



Passport

Cannabis in the Netherlands

Euromonitor International

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CANNABIS IN THE NETHERLANDS - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

The Netherlands has a long history when it comes to cannabis. If one takes into account both the illicit and legal production and sales, the Netherlands is a very well developed, somewhat saturated market with many long-time, advanced users of various cannabis products. As such...

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CANNABIS BACKGROUND

Summary 1 History and evolution of cannabis in the Netherlands:

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Source: Euromonitor International

CANNABIS LEGISLATION

- In 1976, the Dutch government decriminalised the sale and consumption of cannabis for personal use in appointed dispensaries, termed “coffeeshops”. A minimum age of 18 years...



Summary 2 Cannabis Legislation in the Netherlands

Product type

Medical Cannabis

Adult-Use Cannabis

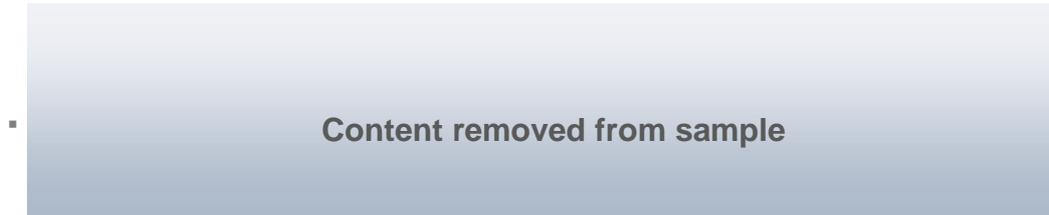
CBD

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Source: <https://www.cbdolie.nl/de-wetgeving-omtrent-cbd/#:-:text=De%20Legaliteit%20van%20CBD,dan%200%2C2%25%20legaal;>
<https://memorable.nl/faq/cbd/cbd-wetgeving/>

CANNABIS DISTRIBUTION

- Adult-use cannabis is distributed through “coffeeshops”. Purchase through these establishments has been decriminalised...



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CANNABIS TAXATION

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CANNABIS PRODUCTION

- Given the decriminalisation of selling through coffeeshops, there is high demand for cannabis.

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Table 1 Cannabis Production in the Netherlands

Product type	2019	2020
Hemp (for medical use)	Content removed from sample	

Source: Bedrocan, Euromonitor

ILLICIT CANNABIS MARKET

- The illicit cannabis market largely consists of the decriminalised coffeeshops, with the...

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MARKET INDICATORS

Table 2 Cannabis User Population by Legal vs Illicit 2019-2020

'000s of Persons

	2019	2020
Adult-Use Cannabis (Legal)	Data removed from sample	
CBD (Legal)		
Medical Cannabis (Legal)		
Total (Legal)		
Illicit Cannabis		

Source: Euromonitor International from official statistics, trade associations, trade press, trade interviews, trade sources

MARKET DATA

Table 3 Sales of Cannabis by Category: Value 2019-2020

EUR million

	2019	2020
Medical Cannabis	Data removed from sample	
Adult-Use Cannabis		
CBD		
Cannabis		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Cannabis by Category: % Value Growth 2019-2020

% current value growth

	2019/20	2019-20 CAGR	2019/20 Total
Medical Cannabis	Data removed from sample		
Adult-Use Cannabis			
CBD			
Cannabis			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Cannabis by Legal vs Illicit 2019-2020

	2019	2020
Legal (Cannabis) (% breakdown)	Data removed from sample	
Legal (Cannabis) (Actuals)		
Illicit (Cannabis) (% breakdown)		
Illicit (Cannabis) (Actuals)		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Distribution of Cannabis by Format: % Value 2019-2020

