



Hemp market *overview & trends*

February 3rd, 2021

Available data on hemp



Poor data availability

- > need to update the **C**ombined **N**omenclature
- > need to encourage MS to enhance **data collection** and support for EIHA survey
- > need to include hemp in the scope of the **Market Observatory**

Available data on hemp



- Estimations for total surfaces: **55.000 ha** (2020)
- Further increase expected following **EUCJ ruling** and normalisation of the crop
- New interest & investments: Lithuania, Poland, ...
- **Seeds** are the main traded commodity followed by **extracts** and other coproducts – still **minor valorisation of shivs and fibre**

Seeds & extracts



Marketing standards (CMO) **needed**

>> EIHA working on proposals and private standards

Extracts: EUCJ ruling enhanced **market confidence** and investments (especially from food & beverage operators). Allowing the harvesting of the **entirety of the plant** will further enhance sector's performances.

Cosmetics: big brands using hemp (efficacy + sustainability). More opportunities offered by hemp packaging, next-to-skin applications, etc. will further increase hemp appeal.

Seeds & extracts



Feed: interesting nutrition profile but changes in legislative framework needed (update of hemp entries in the feed catalogue)

Seeds for food: raw, decorticated and oil are gaining traction

- important **nutritional** properties (fatty acid best balance),
- plant **protein** locally grown for feed and food,
- great opportunities in vegetarian **processed foods**.

On the market



On the market





Focus area for 2021: greatest **unexploited** potential

Big players in **China** and **India** are investing on fibre transformation facilities because:

- Increase in demand (from US, Europe, elsewhere);
- Established manufacturing industry;
- Big brands have hemp lines.

Mainly **short fibre** for denim or blends with cotton, **long fibre** still niche but great applications possible once investments will help setting up the value chains.



New **decorticators** coming up... (new one in Puglia)

Secondary transformation plant for non-woven, wipes, absorbant purposes in Germany (Canadian investments)

ElHA is reaching out to **brands** and other downstream actors to promote hemp as sustainable alternative or complement to other natural fibre or synthetic fibres.

On the market





SSUCHY project ongoing: bringing hemp composites to the next level.

Disruptive potential! lighter weight / less energy consumption / same performances

Info: ELHA joined **ERMA**

But **missing** focus on **biobased** alternatives!!!



SCOOTER

A bio-based "Monocoque scooter frame" with 100% SSUCHY hemp woven reinforcement is being developed by **NPSP** and is expected to be finished by the end of 2021.

[More info](#)



AUTOMOTIVE

A 100% bio-based and fully recyclable "Trunk loadfloor" is being developed by **Trèves** and is expected to be finished before by the end of 2021.

[More info](#)



AEROSPACE

A redesigned "Cockpit panel" for electrical aircraft containing a 100% SSUCHY hemp woven reinforcement will be produced by **EADCO** by the end of 2021.

[More info](#)



ACOUSTICS

A "Green loudspeaker" belonging to the "Precision series" was produced in a final form by **Wilson Benesch's** audio company and a development in the "ACS" series is ongoing.

[More info](#)



This project is funded
by the European Union

On the market



On the market



On the market



Hemp paper next big thing?

Hemp can be successfully used as a raw material in paper production, after creation of a proper technology and selection of optimal conditions for the operation of the industrial installation producing cellulose hemp pulp.

EHHA's working on...



- Seeds, extracts, fibre and shivs **marketing standards**;
- Connecting **operators** and steering **investments**;
- **Promoting** hemp downstream in the value chain;
- Connecting with **academia** (Scientific Committee);
- Investing 3.5Mln in **toxicology study** on THC and CBD;
- EU **Green Deal project** submitted (16Mln / RESTORE).