

# Australian medicinal cannabis industry strategic export roadmap



**MCIA**

**Medicinal Cannabis Industry Australia**

This factsheet provides background information on the industry's plans to develop a roadmap to support the development of sustainable export markets for the Australian medicinal cannabis industry.

This has been enabled through the support of a grant from the Federal Government's Agricultural Trade and Market Access Cooperation (ATMAC) program through the Department of Agriculture, Fisheries and Forestry.

This grant and the roadmap will support the development of an export strategy and international engagement activities to help the industry build a globally competitive supply chain.

## Background

The Australian medicinal cannabis has grown rapidly since its inception in 2016 and is now seeking to grow its export capability, with a focus on developing the frameworks and capability needed to navigate the new regulatory environment.

The Australian regulatory framework and adherence to globally recognised quality standards has ensured that the industry is well positioned to take advantage of export opportunities. This project will assist in helping develop the Australian industry brand, address much needed knowledge and skill gaps and assist the industry to establish a strong presence on the global stage.

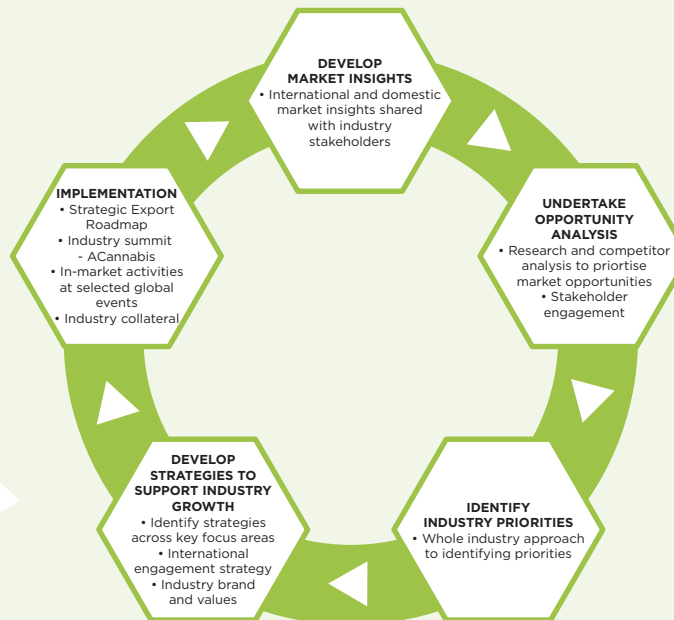
The MCIA in partnership with Global Victoria, has undertaken some export activity to date which along with activities of some medicinal cannabis companies has and continues to grow the industry's export footprint. While this has included a focus to promote Australian medicinal cannabis products globally, the industry lacks a comprehensive export strategy. There is an opportunity to develop a more coordinated export focus and build capability to ensure that the industry can successfully execute.

The industry needs to better understand regulatory and customer requirements and develop a deeper knowledge and understanding of its competitors, global markets, customers, and the rapidly growing and changing global medicinal cannabis market.

The last few years has seen a period of rapid legalisation and normalisation of medicinal cannabis which has created substantial opportunities and challenges. While medicinal cannabis has a complex and evolving regulatory landscape, as patients become more familiar with this new class of medicine, they and partners in the supply chain are increasingly focused on other values such as quality, provenance, sustainability and a transparent supply chains with independent data to verify claims.

For the industry to take full advantage of this changing global market, the time is right for the industry to develop a strategic export market roadmap and build industry market knowledge in key overseas markets.

The report will be presented at an industry summit planned to coincide with ACannabis 2024, Australia's largest dedicated industry event, organised by MCIA. The report and industry summit will allow companies to make informed decisions on market development and investment.



## What is the Roadmap?

MCIA will work with its members and the broader industry to develop a Strategic Export Roadmap for the Australian medicinal cannabis Industry that will provide clear direction for the industry to:

- Establish a position as a leading global supplier of quality products
- Create competitive advantage
- Capitalise on investments in research, innovation and sustainability to create value for the industry
- Ensure industry activities are aligned with regulatory environments and patient needs.

