



# Hemp Products Market Comparison

September 2020 – David Dyer, Lewis George

# Key Takeaways & Recommendations

1

Germany is the largest importer of hemp products under the HS codes 5302 and 530290. Germany is also the second largest market when it comes to products launched containing hemp.

2

Four other European markets are in the top 10 in terms of product launches. The vast majority of the top 10 importers of hemp under 5302 and 530290 are also European.

3

Whilst the US and Canada may be tempting, with the highest number of products launched and the fourth highest respectively, both are producers of large volumes of hemp themselves, with low levels of import likely due to this domestic dominance.

4

“Organic” is the most commonly used on-pack claim in hemp oil products, with “Vegan” and “GMO Free” becoming increasingly popular in recent years. For Vitamins/Dietary Supplement and Skincare “Botanical/Herbal” is the dominant claim.

5

61% of products containing hemp-based ingredients declare hemp seed. Hemp protein is cited in 23% of launches, with products containing hemp oil accounting for just 7% of the market.

6

Even in a developed market such as the US, consumers are confused about the difference between hemp and CBD. Mintel states that usage is still low, at around 10% of the population, which perhaps explains the confusion. On pack images of cannabis leaves are unlikely to help here also.

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## Introduction

A summary of the background, purpose, methodology and limitations of this research.



## Methodology and Limitations

### Methodology

Secondary market research based on publicly available sources and subscription databases such as Mintel's Global New Products Database (GPND).

- **Mintel GPND** covers 38,000 new product launches a month across 86 global markets. The platform displays images and detailed product information for launches in a wide array of categories.

### Limitations

- The information provided in this report was sourced from secondary data sources. Due to the nature of secondary research, all values and figures should be treated as indicative, rather than absolute.
- The latest information available at the time of research was used, however present values may differ.
- Mintel's Global New Products database is designed to give an overview of a given market and is not an exhaustive list of the products available.

## Market Comparison

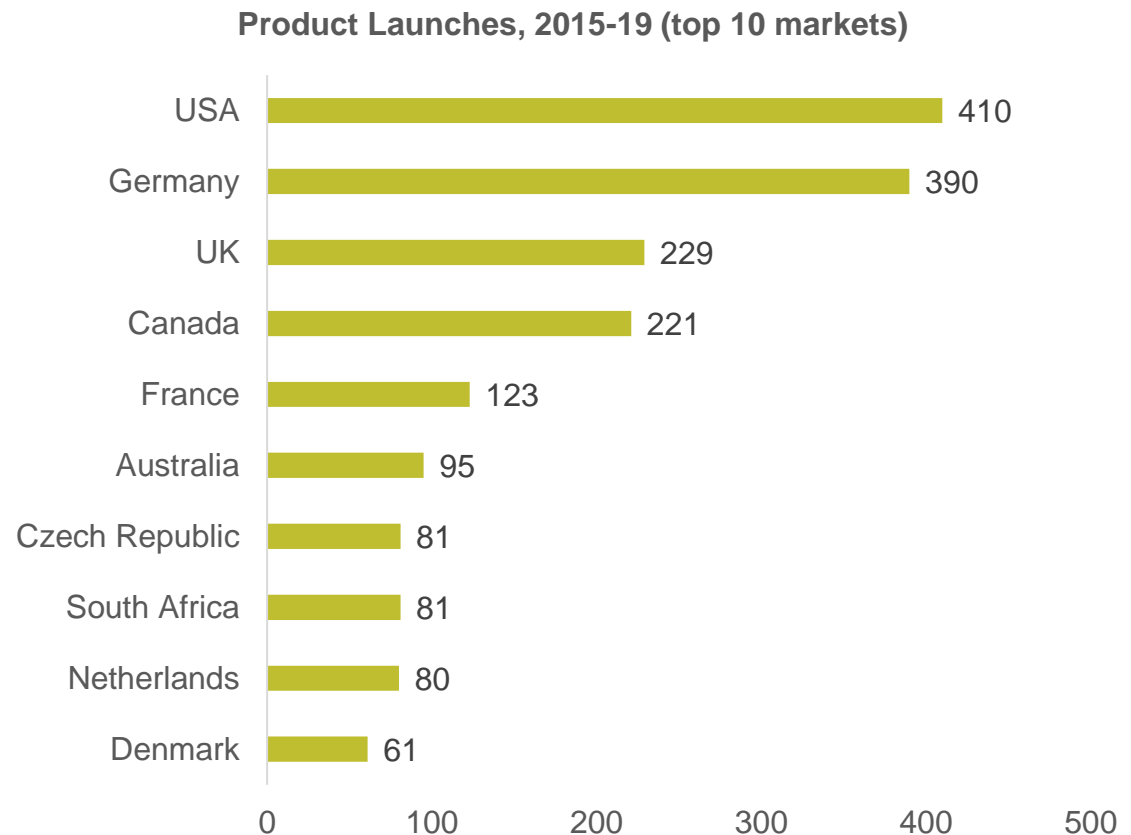
An overview of the key markets for hemp products worldwide.



## Product Launches by Market

### USA and Germany dominate in terms of product launches

- The USA and Germany are the most developed markets in terms of the number of products launched that contain hemp (no CBD).
- Five European markets (and UK) are inside the top ten, with large English speaking markets such as USA Canada and Australia making up the rest.
- Given South Africa's relative distance from other markets, this might be a challenging one to target.

