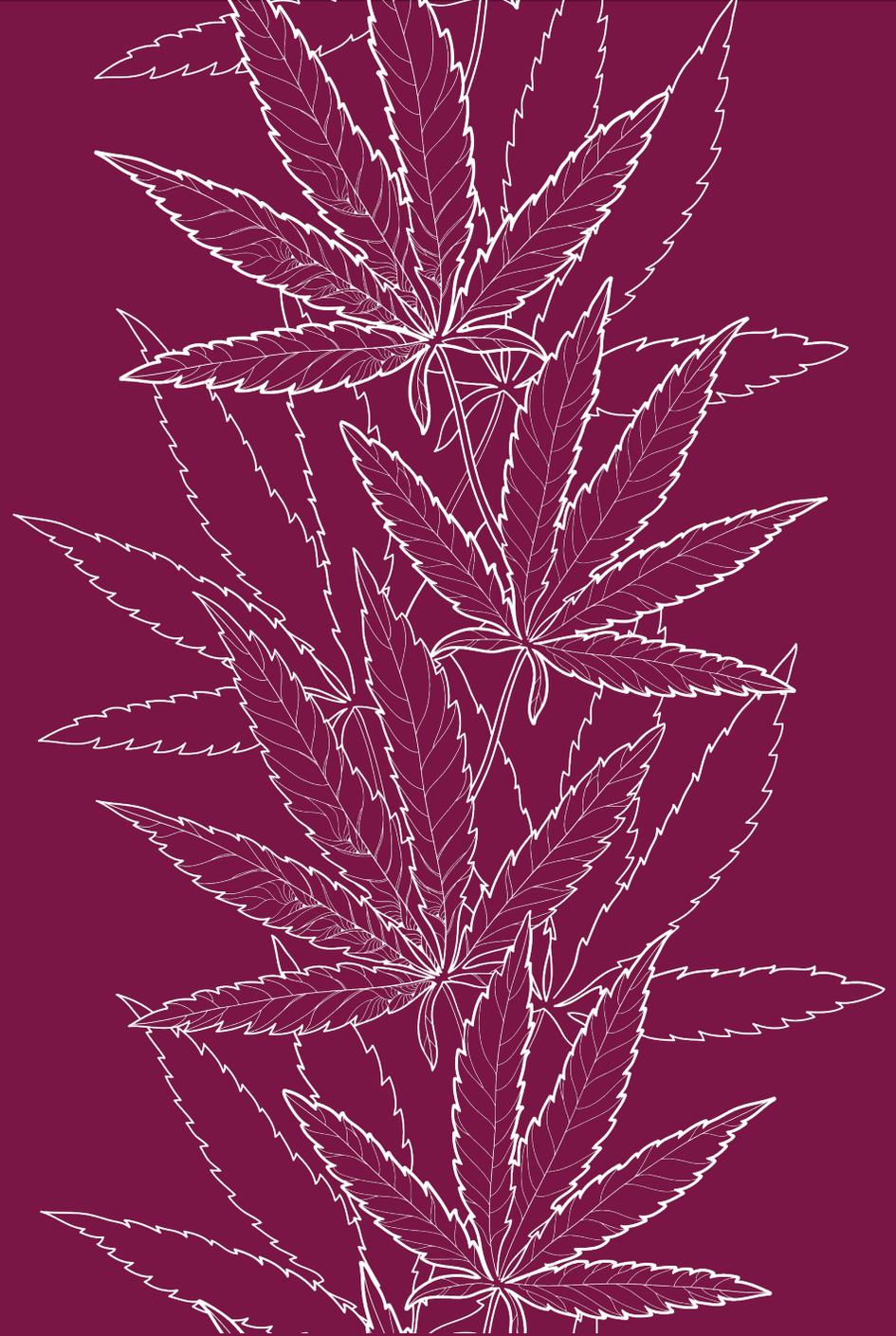


# International Cannabis Refresh

The impact of shifting global  
regulatory environments

OCTOBER 2022



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# Learn more as a Brightfield Partner!

This report includes **just a fraction of the data and insights** that Brightfield Group clients receive. Contact us **to access the full report** and learn how consumer **insights amplify Point-of-Sale data** to help you better understand the roadblocks and opportunities across the CBD market.

