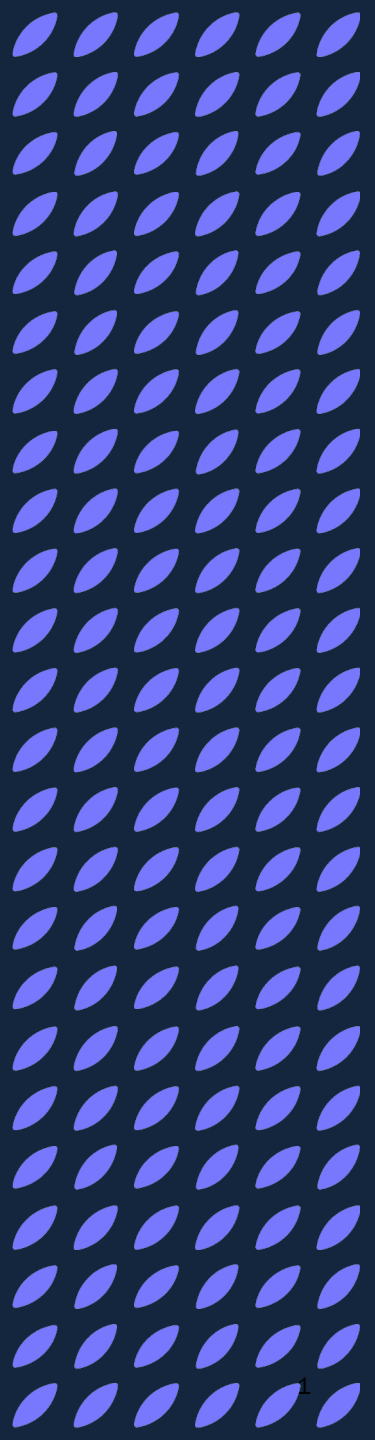




UPDATED GLOBAL CANNABIS MARKET FORECASTS: FALL 2022

Roy Bingham | CEO

September 21, 2022



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



RETAIL SALES TRACKING

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



MARKET FORECASTS

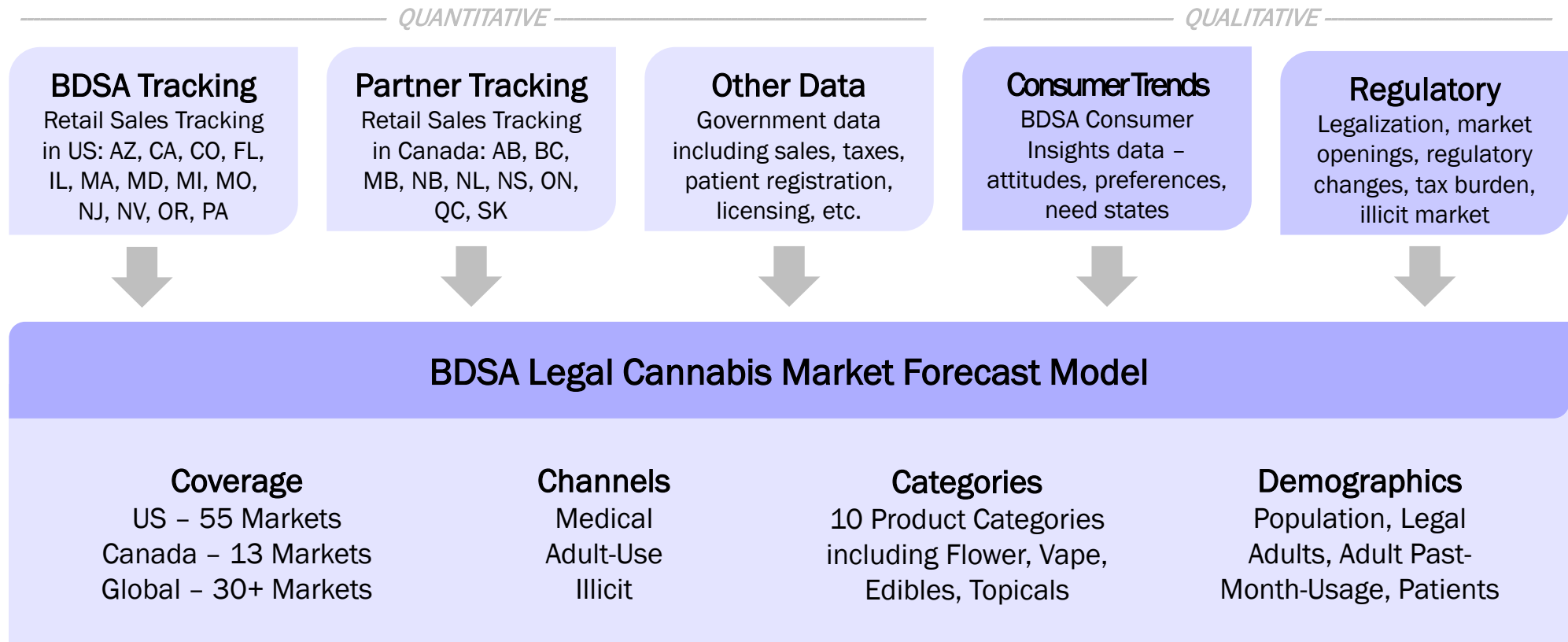
Gain a comprehensive understanding of market size and future opportunity