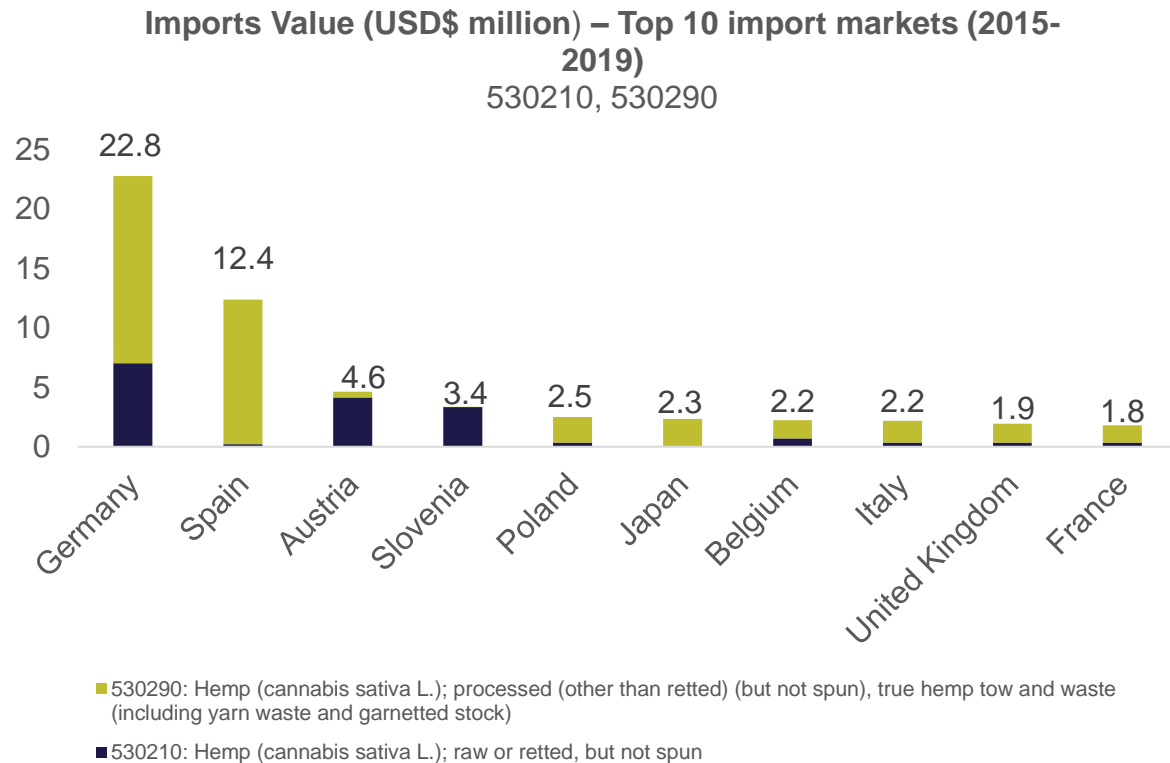


## Imports by Market

### Germany imports almost double that of the next largest market

- Germany is the largest importer of hemp products worldwide.
- As with Spain (in second place), the majority of imports of hemp fall under the HS code 530290.
- Given that the US is such a large producer of hemp, it perhaps makes sense that Germany is importing so much more given the number of product launches.
- According to [this](#) report from New Frontier Data, the US mostly imports Hemp Seeds and Hemp Seed Oil Cake and other residues (see note below)

*Note: 1207990320: Hemp Seeds Whether or Not Broken, 1515908010: Hemp Oil Nesoi Wether/nt Refined Nt Chem Modified and 2306900130: Hemp Seed Oilcake & Other Solid Residues are not included in this calculation as our sources cannot supply this level of granularity.*



Source: UN Comtrade, *Trade Data*, 2015-2019  
New Frontier Data, *How Much Hemp Does the US Import Every Year?*, 2019