## In the full report, you'll learn:

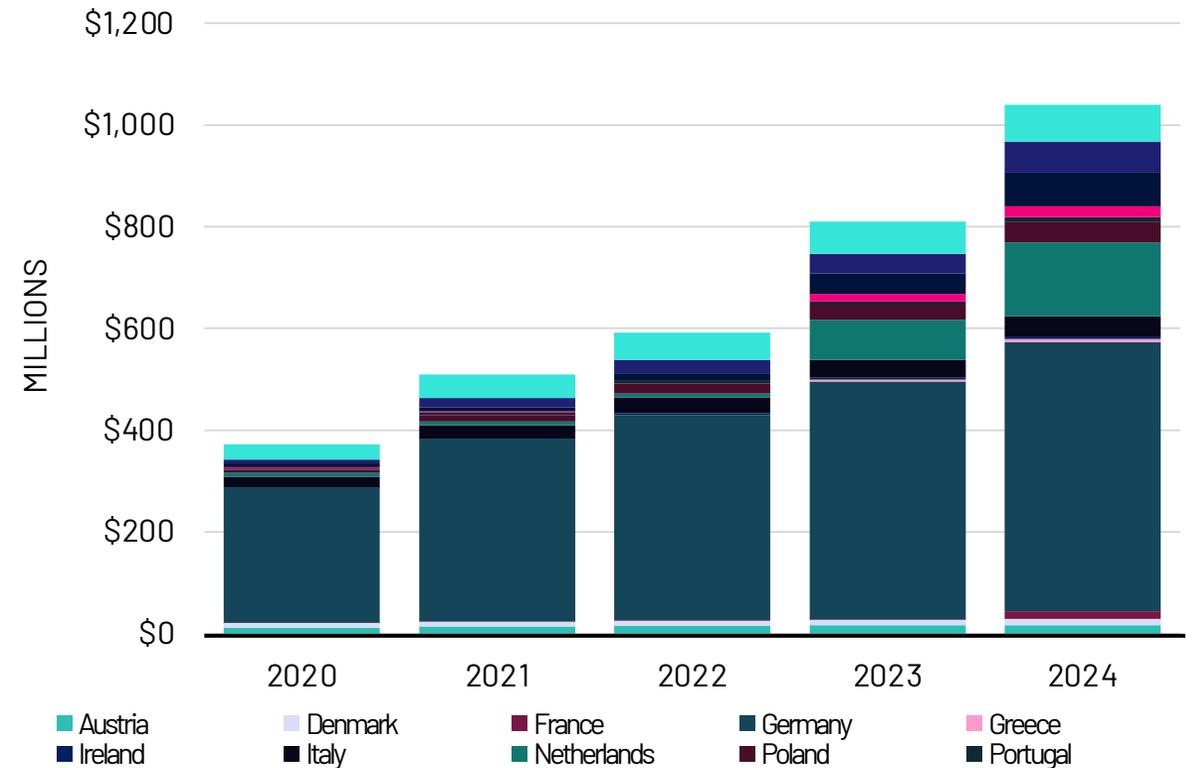
- Our complete analysis of cannabis in Europe with data going back to 2018
- Revenue forecasts through 2027 in all markets
- In-depth spotlights on Germany, the Netherlands, Israel, and Mexico
- Projected impact of regulations in Switzerland, the Netherlands, and Germany
- Cannabis sales and future projections by product type
- European regulation report
- The international competitive landscape as cannabis becomes increasingly globalized

To learn more about our solutions for CBD, [request your demo here.](#)

## Cannabis in Europe

- Regulated cannabis sales across Europe are expected to be up 16% from 2021.
- Growth can largely be attributed to the commencement of adult-use sales, both in trial programs and in formal regulation.
- Domestic cultivation is also expected to boost market sizes, with many countries currently relying on imports from other nations.

