

# Market update

October 2018

# Mission

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**Supply high-quality, trusted & innovative medicinal cannabis products & delivery platforms to enhance the wellbeing of patients in Australia & globally.**



# Cann Group is building a sustainable growth platform



Our objective is to be the Australian industry leader & to quickly build sufficient capacity/capability to service expanding export markets

## 24 harvests successfully completed

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- Cann has successfully completed 24 harvests
- New capacity added at Southern facility
- First full medicinal crop now underway at Northern facility
- New supply agreement executed with Victorian Government
- Imported genetics recently cleared by Australian quarantine authorities



# Major expansion plans progressing: Project Tullamarine



- World scale greenhouse, associated support areas & GMP standard production rooms for final form medicinal cannabis product
- Heads of agreement signed with Australia Pacific Airports (Melbourne) Pty Ltd (APAM) to secure site
- Aurora Larssen Projects (ALPS) providing design & consulting services

# Project Tullamarine provides a clear pathway to sustained profitability

- First design phase completed
- Vendor bid specifications for greenhouse, warehouse, support building and utilities released this week
- Workforce planning underway: Recruitment to start Q2 2019



Expected to produce 40-50,000Kg per annum at full capacity<sup>1</sup>

# Strengthening our capabilities via key partnerships



- New research collaboration agreement signed with CSIRO
- Research MOU executed with Agriculture Victoria
- Extension of agreement with La Trobe University: Focus on genetics; breeding & cultivation
- Manufacturing agreement with IDT Australia Ltd
- Ongoing collaboration with Aurora Cannabis Inc & Anandia Labs



# Large & growing global market opportunity

The global medicinal cannabis market is estimated to reach US\$100 billion by 2025, with an estimated growth rate of over 30% CAGR<sup>1</sup>.

The key driver for global growth is increasing legalisation. Medicinal cannabis has been legalised (or decriminalised) in 26 (58) countries across North & South America, Europe & Australia.

Global Market growth	
Year	USD Mn
2015	5,610
2016	7,644
2017	11,169
2018	17,497
2019	30,185
2020	47,117
2021	62,320
2022	74,661
2023	84,573
2024	93,131
2025	100,972
1- Source: Grand View Research 2018	



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