

The U.S. Medical Marijuana Market

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Abstracts

Information You Will Not Find Anywhere Else:

Analysis and \$ Size of the Marijuana Lab Test Market

Analysis & \$ Size of the Hydroponics Equipment Market

Profile and Operations of Retail Head Shops

Detailed Demographics of Medical Marijuana Users, by Type Condition/Disease

September 2013 Number of People Registered at State Programs

This groundbreaking new analysis by Marketdata examines the growing and controversial \$2.2 billion business of medical marijuana, one expected to triple in size by 2018. There are the about 1,700-2,000 medical marijuana retail dispensaries now operating in the United States, operating in a very uncertain but improving environment. 20 states have legalized it, but “patients” must meet strict criteria and register with state agencies. There are 28 million Americans that potentially could benefit from using medical marijuana, mostly for chronic pain, chemotherapy-related nausea, and other conditions.

This study examines the TOTAL medical cannabis market structure and history (incl. ancillary market segments), federal/state regulation, \$ revenues/growth: 2011-2018F, market segments (dispensaries, cultivators, laboratory testing, hydroponic equipment, edibles, head shops, ancillary services), key market trends and issues, state market potentials/outlooks, consumer demand factors/demographics, and operating ratios.

The industry is fragmented, populated by small competitors and development stage companies hoping to strike it rich, including 11 public penny stock companies. Shifting public opinion and tax revenue-hungry states are fueling optimism about the medical marijuana (cannabis) market, but significant hurdles remain. Until recently, since pot is still considered illegal at the federal level, marijuana retail dispensaries were subjected to raids, fines, closures and imprisonment.

This has all changed with recent statements by the U.S. Justice Department in August and September that indicate that the Feds are loosening restrictions and will be more accommodating, provided that certain guidelines are implemented.

The study contains 15 company profiles of the leading players. This report is also sold by single chapters. It's all here in ONE Place!

Contents

INTRODUCTION: STUDY SCOPE, SOURCES, METHODOLOGY

EXECUTIVE OVERVIEW OF MAJOR FINDINGS (\$300)

Highlights of all study chapters: nature and structure of the industry, main issues and trends affecting the market, state/federal regulations, market size and growth (2011-208F), market segments analysis (dispensaries, cultivators, lab testing, hydroponics, head shops, others), key operating ratios of medical marijuana dispensaries, patient demographics, list of main competitors, results of phone interviews with industry analysts and competitors.

Nature of the Business & Industry Structure

Definition of medical marijuana, its use, market history, market structure (retail dispensaries, cultivators, edibles companies, ancillary products & services), states where it is legal, discussion of major issues/obstacles (taxation, city ordinances, licensing, voter initiatives, federal actions, difficulty establishing banking/credit card accounts, potential for industry roll-ups and acquisitions).

INDUSTRY REGULATION & OBSTACLES (\$150)

Discussion of past/recent actions to legalize medical and recreational marijuana use by the states, shifting attitudes, Justice Dept. actions to legalize banking for dispensaries and statement to relax restrictions and leave it to the states to decide, past raids in 2011, list of laws to legalize pot in 18 states, when passed, list of states with: operating dispensaries, those in progress, those with legal recreational use, arguments for legalization, state-by-state status reports for: Alaska, Arizona, California, Colorado, Connecticut, Delaware, Washington DC, Hawaii, Maine, Maryland, Michigan, Montana, New Jersey, New Mexico, Oregon, Rhode Island, Vermont, Washington state.

