

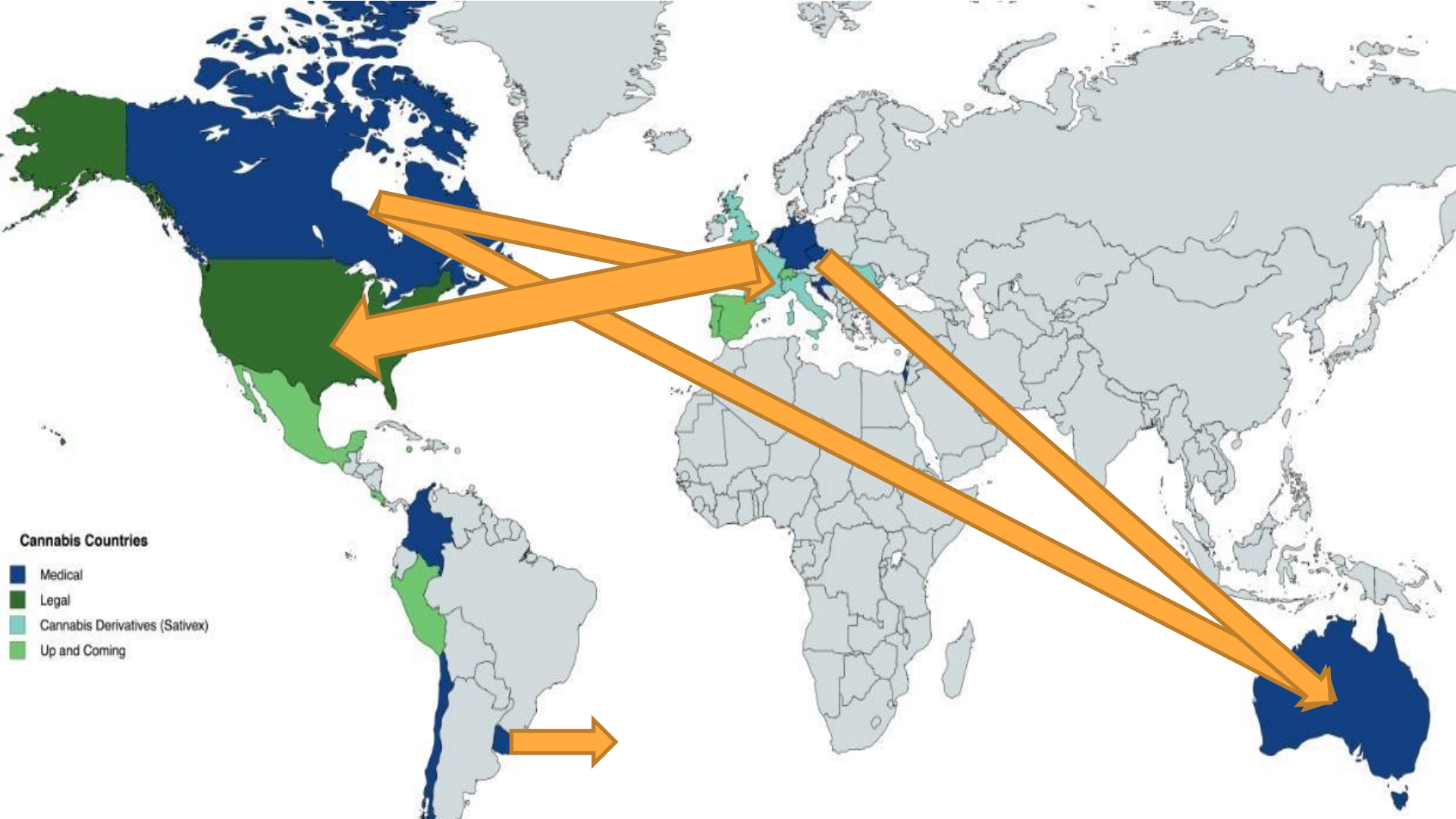
A faint world map is visible in the background, centered on the Atlantic Ocean. The map is light green and yellow, contrasting with the blue and teal background. Two horizontal black lines are positioned above and below the main title text.

