



Australian Industrial Hemp Alliance
James Vosper- President

AIHA Established in 2015

- State Associations saw need for national peak body
- Cooperation between states vital
- Some states without IH Associations (QLD)
- Laws increasingly Federal- Food/Medicinal
- AIHA has been instrumental in legalisation of hemp foods- Nov 2017
- Has consulted to gov't regarding medicinal cannabis exports and law reform



Industrial Hemp is Low THC





E-Mail: info@hempalliance.org.au

Telephone: +61 410 348 211



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FOOD

Hemp foods are now legal for human consumption in Australia, since the FSANZ (Food Standards Australia New Zealand) were approved by the Federal Government in April 2017. This is a landmark for the industry as hemp foods can be profitably grown on smaller size holdings. The benefits of



FIBRE

Hemp fibre is obtained by separating the outer skin (bast) from the woody hemp hurd. This was traditionally done in the field through a process known as "retting". Advances have been made and this is now achievable through decortication of material directly at harvest. This improves the fibre quality



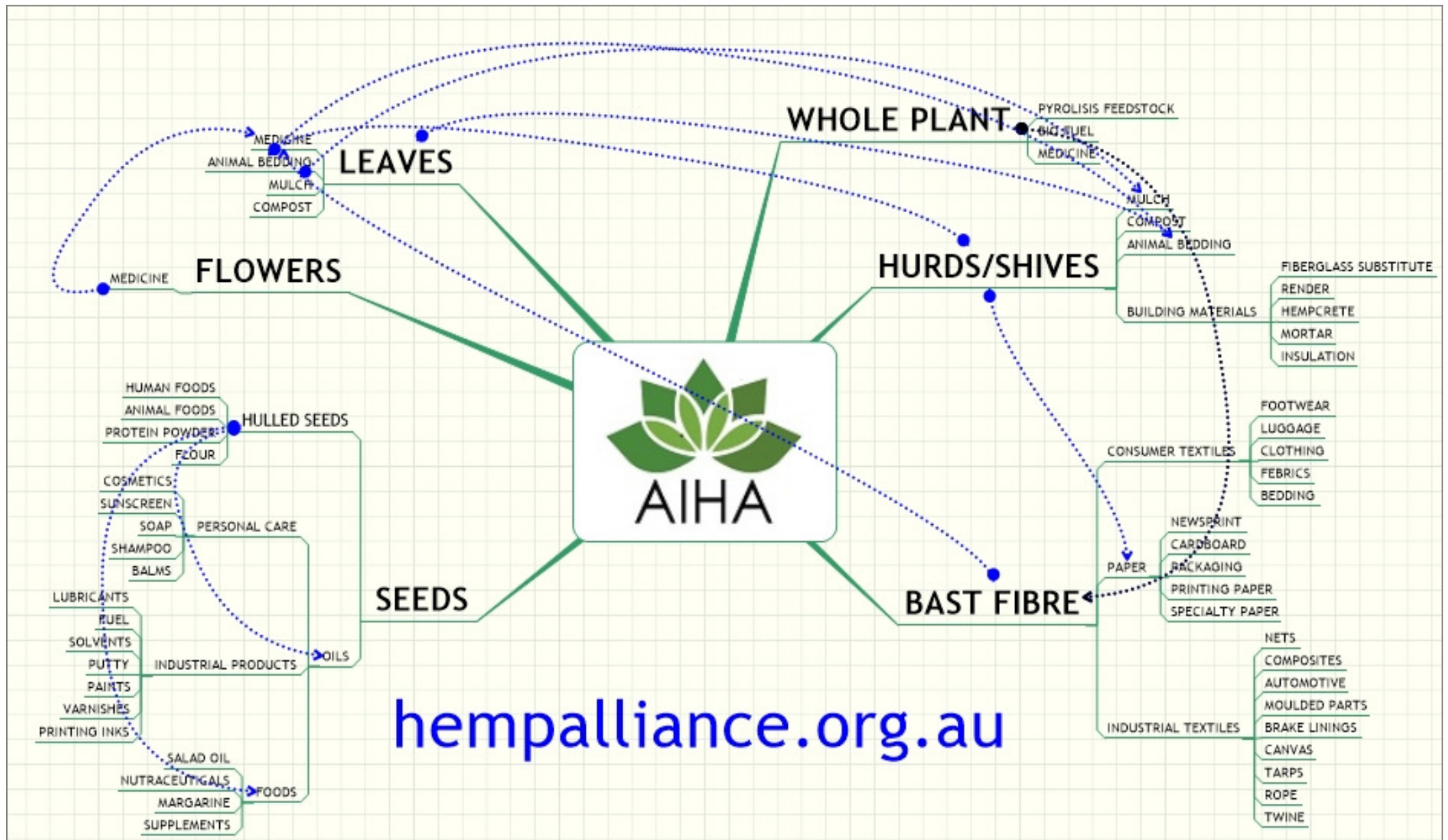
HURD

Hemp hurds, also known as shives or hemp wood, are a product from the inner woody core of the hemp stalk. Once separated from hemp fibre the hurd is broken into pieces, where the grade depends on the purpose for which the hurd is used.

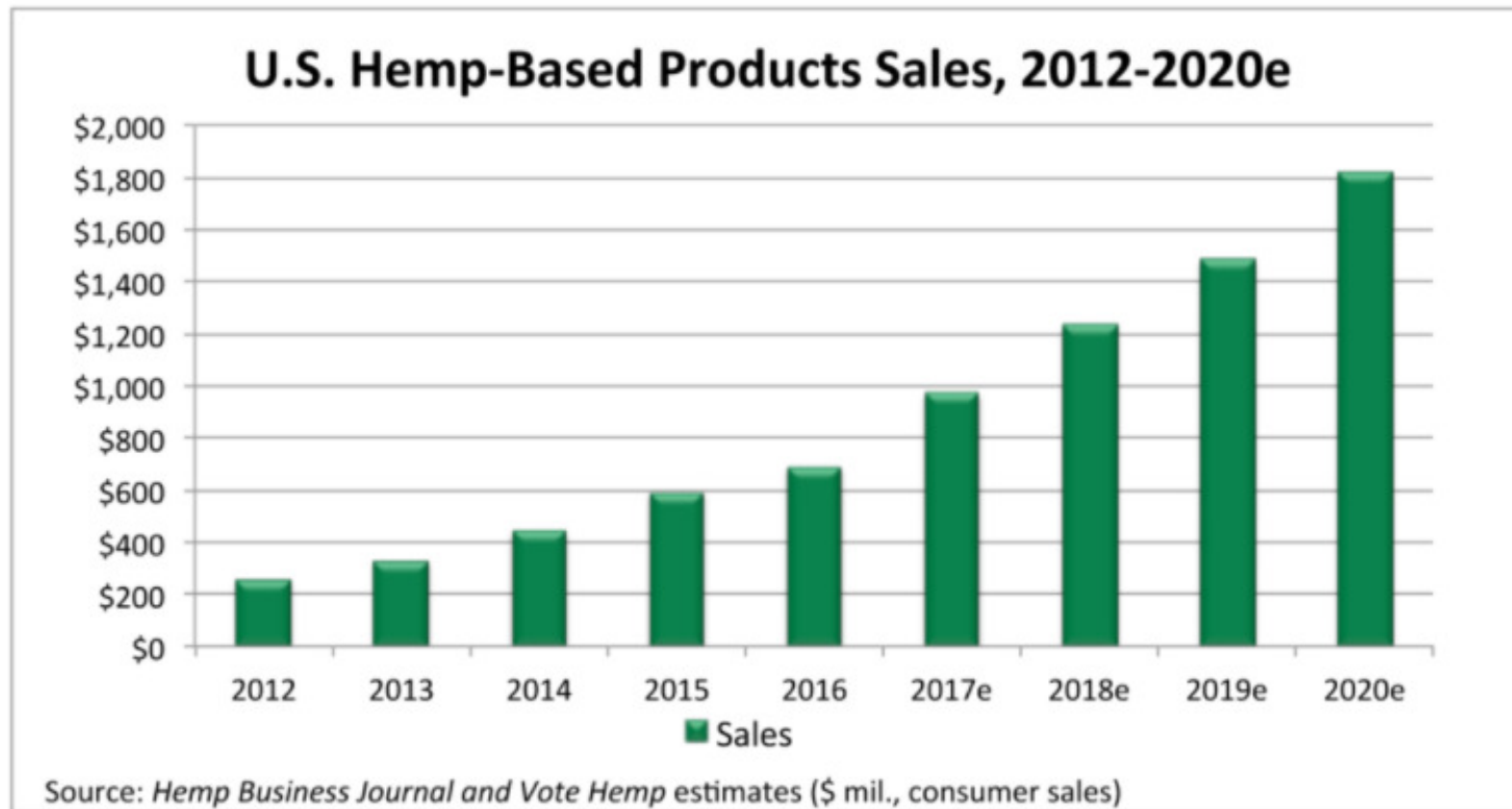


MEDICINE

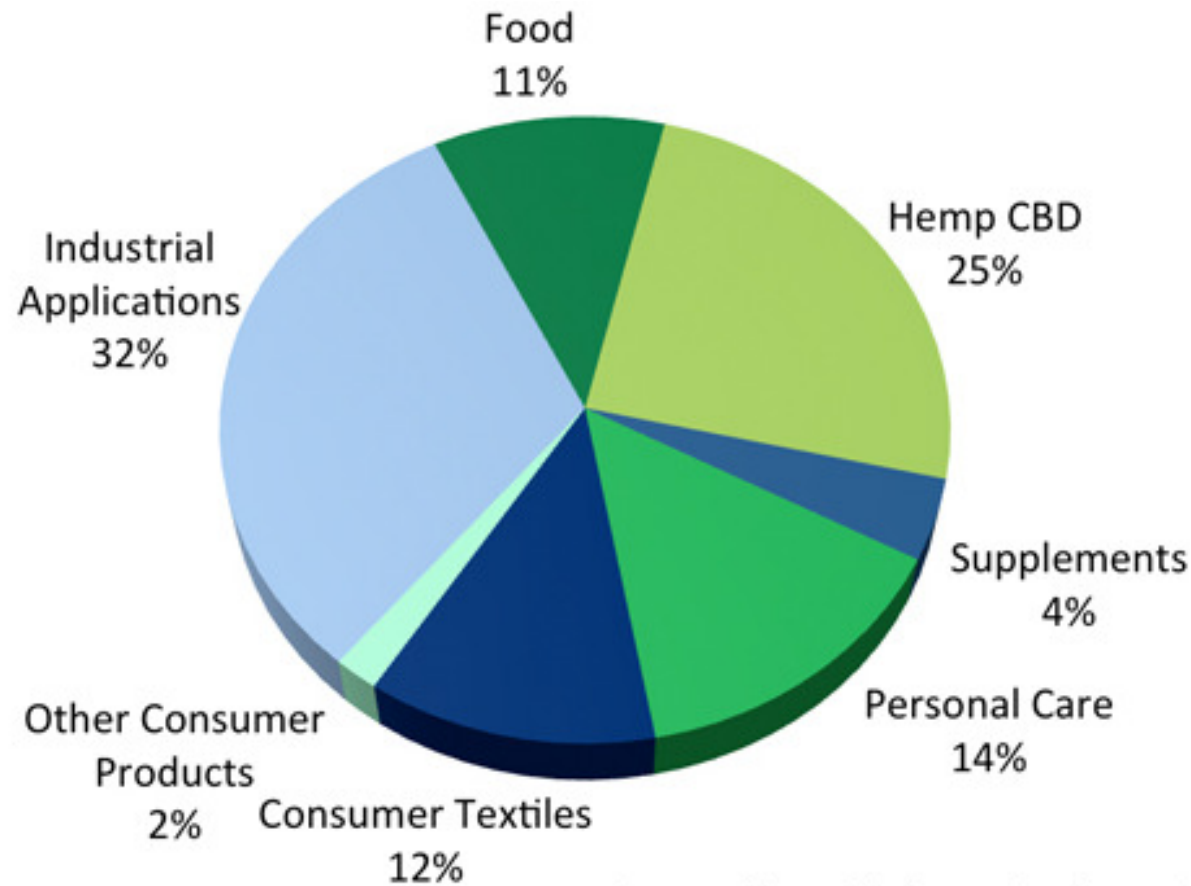
Whilst the AIHA was formed in 2015 primarily to facilitate the development of the hemp fibre and hemp seed food industries in Australia, when the Alliance was established there was also a commitment made to ensure that as and if needed, the Alliance would



US Hemp Sales reached \$688 million in 2016



US Hemp Sales will reach \$1.8 billion in 2020



Source: Hemp Biz Journal estimates |



Bodyshop Bodycare Range



Adidas Hemp Shoes



Dolce & Gabbana Suits



Mercedes Hemp Car Parts



Lotus Hemp Bodied Car



Hemp Replacing Plastic



Modern Houses in Australia



Large Developments in UK



KEVIN McCLOUD
Host of Grand Designs



Adnams Hemp Building UK



Biofuel From “WASTE” Material



Hemp Fibre replaces Graphene in Batteries



Hemp Foods Legalised in November 2017

- Hundreds of hectares planted for hemp grain
- New brands have been launched
- Supermarkets are stocking hemp foods- seed, protein, flour, oil
- New Products are in development
- Some brands leveraging hemp ingredients
- New advertising category



Hemp Foods In Supermarket Chains



coles



COSTCO
WHOLESALE



Woolworths Macro Hemp Range



Hemp Beer Brewed in Victoria



Medicinal Cannabis Legalised in 2016

- THC reclassified from Schedule 9 (Prohibited Substance) to Schedule 8 (Controlled Drug)
- CBD placed in Schedule 4 (Prescription Only Medicine)
- The Office of Drug Control (ODC) appointed to administer cultivation, manufacturing and supply
- ODC has strict controls on licencing and exports prohibited
- Following industry consultation export ban lifted in January 2018



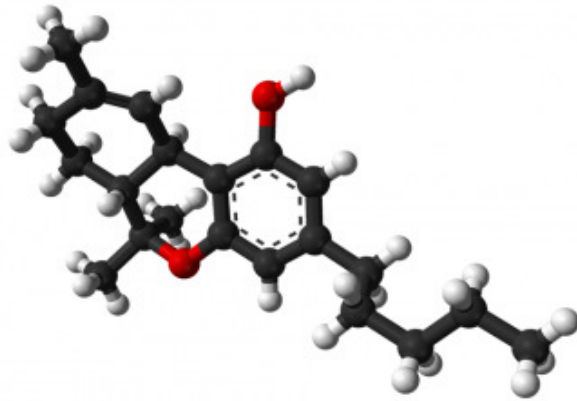
Patient Access Controlled by TGA

- Therapeutic Goods Administration (TGA) has strict guidelines on patient access
- Two schemes in operation
 - Special Access Scheme- 153 people treated
 - Authorised Prescriber Scheme- 30 Doctors/100 people treated
- Costs of treatment as high as \$120 per day
- Gov't is working to streamline the process

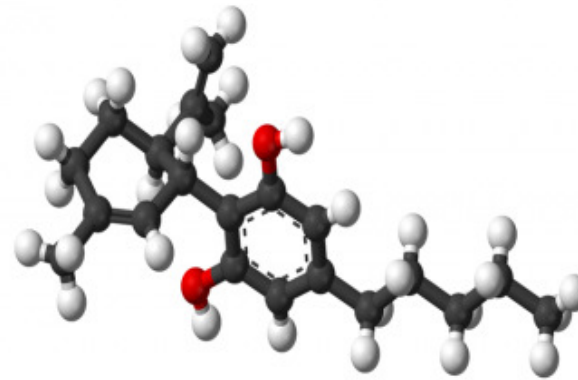


THC and CBD Similar but Different

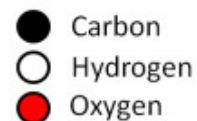
Ball-n-Stick Models of THC and CBD



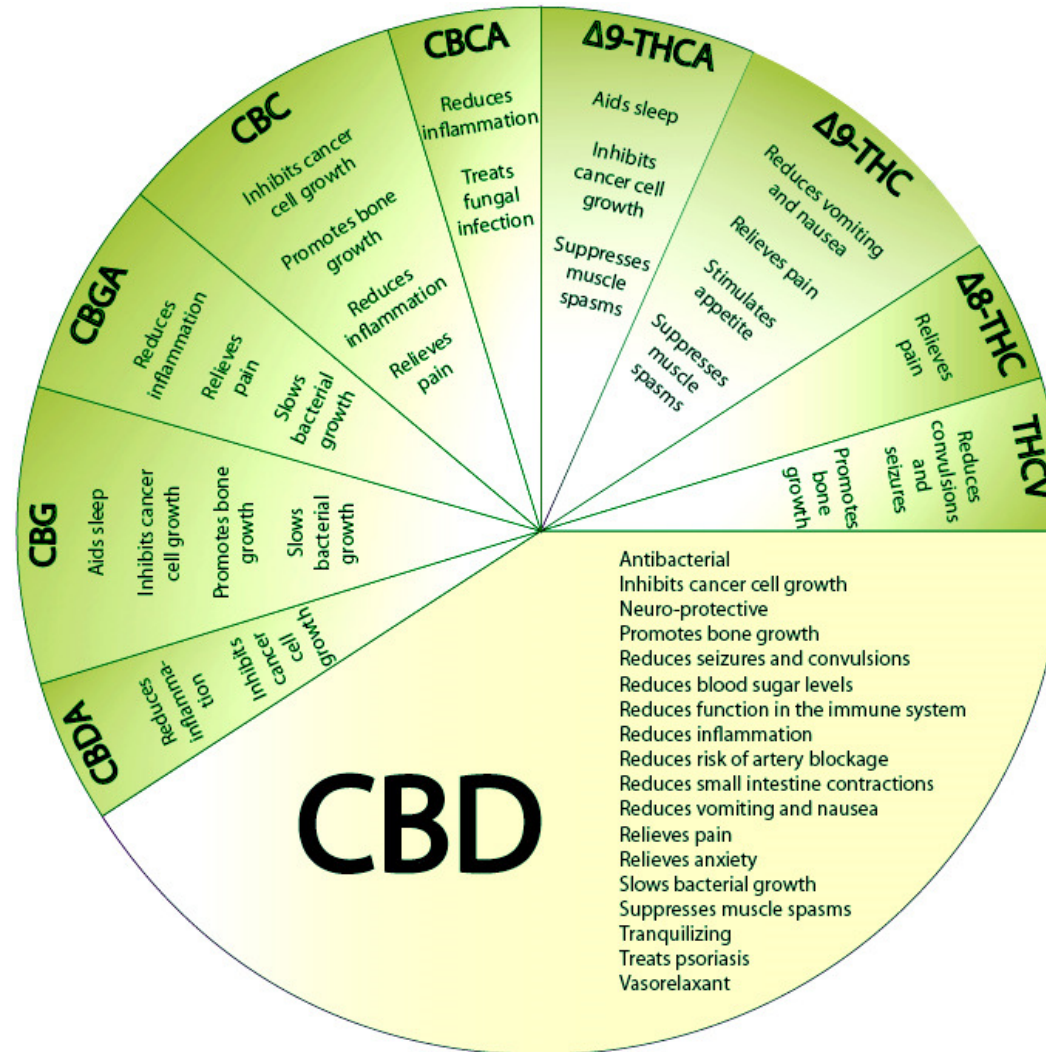
Δ 9-tetrahydrocannabinol (THC, CBN)



Cannabidiol (CBD)



113 Cannabinoids Identified



OTC Products in US



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Hemp Dispensaries in North America and Europe



ASX Listed Medicinal Stocks

ASX CODE	Company	March Quarter Receipts	Dec Quarter Receipts	6 Month Price Change	Price May 1	Market Cap M
1PG	1PAGE (susp)	\$ -	\$ -	0%	0.165	25
ACB	AUSCANN	\$ -	\$ -	241%	1.72	477.5
AEB	ALGAE.TEC*	\$ 5,157	\$ 1,791	36%	0.03	23.4
ATP	ATLAS PEARLS*	NA	NA	-26%	0.02	10.3
BDA	BOD AUS	\$ 201,000	\$ 188,000	267%	0.44	24.4
BOT	BOTANIX PHARM	\$ 145,000	\$ -	177%	0.13	85.2
CAN	CANN GROUP	\$ -	\$ -	94%	3.58	499.6
CP1	CANPAL	\$ -	\$ -	27%	0.21	19.6
CPH	CRESO PHARMA	\$ 188,000	\$ 14,000	50%	0.81	91.4
ESE	ESENSE	\$ 7,000	\$ 29,000	-28%	0.17	13.3



ASX Listed Stocks (cont'd)

ASX CODE	Company	March Quarter Receipts	Dec Quarter Receipts	6 Month Price Change	Price May 1	Market Cap M
EVE	EVE*	\$ -	\$ -	150%	0.01	24.6
EXL	ELIXINOL	\$ 5,900,000	NA	0%	1.69	173.9
LSH	LIFESPOT HEALTH*	\$ 166,000	\$ 196,000	-10%	0.13	9.4
MDC	MEDLAB CLINICAL	\$ 923,000	\$ 1,200,000	3%	68	145.6
MMJ	MMJ PHYTO TECH	\$ 1,000	\$ 43,000	6%	0.38	84.1
MXC	MGC PHARMA	\$ 81,000	\$ 69,000	13%	0.08	92.6
QBL	QUEENSLAND BAUXITE	\$ 34,000	\$ -	233%	0.05	79.7
RGI	ROTO-GRO INT	\$ 338,000	\$ 380,000	1%	0.39	35.2
SCU	STEMCELL UNITED	\$ 100,000	\$ 46,000	133%	0.71	94
ZLD	ZELDA THERAPEUTICS	\$ -	\$ -	62%	0.12	86.9
* Inc non- medicinal						
Source: Stockhead		\$ 8,089,157	\$ 2,166,791			\$ 2,096



Medicinal Cannabis Licences

ASX CODE	Company	Research Licence	Cultivation Licence	Permit	Manufacture Licence	State Import Licence	ODC Import Authorisation	APVMA Import Authorisation	Export
ACB	AUSCANN	YES	YES		YES				
AEB	ALGAE.TEC		Under App						
BDA	BOD AUS					NSW	YES		Plans to apply
CAN	CANN GROUP	YES	YES	YES		VIC	YES		
CP1	CANPAL						YES	YES	
CPH	CRESO PHARMA						Via Health House		
EXL	ELIXINOL		Under App		Under App		Under App		Under App
MDC	MEDLAB CLINICAL	YES				VIC	YES		
MMJ	MMJ PHYTOTECH						Via HL Pharma		
MXC	MGC PHARMA	Under App(RMIT)	Under App				Via HL Pharma		
QBL	QUEENSLAND BAUXITE						Via Burleigh Heads Cannabis		Under App
THC	THE HYDROPONICS CO	YES	YES		Under App	NSW	YES		Plans to apply

Source: Stockhead



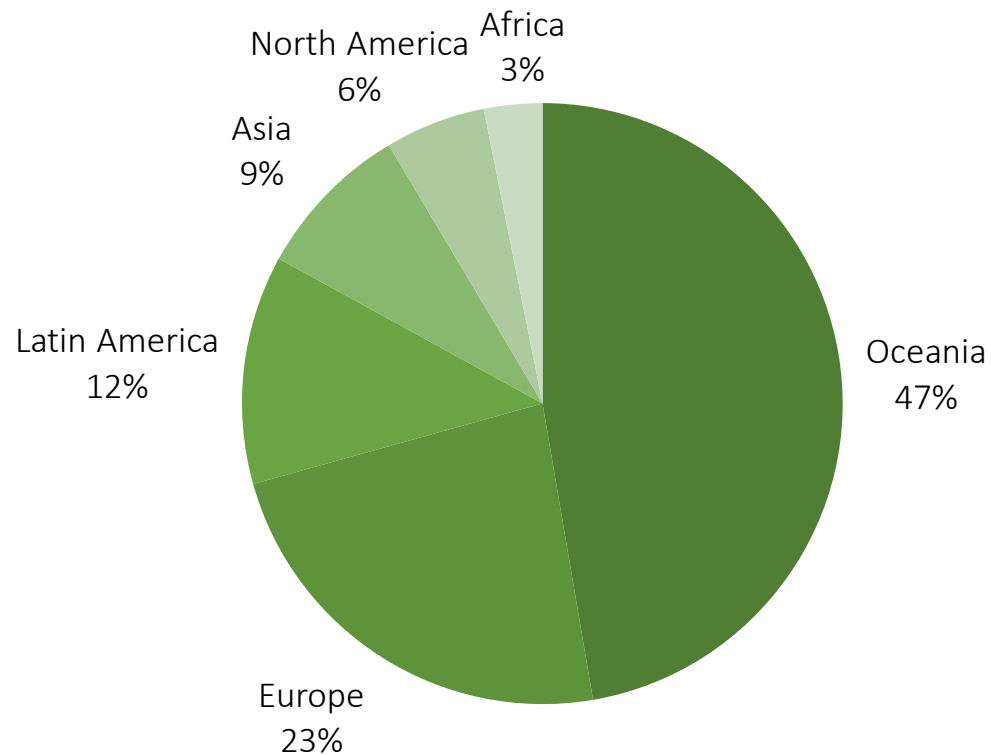
Australia can lead the world in industrial hemp

- Australia has the capacity to produce world's best products
- Australian organic certification is respected and trusted
- Australian companies can deliver successful brands
- Australian products/brands are highly valued in Asia
- Australia has a competitive advantage that cannot be replicated



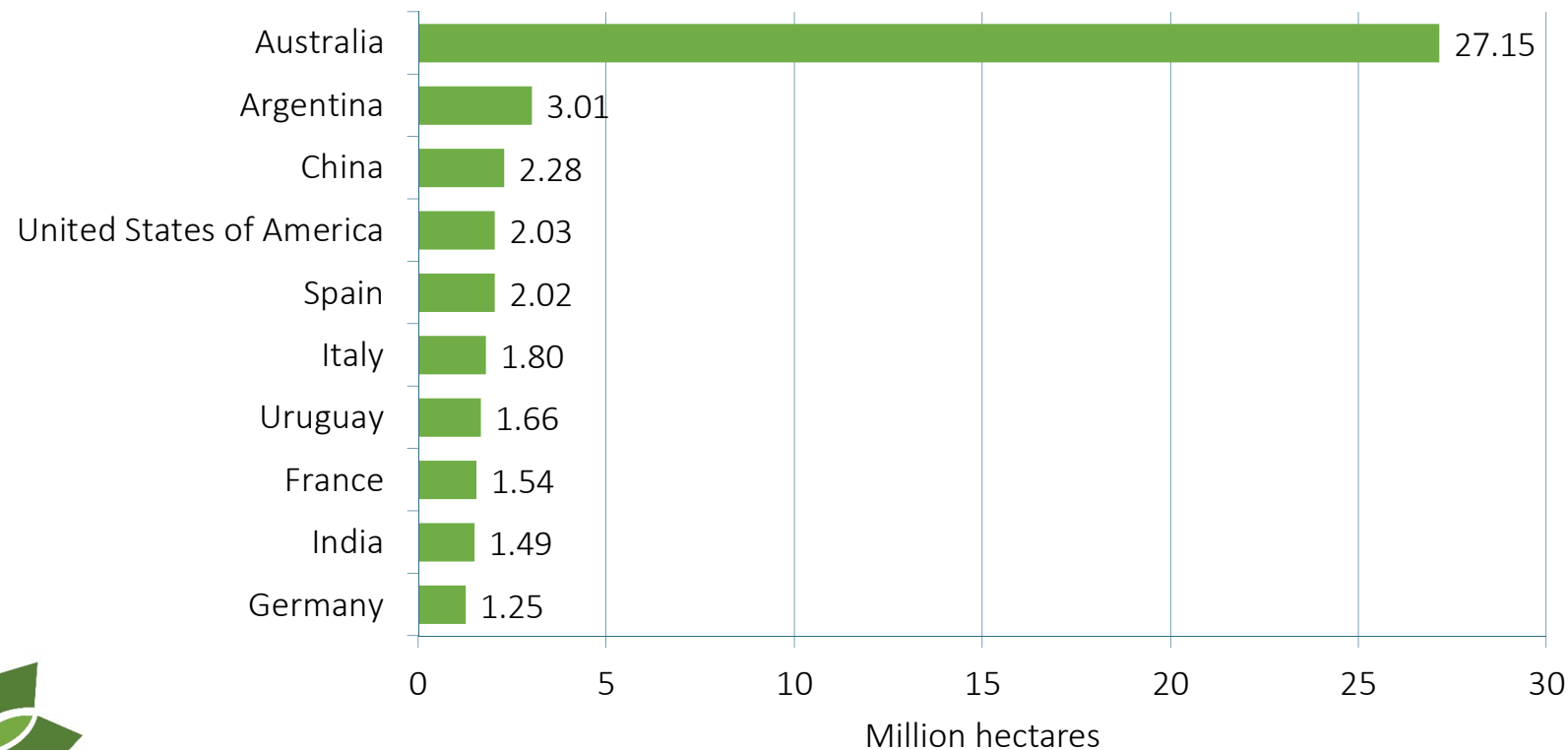
Organic Land by Region 2016

Source: FiBL survey 2018

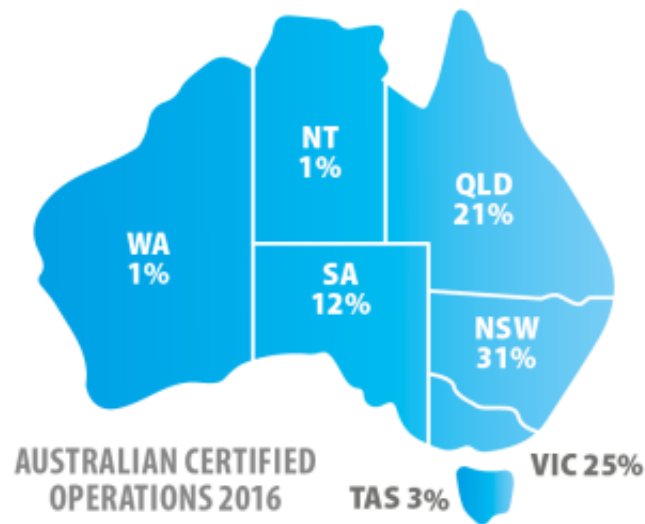


Organic Land by Country 2016

Source: FiBL survey 2018



Organic Land by State



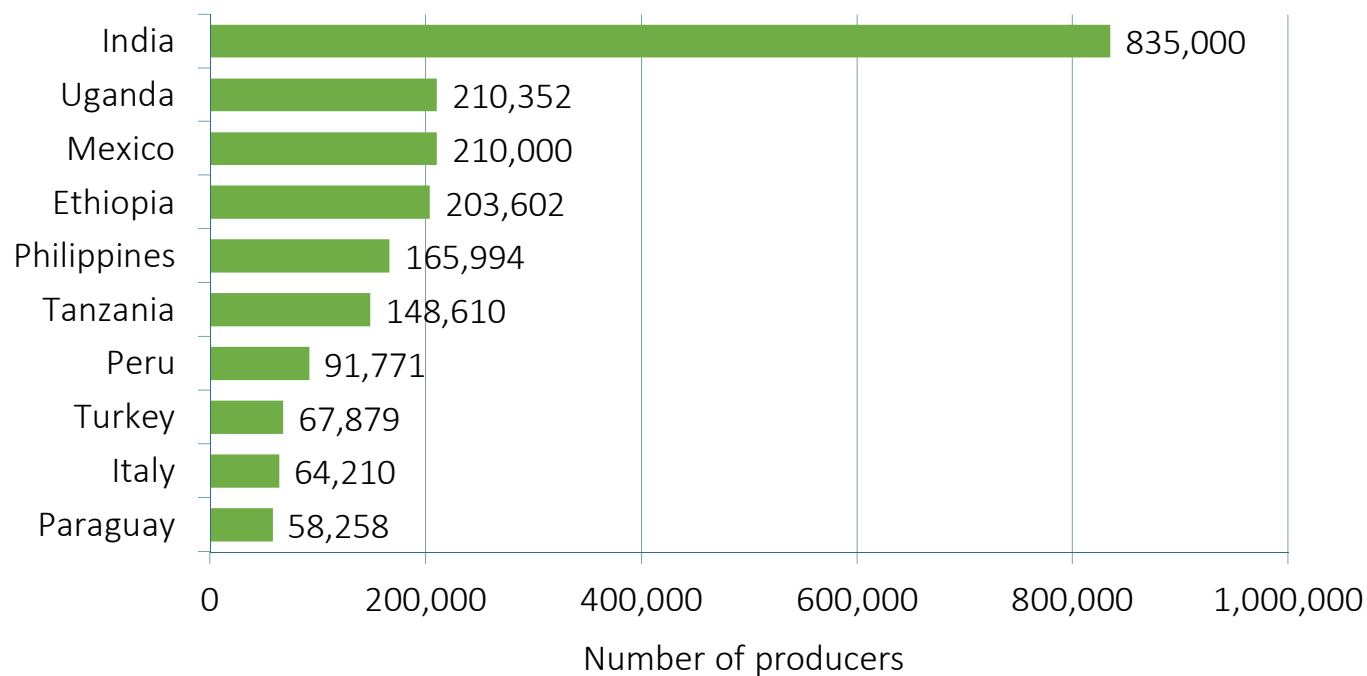
The number of certified organic operations in Australia grew by **5%** between 2015 and 2016.

There were an estimated **2,075 certified producers**, **1,163 certified processors**, and **513 certified handlers** in Australia in 2016.



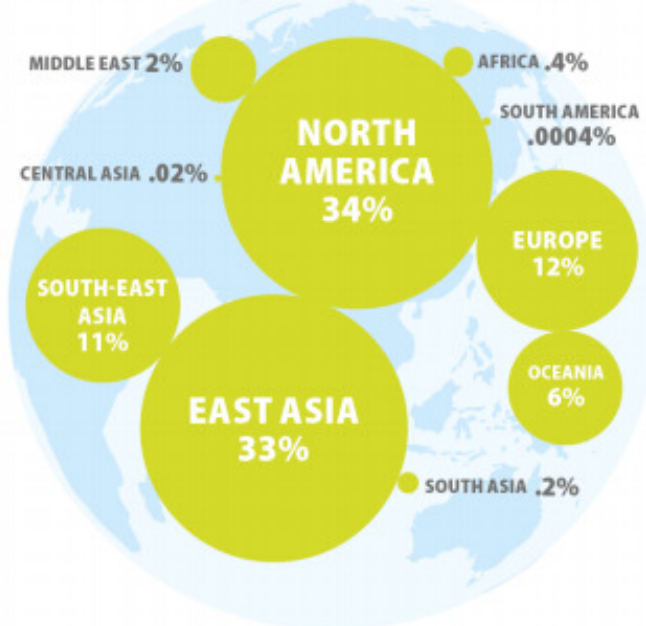
Organic Producers by Country 2016

Source: FiBL survey 2018



Australian organic exports

AUSTRALIAN CERTIFIED EXPORTS 2016



TOP 5 EXPORT DESTINATIONS:

- 1 USA
- 2 South Korea
- 3 China
- 4 Hong Kong
- 5 Singapore

(accounting for about two-thirds of total tonnage exported)

EXPORT GROWTH:

The tonnes of organic products exported grew by **17%** in 2016



In Conclusion

- The hemp industry is growing exponentially
- Hemp products are increasingly mainstream
- Australian products are highly valued in Asia
- Australia has an abundance of organic farmland
- Investment in the right hemp ventures will deliver ROI