CUSTOMER DEMOGRAPHICS (\$200)

Summary & discussion: qualifying conditions

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Estimated Potential Number of Medical Marijuana Users, by Medical Condition
Percent of Registered Users or Active Cardholders Reporting Pain, As % all Medical Conditions

Findings of the National Survey on Drug Use and Abuse, discussion of:

Scope of illicit drug use

Substance Dependence, Abuse, and Treatment

Past Month Illicit Drug Use among Persons

Adult pot use

Medical Conditions for Which Medical Marijuana Is Applicable

Chronic Pain: discussion of the condition, number of sufferers

AIDS: discussion of the condition, number of sufferers

Arthritis: discussion of the condition, number of sufferers

Cancer treatment – chemotherapy: discussion of the condition, number of sufferers

Hepatitis C: discussion of the condition, number of sufferers

ALS Amyotrophic lateral sclerosis: discussion of the condition, no. sufferers

Chron's disease: discussion of the condition, number of sufferers

Parkinson's disease: discussion of the condition, number of sufferers

Multiple sclerosis: discussion of the condition, number of sufferers

Registered Users: How Many People in the United States Use Medical Marijuana?

Table: Number of medical marijuana patients, by state, related to population

Demographic Profiles of Registered Users, by State

(number, sex, age, active cardholders, by medical conditions & by county when available)

California

Colorado

Michigan

Oregon

Montana

Nevada

Arizona

DISPENSARY OPERATING RATIOS (\$50)

Major Overview findings of MMJ Business Daily's 2012 "Marijuana Business Factbook"

Total industry size estimate and rationale
Which states are best for cannabis-related businesses – and which are worst?
discussion
How are cannabis-related business startups funded? discussion
How much money can a cannabis business generate? – annual revenues for mom & pop, mid-sized and large competitors
Avg. annual revenues for: dispensaries, cultivators, edibles companies, ancillary service companies
Time required to reach profitability? – discussion.
Table: Industry Average: Dispensaries, Start-up Expenses As A percent of Total

MARKET SIZE, GROWTH & FORECASTS, MARKET SEGMENTS (\$300)

Discussion of research/estimates by See Change Strategy 2011 report, MMJ Business Daily, Delphi Associates, other analysts. Limitations of data.
Analysis of number of retail dispensaries nationwide, growth, factors affecting
Number of Registered Patients & Potential Patients analysis
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Average Spending Per Dispensary Customer
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Analysis of cultivation sites, \$ avg. annual revenues, number
Summary/list/definition of all market segments
Cannabis testing and lab services: discussion of type tests performed (THC potency, e-coli, microbial, pesticides, etc.), best methods used (high performance liquid chromatography gas chromatography, thin layer chromatography), why it is crucial to dispensaries/industry growth, cost of tests, market \$ size: 2013, 2018F
List of 8 major cannabis test labs: name, address, phone

Hydroponic cultivation equipment market: products, \$ market size, main competitors, wholesale vs. retail sales, competitor profiles of: Sunlight Supply, Hydrofarm, BWGS, R & M Supply Inc.

Head shops (smoke shops): discussion of number in the U.S., number in medical marijuana states, operations, products sold, client profile, possible future role as distribution channel for medical and recreational marijuana.

Results of Headquest Publications Industry Survey

Avg. daily & annual sales

No. of mfrs., wholesalers, retailers, avg. profit margins of each

Total industry receipts, payroll, employment

Table: Estimated Number of head Shops in Medical Marijuana Legal States

Medical Pot Market Outlooks by State: recent developments, pending bills, \$ mkt. potential

California: Los Angeles, San Diego, Sacramento, other markets

Nevada

Washington state

Colorado

Oregon

Vermont

Ohio

MEDICAL MARIJUANA COMPETITOR PROFILES (PUBLIC COMPANIES) (\$100)

(Company description, products, specializations, address/phone/website/contacts)

Cannabis Science, Inc.

Hemp, Inc.

Terra Tech Corp. (Grow Up Technology)

Neutra Corp.

Medical Marijuana, Inc.

MediSwipe

Nuvilex

Endexx Corp.

Fusion Pharm

Growlife

GreenGro

REFERENCE DIRECTORY OF TRADE ASSOCIATIONS & SOURCES

Address, phone, contacts for major trade groups, websites, magazines, consultants, list

of industry reports and articles, Wall Street analysts/research reports.

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