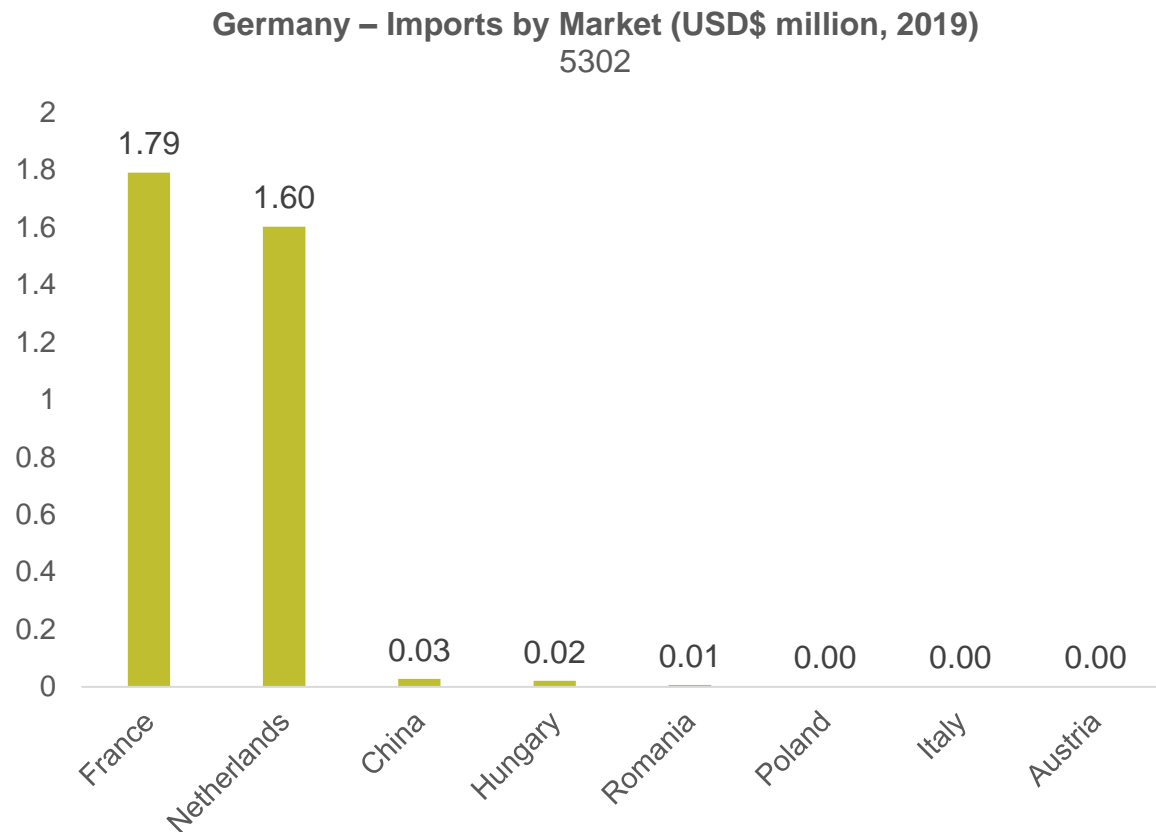


## Germany's Imports by Market

France and Netherlands are Germany's main partners by significant margins

- Both France and Netherlands exported over 1.5 million USD of product to Germany under the HS code 5302 in 2019.
- This covers almost all of Germany's imports in the category.

*Note: HS5302 is defined as: True Hemp, raw or processed but not spun; tow and waste of true hemp including yarn waste and garneted stock.*

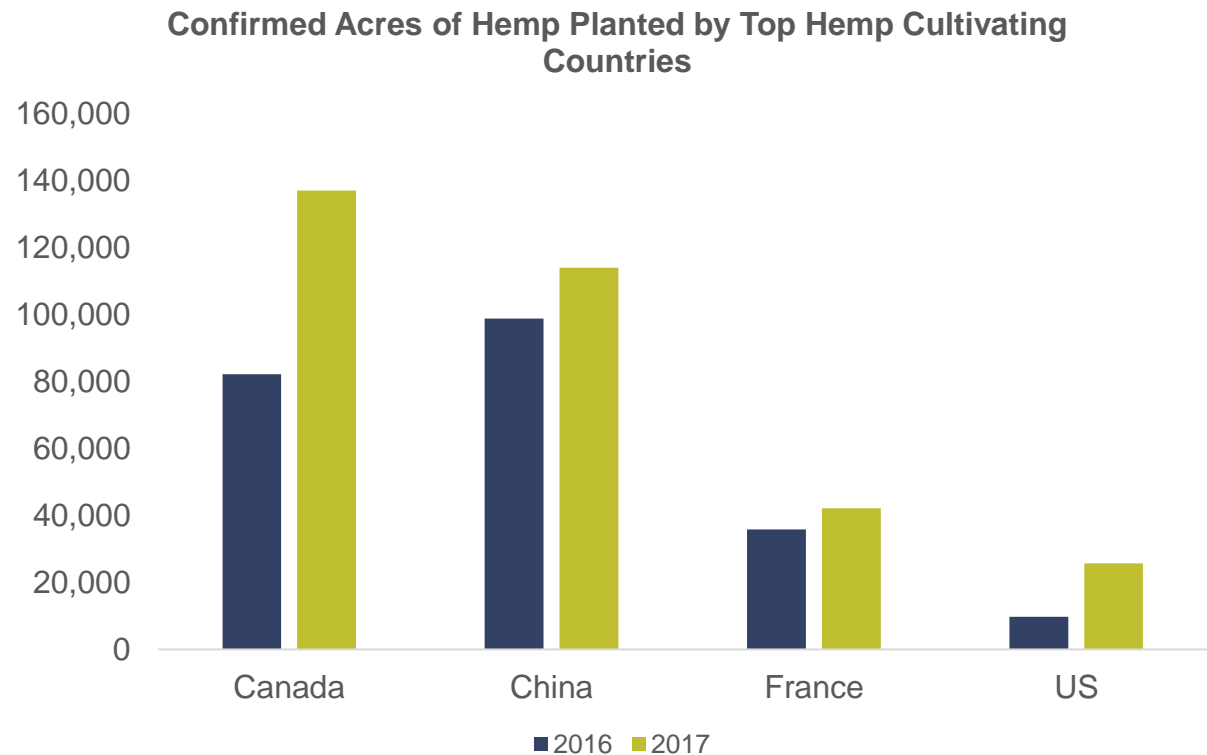


Source: UN Comtrade, Trade Data, 2019

## Hemp Production by Top Cultivating Countries

### Canada and China dominate in production terms

- In November 2019, Statista reported on this chart showing the acres of planted hemp by main markets.
- This shows that Canada dominated in 2017 but China planted nearly the same amount as Canada across the two years, despite hemp being something of a contentious issue in Chinese culture.
- The Wall Street Journal reported in 2019 that Marijuana is considered serious but the interest in CBD has encouraged China to up its production of hemp. In 2018, the production of hemp in China was larger than the US and the entirety of Europe – representing 11% of worldwide production.