CONSUMER INSIGHTS

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

BDSA LEGAL CANNABIS MARKET FORECAST



Source: BDSA



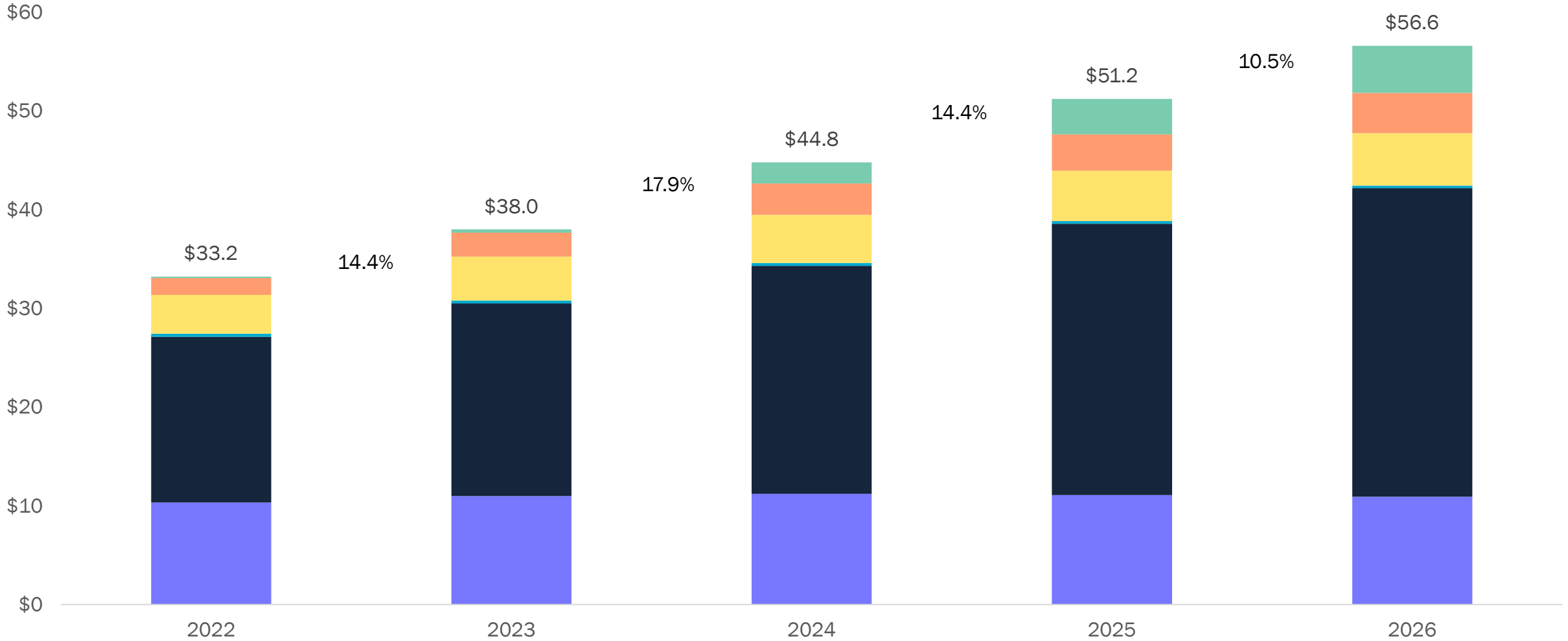
GLOBAL CANNABIS MARKET FORECAST



WORLDWIDE LEGAL SPENDING

BDSA Global Legal Cannabis Forecast (USD, billions)

