



CANAPAFORUM 2022



Hemp decortication in Europe

Overview of the sector

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Lorenza Romanese
EIHA Managing Director

Representing hemp farmers and
processor at European level and *helping*
them **developing** the fibre **value chain**
and a thriving **consumer** market

EHHA role



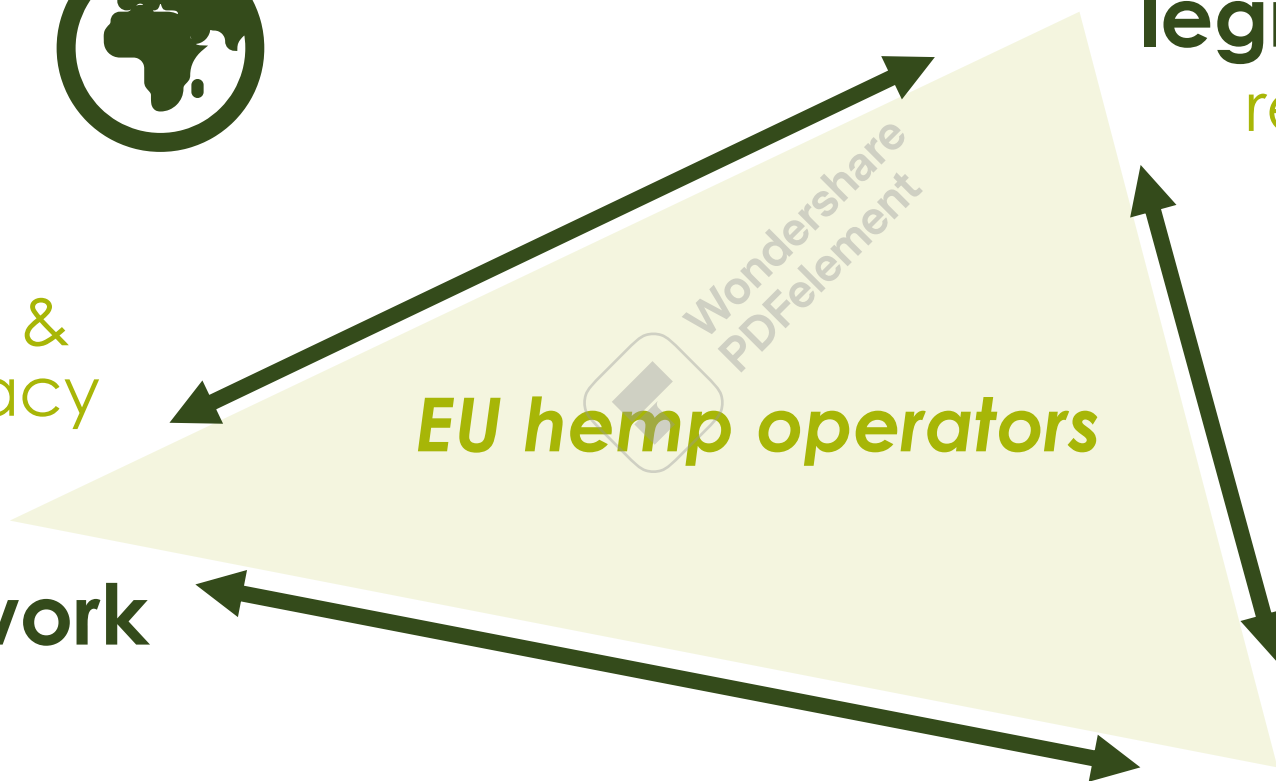
comm &
advocacy

**Build
a network**

EU hemp operators

**Adapt
legislation**
regulatory
affairs

**Find
opportunities** business
development



Let's work together!



*Not
a bigger
slice...*



*... but
a bigger
cake*

ElHA team



Francesco Mirizzi
Senior Policy Advisor



Lorenza Romanese
Managing Director



Louis Tasset
Policy & Comm officer



Monica Solano
Members Manager



Decortication facilities in Europe

Active lines in the EU:

France (6); Netherlands (2); Poland (1);

Italy (1); Romania (1); Lithuania (1).



No reliable data on
total production (mostly used for
automotive, paper, construction)

Scutching facilities in Europe

Well **established** flax sector

Producing around **180,000 tons** of long fibre per year

Accounting for **85% global production**



Very **small production** of long
hemp fibre, but growing interest

Numerous fibre application



Where
are all these hemp products?
...availability: precisely the point!

What barriers ?

. Regulatory aspects

! Missing value chain

- *Missing processing lines*
- *Farmers/businesses lack knowledge*

Not starting from scratch

Hemp products are already on the market **BUT**

- **niche** markets (: limited quantity)
 - .. often **expensive**

Textile products



Construction materials



Composites and plastics



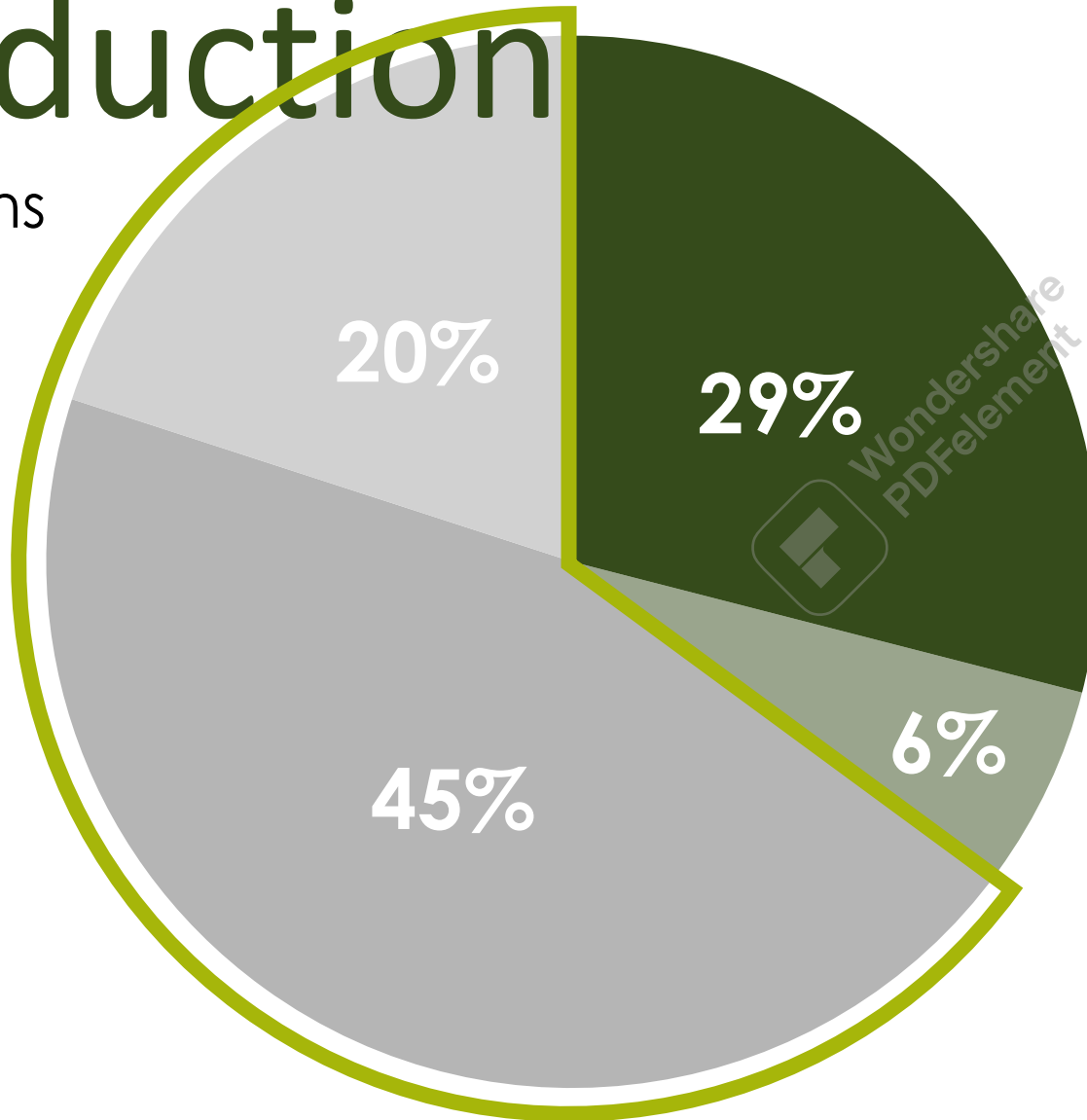
Huge markets ahead...

- *EU non-wovens turnover in 2019:*
EUR 9,178 million. Source: Edana
- *Global Natural fibre market in 2019:*
USD 60,000 million. Source: DNFI
- *Global Synthetic fibre market in 2019:*
USD 147,000 million. Source: The Business Research Co.
- *EU Construction products turnover 2021:*
EUR 800,000 million. Source: EU Commission.

Huge markets ahead...

Production

110 M tons



- Natural
- Cellulosic
- Synthetic filament
- Synthetic staple

1
Billion USD
Market

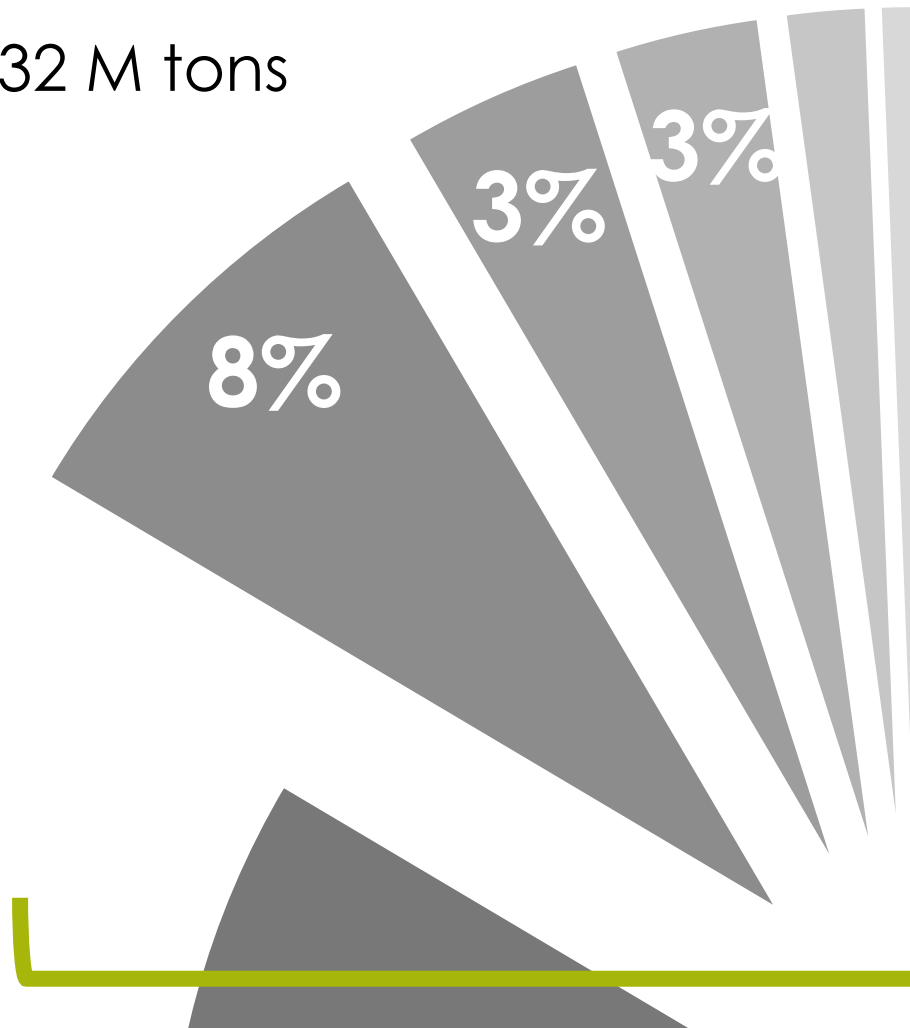
The Business
Research Company



Huge markets ahead...

Production

32 M tons



Discover Natural Fibres Initiative
DNFI.org

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

6 Billion USD
Market

What way forward ?

1. Facilitate private **investments** in decortication facilities
2. (Re)connect the value chain actors and steer a **dialogue**
3. Raise **awareness** among consumers, businesses and public authorities

What way forward ?

4. Continue **research** in retting techniques
(dew retting not possible in Italy)
5. Look for **public funding and support**
6. Foster **skills & expertise** among farmers
and operators

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**Thank
you**