

UIVEC

UNION DES INDUSTRIELS
POUR LA VALORISATION DES
EXTRAITS DE CHANVRE

DEVELOPPING THE HEMP EXTRACT INDUSTRY

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L'UIVEC

Gathering of the different **industrial and economic actors interested in the exploitation of non-narcotic hemp extracts** (CBD, CBG, CBN, etc., with the exception of THC, THC-A and any other drug) in France

Representing the entire value chain of the hemp extract industry, from production to processing, advice and distribution.

Focusing on the **different uses of hemp extracts in finished products** (foodstuffs, cosmetics, animal feed, etc.)

 **GILSON**[®]

 **Arkopharma**
LABORATOIRES

 **Planète Chanvre**
Île-de-France

LABORATOIRE
THERASCIENCE
PHYSIONUTRITION FOR A BETTER LIFE

PiLeJe
LABORATOIRE

 **Scientia Natura**

SPECTRUMS
EUROPE
FROM SEED TO WELLNESS[®]

 **ROBERTET**
GROUPE

E.Leclerc 

NUTRIKÉO
conseil en stratégies nutrition

CanXChange

Belvedere Pharma

 **NATURAL SANTÉ**

 **LEAF**
LABORATOIRE D'ÉTUDES ET D'ANALYSES DES FLUIDES

CAVAC
POSITIVE AGRICULTURE!

 **Canèbe**

 **SOLINVEST**
GROWING TOGETHER

EXPERTOX LAB
LABORATOIRE D'ANALYSES INDUSTRIELLES

 **Strapharm**
Health Partner

 **GILBERT**
Santé & Bien-être

Laboratoire Ondegone

 **EXTRACTIS**

Chilled
EAU PÉTILLANTE AU CBD

rainbow
GREEN FUTURE

GREENTECH GROUP

LABORATOIRES
INELDEA

epycure

IRATI
INTERNATIONAL
Certifié / Certified ECOCERT
Certifications : ISO 9001, 22000 & 22716