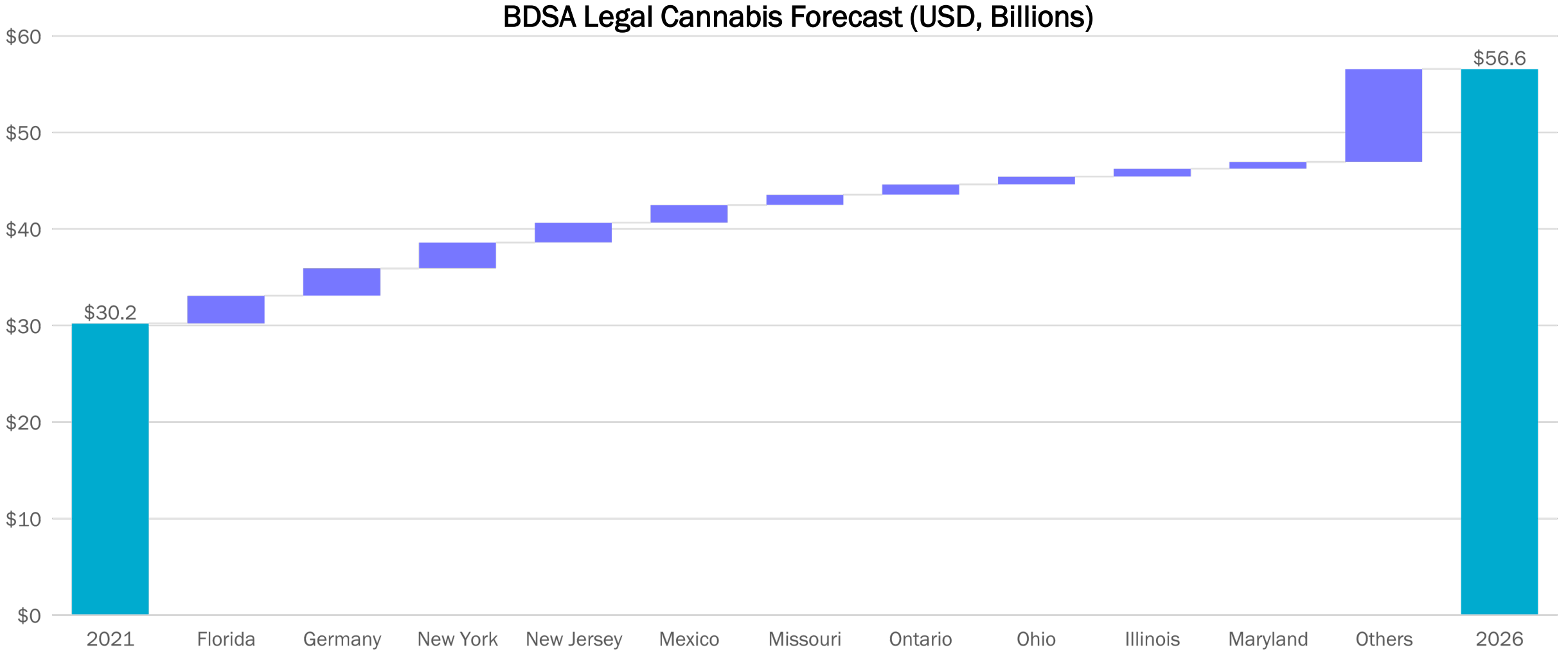
'22-'26 CAGR
14.3%



Source: BDSA

■ US Medical
 ■ US Adult Use
 ■ Canada Medical
 ■ Canada Adult Use
 ■ International Medical
 ■ International Adult Use