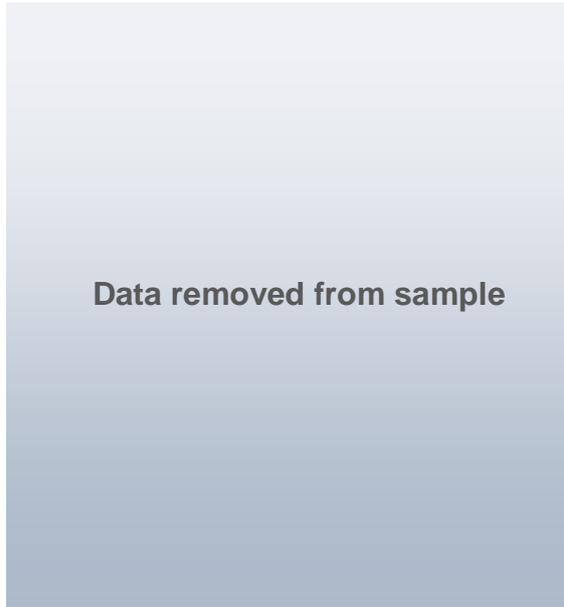
% retail value rsp	2019	2020
Store-Based Retailing	Data removed from sample	
- Modern Grocery Retailers		
-- Convenience Stores		
-- Discounters		
-- Forecourt Retailers		
-- Hypermarkets		
-- Supermarkets		
- Traditional Grocery Retailers		
-- Food/drink/tobacco specialists		
-- Independent Small Grocers		
-- Other Grocery Retailers		
- Mixed Retailers		
-- Department Stores		
-- Other Mixed Retailers		
- Non-Grocery Specialists		
-- Dispensaries		
-- Chemists/Pharmacies		
-- Other Non-Grocery Specialists		
Non-Store Retailing		
- Vending		
- Homeshopping		
- E-Commerce		
- Direct Selling		
Non-retail channels		
- Hotels/restaurants/bars		
Total		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Distribution of Cannabis by Format and Category: % Value 2020

% retail value rsp	MC	AUC	CBD
Store-Based Retailing	Data removed from sample		
- Modern Grocery Retailers			
-- Convenience Stores			
-- Discounters			

- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Food/drink/tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Mixed Retailers
- Department Stores
- Other Mixed Retailers
- Non-Grocery Specialists
- Dispensaries
- Chemists/Pharmacies
- Other Non-Grocery Specialists
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Non-retail channels
- Hotels/restaurants/bars
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Key: MC = medical cannabis; AUC= adult-use cannabis; CBD = CBD

Table 8 Forecast Sales of Cannabis by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Medical Cannabis	Data removed from sample					
Adult-Use Cannabis						
CBD						
Cannabis						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Forecast Sales of Cannabis by Category: % Value Growth 2020-2025

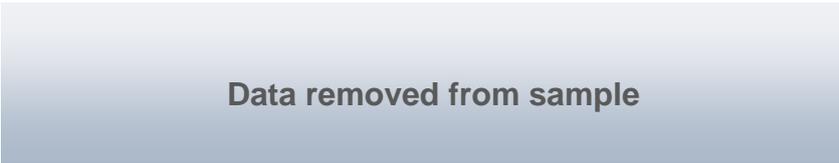
% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Medical Cannabis	Data removed from sample		
Adult-Use Cannabis			
CBD			
Cannabis			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Forecast Sales of Cannabis by Legal vs Illicit 2020-2025

	2020	2021	2022	2023	2024	2025
Legal (Cannabis) (%)	Data removed from sample					

breakdown)
Legal (Cannabis)
(Actuals)
Illicit (Cannabis) (%
breakdown)
Illicit (Cannabis)
(Actuals)