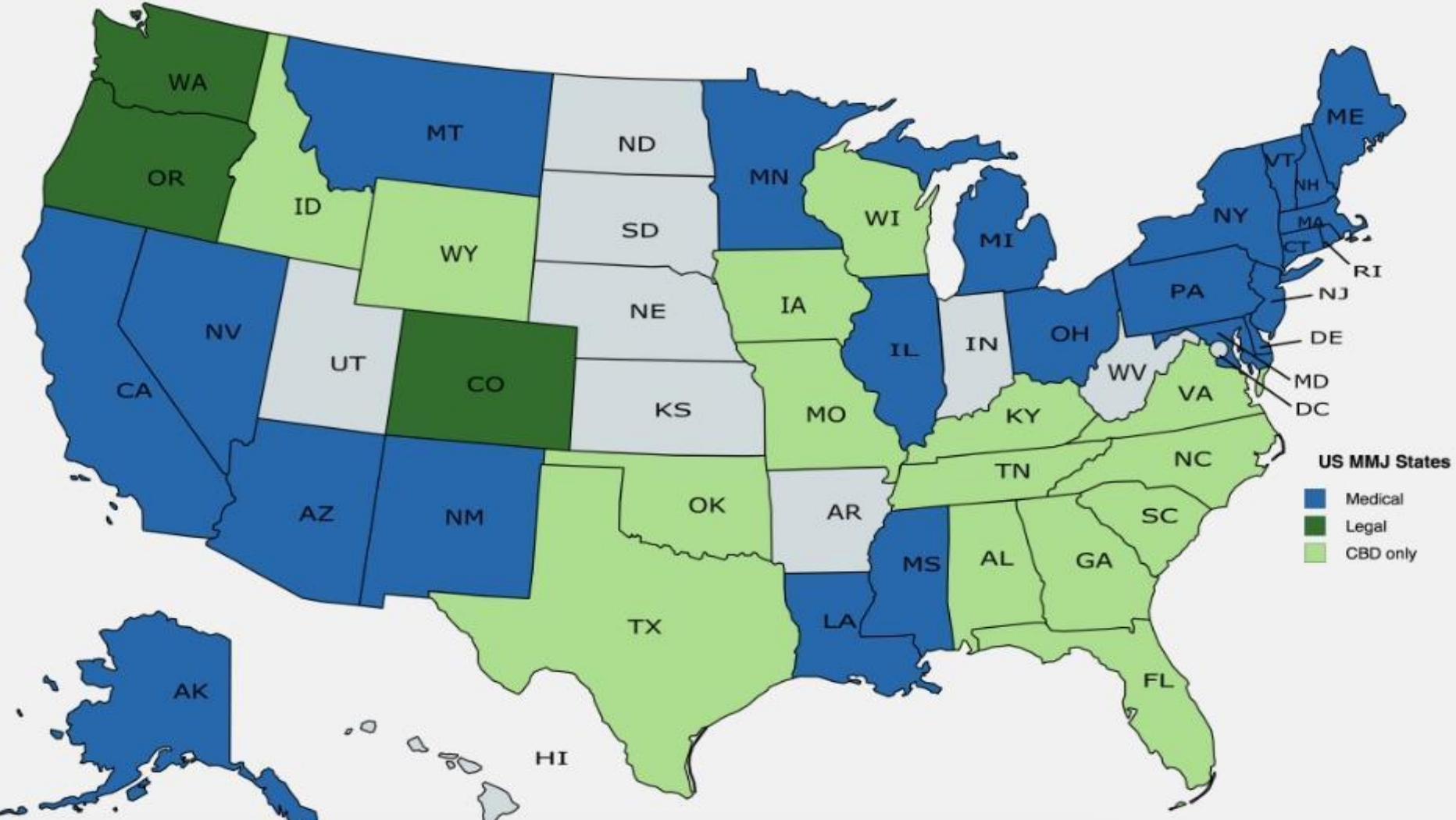
Global Economic Trends in the Cannabis Industry

