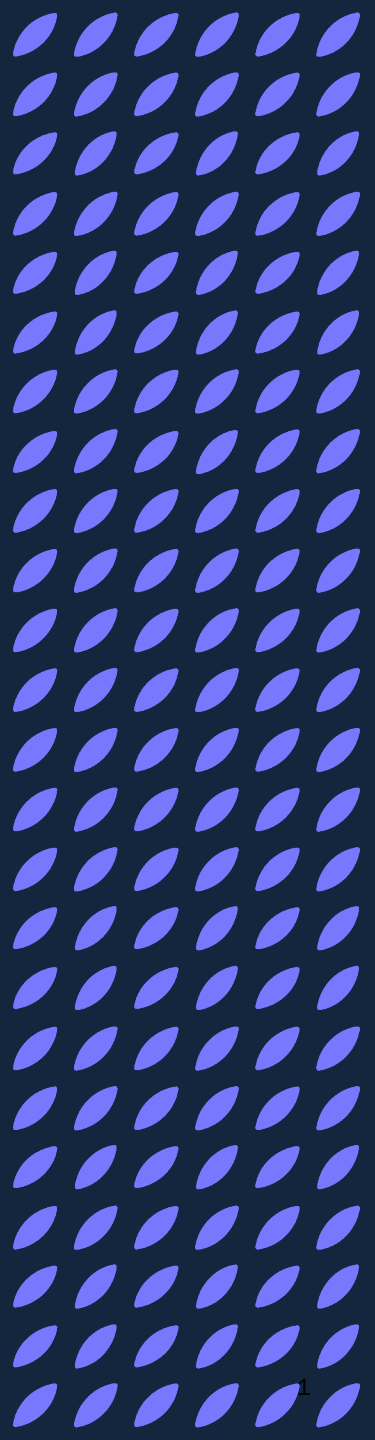




LEGAL CANNABIS FORECAST FEBRUARY 2022 UPDATE

BDSA Cannabis Market Forecast Briefing

February 24, 2022

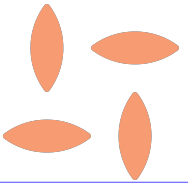


BDSA PROVIDES A COMPLETE VIEW OF THE GLOBAL CANNABINOID MARKET OF TODAY **AND** TOMORROW



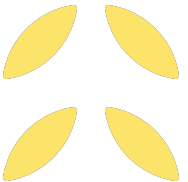
RETAIL SALES TRACKING

Know exactly what is selling where, when, and at what price point



MARKET FORECASTS

Gain a comprehensive understanding of market size and future opportunity



CONSUMER INSIGHTS

Understand consumer (and non-consumer) segments, sizing, behavior, consumption patterns, purchase habits, and more