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

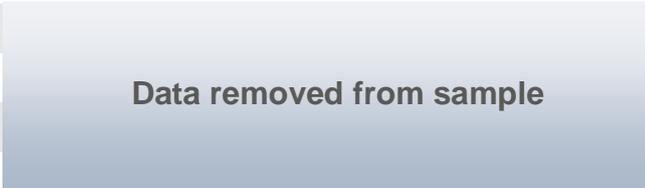
SOURCES

Summary 3 Research Sources

Official Sources

Trade Associations

Trade Press

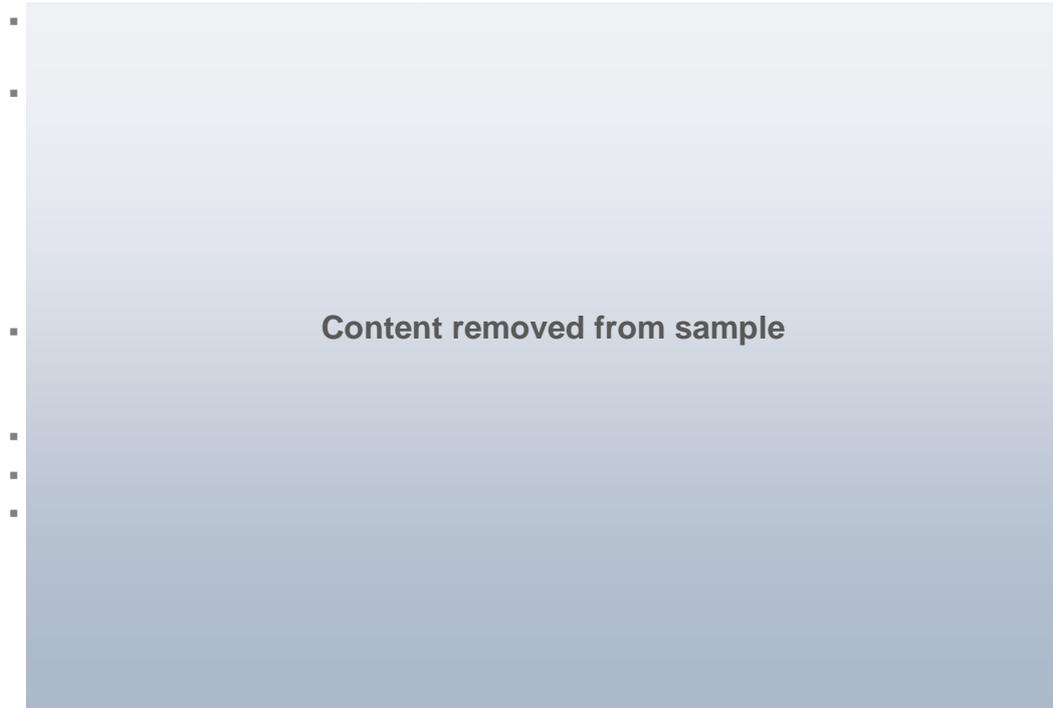


Source: Euromonitor International

MEDICAL CANNABIS

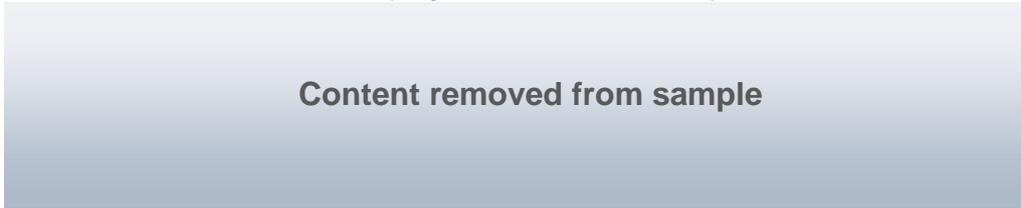
Market Sizes

- Growth in medical cannabis has stagnated somewhat, with retail value sales rising just 2%...



Cannabinoids

- Most medical cannabis has relatively high levels of THC. CBD-only medical cannabis is...



Brands



Distribution



Category Data

Table 11 Sales of Medical Cannabis by Category: Volume 2019-2020

	2019	2020
Flower (Medical Cannabis) (Tonne)		
Pre-Roll (Medical Cannabis) (million units)		
Vapour (Medical Cannabis) ('000 litres)		
Concentrates (Medical Cannabis) (Tonne)		
Beverages (Medical Cannabis) ('000 litres)		
Edibles (Medical Cannabis) (Tonne)		
Capsules (Medical Cannabis) (million units)		
Tinctures and Sprays (Medical Cannabis) ('000 litres)		
Topicals (Medical Cannabis) ('000 litres)		
Other (Medical Cannabis) (million units)		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 Sales of Medical Cannabis by Category: Value 2019-2020

EUR million	2019	2020
Flower (Medical Cannabis)		
Pre-Roll (Medical Cannabis)		
Vapour (Medical Cannabis)		
Concentrates (Medical Cannabis)		
Beverages (Medical Cannabis)		
Edibles (Medical Cannabis)		
Capsules (Medical Cannabis)		
Tinctures and Sprays (Medical Cannabis)		

Topicals (Medical Cannabis)
 Other (Medical Cannabis)
 Medical Cannabis

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Sales of Medical Cannabis by Category: % Volume Growth 2019-2020