TOP TEN CONTRIBUTORS TO GROWTH



Source: BDSA



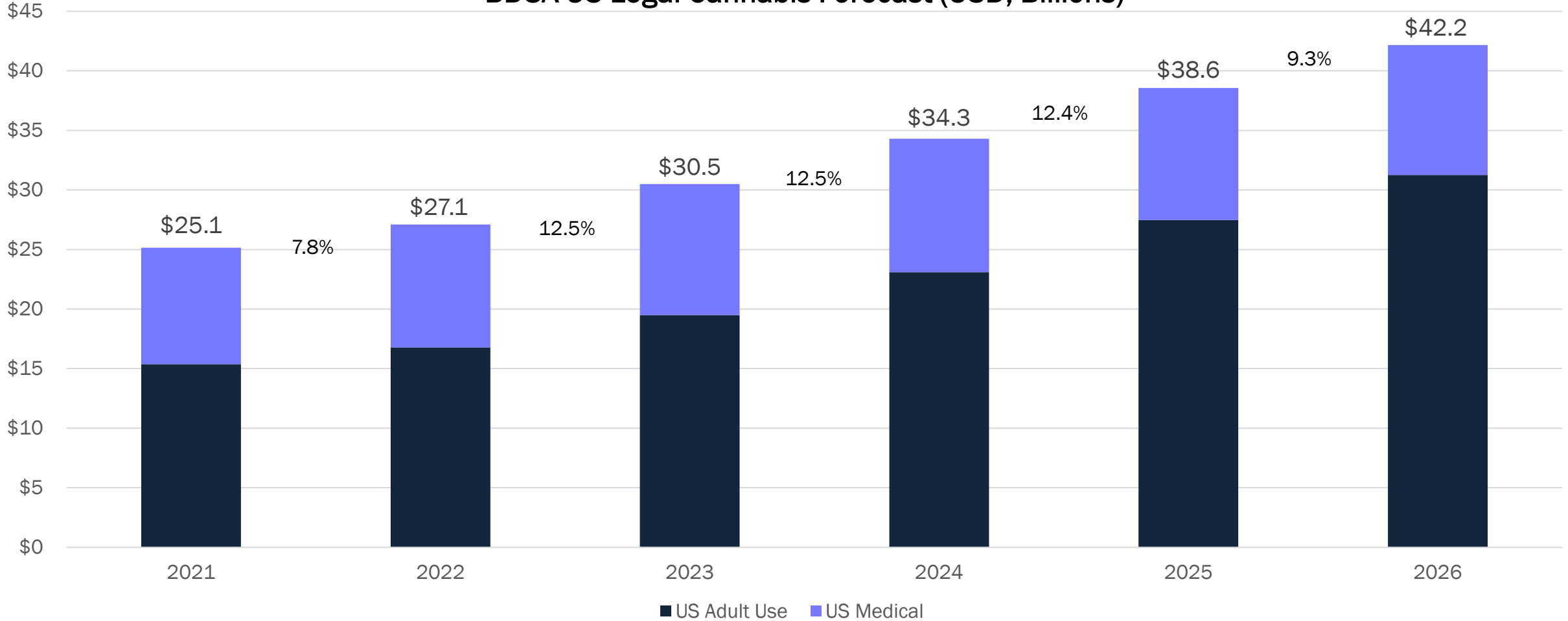
US CANNABIS MARKET FORECAST



US LEGAL SPENDING

'21-'26 CAGR
11%

BDSA US Legal Cannabis Forecast (USD, Billions)



Source: BDSA

FORECAST MARKET LAUNCH DATES (RETAIL SALES)

