



Cannabis and hemp in Africa – challenges and opportunities

Prof David Katerere



ESTIMATED CANNABIS MARKET VALUE BY 2023

US\$900M
MOROCCO

US\$3.7B
NIGERIA

ZIMBABWE
US\$80M


US\$1.7B
SOUTH AFRICA

US\$90M
LESOTHO

DOWNLOAD THE AFRICAN CANNABIS REPORT™ NOW ↗

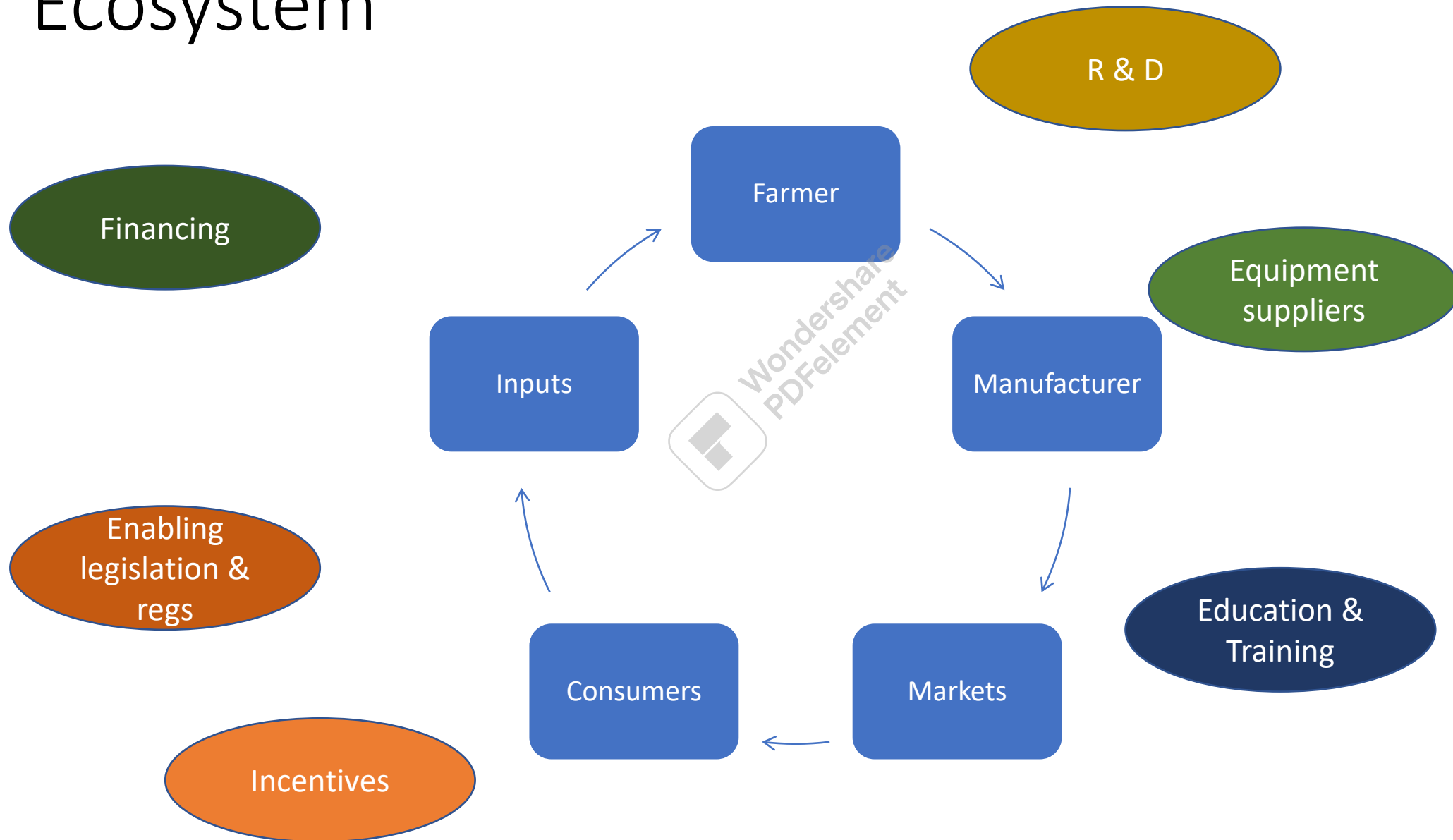