% volume growth	2019/20	2019-20 CAGR	2019/20 Total
Flower (Medical Cannabis)	Data removed from sample		
Pre-Roll (Medical Cannabis)			
Vapour (Medical Cannabis)			
Concentrates (Medical Cannabis)			
Beverages (Medical Cannabis)			
Edibles (Medical Cannabis)			
Capsules (Medical Cannabis)			
Tinctures and Sprays (Medical Cannabis)			
Topicals (Medical Cannabis)			
Other (Medical Cannabis)			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Sales of Medical Cannabis by Category: % Value Growth 2019-2020

% current value growth	2019/20	2019-20 CAGR	2019/20 Total
Flower (Medical Cannabis)	Data removed from sample		
Pre-Roll (Medical Cannabis)			
Vapour (Medical Cannabis)			
Concentrates (Medical Cannabis)			
Beverages (Medical Cannabis)			
Edibles (Medical Cannabis)			
Capsules (Medical Cannabis)			
Tinctures and Sprays (Medical Cannabis)			
Topicals (Medical Cannabis)			
Other (Medical Cannabis)			
Medical Cannabis			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Sales of Medical Cannabis by CBD vs THC content: % Value 2019-2020

% retail value rsp	2019	2020
CBD Dominant	Data removed from sample	
THC 1:1 CBD		
THC Dominant		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Distribution of Medical Cannabis by Format: % Value 2019-2020

% retail value rsp	2019	2020
Store-Based Retailing	Data removed from sample	
- Modern Grocery Retailers		
-- Convenience Stores		
-- Discounters		
-- Forecourt Retailers		
-- Hypermarkets		
-- Supermarkets		
- Traditional Grocery Retailers		
-- Food/drink/tobacco specialists		
-- Independent Small Grocers		
-- Other Grocery Retailers		
- Mixed Retailers		
-- Department Stores		
-- Other Mixed Retailers		
- Non-Grocery Specialists		
-- Dispensaries		
-- Chemists/Pharmacies		
-- Other Non-Grocery Specialists		
Non-Store Retailing		
- Vending		
- Homeshopping		
- E-Commerce		
- Direct Selling		
Non-retail channels		
- Hotels/restaurants/bars		
Total		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Forecast Sales of Medical Cannabis by Category: Volume 2020-2025

	2020	2021	2022	2023	2024	2025
Flower (Medical Cannabis) (Tonne)	Data removed from sample					
Pre-Roll (Medical Cannabis) (million units)						
Vapour (Medical Cannabis) ('000 litres)						
Concentrates (Medical Cannabis) (Tonne)						
Beverages (Medical Cannabis) ('000 litres)						
Edibles (Medical Cannabis) (Tonne)						
Capsules (Medical Cannabis) (million units)						
Tinctures and Sprays (Medical Cannabis) ('000 litres)						
Topicals (Medical Cannabis) ('000 litres)						
Other (Medical Cannabis) (million units)						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 Forecast Sales of Medical Cannabis by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Flower (Medical Cannabis)	Data removed from sample					
Pre-Roll (Medical Cannabis)						
Vapour (Medical Cannabis)						
Concentrates (Medical Cannabis)						
Beverages (Medical Cannabis)						
Edibles (Medical Cannabis)						
Capsules (Medical Cannabis)						
Tinctures and Sprays (Medical Cannabis)						
Topicals (Medical Cannabis)						
Other (Medical Cannabis)						
Medical Cannabis						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Medical Cannabis by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Flower (Medical Cannabis)	Data removed from sample		
Pre-Roll (Medical Cannabis)			
Vapour (Medical Cannabis)			
Concentrates (Medical Cannabis)			
Beverages (Medical Cannabis)			
Edibles (Medical Cannabis)			
Capsules (Medical Cannabis)			
Tinctures and Sprays (Medical Cannabis)			
Topicals (Medical Cannabis)			
Other (Medical Cannabis)			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Forecast Sales of Medical Cannabis by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Flower (Medical Cannabis)	Data removed from sample		
Pre-Roll (Medical Cannabis)			
Vapour (Medical Cannabis)			
Concentrates (Medical Cannabis)			

- Beverages (Medical Cannabis)
- Edibles (Medical Cannabis)
- Capsules (Medical Cannabis)
- Tinctures and Sprays (Medical Cannabis)
- Topicals (Medical Cannabis)
- Other (Medical Cannabis)
- Medical Cannabis

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

ADULT-USE CANNABIS

Market Sizes

- Adult-use cannabis sales will be limited by the number of dispensaries (“coffeeshops”) that are participating in the legal cannabis pilot scheme.

