

NEW CONTENDERS

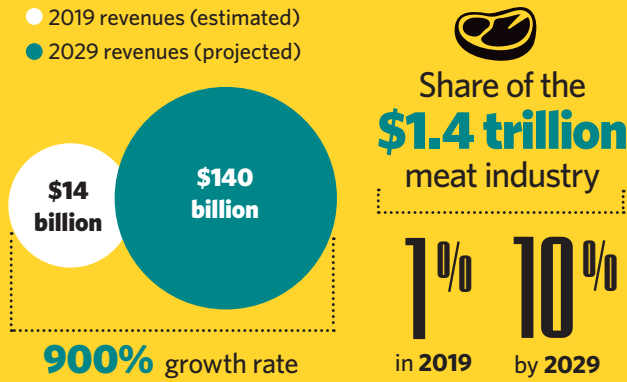
From esports to cannabis to on-demand services, entirely new industries have sprouted in recent years—more proof the business landscape is forever in flux.

PROVING THEIR METTLE

A few years ago, these markets were new and shiny—and untested. They have emerged as serious contenders capable of disrupting long-established industries.

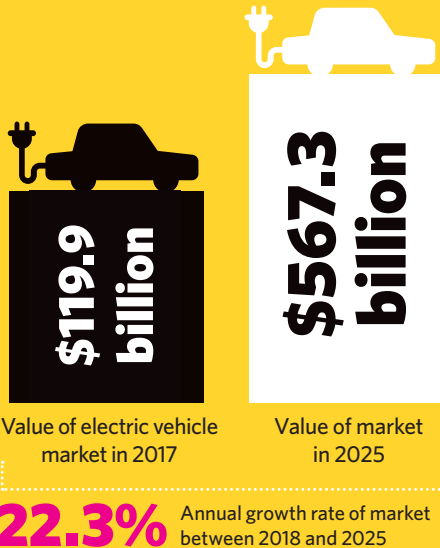
ALTERNATIVE MEAT PRODUCTS

- 2019 revenues (estimated)
- 2029 revenues (projected)



ELECTRIC VEHICLES

5.1 million Size of global electric car fleet in 2018—up 2 million from previous year



ESPORTS

\$1.1 billion

2019 revenues (projected)—the highest ever



Top regional markets in 2019:



2019 revenue streams:



453.8 million

Esports viewers in 2019—15% higher than in 2018 (projected)

ON-DEMAND SERVICES



\$161.7 billion
Global online food delivery market by 2023 (projected)

Asia-Pacific's online food delivery market



in 2017



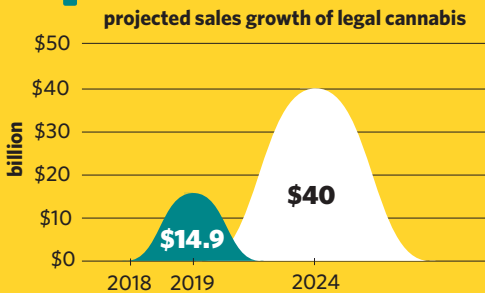
in 2023 (projected)

On-demand home services such as cleaning, laundry and plumbing are projected to grow **\$870 billion** from 2018 to 2022—a **52%** compound annual growth rate

LEGAL CANNABIS



Number of countries where medical cannabis is legal



33% compound annual growth rate outside U.S., 2018-2024

Big business is jumping into the market.

\$1.8 billion

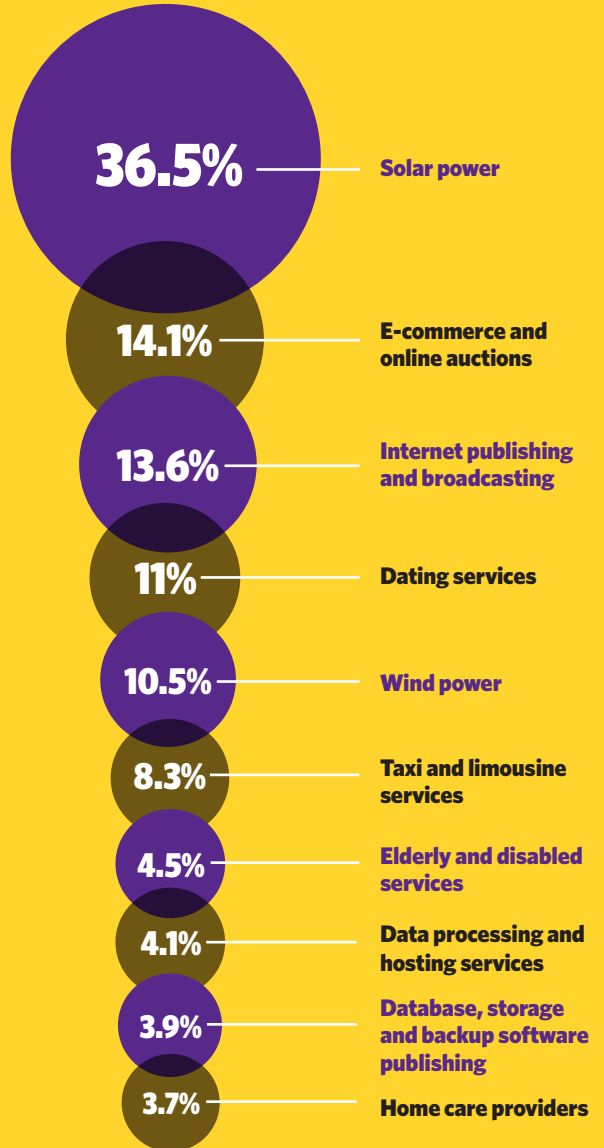
Amount paid in 2018 by **Altria**, the world's largest tobacco company, for a 45% stake in Canadian cannabis producer Cronos

\$4 billion

Amount paid in 2018 by alcohol giant **Constellations Brands** for a 38% stake in Canopy Growth, Canada's largest cannabis company

ON THE FAST TRACK

These are 10 of the fastest-growing* industries in the U.S.:



*All figures percentage growth 2014-2019, except solar and wind power, and elderly and disabled services, which are 2013-2018

Sources: Carving Up the Alternative Meat Market, Barclays, 2019; Electric Vehicle Market by Type ... and Vehicle Type—Global Opportunity Analysis and Industry Forecast, 2018-2025, Allied Market Research, 2019; Cannabis Attracts Big Tobacco, Alcohol, and Pharma, Forbes, 2018; Global Esports Market Report, Newzoo, 2019; Global Online Food Delivery Market, Adroit Market Research, 2019; Global EV Outlook 2019, IEA, 2019; Online On-Demand Home Services Market, Technavio, 2019; State of Legal Cannabis, Arcview Market Research and BDS Analytics, 2019; various market research reports, IBISWorld, 2019