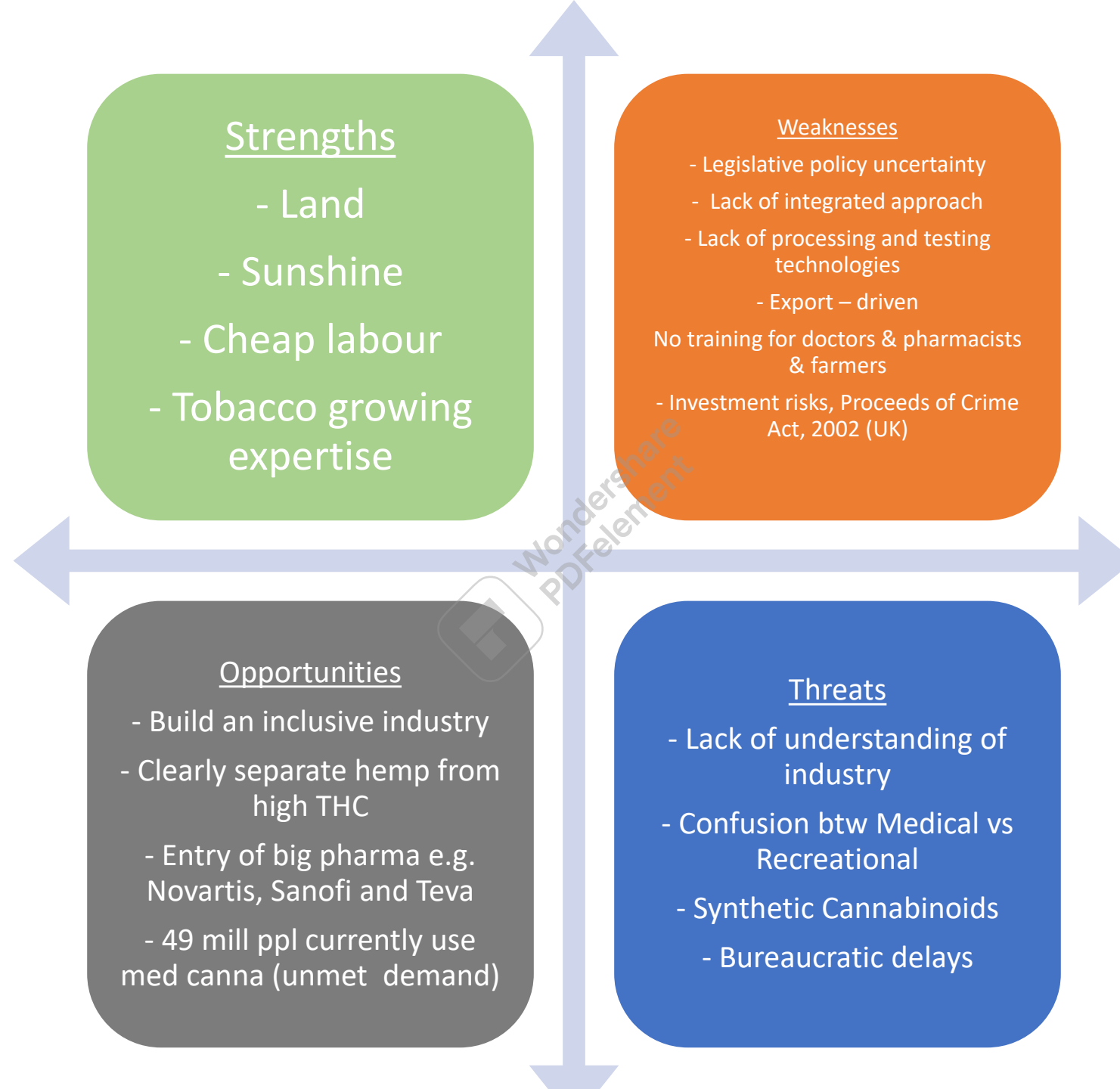
Licensing at a glance



	Medical Cannabis	Hemp	THC limit for hemp
Lesotho	149 (25 renewed)		Not specified
Malawi	40 (10 active)		1%
South Africa	80	10 (50 ha max)	0,2%
Zimbabwe	59	39 (no special conditions)	0,3%
Rwanda	new		
Uganda	2		