KEY TAKEAWAYS

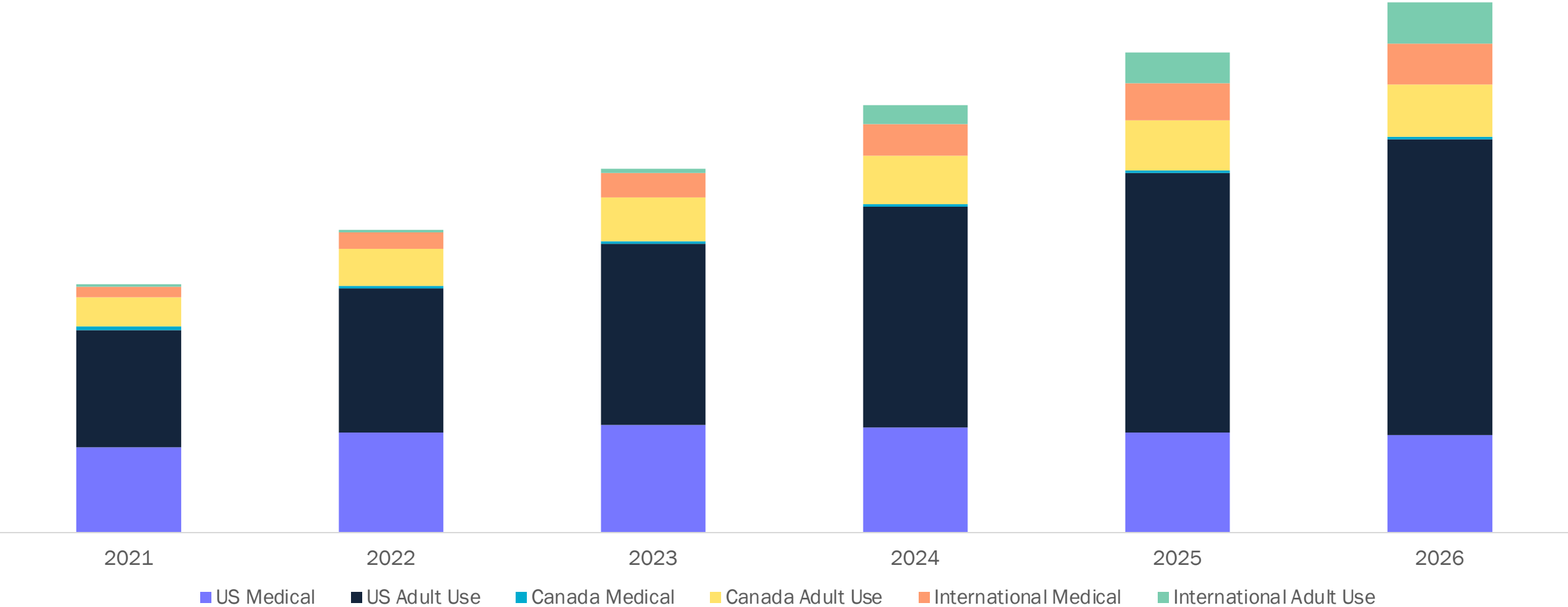
- **Legal cannabis sales in the US grew briskly in 2021...**
 - ...though most markets saw second-half weakness following pandemic boost the past 12 months.

- **Canada growing strongly but slowing. Ontario dominating, Cannabis 2.0 products gaining share.**
 - Ontario's share of adult-use grows with its expanding retail footprint.

- **International growth led by Germany and Mexico**
 - Mexico seems on course to launch adult-use sales soon and Germany could follow, pending regulatory action.

WORLDWIDE LEGAL SPENDING

BDSA Global Legal Cannabis Forecast (USD, billions)