 **SWISS ORGANIC PARTNERS**

 **FACOPHAR FPS**
SANTÉ

A FRENCH INDUSTRY READY

03 Preparation

Air Liquide

GILSON®

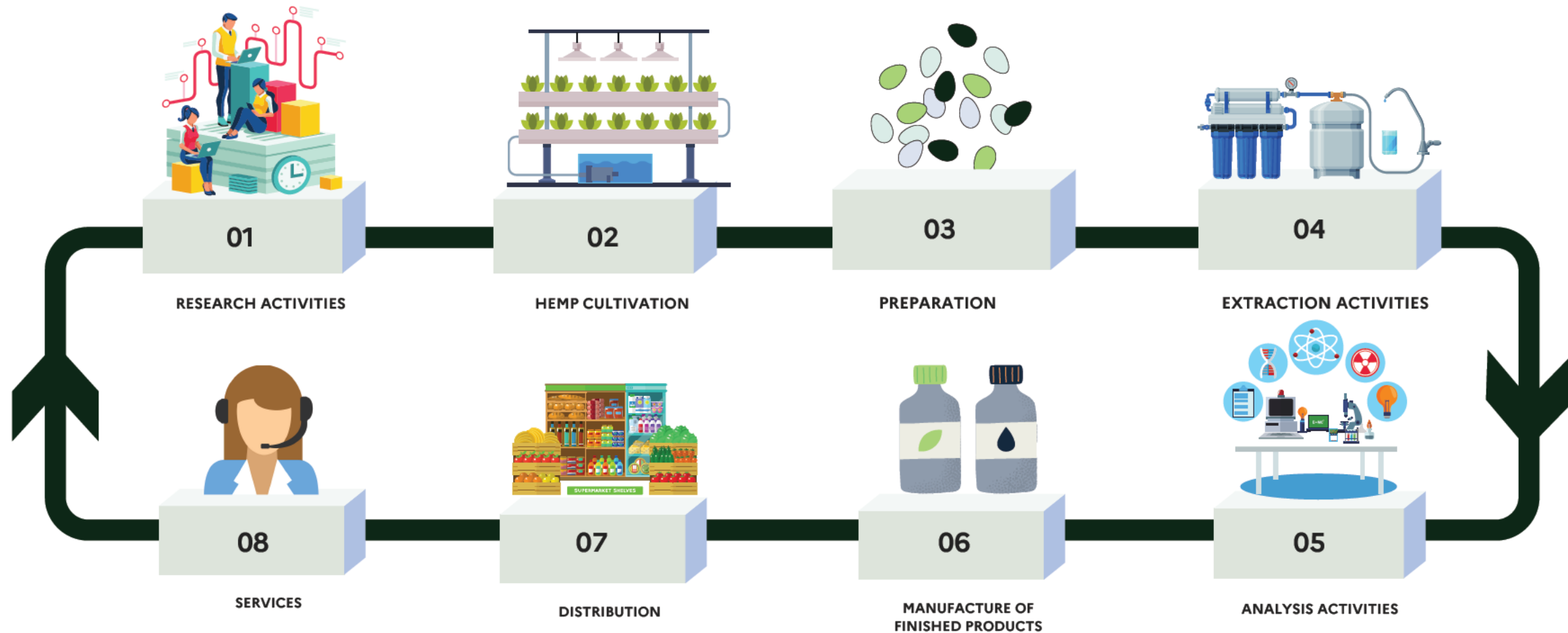
02 Culture

CAVAC
POSITIVE AGRICULTURE I

Planète Chanvre
Ile-de-France

01 Search

iteipmai



04 Extraction

ROBERTET
GROUPE

GREENTECH GROUP

05 Analysis

eurofins

LEAF
LABORATOIRE D'ÉTUDES ET
D'ANALYSES DES FLUIDES

**06 Manufacture of
finished products**

PiLeJe
LABORATOIRE

Arkopharma

France has all the assets, at all levels of the value chain, to become one of the world leaders in the hemp extract sector.

08 Services

NUTRIKÉO
conseil en stratégies nutrition

Nutraveris

07 Distribution

E.Leclerc

PARIS PHARMA
Votre santé est capitale

KEY FIGURES

TODAY



United States

The CBD market was worth €2 billion in 2020 and is expected to reach nearly €7 billion by 2025



United Kingdom

The CBD market is estimated to be worth over €800 million by 2021



In the world

1.45 billion in 2018 and expected to reach \$24 billion in 2023



TOMORROW

700

million euros of market potential in France

estimated market weight of CBD-containing products (excluding smoking flowers) by the end of 2022 if favorable regulations are adopted

15 000

jobs created

If the area under hemp in France were to return to its 19th century level

53%

market share for CBD dietary supplements in Europe

CBD dietary supplements are by far the largest market and annual growth of 10% is expected in this sector



REGULATORY EVOLUTION

LEGAL FRAMEWORK BEFORE 12.30.2021

- ~~Ban on the "cultivation, import, export and industrial and commercial use" of hemp flowers and leaves~~



- ~~CBD from flowers/leaves is by extension covered by the regulations on narcotics: it is therefore prohibited and impossible to manufacture in France~~



LEGAL FRAMEWORK AS OF 01.01.2022

- Extension of the "authorisation of the "cultivation, import, export and industrial and commercial use"" to all parts of the hemp plant

- Use of flowers and leaves only for the production of hemp extracts (/!\ *The ban on raw hemp flowers has been suspended by the French court's decision of 24th January*).

- Different non-narcotic hemp extracts (CBD, CBG, CBC...) can be extracted from hemp flowers and leaves
- Different types of ingredients are allowed (isolates, broad spectrums...), as long as the THC threshold of 0.3% is met



REGULATORY EVOLUTION

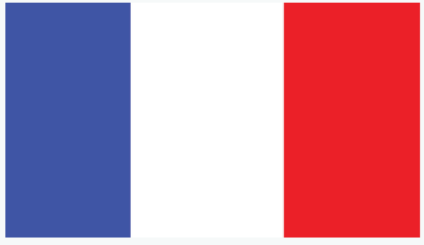
LEGAL FRAMEWORK BEFORE 12.30.2021

- ~~• It is only permitted to cultivate variety inscribed in the official catalogue of species and varieties of plants cultivated in France ; and this variety does not exceed 0,2% of THC~~