MEDICAL

ADULT-USE

2022

Georgia, Mississippi,
South Dakota, D.C. *

Guam, Montana, **New Jersey**, New
Mexico, **New York**, Vermont

2023

Alabama, Kentucky, North Carolina, South
Carolina,

Connecticut, Delaware,
Missouri, Rhode Island

2024

Idaho, Kansas, Nebraska

Maryland,
North Dakota,
South Dakota, Virginia

2025

Florida, Ohio, Pennsylvania

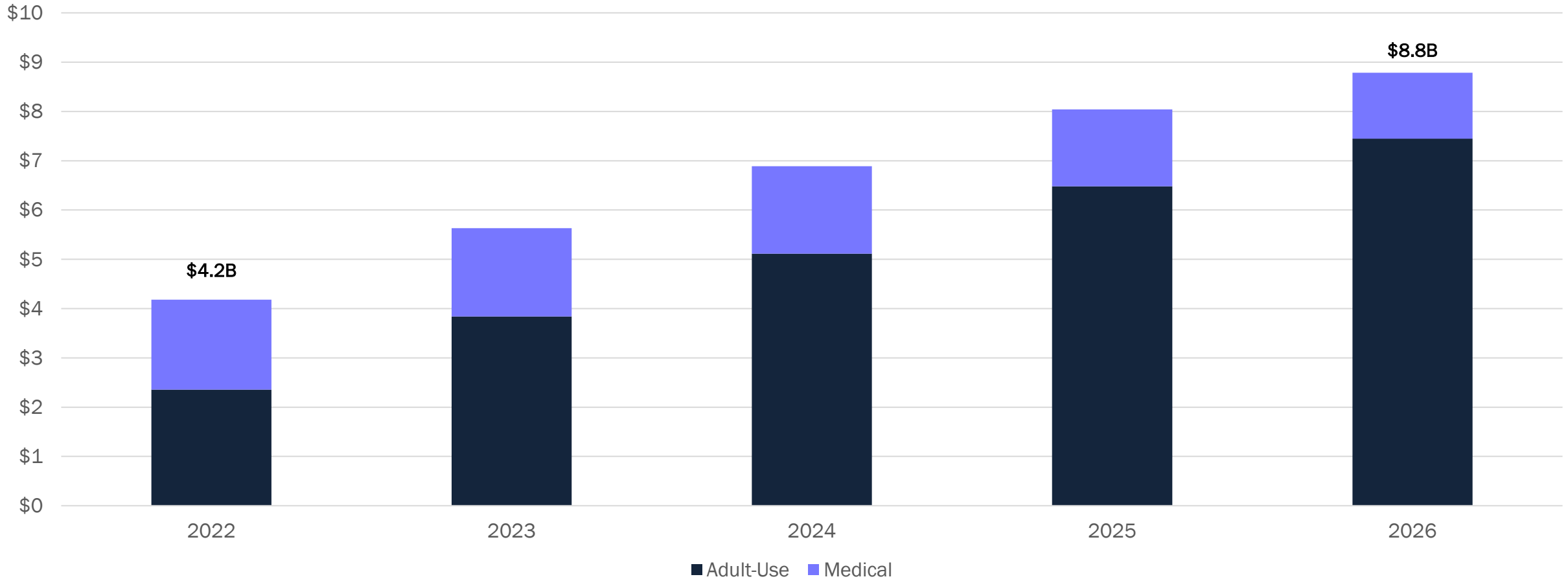
2026

Wyoming

CANNABIS EXPANSION IN EASTERN US

'22-'26 CAGR
20%

MA, NJ, NY, PA Combined Legal Cannabis Sales by Channel (USD, Billions)

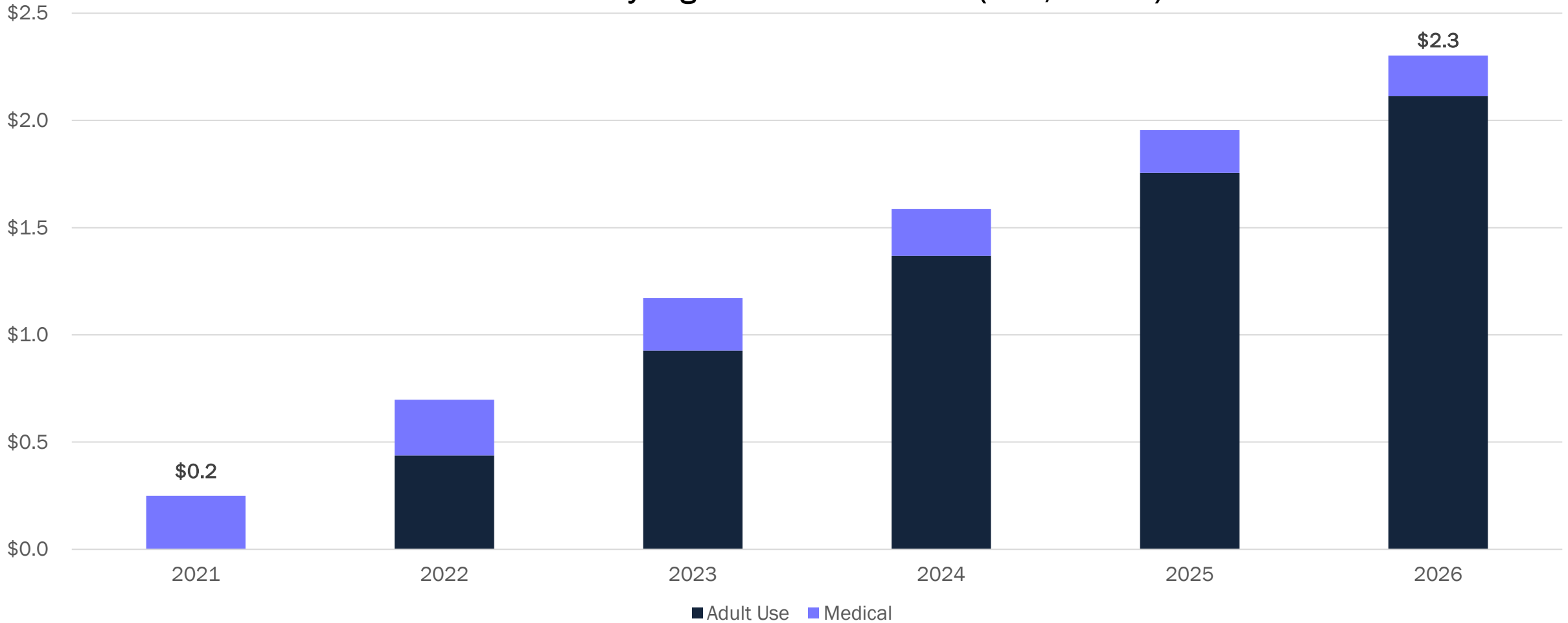


Source: BDSA Market Forecast

US LEGAL SPENDING: NEW JERSEY

'21-'26 CAGR
56%

BDSA New Jersey Legal Cannabis Forecast (USD, Billions)