-
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-
-
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Cannabinoids

- The cannabis that has been produced illegally over the past years can serve as a guide as...

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Brands

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Distribution

- Adult cannabis will only be available through a selection of dispensaries, known as...

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Category Data

Table 21 Forecast Sales of Adult-Use Cannabis by Category: Volume 2020-2025

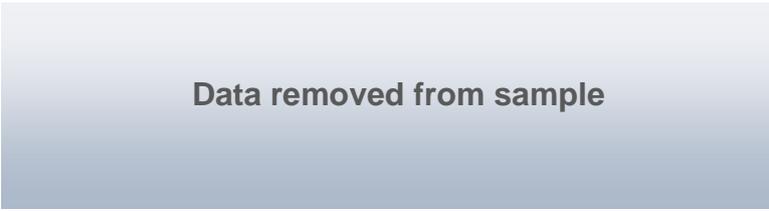
	2020	2021	2022	2023	2024	2025
Flower(Adult-Use Cannabis) (Tonne)	Data removed from sample					
Pre-Roll (Adult-Use Cannabis) (million units)						
Vapour (Adult-Use Cannabis) ('000 litres)						
Concentrates (Adult-Use Cannabis) (Tonne)						
Beverages (Adult-Use Cannabis) ('000 litres)						
Edibles (Adult-Use Cannabis) (Tonne)						
Capsules (Adult-Use Cannabis) (million units)						
Tinctures and Sprays (Adult-Use Cannabis) ('000 litres)						
Topicals (Adult-Use Cannabis) ('000 litres)						
Other (Adult-Use Cannabis) (million units)						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 Forecast Sales of Adult-Use Cannabis by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Flower(Adult-Use Cannabis)	Data removed from sample					
Pre-Roll (Adult-Use Cannabis)						
Vapour (Adult-Use Cannabis)						
Concentrates (Adult-Use Cannabis)						
Beverages (Adult-Use Cannabis)						
Edibles (Adult-Use Cannabis)						
Capsules (Adult-Use Cannabis)						

Cannabis)
 Tinctures and Sprays
 (Adult-Use Cannabis)
 Topicals (Adult-Use
 Cannabis)
 Other (Adult-Use
 Cannabis)
 Adult-Use Cannabis



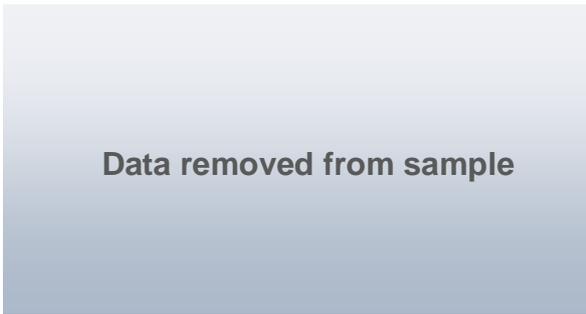
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 Forecast Sales of Adult-Use Cannabis by Category: % Volume Growth 2021-2025

% volume growth

2021/22 2021-25 CAGR 2021/25 Total

Flower(Adult-Use Cannabis)
 Pre-Roll (Adult-Use Cannabis)
 Vapour (Adult-Use Cannabis)
 Concentrates (Adult-Use Cannabis)
 Beverages (Adult-Use Cannabis)
 Edibles (Adult-Use Cannabis)
 Capsules (Adult-Use Cannabis)
 Tinctures and Sprays (Adult-Use
 Cannabis)
 Topicals (Adult-Use Cannabis)
 Other (Adult-Use Cannabis)



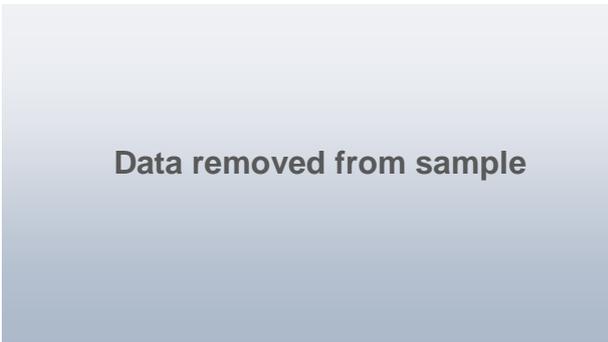
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 24 Forecast Sales of Adult-Use Cannabis by Category: % Value Growth 2021-2025