Ecosystem





PRE-PRODUCT LEVEL

Making government proposals

Financial plans for investors

Project feasibility reports

Regulatory landscape & forecasts

Minimum Viable Product (MVP) as an entry point

Product evolution for the next 5 years

Identifying customer classes (export in this case)

Forecasted sales & return on Investment

PRODUCT LEVEL

Facility Design & Planning

Cultivation & Green House Planning

Material Flow Planning

Equipment Specification

Documentation and tracking traceability

Case study – South Africa



CBD Oil in South Africa Is Av...
cbdstore.co.za



NuCare CBD Oil 600mg 3...
takealot.com



Extract 500mg Premium
takealot.com



NATIONAL CANNABIS MASTER PLAN FRAMEWORK

The Master Plan is aimed at providing a framework for the establishment, growth and development of the Cannabis industry in South Africa in order to contribute to economic growth, poverty alleviation and job creation

OBJECTIVES

- Increase the volumes and variety of Cannabis products destined for both local and export markets.
- Establish and increase the capacity of South African farmers to produce dagga and hemp
- Create opportunities for creation of small and medium size enterprises across the Cannabis value chain.
- Replace imported Cannabis products with locally produced products.
- Increase investments in research and technology development to support increased production, productivity and competitiveness of the Cannabis industry.
- Establish and increase the manufacturing capacity of the South African Cannabis industry.
- Development and maintenance of an effective regulatory system by strengthening law enforcement measures to deter the production, manufacturing and sale of Cannabis outside the legal framework.