Source: Statista, *Chart of the Day: Where Hemp Production Blooms, 2019* (sources in image)

## Product Analysis

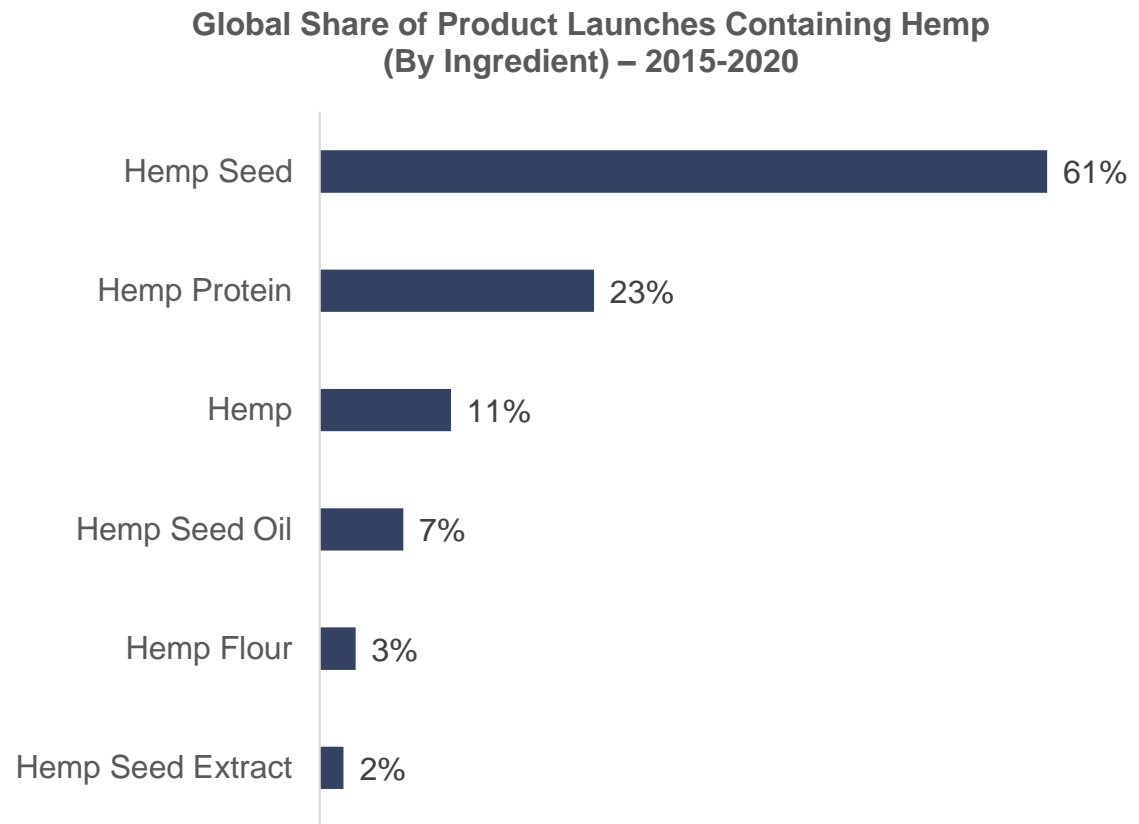
Overview of claims and  
product examples



## Product Launches by Ingredient - Global

### Hemp Seed is the most common ingredient in products containing hemp

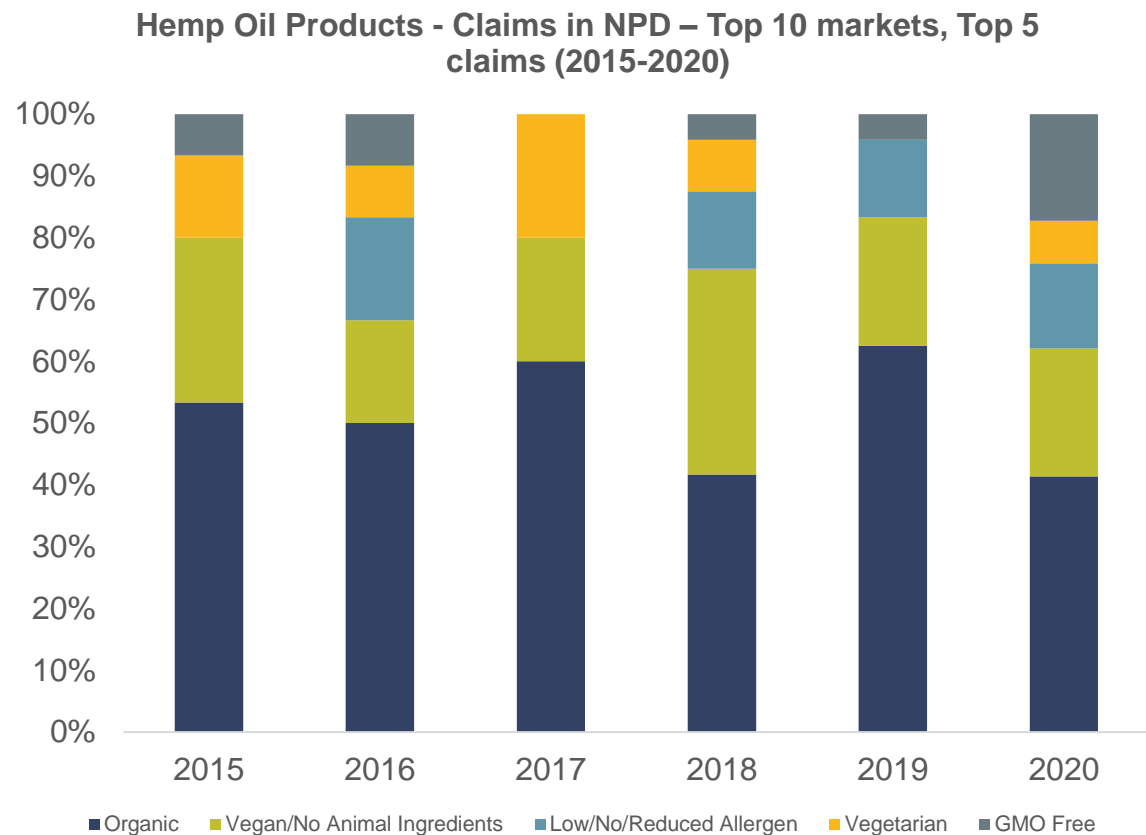
- Looking at the worldwide picture, hemp product launches (excluding cannabidiols) are dominated by whole Hemp Seed, which represents around two thirds of the products launched.
- Hemp Protein is present in around 23% of launches.
- Hemp Seed Oil is still relatively rare as an ingredient, in 7% of product launches in this category.