% constant value growth

2021/2022 2021-25 CAGR 2021/25 Total

Flower(Adult-Use Cannabis)
 Pre-Roll (Adult-Use Cannabis)
 Vapour (Adult-Use Cannabis)
 Concentrates (Adult-Use Cannabis)
 Beverages (Adult-Use Cannabis)
 Edibles (Adult-Use Cannabis)
 Capsules (Adult-Use Cannabis)
 Tinctures and Sprays (Adult-Use
 Cannabis)
 Topicals (Adult-Use Cannabis)
 Other (Adult-Use Cannabis)
 Adult-Use Cannabis



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

CBD

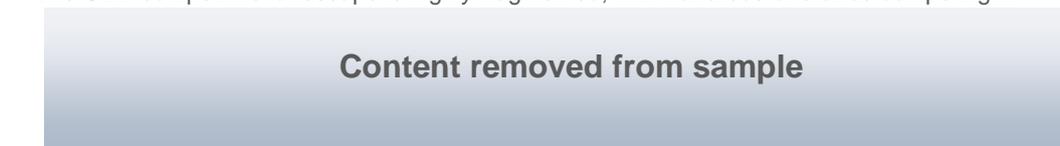
Market Sizes

- CBD popularity has in large part been driven by increased health concerns. Indeed, consumers are turning to more natural ways to treat minor ailments....



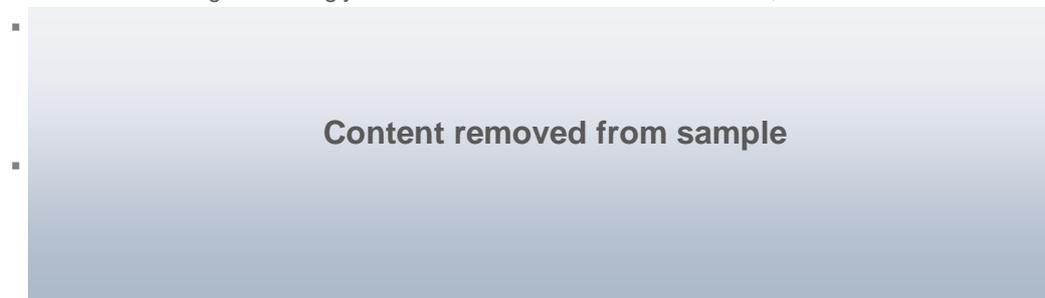
Brands

- The CBD competitive landscape is highly fragmented, with hundreds of brands competing...



Distribution

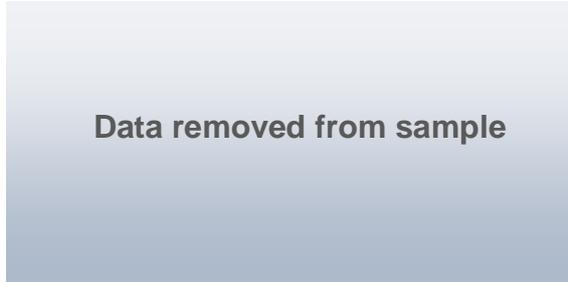
- CBD is becoming increasingly available in more distribution channels, with a channel that is...



Category Data

Table 25 Sales of CBD by Category: Volume 2019-2020

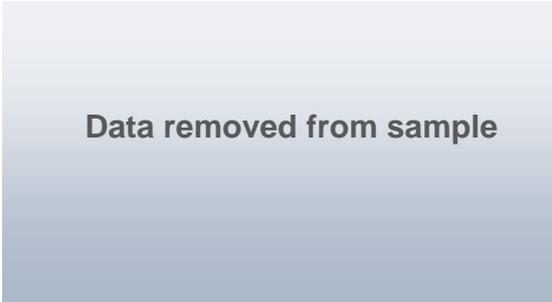
	2019	2020
Flower (CBD) (Tonne)		
Pre-Roll (CBD) (million units)		
Vapour (CBD) ('000 litres)		
Concentrates (CBD) (Tonne)		
Beverages (CBD) ('000 litres)		
Edibles (CBD) (Tonne)		
Capsules (CBD) (million units)		
Tinctures and Sprays (CBD) ('000 litres)		
Topicals (CBD) ('000 litres)		
Other (CBD) (million units)		



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 26 Sales of CBD by Category: Value 2019-2020