**EUROPE CANNABIS SALES**  
(BY COUNTRY, 2020-2024)

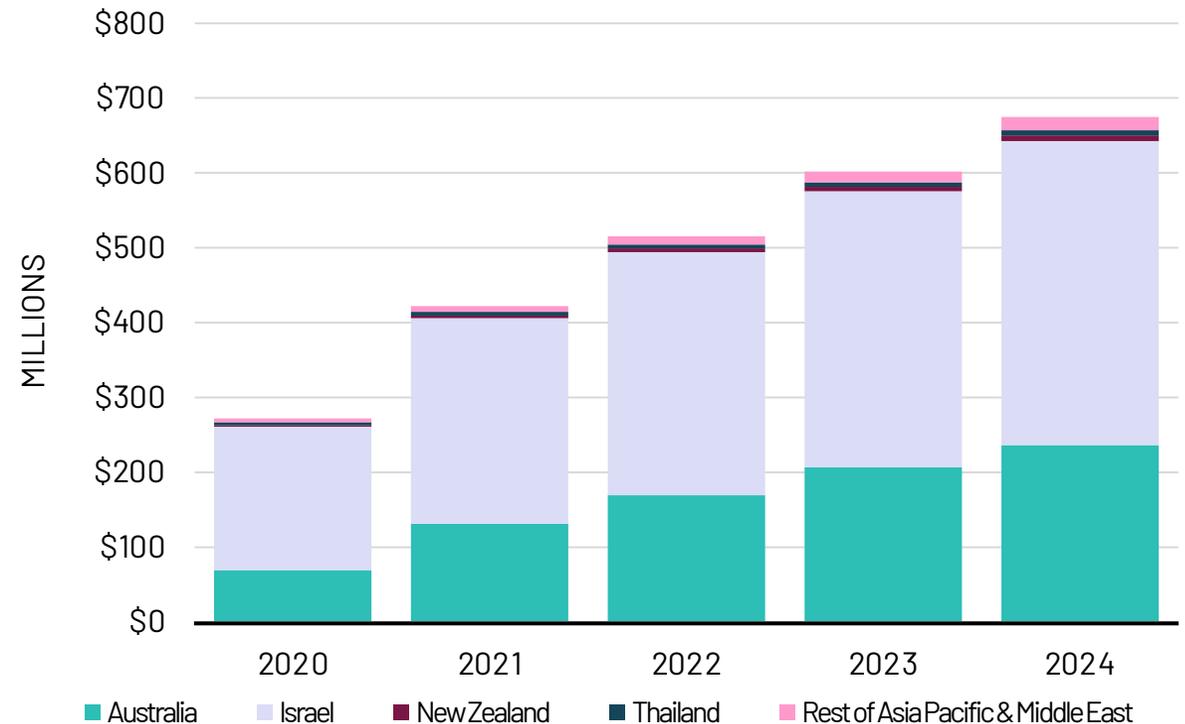


Source: Brightfield Group; 2022

## Cannabis in Asia Pacific & Middle East

- The sale of cannabis in the Asia Pacific & Middle East (APAC & ME) region is on target for an increase of 22% from 2021.
- While Israel holds the top spot overall, **Australia is the second largest market in the region.**
- **Flower & Pre-rolls are the largest product type in APAC & ME.**