Saul Kaye

CEO

iCAN: Israel-Cannabis.com

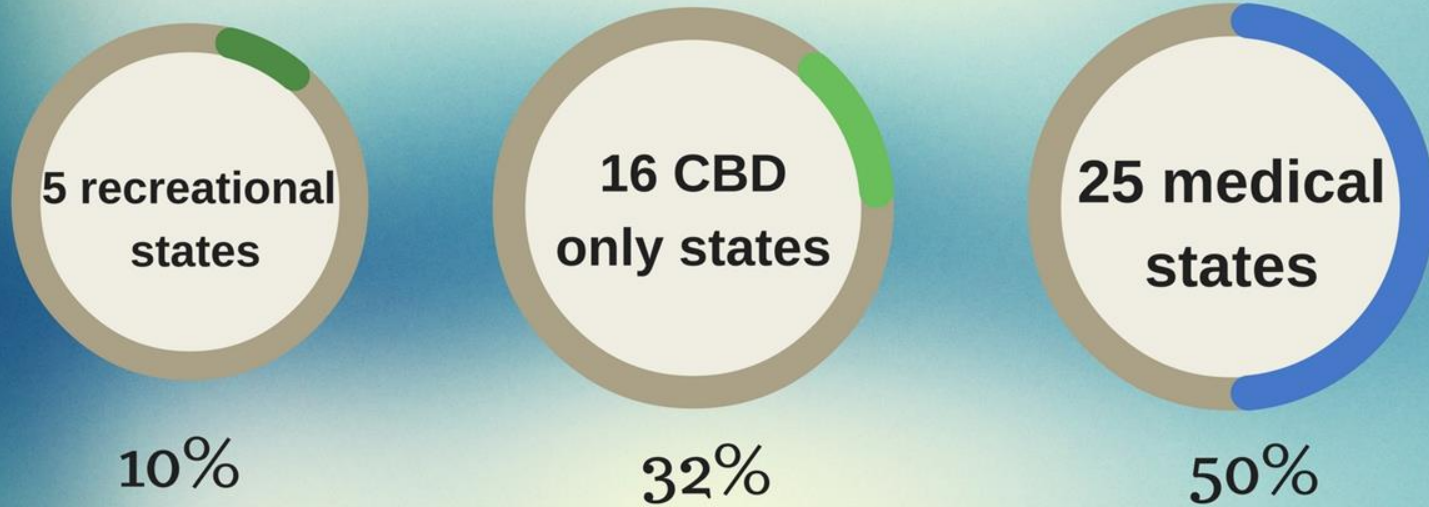




US MMJ States

- Medical
- Legal
- CBD only

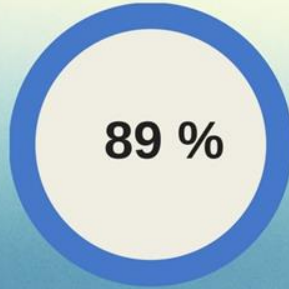
U.S legal overview



US Statistics



Estimated size of the legal US cannabis industry, 25% boost from 2015



Americans supporting legalisation of medical cannabis prescribed by a doctor

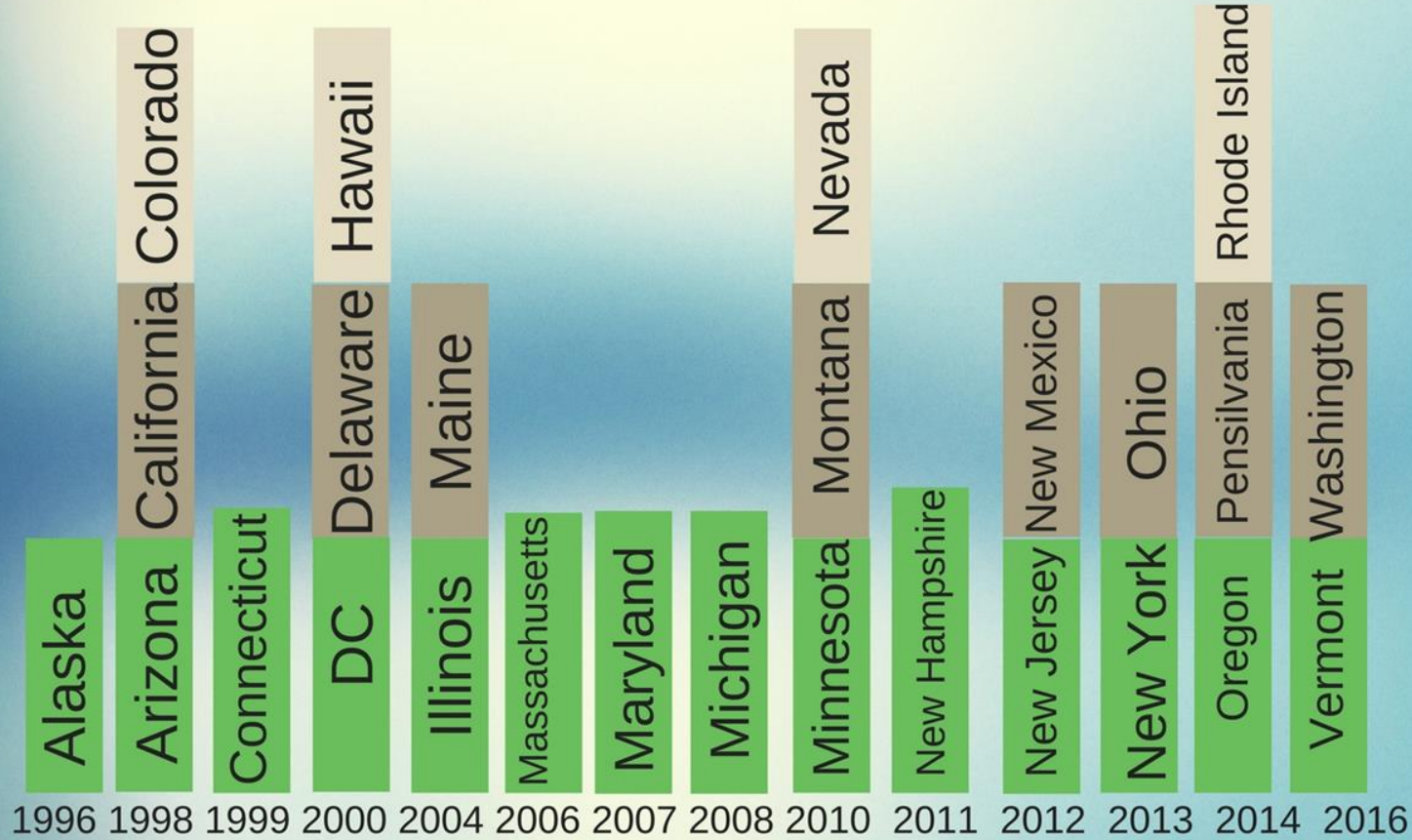


States up for legalisation in November 2016 ballot.



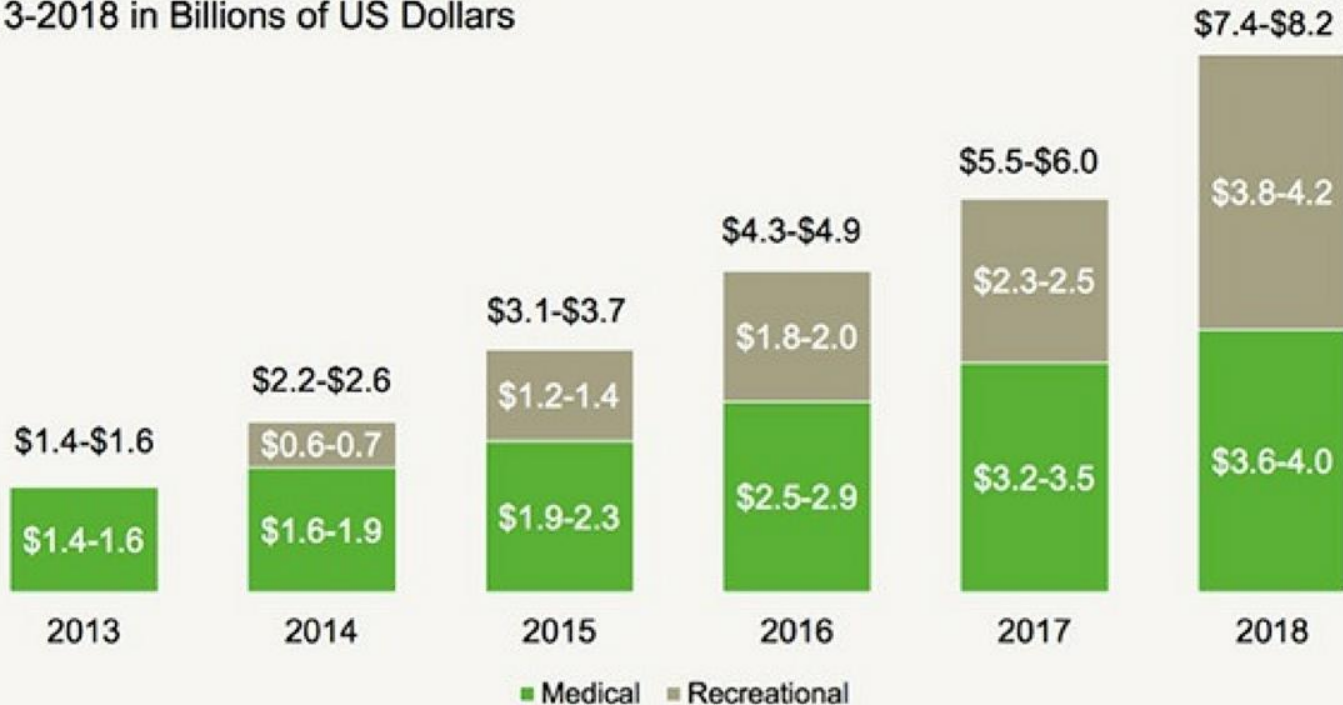
States legally growing hemp

Legalisation by year



US Sales Estimates

US Marijuana Sales Estimates
2013-2018 in Billions of US Dollars



UK

- **No medical cannabis patients**
- **Stakeholder discussions but nothing on the horizon**
- **GW Pharmaceuticals (LSE - 1.88BN GBP Market capitalization)**
 - **lead product Sativex - approved in 20 countries**
 - **Epidiolex (product in development)**

Germany

- **Expected to legalize medical cannabis early 2017**
- **Under 800 patients**
- **Purchase flowers from Netherlands and recently Canada (four strains)**
- **Cannabis cultivation and possession can be permitted to scientific institutions or administrative bodies**
- **Pharmacies can obtain a special permission to sell cannabis or cannabis based medication to patients**

Czech Republic

- **Medical Cannabis allowed but practically unavailable to patients**
- **Leader in cannabis infused topicals , major European and U.S. supplier**
- **Strong Hemp industry**

Israel

- **Regulatory changes**
- **Increased physicians and patients**
- **Potential global export**
- **Part of global trends towards edibles and vapes**

Companies to watch



grownetics

AgTech



Brands



Terpene Research



GUARDIAN
DATA SYSTEMS

US Banking & Regulatory

LEAF

Home growing system



Czech CBD cultivator

Trends

- **Based on US data up to 1% of population become medical cannabis users within 24 months of regulatory changes (NY 0.8%- 1.96% Colorado)**
- **Vape/edibles over flowers**
- **Demand for brands**
- **Medical cannabis treatment to transition into :**
 - Recreational (US)
 - Nutraceutical
 - Pharmaceutical

THANK YOU