## Claims (Top 10 markets) – Hemp Oil

“Organic” is most important, with “Vegan” and “GMO Free” gaining share

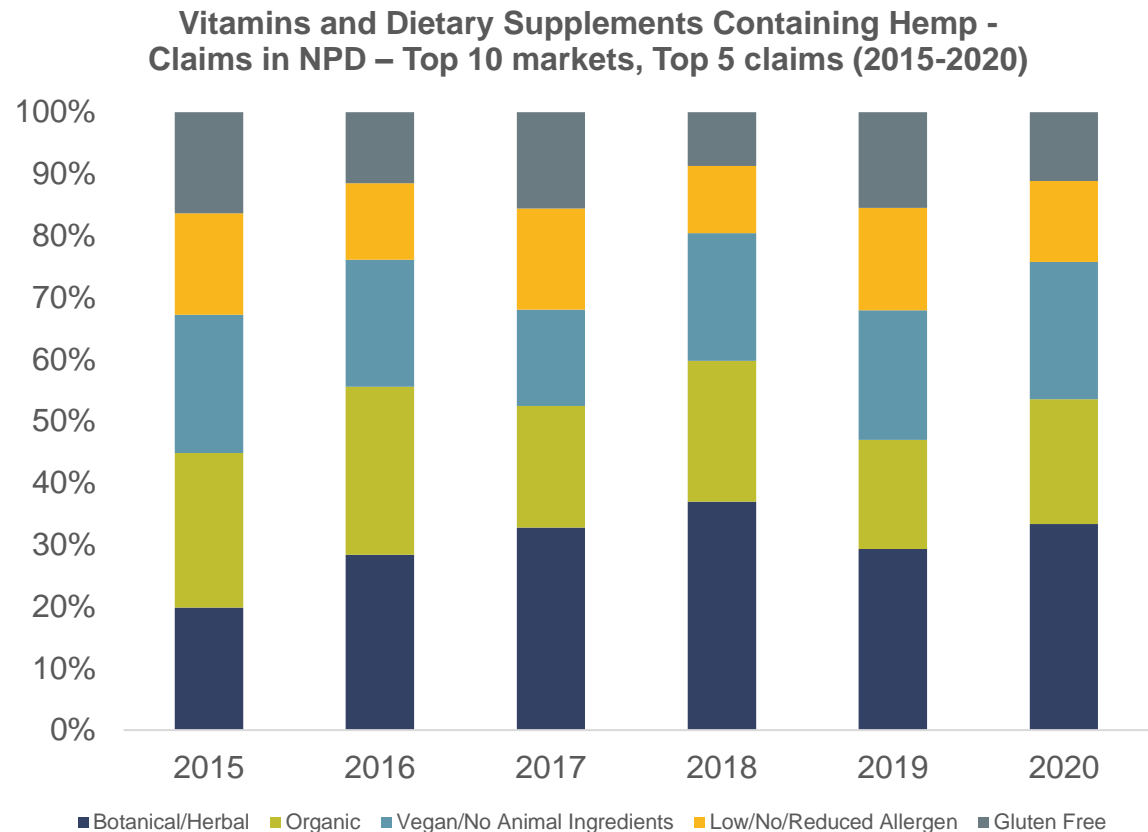
- “Organic” is by far the most used claim in the Hemp Oils category across the top ten markets, with 60 of 116 products displaying this claim.
- The majority of these are certified organic but some appear not to display the certification.
- Developed markets will be subject to varying levels of scrutiny in terms of organic accreditation.
- Of the 116 products launched 2015-2020, 68 have claims, showcasing just how important “Organic” is to the category.
- “Vegan/No Animal Ingredients” is on an upwards trajectory, with “GMO Free” claims experiencing a sudden uptick in 2020.



## Claims (Top 10 markets) – Vitamins and Dietary Supplements

“Botanical/Herbal” is the most common claim, followed by “Organic”

- In the Vitamins and Dietary Supplements segment, “Botanical/Herbal” and “Organic” are popular claims for products containing hemp.
- This is a point of difference for hemp-based products in the category, with naturally derived products seen as an alternative to synthetic medicines.
- The prevalence of “Vegan/No Animal. Products with vegan casings could outperform those without in certain markets.

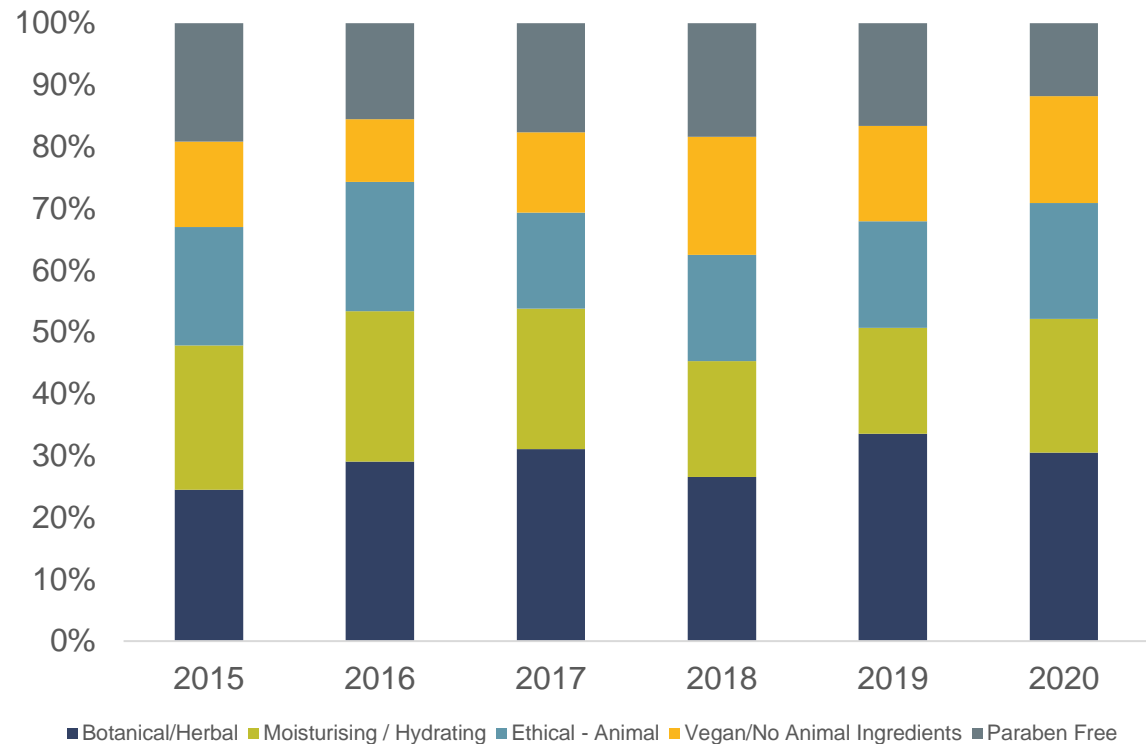


## Claims (Top 10 markets) – Skincare

“Botanical/Herbal” is the most common claim, followed by functional claims

- Skincare is a category that generally relies on functional claims to aid consumer understanding, combined with value-added claims.
- “Botanical/Herbal” dominates here when looking at skincare products containing hemp, even more frequently used than the functional claim “Moisturising/Hydrating”.
- Unlike in the other categories, ethical claims around animal testing and ingredients are also commonly used.

Skincare Products Containing Hemp - Claims in NPD – Top 10 markets, Top 5 claims (2015-2020)



## Consumer Insight

Usage, understanding and curiosity in the US surrounding hemp and CBD.

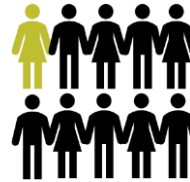




## Usage, Understanding and Curiosity in the US

### Clear messaging required to help consumers navigate the market

- Mintel conducted a survey in the US that suggests that hemp-producers must work to cultivate an identity separate to cannabis.
- Many hemp products contain images of cannabis leaves on pack which can be polarising, potentially off-putting to consumers who do not understand the differences between CBD and hemp.
- This lack of understanding is likely to be further emphasised in less developed markets.
- Clear messaging on pack will be especially important in this category.



**53%**

of US adults do not know the difference between CBD and hemp



**10%**

of US consumers have consumed hemp-derived ingredients (seeds, oil, milk – excludes CBD)

**32%**

of US consumers are interested in hemp dairy alternatives



## Product Examples

A snapshot of competitor products across hemp oils, supplements and skincare



## Product Examples – Cooking Oils



•**Company** Haugen-Gruppen, Denmark

•**Brand** Green Choice

•**Market** Denmark

•**Launch Type** New Variety/Range Extension

•**Storage** Shelf stable

•**Price** DKK 49.95 / \$7.99 / €6.71

•**Price per 100 g/ml** DKK 19.98 / \$3.20 / €2.68

•**Pack Size** 250ml / 250ml

•**Date Published** Sep 2020

### Product Description

Green Choice Økologisk Koldpresset Hampefrøolie (Organic Cold-Pressed Hemp Seed Oil) has been added to the range. This product is said to have a mild taste with hints of hazelnut and can be used for salads and soups, or for cosmetic use. It is rich in omega-3 fatty acids and omega-6 fatty acids, and retails in a 250ml bottle featuring the EU Green Leaf and Green Keyhole logos.

### Positioning Claims

Organic



•**Company** Les Chanvres de l'Atlantique, France

•**Brand** Nunt-I Sunya

•**Market** France

•**Launch Type** Relaunch

•**Storage** Shelf stable

•**Price** €10.12 / \$11.94

•**Price per 100 g/ml** €4.05 / \$4.78

•**Pack Size** 250ml

•**Date Published** Sep 2020

### Product Description

Nunt-I Sunya Huile de Chanvre (Hemp Oil), previously Nunt-I Sunya, has been relaunched under a new brand name and in a newly designed pack. This organic cold-pressed product is rich in omega 3 and 6 essential fatty acids, featuring alpha-linolenic acid, which helps maintain cholesterol levels in the blood, and linoleic acid, which helps maintain normal cholesterolemia. It is a source of vitamin E, a powerful antioxidant, and a source of minerals such as iron, magnesium, phosphorus and calcium.

### Positioning Claims

Antioxidant, Functional - Cardiovascular, GMO Free, Gluten Free, Low/No/Reduced Allergen, Low/No/Reduced Lactose, No Additives/Preservatives, Organic, Vegan/No Animal Ingredients, Vegetarian

## Product Examples – Cooking Oils



- **Company** Intenson Europe, Poland
- **Brand** Intenson Bio
- **Market** Poland
- **Launch Type** New Product
- **Storage** Shelf stable
- **Price** PLN 27.49 / \$7.46 / €6.26
- **Price per 100 g/ml** PLN 11.00 / \$2.98 / €2.50
- **Pack Size** 250.000 ml / 250.000 ml
- **Date Published** Sep 2020

### Product Description

Intenson Bio Olej z Nasion Konopi (Hemp Seed Oil) is now available. The organic, cold pressed product has high content of and polyunsaturated fats and vitamin E that is claimed to help to protect cells against oxidative stress. It can be eaten cold, or as an addition to salads and cooked vegetables, is suitable for vegetarians and vegans, and retails in a 250ml pack featuring the EU Green Leaf logo.

### Positioning Claims

Antioxidant, Organic, Vegan/No Animal Ingredients, Vegetarian



- **Company** Chiron, Germany
- **Brand** Chiron Natur Delikatessen
- **Market** Germany NOT IMPORTED
- **Launch Type** New Product
- **Storage** Shelf stable
- **Price** €7.80 / \$8.93
- **Price per 100 g/ml** €3.12 / \$3.57
- **Pack Size** 250.000 ml / 250.000 ml
- **Date Published** Mar 2019

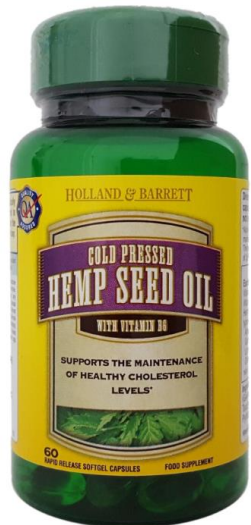
### Product Description

Chiron Natur Delikatessen Bio Kaltgepresstes Hanföl (Organic Cold-Pressed Hemp Oil) is now available. The 100% pure cold-pressed hemp oil is said to have a subtle nutty taste and is recommended for cold cooking and light steaming. The vegan product is rich in omega-3 and retails in a 250ml bottle, bearing the EU Green Leaf logo.

### Positioning Claims

Organic, Vegan/No Animal Ingredients

## Product Examples - Supplements



- Company** Holland & Barrett Retail, UK
- Brand** Holland & Barrett PRIVATE LABEL
- Market** UK
- Launch Type** New Variety/Range Extension
- Price** £5.99 / \$7.46 / €6.82
- Date Published** Apr 2020

### Product Description

Holland & Barrett Cold Pressed Hemp Seed Oil Food Supplement with Vitamin B6 is said to support the maintenance of healthy cholesterol levels, while vitamin B6 contributes to the regulation of hormonal activity. The product is free from artificial colours, flavours, preservatives, added sugar, sweetener, salt, corn, porcine and yeast, and retails in a pack containing 60 rapid release softgel capsules.

### Positioning Claims

Botanical/Herbal, Functional - Cardiovascular, Functional - Other, No Added Sugar, No Additives/Preservatives, Time/Speed



- Company** PPHU Mipama, Poland
- Brand** Diet-Food
- Market** Poland
- Launch Type** New Product
- Price** PLN 26.18 / \$6.97 / €5.89
- Price per 100 g/ml** PLN 13.09 / \$3.49 / €2.95
- Pack Size** 200g / 200g
- Date Published** Sep 2020

### Product Description

Diet-Food Bio Bialko Konopne (Organic Hemp Protein) is now available. This organic, unmodified product comes from unpolluted rural environment, is cultivated by manufacturer's suppliers in unspoilt rural areas, thus providing a check on the conditions of growth and ensuring that hemp is free from contamination. It features over 50% proteins, which are claimed to be necessary for building muscles, and contains more omega 3 fatty acids than olive oil.

### Positioning Claims

Botanical/Herbal, Functional - Cardiovascular, Functional - Weight & Muscle Gain, High/Added Protein, Low/No/Reduced Carb, Low/No/Reduced Fat, Low/Reduced Sugar, Organic, Vegan/No Animal Ingredients, Vegetarian

## Product Examples - Supplements



- Company** JuiceDelivery, USA
- Brand** Sol-ti HEMP+SuperShot
- Market** USA
- Launch Type** Relaunch
- Storage** Chilled
- Price** \$3.99 / €3.68
- Price per 100 g/ml** \$6.75 / €6.22
- Pack Size** 2.000 fl. oz (US) / 59.150 ml
- Date Published** Feb 2020

### Product Description

Sol-ti HEMP+SuperShot Hemp and Turmeric Herbal Supplement has been relaunched with a new brand name previously available under the Sol-ti Wellness Shot and a new 2-fl. oz. sustainable glass bottle, featuring the USDA Organic and 1% Permaculture Planet logos. The vegan and USDA Organic product contains 30mg hemp, is pressed fresh in San Diego, California, by ensuring the liquid is never frozen and never pasteurized, and is packed with curcumin, derived from freshly pressed turmeric.