**1. EFFECTIVE
REGULATORY
SYSTEMS**

**2. SUSTAINABLE
SEED SUPPLY
SYSTEMS**

**3. RESEARCH AND
TECHNOLOGY
DEVELOPMENT**

**4. SUSTAINABLE
PRODUCER
SUPPORT SYSTEMS**

**5. MARKET
DEVELOPMENT**

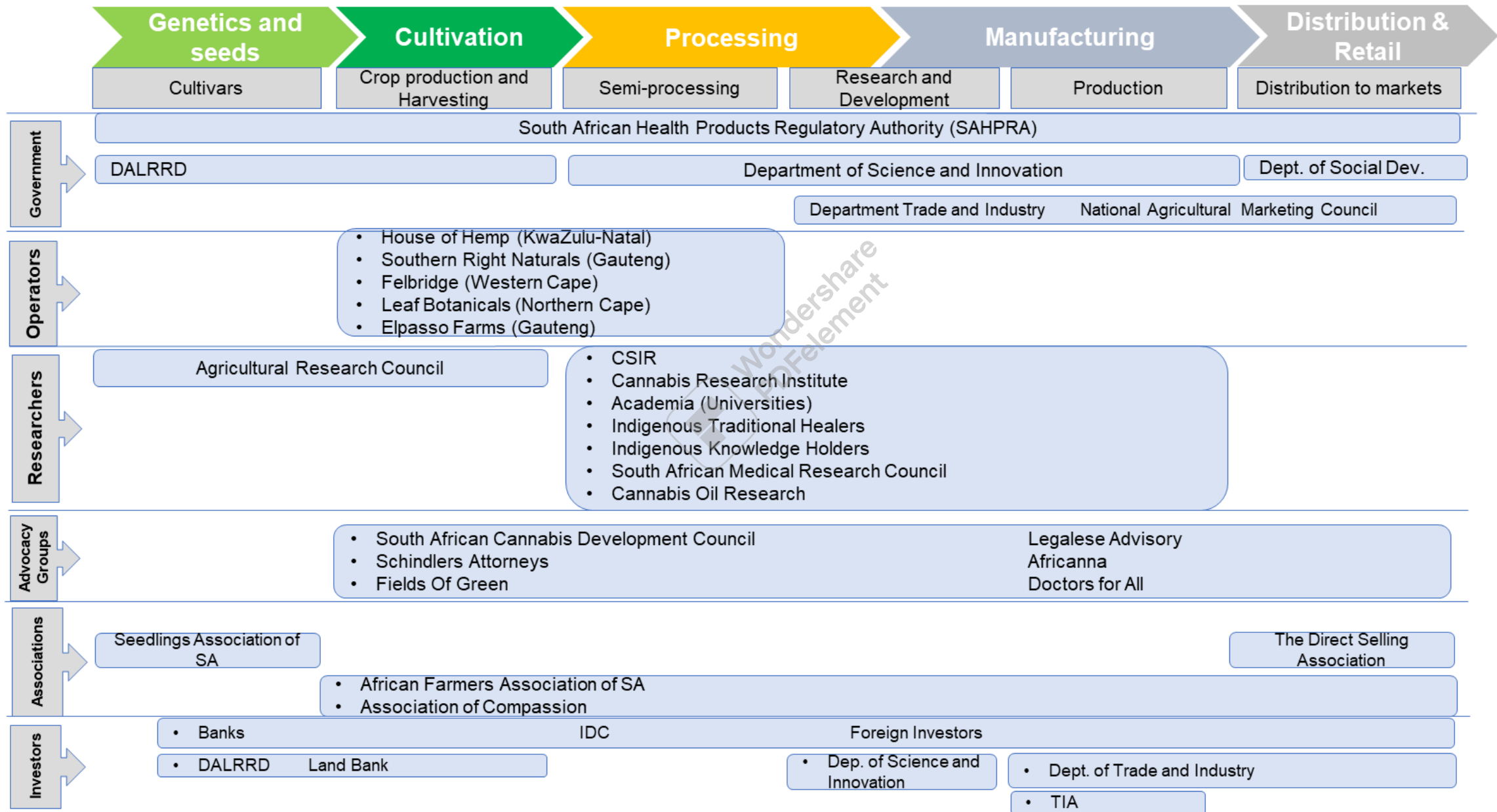
**6. SUPPLIER
DEVELOPMENT
SYSTEMS**

**7.
MANUFACTURING
AND PRODUCT
DEVELOPMENT**

8. EDUCATION AND TRAINING

9. COMMUNICATION AND AWARENESS

Stakeholders



Sector challenges

- Legislative restrictions
- Negative public perception
- Proliferation of illegal products of cannabis
- High entry barriers, esp for medicinal cannabis
- Seed supply
- Mainstreaming of previously marginalized (illegal) rural poor
- Cost of technology – growing, processing, extraction