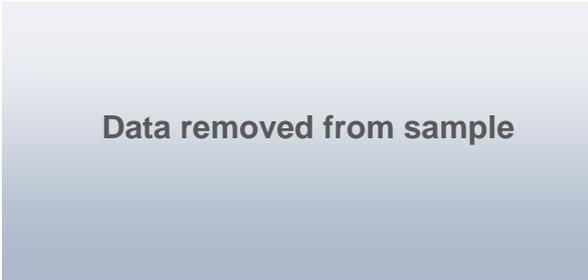
EUR million	2019	2020
Flower (CBD)		
Pre-Roll (CBD)		
Vapour (CBD)		
Concentrates (CBD)		
Beverages		
Edibles (CBD)		
Capsules (CBD)		
Tinctures and Sprays (CBD)		
Topicals (CBD)		
Other (CBD)		
CBD		



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27 Sales of CBD by Category: % Volume Growth 2019-2020

% volume growth	2019/20	2019-20 CAGR	2019/20 Total
Flower (CBD)			
Pre-Roll (CBD)			
Vapour (CBD)			
Concentrates (CBD)			
Beverages (CBD)			
Edibles (CBD)			
Capsules (CBD)			
Tinctures and Sprays (CBD)			
Topicals (CBD)			
Other (CBD)			



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 28 Sales of CBD by Category: % Value Growth 2019-2020

% current value growth	2019/20	2019-20 CAGR	2019/20 Total
Flower (CBD)	Data removed from sample		
Pre-Roll (CBD)			
Vapour (CBD)			
Concentrates (CBD)			
Beverages (CBD)			
Edibles (CBD)			
Capsules (CBD)			
Tinctures and Sprays (CBD)			
Topicals (CBD)			
Other (CBD)			
CBD			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 29 Distribution of CBD by Format: % Value 2019-2020

% retail value rsp	2019	2020
Store-Based Retailing	Data removed from sample	
- Modern Grocery Retailers		
-- Convenience Stores		
-- Discounters		
-- Forecourt Retailers		
-- Hypermarkets		
-- Supermarkets		
- Traditional Grocery Retailers		
-- Food/drink/tobacco specialists		
-- Independent Small Grocers		
-- Other Grocery Retailers		
- Mixed Retailers		
-- Department Stores		
-- Other Mixed Retailers		
- Non-Grocery Specialists		
-- Dispensaries		
-- Chemists/Pharmacies		
-- Other Non-Grocery Specialists		
Non-Store Retailing		
- Vending		
- Homeshopping		
- E-Commerce		
- Direct Selling		
Non-retail channels		
- Hotels/restaurants/bars		
Total		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 30 Forecast Sales of CBD by Category: Volume 2020-2025

	2020	2021	2022	2023	2024	2025
Flower (CBD) (Tonne)	Data removed from sample					
Pre-Roll (CBD) (million units)						
Vapour (CBD) ('000 litres)						
Concentrates (CBD) (Tonne)						
Beverages (CBD) ('000 litres)						
Edibles (CBD) (Tonne)						
Capsules (CBD) (million units)						
Tinctures and Sprays (CBD) ('000 litres)						
Topicals (CBD) ('000 litres)						
Other (CBD) (million units)						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 31 Forecast Sales of CBD by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Flower (CBD)	Data removed from sample					
Pre-Roll (CBD)						
Vapour (CBD)						
Concentrates (CBD)						
Beverages (CBD)						
Edibles (CBD)						
Capsules (CBD)						
Tinctures and Sprays (CBD)						
Topicals (CBD)						
Other (CBD)						
CBD						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 32 Forecast Sales of CBD by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Flower (CBD)	Data removed from sample		
Pre-Roll (CBD)			
Vapour (CBD)			
Concentrates (CBD)			
Beverages (CBD)			
Edibles (CBD)			
Capsules (CBD)			

Tinctures and Sprays (CBD)
 Topicals (CBD)
 Other (CBD)

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 33 Forecast Sales of CBD by Category: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Flower (CBD)	Data removed from sample		
Pre-Roll (CBD)			
Vapour (CBD)			
Concentrates (CBD)			
Beverages (CBD)			
Edibles (CBD)			
Capsules (CBD)			
Tinctures and Sprays (CBD)			
Topicals (CBD)			
Other (CBD)			
CBD			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources