

Hemp fibre *the road ahead*

February 3rd, 2021

Turning challenges into opportunities



Textile/composites/plastics

- Enhance sustainability,
sustainable farming and circular business model
- decarbonisation of products,
carbon negative raw material
- Raw material sovereignty,
grown everywhere in Europe
- Create green new jobs
repatriating production capacity

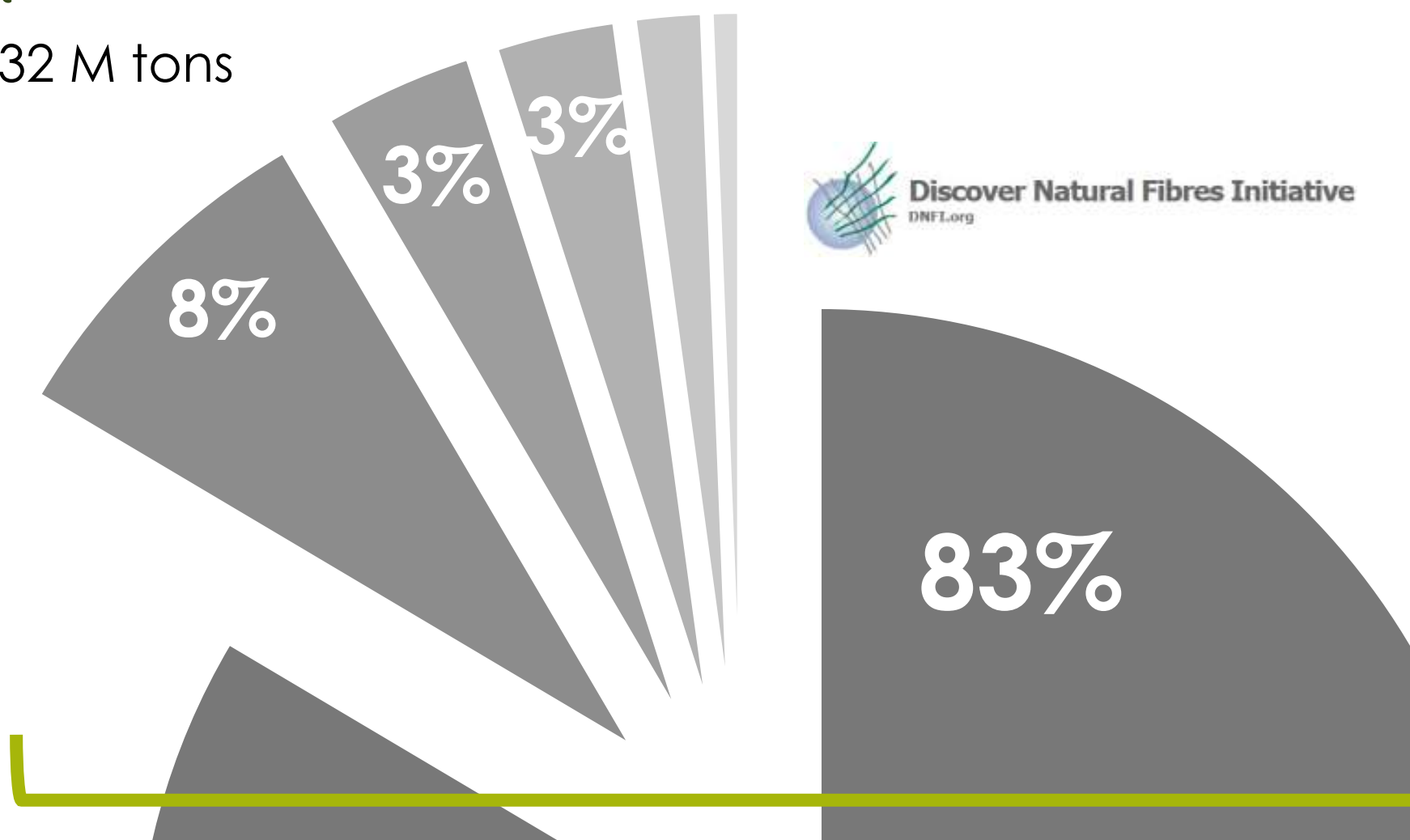


The market size



Production

32 M tons



- Cotton
- Jute/Kenaf
- Wool
- Abaca/Sisal
- Hemp/Ramie/Flax
- Other

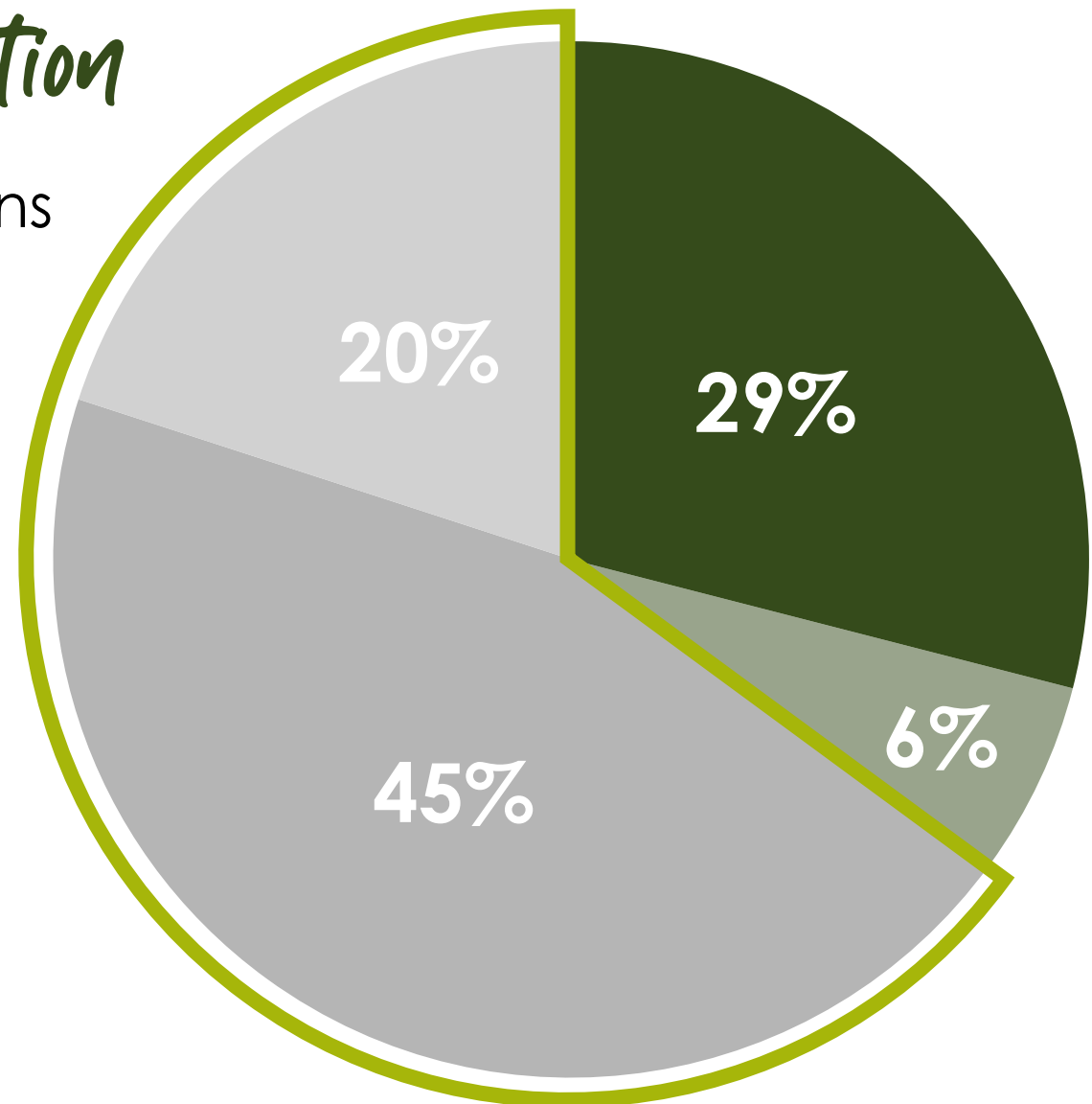
60 Billion USD Market

The market size



Production

110 M tons



- Natural
- Cellulosic
- Synthetic filament
- Synthetic staple

147

Billion USD
Market



Third countries



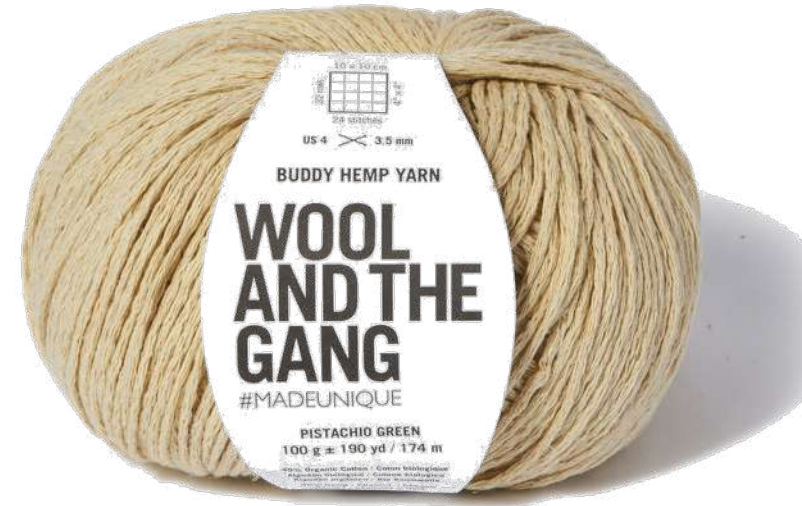
China >> big investment in hemp valley – upscale of production capacity – import from Europe and some domestic production – the Uigur issue – strong manufacturing industry already in place



Third countries

India >> no hemp cultivated – mainly imports from Europe – strong sustainability stances – strong manufacturing industry already in place