Guidelines

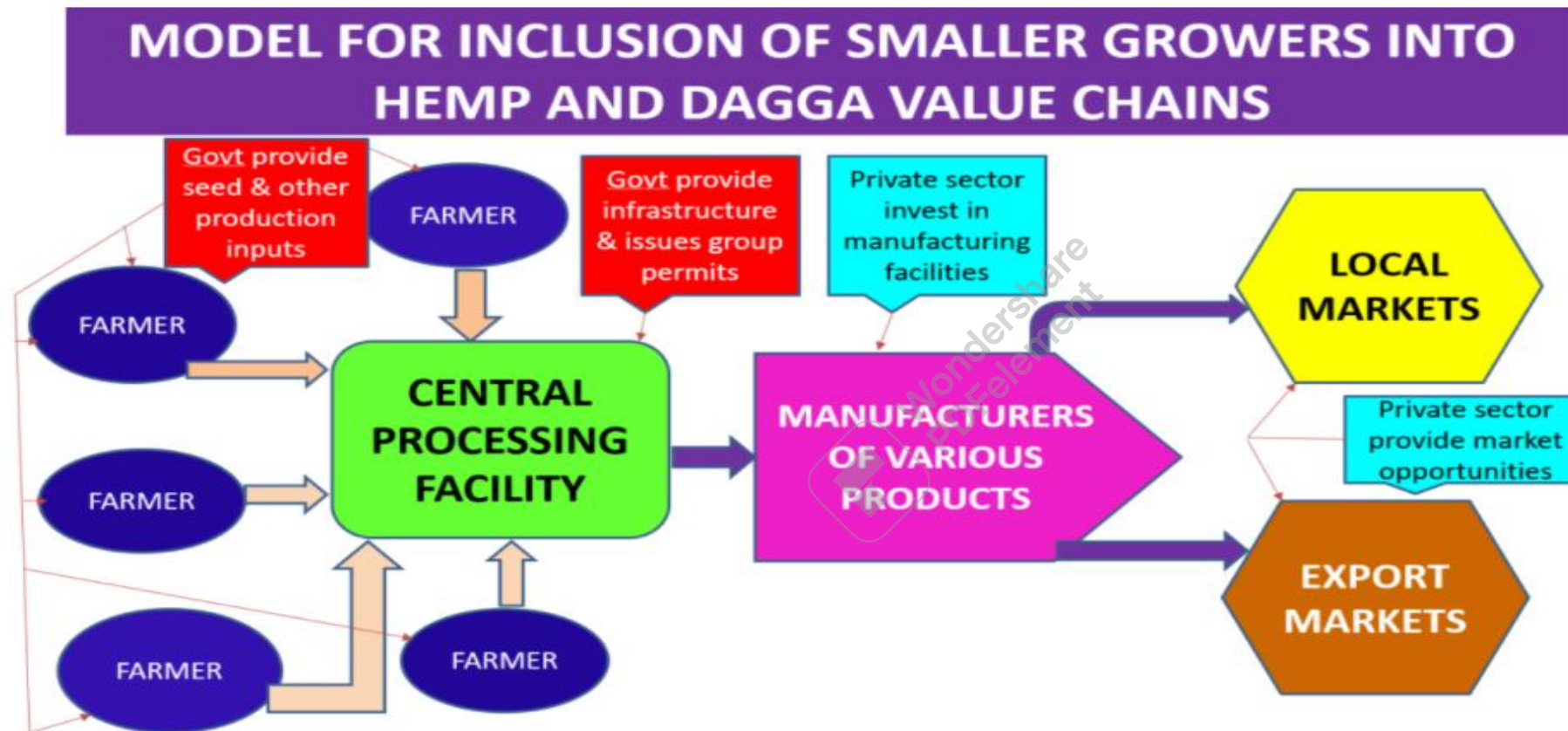
- HP-GD-001 Guidelines for Hemp
- HP-GD-002 Hemp Permit Conditions
- HP-GD-003 Hemp Permit Conditions for Breeding Research
- HP-GD-004 Hemp Permit Conditions for Sale of Material
- HP-GD-005 Hemp Permit Conditions for Cultivation
- HP-GD-006 Hemp Permit Conditions for Cleaning
- HP-GD-007 Hemp Permit Conditions for Export
- Hemp Tariffs - 2021 - 2022.

Application Forms

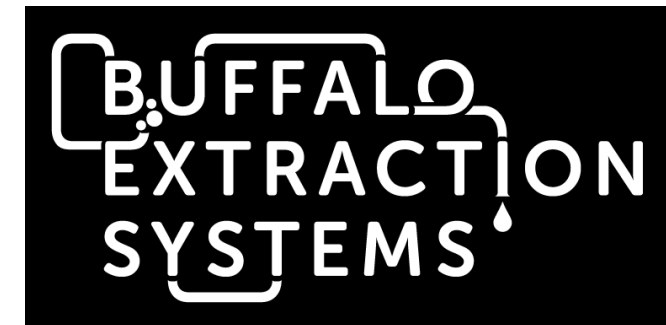
- HP-Form-001 Application Form for Hemp Permit
- HP-Form-003 Application Form for Import of Hemp Varieties
- HP-Form-005 Application Authorisation for Locally Bred Unlisted Hemp Varieties
- HP-Form-006 Transport Declaration for Hemp
- HP-Form-007 Notification of Planting of Hemp.

Model For Inclusion of Small Growers in the Value Chain

75
YEAR
ANNIVERSARY



Towards a technology centre...



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Local news

TUT and CSIR establish cannabis research hub

"Hemp and cannabis are included in the scope of the master plan, covering medicinal industrial and recreational use, cosmetics, food and beverages.

July 18, 2022



Tebogo Katsedi

2 minutes read



Super Critical Fluid CO2 extraction equipment

Primary Extraction Systems

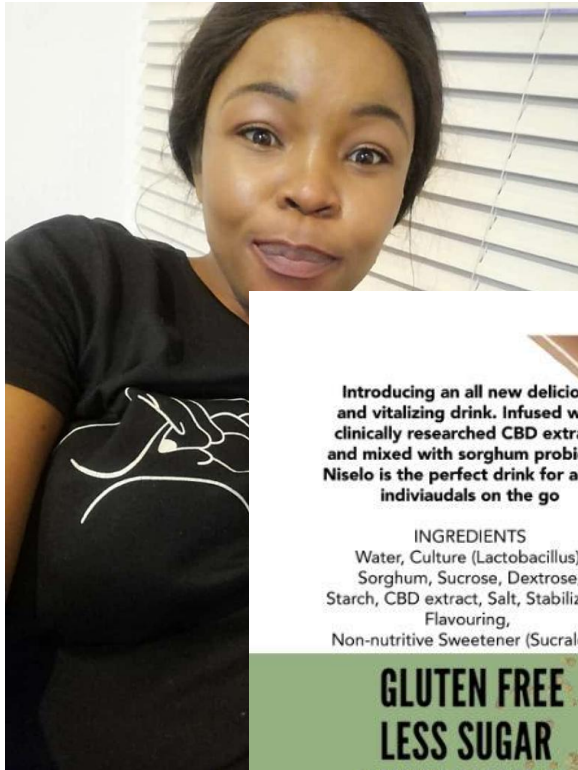


Super-critical CO2 extraction Systems



Knowledge sharing & translation

SDG2 – Zero Hunger



Introducing an all new delicious and vitalizing drink. Infused with clinically researched CBD extract and mixed with sorghum probiotic. Niselo is the perfect drink for active individuals on the go

INGREDIENTS
Water, Culture (Lactobacillus), Sorghum, Sucrose, Dextrose, Starch, CBD extract, Salt, Stabilizers, Flavouring, Non-nutritive Sweetener (Sucralose)

**GLUTEN FREE
LESS SUGAR
VHUTIMLILO**

**niselo
ACTIVE**
sorghum and CBD infusion

330ml

PROUDLY SOUTH AFRICAN

Typical Nutritional Information:

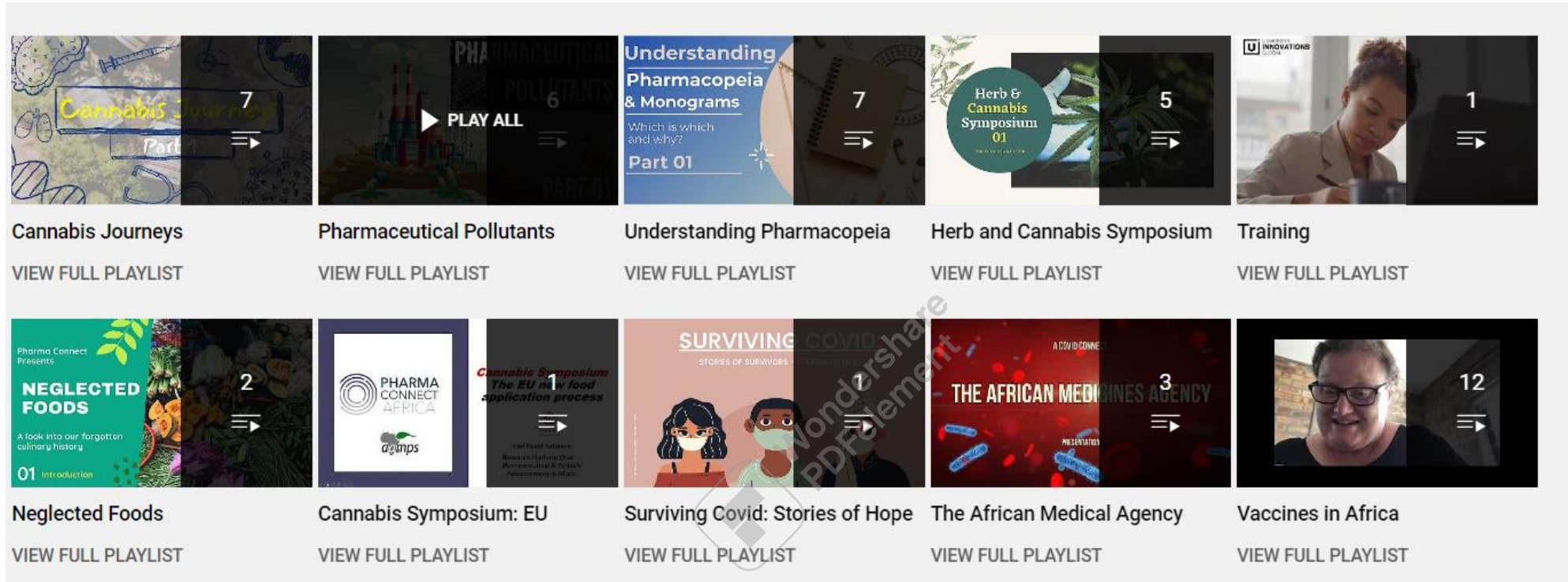
NUTRIENT	UNIT OF MEASURE	PER 100 ML	PER 250 ML PORTION
Energy	kJ	169	373
Protein	g	1.0	2.5
Glycemic Carbohydrate	g	7	18
Total Fat	g	0.2	0.5
Dietary Fibre	g	1.3	3
Total Sodium	mg	46	115

Source of data - actual laboratory analysis.
* As measured by AOAC 985.29. Total dietary fibre in foods.

Nutritica SA
Packaged at:
Hiuzen Kaas en Produkte
Posbus 11262
Tiegerpoort 0056

REFRIGERATE AFTER OPENING,
REPLACE CAP,
DRINK WITHIN 3 DAYS OF OPENING

0 781718 012942



Youtube channel – Connect Conversations Africa

<https://www.facebook.com/ConnectConversations>

AAMPSAssociation for
African Medicinal Plants Standards

Talking African Plants

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Cannabis and Hemp

Special Issue

AAMPS Newsletter

Highlights

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From the Editor

I have been traversing Southern Africa in the past 2 months trying to understand the nascent industry of an ancient medicine, cannabis. Starting in South Africa at the Cannabis Expo, I drove through with good travelling companions to Maseru in Lesotho.

There we met with local Basotho entrepreneurs hoping to jump onto the cannabis business train. We met with the Minister of Health, who expressed concern that of the nearly 40 licences issued, only about 10 have broken ground and most Basotho are not benefiting apart from leasing their land. We were able to witness the official opening of a R100 million farm in the Berea district and the Lesotho Prime Minister, Hon Majoro echoed the same sentiments.

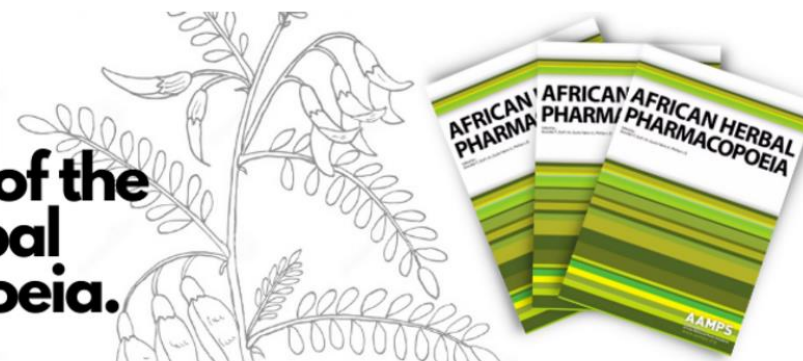
In Zimbabwe we met young and energetic movers and shakers. The landscape seems highly responsive to locals after an initial militarized approach which failed to attract local and international investors. Recently South Africa has also moved to give licences for hemp though the THC limit of 0.02% appears to remain contentious and the agronomy doesn't support it.

We know that cannabis exposed to prolonged sunlight will always produce high THC (that's why the best growers in Canada and Europe invest in good lights and here in Africa we are naturally blessed with high levels of insolation). So cannabis



AAMPS newsletter editor Prof. David Katerere with the Lesotho Minister of Health and AFCANN team

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