The objective is to develop a Strategic Export Roadmap that:

- Clearly defines the opportunity in the global market
- Identifies strategies and actions for capitalizing on opportunities
- Develops a whole of industry approach to markets
- Develops tools to assist build industry skills and knowledge

MCIA will work with the industry to identify key areas of focus for the roadmap. This could include focus areas such as:

- understanding regulatory environments
- understanding customers and markets
- Importance of and defining values of the Australian medicinal cannabis brand
- industry data
- sustainability

## Why do we need a Roadmap?

The industry has grown rapidly and now has the opportunity to leverage export growth to support industry performance. It is timely for the industry to examine how it is positioned to take advantage of export opportunities and work collectively to develop the industry's brand and values to underpin export activities of medicinal cannabis companies.

The roadmap provides an opportunity to assess whether the industry has the programs and systems in place to deliver high quality products to patients in export markets, understand the needs and drivers in these markets and how Australia compares to its competitors.

These are all important questions that are best answered as the industry collectively.

This project provides the opportunity for the industry to have the conversations needed to effectively position the industry as a leading supplier of medicinal cannabis products. The whole industry will be better placed if we have a clear roadmap for the future that's designed together.

### Outcome:

- Develop a market engagement strategy to build a globally competitive supply chain and capture export opportunities for cultivators and manufacturers.

### Objectives:

- Develop relationships and enhance exports to priority markets through targeted engagement activities
- Develop networks between Australia and priority markets
- Build market intelligence capability
- Identify appropriate commercial partners for the import, warehousing, distribution and marketing of products

## How will the Roadmap be funded?

MCIA has received ATMAC funding from the Australian Government to invest in development of the Strategic Export Roadmap for the Australian medicinal cannabis industry. This will enable MCIA to work with members and the broader industry to facilitate a roadmap owned by the Australian industry.

## How will the Roadmap be developed?

MCIA will lead the development of the Roadmap, with support of external consultants.

Rosemary Richards from Bowman Richards & Associates (BR+A) has been contracted as Project Manager to coordinate the project. Other consultants will be utilised to undertake required research and stakeholder engagement activities.

MCIA will establish an Industry Working Committee to provide advice on the development of the Roadmap.

The project will be undertaken over a number of phases and will include broad stakeholder engagement and industry consultation. A number of workshops will be held to identify and explore the key issues, supported by external/technical input and advice as required. All of industry will have the opportunity to participate through workshops, interviews and surveys.

### PHASE 1 PROJECT PLAN

#### Purpose

- Clarify objectives, consultation plan and approach

#### Activities

- Working group inception meeting
  - Initial information review
  - Stakeholder consultation plan

#### Outcome

- Shared understanding of project objectives and outcomes

### PHASE 2 CURRENT STATUS

#### Purpose

- Identify and agree key focus areas

#### Activities

- Desktop research
- Stakeholder workshops
- Survey and targeted interviews
  - Working group
- Initial report on market knowledge and issues relating to key focus areas

### PHASE 3 DEVELOP ENGAGEMENT STRATEGIES

#### Purpose

- Identify and prioritise strategies

#### Activities

- Review market knowledge report
  - In-market research
- Working group workshop re market and strategic options

#### Outcome

- Agreement on strategic solutions

### PHASE 4 REPORT

#### Purpose

- Develop Australian medicinal cannabis export roadmap

#### Activities

- Consolidate outputs
- Develop roadmap and related industry collateral
- Presentation to working group and industry (ACannabis)

#### Outcome

- Shared knowledge and improved export access for the industry

## What's the timeframe?

<b>September 2023</b>	Industry Workshops and initial meeting of Industry working group
<b>October 2023</b>	Market knowledge report
<b>November 2023</b>	Industry webinar and feedback on Market knowledge report Research phase, stakeholder interviews, industry survey, in-market activities
<b>December 2023</b>	Draft Export Roadmap Strategy
<b>January-April 2024</b>	Industry workshops to test and refine draft strategy including ACannabis industry summit
<b>January-June 2024</b>	In-market activities
<b>June 2024</b>	International Engagement Strategy and initial implementation activities

## More information

This project is managed by Patty Holmes, MCIA Executive Officer and Project Manager Rosemary Richards, Bowman Richards & Associates

Support for the project is being provided by MCIA.

If you have any questions or would like further information please contact:

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