### Positioning Claims

Ethical - Charity, Ethical - Environmentally Friendly Package, Ethical - Sustainable (Habitat/Resources), Organic, Vegan/No Animal Ingredients



- Company** Vitality CBD, UK
- Brand** Vitality CBD
- Market** UK
- Launch Type** New Product
- Price** £14.39 / \$18.82 / €16.85
- Date Published** Jan 2020

### Product Description

Vitality CBD Raspberry & Orange Flavours Gummy Bears contain 5mg CBD per gummy. This food supplement with sugars is made from organically-grown hemp and is said to be a great way to take a daily CBD dose. It contains natural CBD, no THC and is non-psychoactive. This product retails in a pack with 40 units.

### Positioning Claims

Botanical/Herbal, Organic

## Product Examples - Skincare



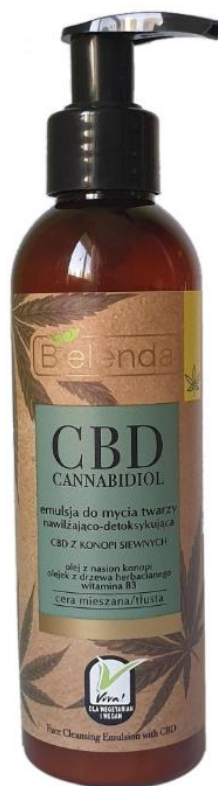
- Company** The Body Shop, UK
- Brand** The Body Shop Hemp PRIVATE LABEL
- Market** Hungary IMPORTED PRODUCT
- Launch Type** New Product
- Price** HUF 3990.00 / \$13.11 / €11.07
- Price per 100 g/ml** HUF 3990.00 / \$13.11 / €11.07
- Pack Size** 100.000 ml / 100.000 ml
- Date Published** Sep 2020
- Location of Manufacture** UK

### Product Description

The Body Shop Hemp Kendermagolajos Lábvaj (Hard-Working Foot Protector) is said to offer expert care for ultra dry feet. The dermatologically tested cream contains hemp seed oil from France, said to smooth, soften, hydrate and protect ultra dry feet and hard skin. It retails in a 100ml pack. The company is against animal testing.

### Positioning Claims

Botanical/Herbal, Dermatologically Tested, Ethical - Animal, Moisturising / Hydrating



- Company** Bielenda, Poland
- Brand** Bielenda CBD Cannabidiol
- Market** Romania IMPORTED PRODUCT
- Launch Type** New Product
- Price** RON 32.99 / \$8.04 / €6.81
- Price per 100 g/ml** RON 18.85 / \$4.59 / €3.89
- Pack Size** 175.000 g / 175.000 g
- Date Published** Sep 2020
- Location of Manufacture** Poland

### Product Description

Bielenda CBD Cannabidiol Emulsie de Curatare a Fetei (Moisturising & Detoxifying Face Cleansing Emulsion with CBD) features a mild vegan formula enriched with vitamin B3 and hemp seed oil, designed to effectively cleanse and refresh the skin, and a light and creamy texture to provide daily care for combination and oily skin. The product contains acne fighting ingredients, such as CBD and tea tree oil, and is claimed to cleanse and detoxify, while delivering a soft and fresh skin appearance. It has been dermatologically tested, and retails in a 175g pack, bearing the Viva! For Vegetarians and Vegans logo and the ISO 9001 and 14001 standards.

### Positioning Claims

Anti-Acne, Botanical/Herbal, Cleansing, Dermatologically Tested, Ethical - Environmentally Friendly Product, Moisturising / Hydrating, Skin Disorders, Vegan/No Animal Ingredients, Vegetarian, Vitamin/Mineral Fortified

## Product Examples - Skincare



- **Company** Garnier, France
- **Brand** Garnier Organic Restoring Hemp
- **Market** UK IMPORTED PRODUCT
- **Launch Type** New Product
- **Price** £7.99 / \$10.32 / €8.72
- **Price per 100 g/ml** £15.98 / \$20.64 / €17.44
- **Pack Size** 50.000 ml / 50.000 ml
- **Date Published** Sep 2020

### Product Description

Garnier Organic products are made with selected herbs and essential oils for every skin type, as well as ingredients formulated in efficient and indulging organic certified products for results that you can see and feel. The Restoring Hemp sub-range contains organic hemp seed oil, obtained by cold processing the seeds in Germany without dilution to get the purest extract, rich in fatty acids, omega 3 and 6. It is grown in Europe and harvested in autumn at the most potent moment of its life cycle, full of restoring and nourishing properties. Included is Multi-Restore Gel Cream, which is enriched with vitamin E, and claimed to target signs of stressed, dry and sensitive skin caused by daily stresses such as harsh weather, pollution and lack of sleep. According to the manufacturer, it soothes, hydrates and plumps fine lines with moisture. The dermatologically-tested and vegan product is suitable for sensitive skin, contains 23% organic ingredients as well as 98% natural origin ingredients. It retails in a 50ml pack, made with recyclable, FSC-certified cardboard, tube with 49% less plastic and lighter cap, bearing the Cosmos Organic Soil Association logo and a Data Matrix code

### Claims

Anti-Ageing, Botanical/Herbal, Dermatologically Tested, Ethical - Environmentally Friendly Package, Ethical - Recycling, Ethical - Sustainable (Habitat/Resources), For Sensitive Skin, Moisturising / Hydrating, Organic, Plumping, Reduces Fine Lines / Wrinkles, Vegan/No Animal Ingredients, Vitamin/Mineral Fortified





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We provide customised services and support to ambitious businesses looking to go global. We help them build their capability, boost their global reach, connect to other businesses and invest in their growth. We also connect international investors with opportunities in New Zealand through a global network of investment advisors.

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