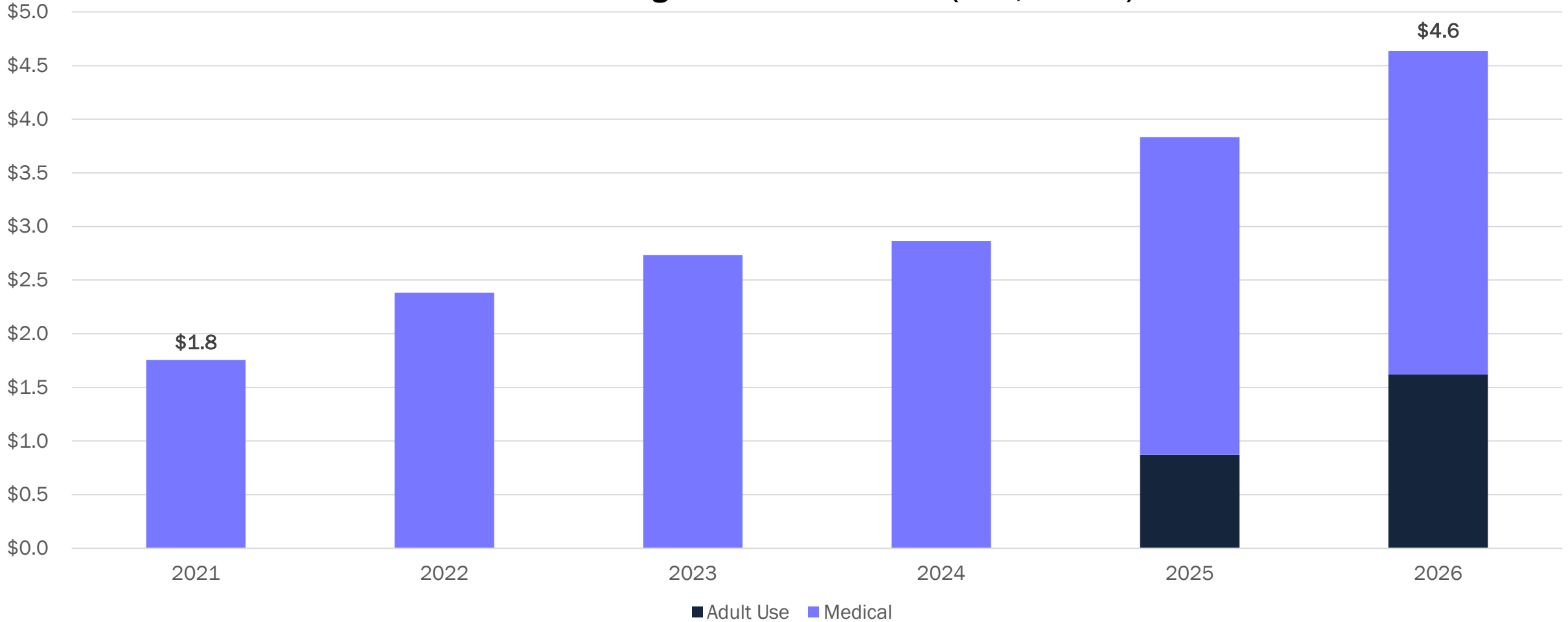


Source: BDSA

US LEGAL SPENDING: FLORIDA

BDSA Florida Legal Cannabis Forecast (USD, Billions)

'21-'26 CAGR
21.4%

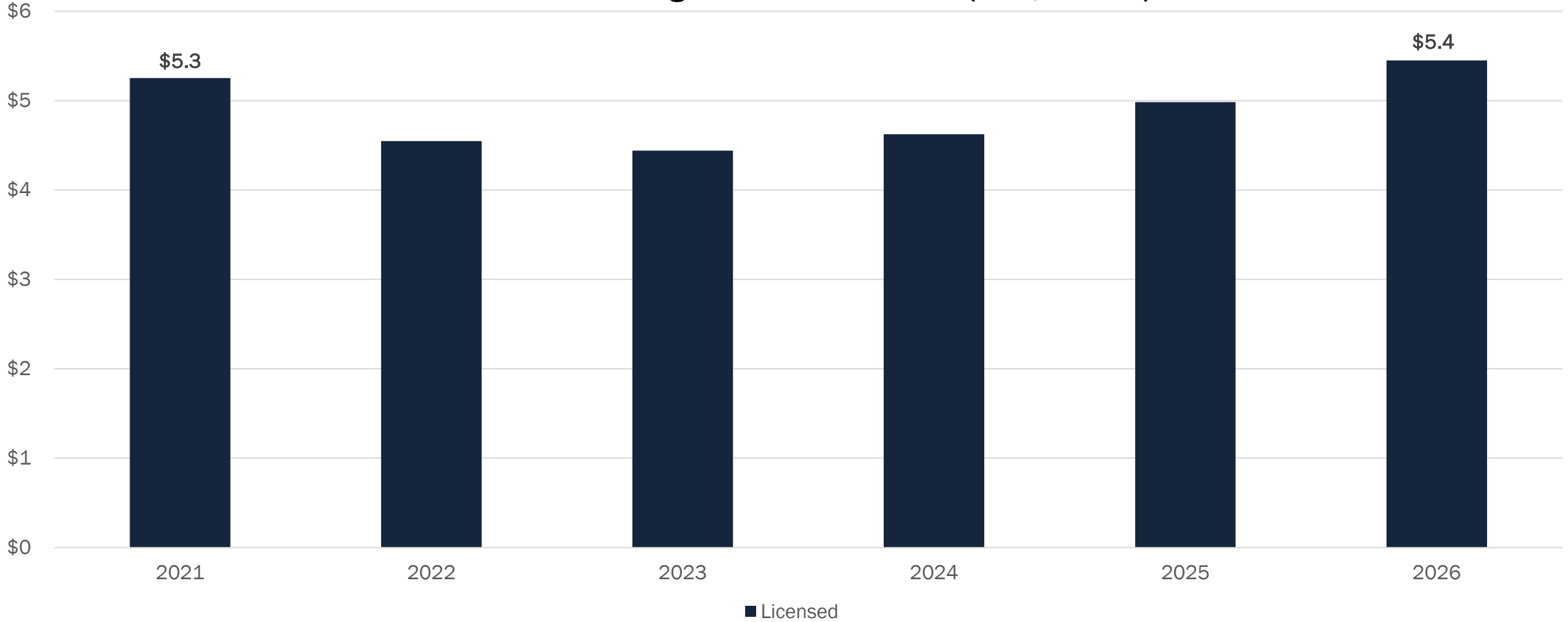


Source: BDSA

US LEGAL SPENDING: CALIFORNIA

BDSA California Legal Cannabis Forecast (USD, Billions)

'21-'26
CAGR 0.7%



Source: BDSA



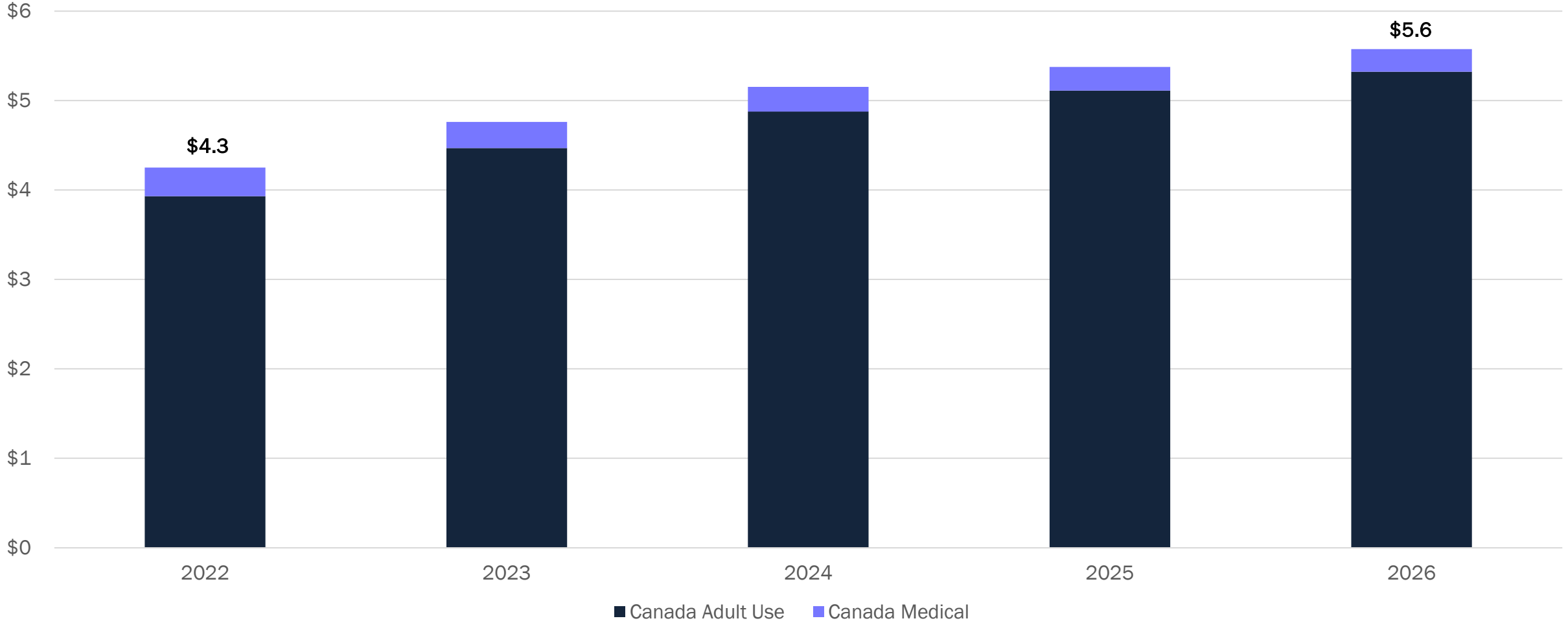
CANADIAN CANNABIS MARKET FORECAST



CANADA LEGAL SPENDING

'22-'26 CAGR
7%

BDSA Canada Legal Cannabis Forecast (USD, Billions)



Source: BDSA



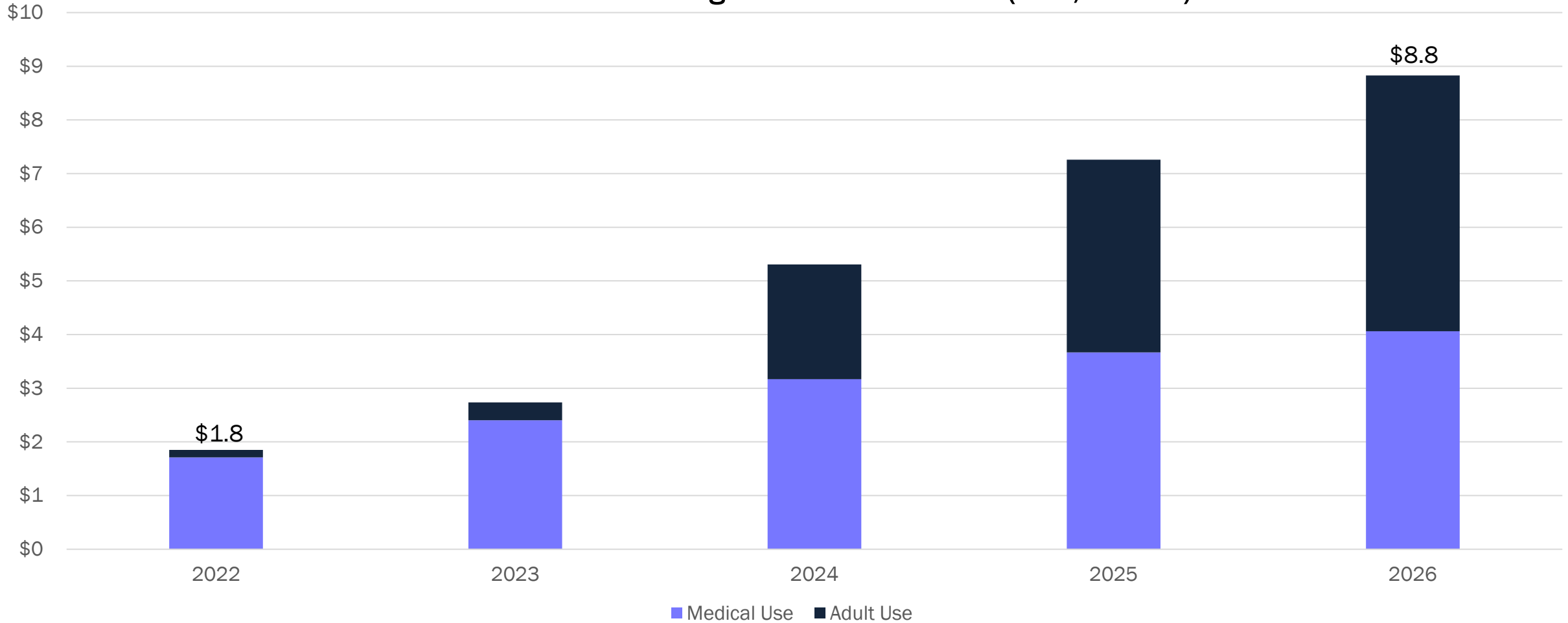
INTERNATIONAL CANNABIS MARKET FORECAST



INTERNATIONAL LEGAL SPENDING (EXCLUDING US AND CANADA)

'22-'26 CAGR
48.7%

BDSA International Legal Cannabis Forecast (USD, Billions)



Source: BDSA
Note: International excludes US and Canada





IT'S A NEW GAME

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

info@bdsa.com