US >> cotton/tobacco producers looking for better opportunities – manufacturing industry in place – renewed interest for the fibre



Shortcomings of the EU h. fibre sector



- Need to harmonise fibre quality **standards**
EIHA internal reflection ongoing
- Steer **R&D**
EIHA Scientific Committee established
- Regulatory normalisation needed
EIHA advocacy and information

Shortcomings of the EU h. fibre sector



- **Investments** needed for decorticators, spinning mills, harvesting material

Contacts with investors, public relations

- **Structuring** of the sector ongoing

Steering the creation of POs, IBOs

- **Bridge the gap** between farmers and downstream actors

IBOs, ElHA working groups, RESTORE project

Our competitive advantage



- **Green Deal policies**
our greatest strenght
- **Consumers demand**
for sustainable products
- **European know how and clout**
in textile, apparel, design
- Highly **technological** /
highly **sustainable**

Our competitive advantage



- **Industrial synergies** in

- agriculture and fisheries (fishing nets, growing mats, etc.),
- food production (packaging),
- consumers goods industry (non woven textile applications),
- public procurement (hospital furniture and linen, army clothing, etc.),
- built environment (insulation),
- vehicles (composites),
- paper (absorption, general purposes) ...

- **Flax & cotton sectors**

Let's build a better future together 😊





- Acknowledge hemp as great asset for **repatriating** essential production and decreasing carbon emissions
- Higher value for the **multipurpose** role of hemp, its environmental benefits and social implications
- **Ultra-transparent** policy-making: fear of interference from big names looking for greenwashing
- Help the value chain **structuring**, speed up innovation, steer green investments
- **Trace and certify** the REAL sustainability (NOT the Higg index!)

Sustainability certificates



Correctly **define sustainability**: environment, social, economic and public health >> avoid green at all costs

Importance of looking at **each actor contribution** to the value chain, its responsibility and the possible compensatory actions put in place

Avoid arbitrary calculations methods!

- PEFCR, LCA, ISO ? Clarity needs to be made within a wider reflection
- Carbon tax: effect on prices of imports might further enhance the sector