LEGAL FRAMEWORK AS OF 01.01.2022

- Hemp varieties from the official catalogue of species and varieties of plants cultivated in France and the common catalogue of varieties of agricultural plant species are allowed to be grown.
- The whole plant can contain up to 0,3% of THC
- Only "active farmers" can grow flowers and leaves
- The sale of seedling and the practice of cuttings are prohibited



REGULATORY EVOLUTION

SPECIFIC REQUIREMENTS FOR HEMP FLOWERS AND LEAVES :

- **Flowers and leaves must be produced from certified seeds**
- **To sell/buy flowers and leaves, the producer and the buyer have to sign a written contract before the production period (March/April). The contract must mention information such as volume and price. The quality of the products may be specified.**
- **It is allowed to import flowers and leaves for extraction if they come from varieties in one of the two catalogues (French/European).**



REGULATORY EVOLUTION

LEGAL FRAMEWORK EXISTING BEFORE 12.30.2021

- Prohibition of therapeutic and health claims
- Prohibition of the promotion of cannabis (criminal offence of provocation to use drugs)



LEGAL FRAMEWORK ON 01.01.2022

- Prohibition of therapeutic and health claims
- Prohibition of the promotion of cannabis (criminal offence of provocation to use drugs)



- ~~• Prohibition of all THC in finished products~~

- Allowing the presence of THC up to 0.3% in finished products, subject to applicable EU regulations



Food products



Other products



ISSUES NOT ADDRESSED BY THE REGULATORY EVOLUTION

ISSUES

Securing the first market for CBD and guaranteeing the quality of food products previously tolerated on the market, pending the validation of *Novel Food* dossiers



Adoption of transitional measures to regulate the CBD food sector :

- Regulating the use of CBD in food supplements according to certain modalities, as permitted by Article 35 of the Novel Food Regulation.

No mention of cosmetic products containing hemp extracts



- **Clarifying the possibility of using hemp extracts (isolates, broad spectrums...) in cosmetics, with a maximum threshold of 0.3% THC**

Ensuring the development of the industry in a safe way, by guaranteeing the proper removal of THC during processing



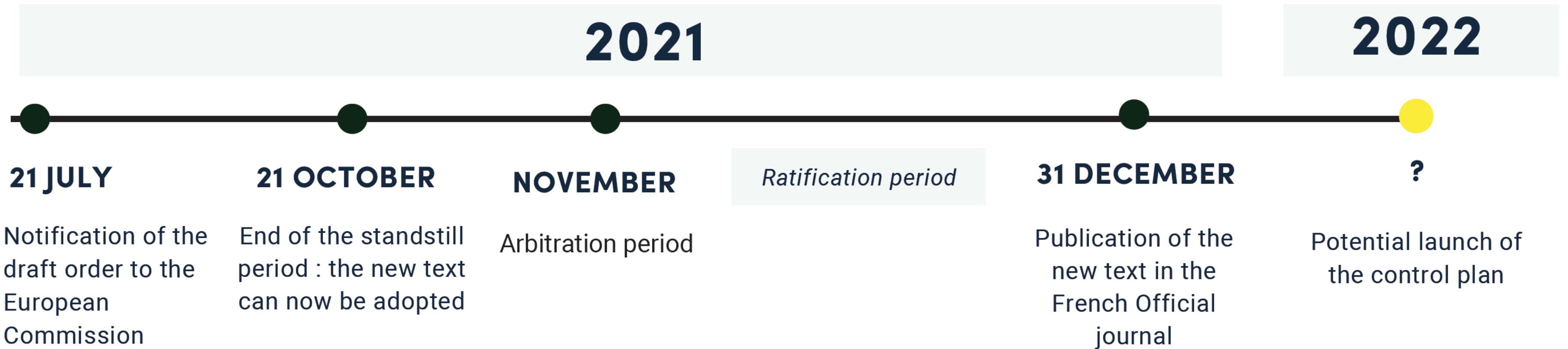
- **Monitoring extraction activities**



- **Facilitating the obtention of THC standards for analytical activities**



THE TIMELINE



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