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9 - 10 December 2020



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Cannabis: Traceability, Trends, and Technology

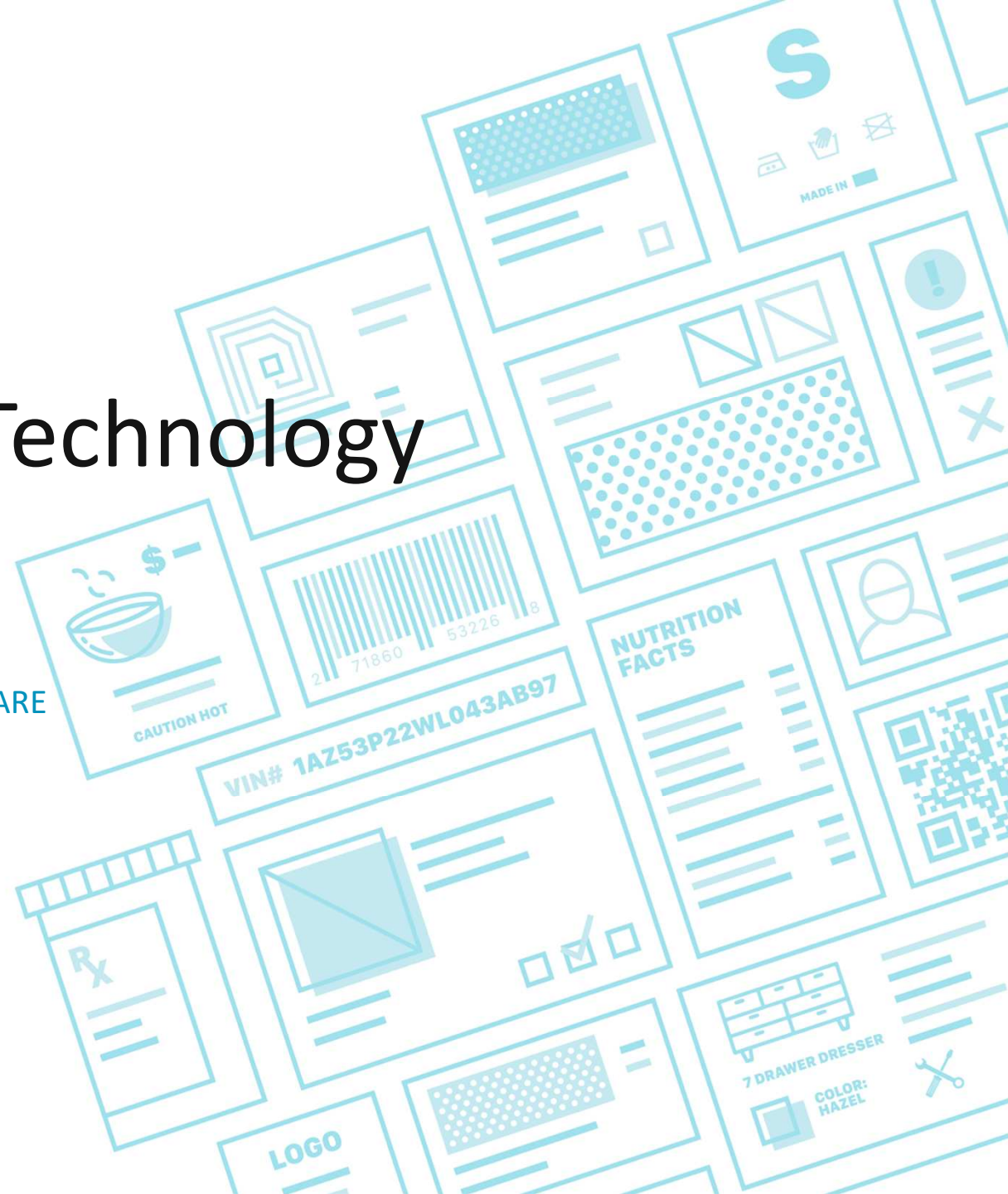


ELIZABETH SINCLAIR

DIRECTOR OF MARKETING, BARTENDER SOFTWARE

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WWW.SEAGULLSCIENTIFIC.COM



BarTender transforms information into the labels, barcodes and RFID tags that drive business



GS1 Global Forum, Brussels



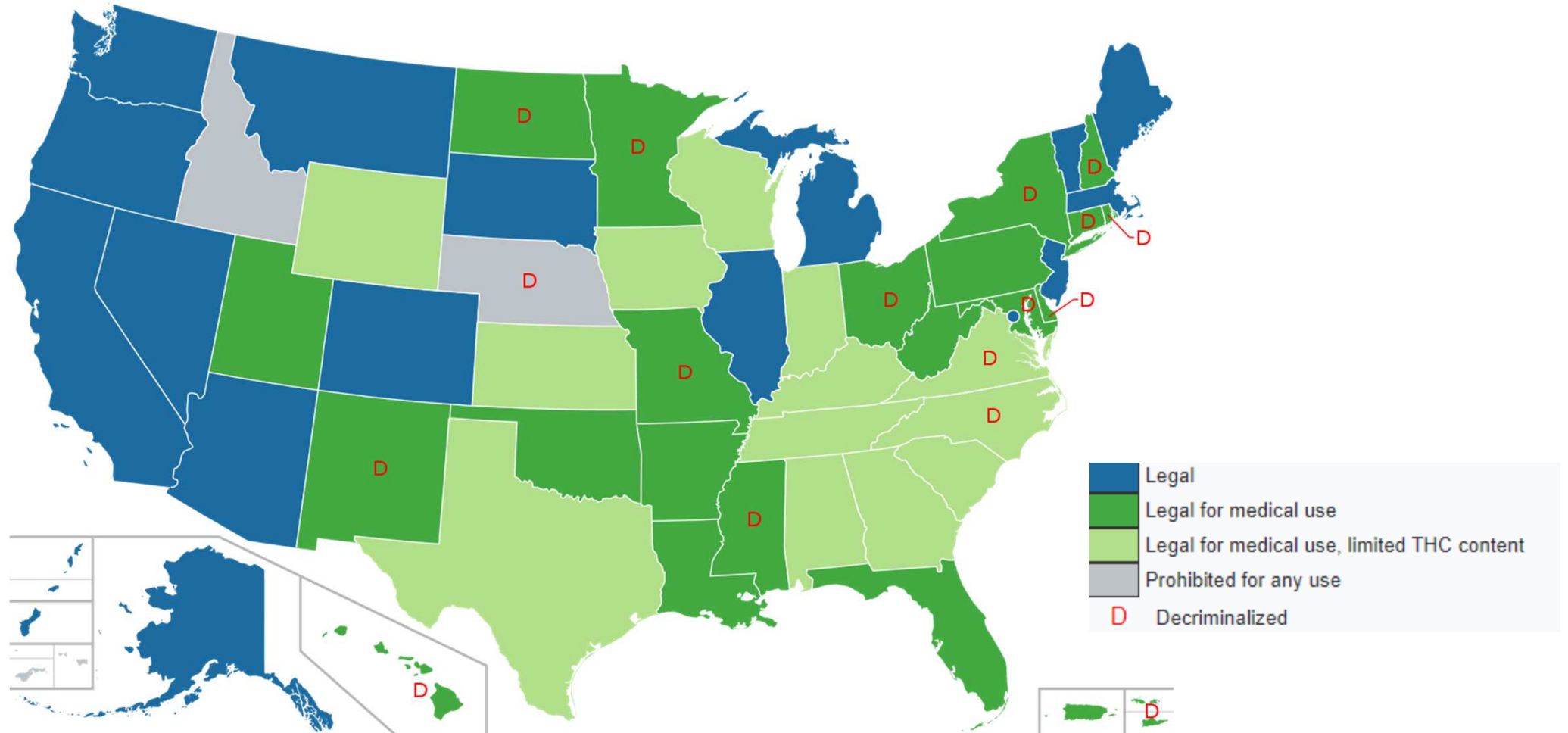
Legal weed won big in the election



By [Alicia Wallace](#), CNN Business

Updated 12:52 PM ET, Fri November 6, 2020

US Election Day, 2020



Meanwhile, just last week...

Expunges Non-Violent Records • Regulates & Taxes Cannabis Sales

LIVE

ON PASSAGE

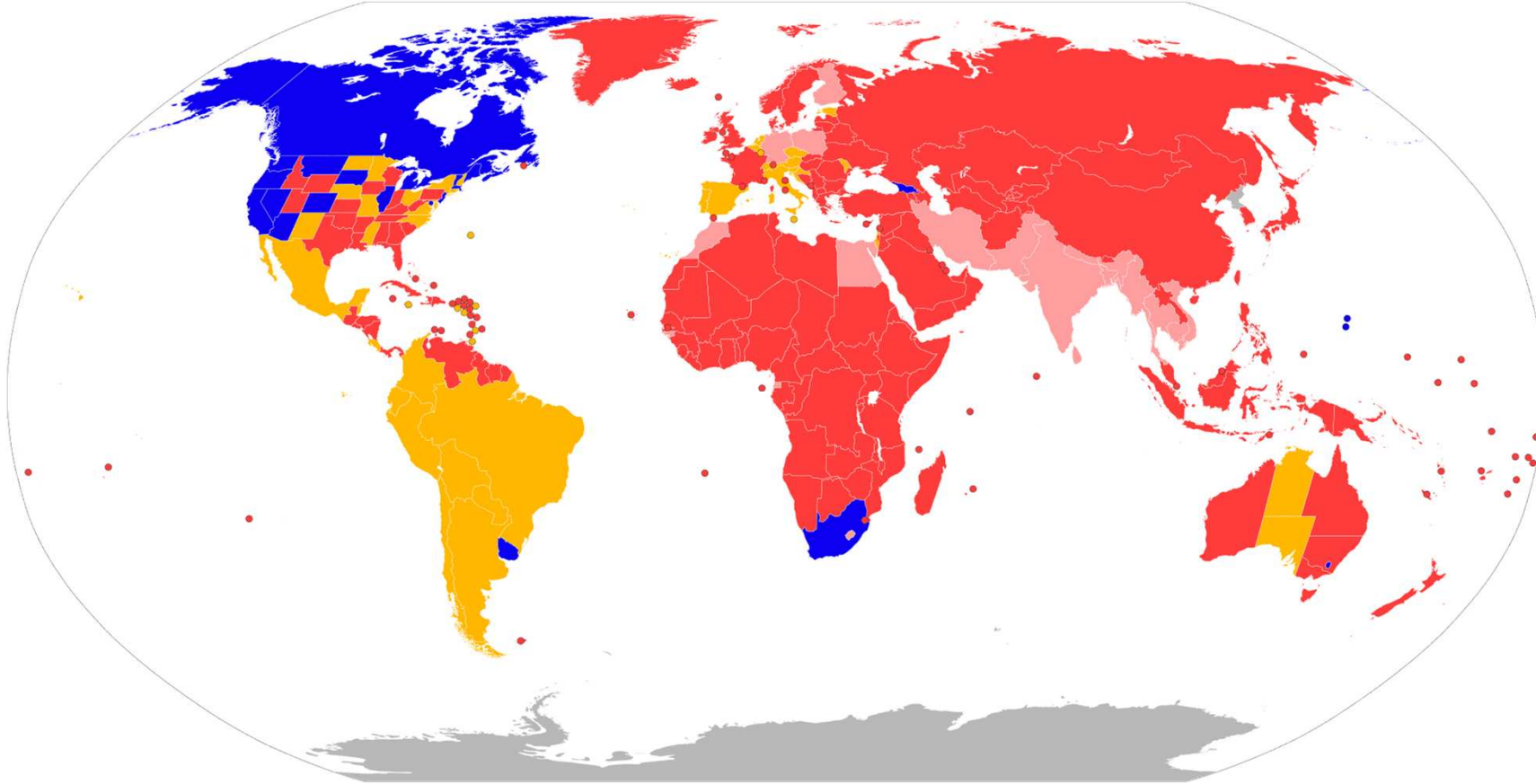
H R 3884

	YEA	NAY	PRES	NV
DEMOCRATIC	222	6		5
REPUBLICAN	5	158		34
INDEPENDENT	1			
TOTALS	228	164		39

The US cannabis market

- 15 states fully legalized, 35 medical
- 2018 sales: \$52B (87% sales illegal, black market)
- 2018 US capital investment: \$10Bn, 2x the amount in (2015 + 2016 + 2017)
- Market segments
 - Retailers
 - Growers / packagers
 - Processors

Legal adult use



► Jamesy0627144, CC BY-SA 4.0 <<https://creativecommons.org/licenses/by-sa/4.0>>, via Wikimedia Commons

Meanwhile, just last week...



UN commission reclassifies cannabis, no longer considered risky narcotic



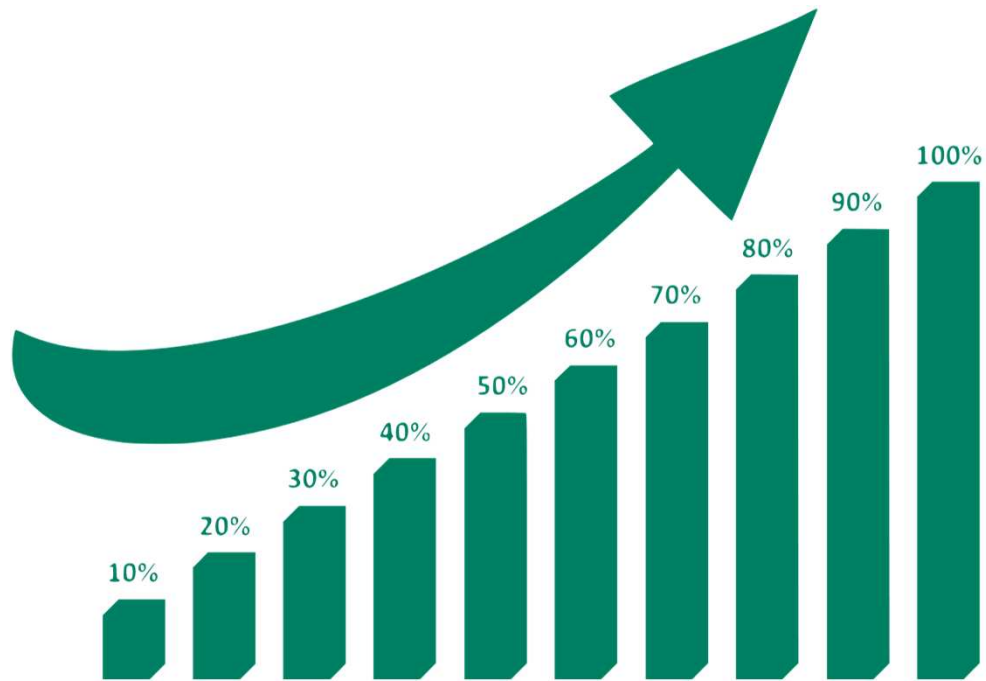
Unsplash/David Gabrić | An industrial hemp field in Pitomača, Croatia.

Cannabidiol (CBD)



- ▶ 2018 Farm Bill created sudden acceleration in demand for supply chain resources
- ▶ CBD v. THC
- ▶ CBD in CPGs is going to be A Big Deal

CBD market environments



- ▶ US CBD market environments
 - ▶ In the US, grew 562% in 2019
 - ▶ 2023: \$24.4Bn
- ▶ Market segments
 - ▶ Retailers
 - ▶ Growers / packagers
 - ▶ Processors
- ▶ Verticals: Pharma, Food, Cosmetics

US FDA and CBD



- ▶ Conflicting positions create confusion
- ▶ GRAS?
- ▶ Testing reveals inconsistent labeling / dosage / ingredients
- ▶ Legal pathway to market entry is murky
- ▶ Can't be marketed as dietary supplement
- ▶ FDA says it can't be added to food and beverages, BUT...

Cannabis regulatory environments

- ▶ Expect increasing standardization and alignment
- ▶ Federal legalization?
- ▶ Every state has seed-to-sale traceability written into law
- ▶ Inventory management software required by law in most states
- ▶ Canada and beyond

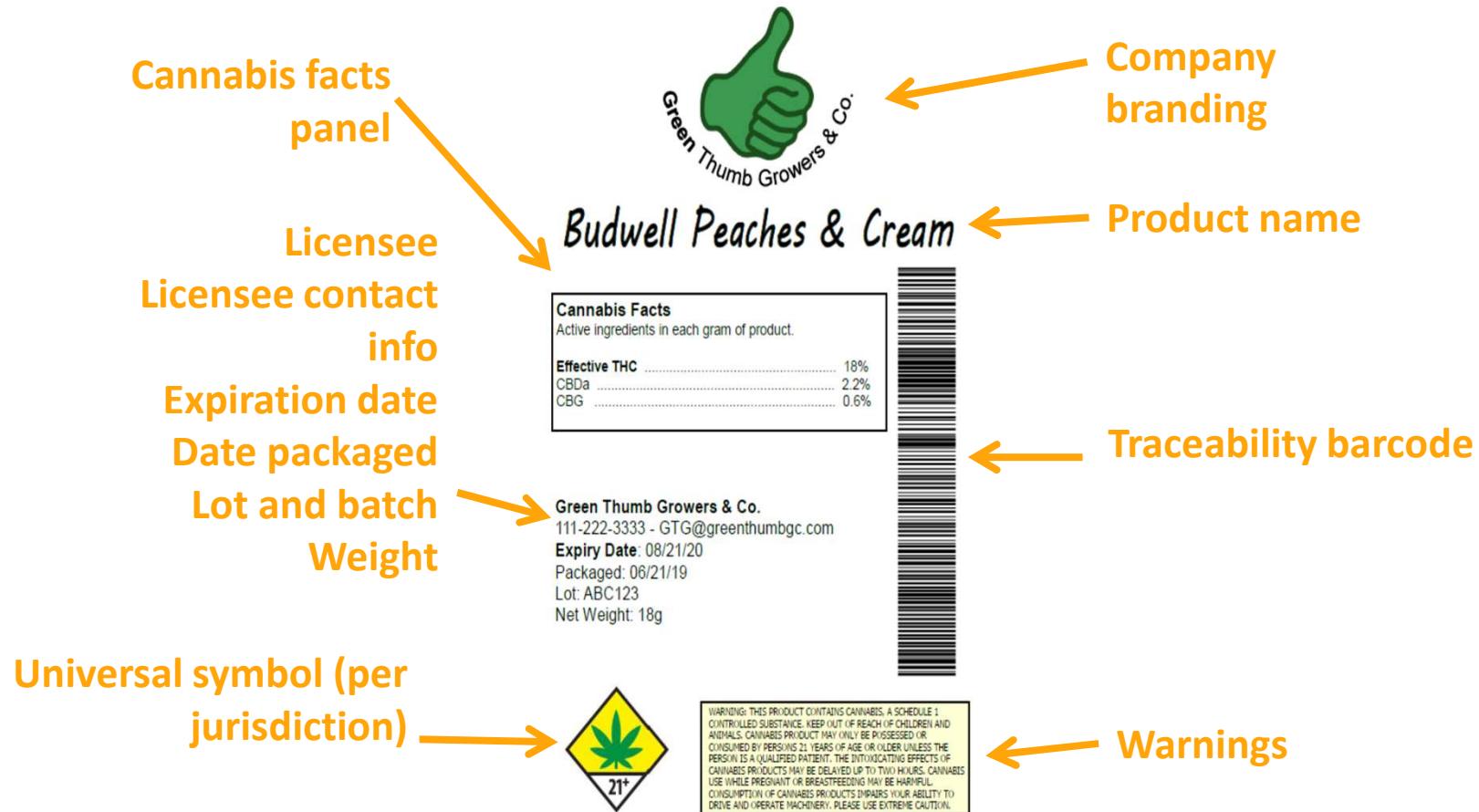
AIDC and cannabis



Packaging

- ▶ Marijuana and hemp items cannot be packaged in a manner that is attractive to minors
- ▶ Typed, legible font that is at least 1/16th of an inch in height based on the uppercase “K,” although the font can be larger
- ▶ All required information must be visible on the outside of the package
- ▶ Barcodes can only be displayed once and must be rectangular in shape with no design

What's on the retail label?



Universal symbols



California



Colorado



Massachussetts



Michigan



Nevada



Oregon



Washington

Keys to growth

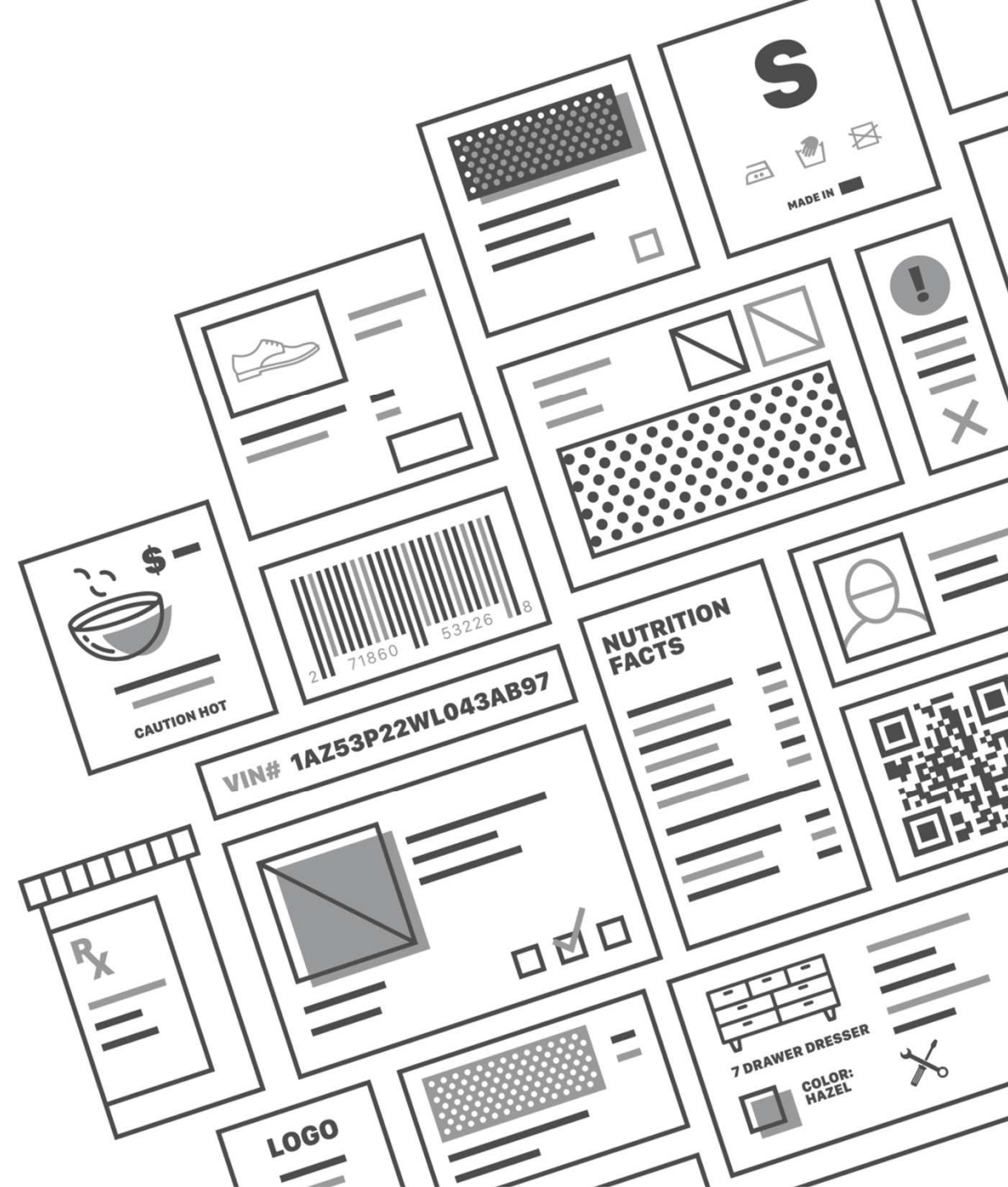


- ▶ Consumer education and awareness
- ▶ Federal standards
- ▶ Systems and business interoperability

Thank you!

ELIZABETH SINCLAIR

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IMPORTANT

**Don't forget to complete the session survey
in the mobile app**

We need your input

Thank you for Attending



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Presentations will be available on-line soon. You will receive an email with a link when they are available.

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