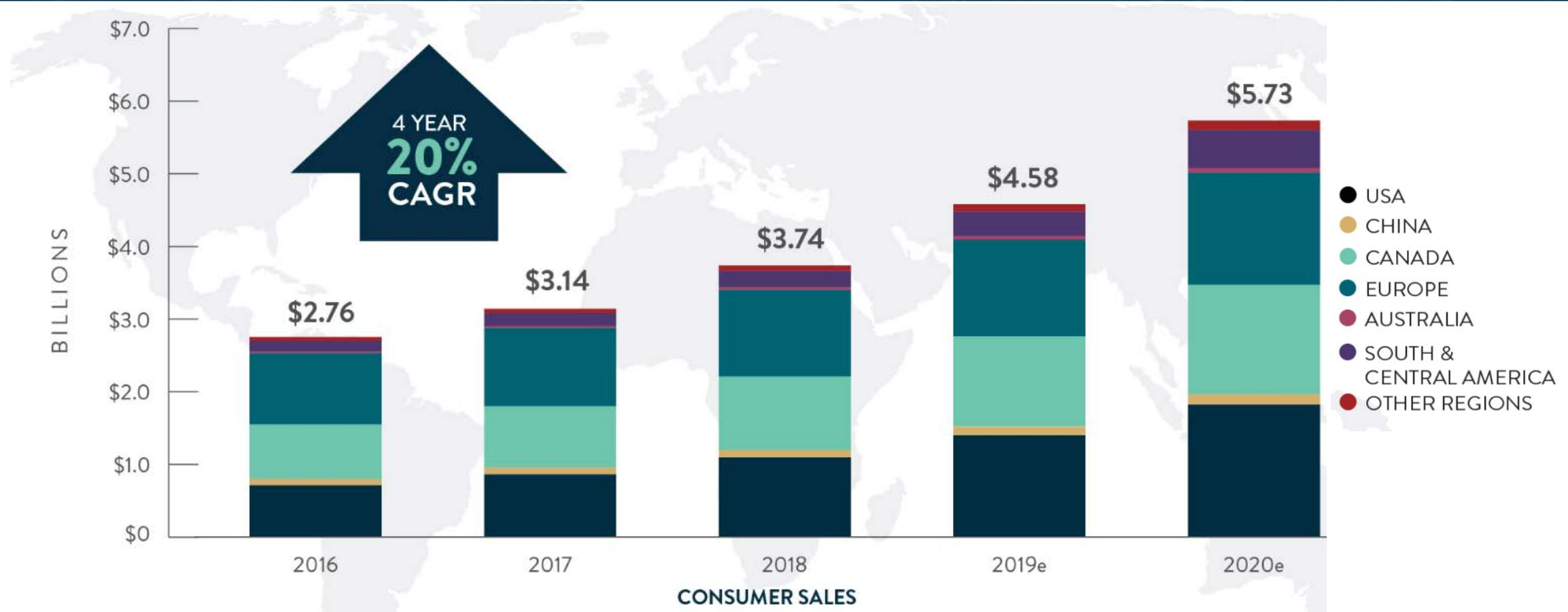
- Automotive
- Green Building
- Industrial Textiles
- Bedding Materials
- BioFuels
- BioPlastics
- Oil Wells
- Other



"Hemp" CBD

- Supplements
- Topicals
- Food/Drink
- Pet Products

DATA DRIVES INSIGHT INTO THE EXPANDING AND MASSIVE GLOBAL HEMP OPPORTUNITY



Under the current market environment, global hemp sales will near \$6 billion by 2020 but expanding legalization of hemp will grow the sector significantly beyond current estimates.