**ASIA PACIFIC & MIDDLE EAST CANNABIS SALES**  
(BY COUNTRY, 2020-2024)

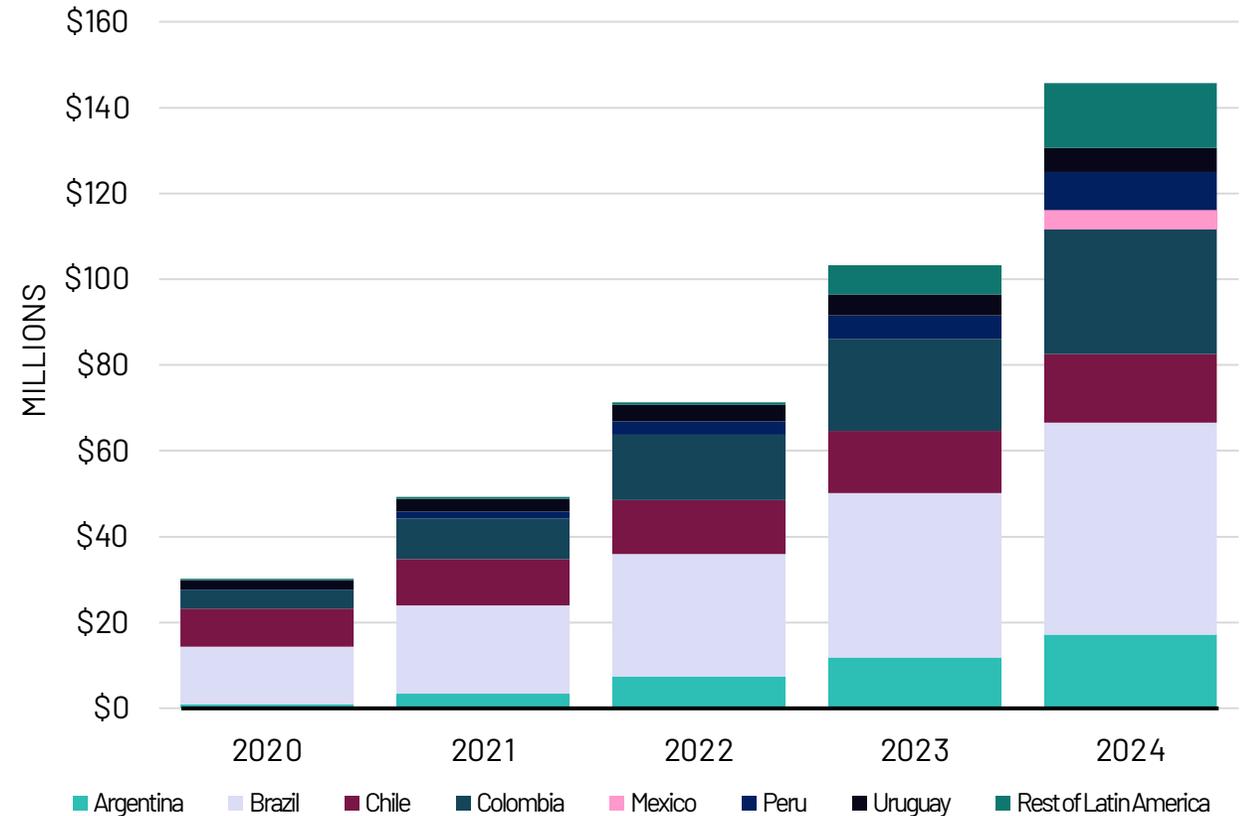


Source: Brightfield Group; 2022

## Cannabis in Latin America

- Cannabis sales across Latin America are forecast to increase 45% from 2021.
- Growth in the region is expected to pick up following the implementation of adult-use sales programs in the region, expected to commence in Mexico and Costa Rica by 2025, as well as from further investment from firms seeking to begin cultivation.

### LATIN AMERICA CANNABIS SALES (BY COUNTRY, 2020-2024)



Source: Brightfield Group; 2022

## Competitive Landscape

- Cannabis is becoming increasingly globalized, with some of the groups of companies at the forefront of this burgeoning industry including:
- Canadian cannabis firms – early large players.
- European cannabis companies – providing for the entire region.
- Low-cost Latin American operators that are taking advantage of low labor costs.
- Israeli and Australian cultivators that are just starting to take off.
- Distributors, telehealth companies, and cannabis clinics that are all helping to provide patients with access to an array of products.

## Companies Profiled in Our Full Report:



**Jazz** Pharmaceuticals



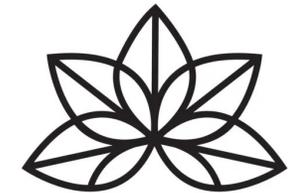
**AURORA**



**TILRAY**



**CRONOS**  
A U S T R A L I A



**FLORA**  
GROWTH



**CLEVER**  
LEAVES

# See in Cannabis, CBD, and emerging CPGs, with user-friendly data on:



## Market Landscape

Understand market position for strategic planning

### Market Sizing

- Overall sizing and 5-year forecasts by product type and distribution channel.

### Product Innovations

- Up-to-date product trends and innovations.

### Company Profiles

- Detailed profiles with positioning, strengths, news and more to understand the composition.

### Global Reach

- Understand the landscape across the US, Europe, LaAm, and Asian Pacific region.



## Consumer Insights

Foster authentic customer relationships

### Identify Target Personas

- Utilize standard personas or create your own for robust segmentation.

### Understand Product Usage

- Insights into how, when, why, and which cannabis products consumers use.

### Recognize Market Needs

- Take a forward-looking view at cannabis consumers to understand market needs.

*Data collected quarterly via balanced consumer survey, N = 3000/quarter, N=12000 per year. Integrated with social media. First collection was Q3 2018.*



## Brand Health

Identify the whitespace that will set you apart

### Purchase Funnel

- Measure conversion rates across top cannabis brands.

### Brand-level Views

- Consumer demographics and personas in each stage of the purchase funnel.

### Top Brand Attributes

- Top attributes, descriptors, and KPIs including repurchase intent, likelihood to recommend and Net Promoter Score (NPS).

### Brand Health Benchmarking

- Compare your brand health to the competition across funnel stages and KPIs.



## Distribution Trends

Look ahead to what's next in the world of cannabis

### Product Trends

- Map your product distribution versus key competitors.

### Product Development Pipeline

- Use robust data to inform your product development strategy.

### Product Positioning

- Identify market opportunities with SKU and brand-level data.

To learn more about our solutions for cannabis, [schedule a demo](#).

**Brightfield Group** is the leading research firm for emerging categories including CBD, cannabis, and wellness. By integrating multi-source data with AI and research expertise into our cross-comparable data lake, we uncover robust insights as new markets develop. We have helped Marketing, Innovation, and Insights leaders drive customer-centric strategies on their next big idea since 2015.

See what we can do for you at [brightfieldgroup.com](https://brightfieldgroup.com).



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