Source: BDSA February 2022 Market Forecast



B D
S A

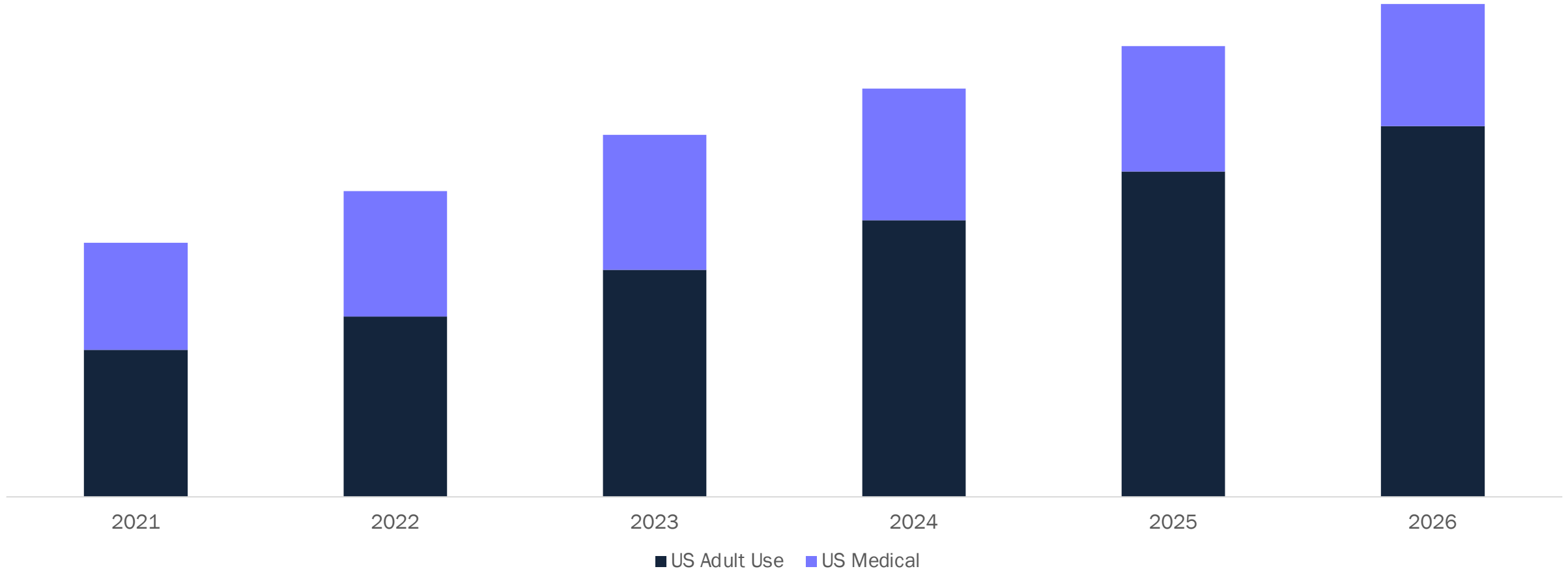


UNITED STATES



US LEGAL SPENDING

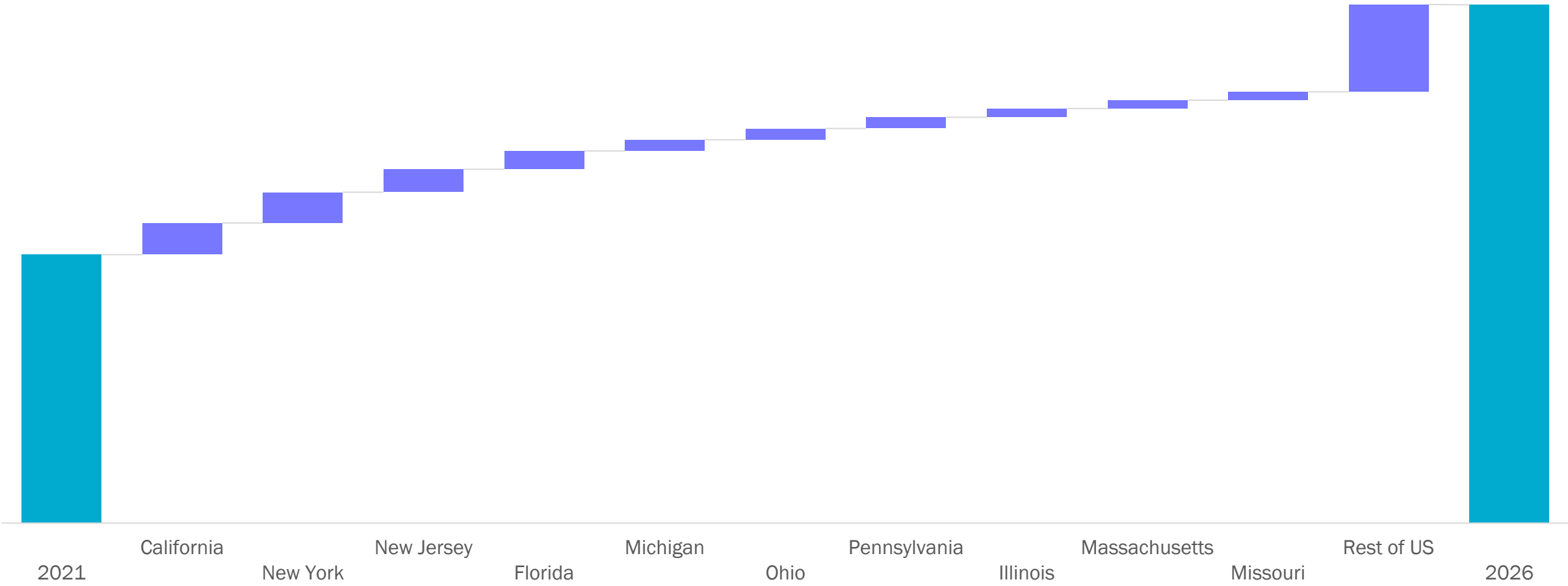
BDSA US Legal Cannabis Forecast (USD, Billions)



Source: BDSA February 2022 Market Forecast

TOP TEN US CONTRIBUTORS TO GROWTH

BDSA US Legal Cannabis Forecast (USD, Billions)



Source: BDSA February 2022 Market Forecast



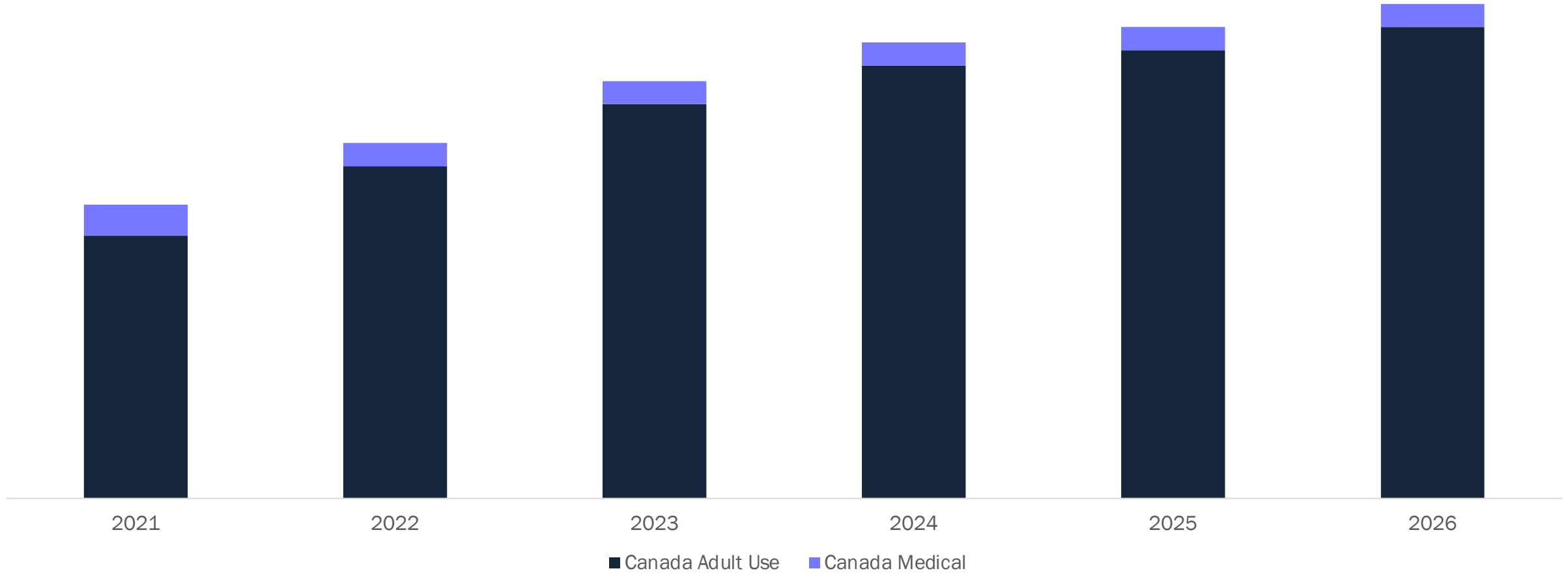


CANADA



CANADA LEGAL SPENDING

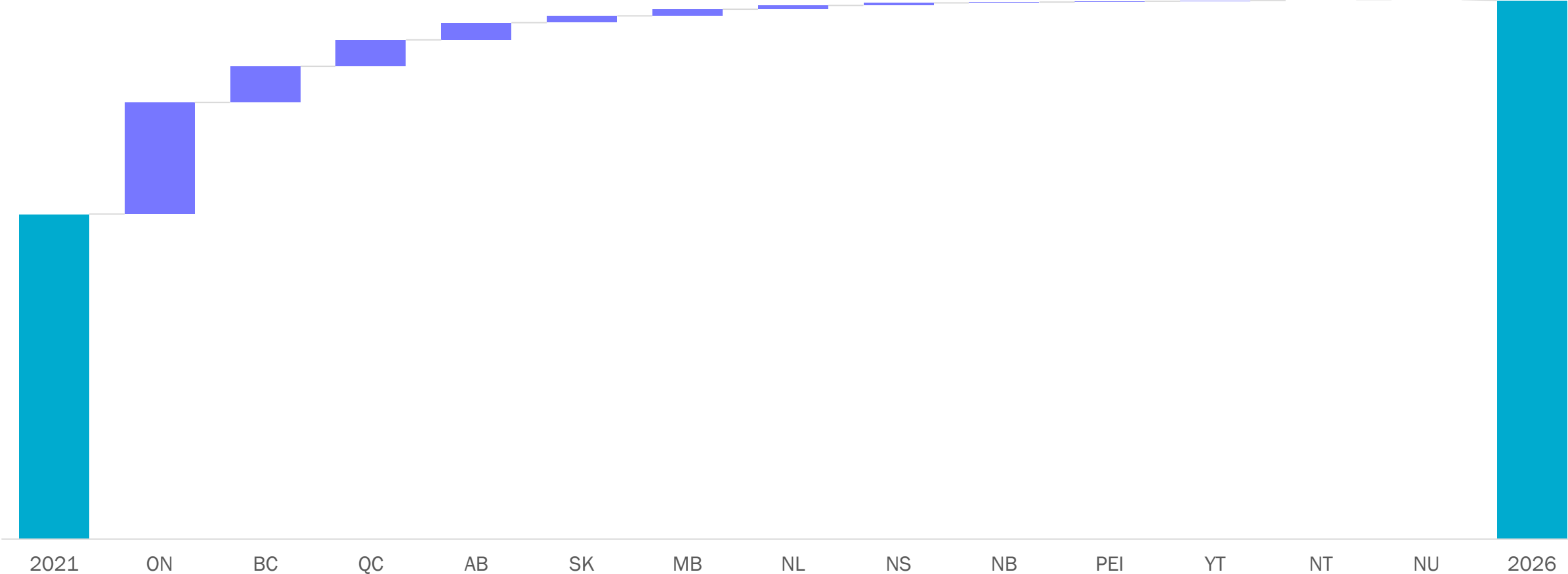
BDSA Canada Legal Cannabis Forecast (USD, Billions)



Source: BDSA February 2022 Market Forecast

TOTAL CANADIAN CONTRIBUTORS TO GROWTH

BDSA Canada Legal Cannabis Forecast (USD, Billions)



Source: BDSA February 2022 Market Forecast

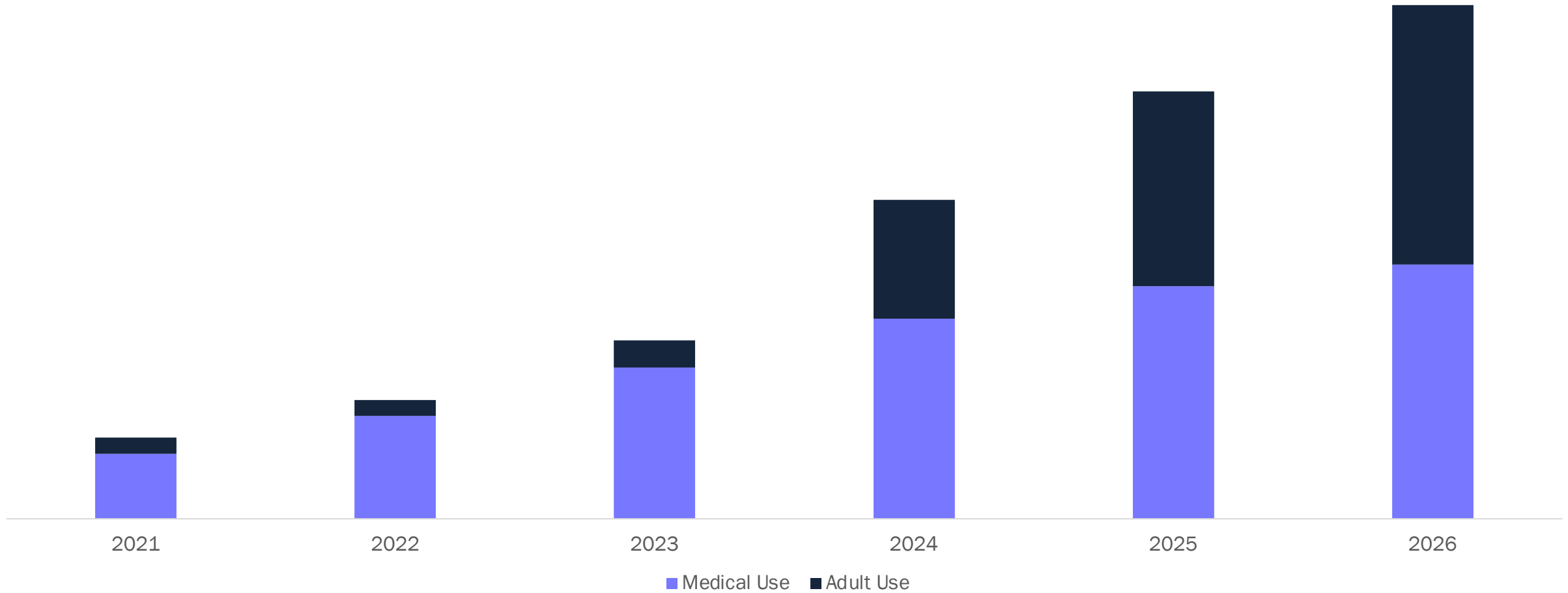


INTERNATIONAL



INTERNATIONAL LEGAL SPENDING

BDSA International Legal Cannabis Forecast (USD, Billions)



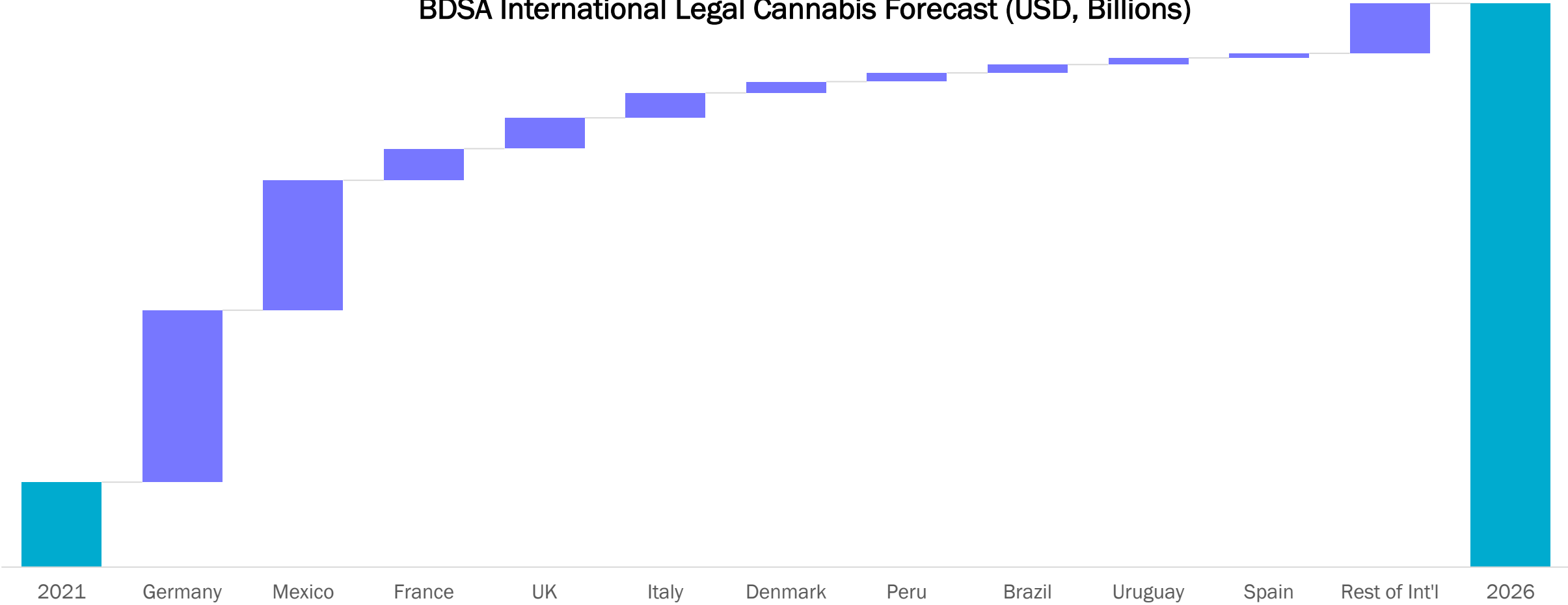
Source: BDSA February 2022 Market Forecast

Note: International excludes US and Canada



TOTAL INTERNATIONAL CONTRIBUTORS TO GROWTH

BDSA International Legal Cannabis Forecast (USD, Billions)



Source: BDSA February 2022 Market Forecast

Note: International excludes US and Canada





IT'S A NEW GAME

**WHAT DOES THAT MEAN FOR
YOUR BUSINESS?**

info@bdsa.com