Hemp &
EU bio-based construction
a Brussels perspective

Future of BioBuilding (FoB:Build) – 10.12.2025

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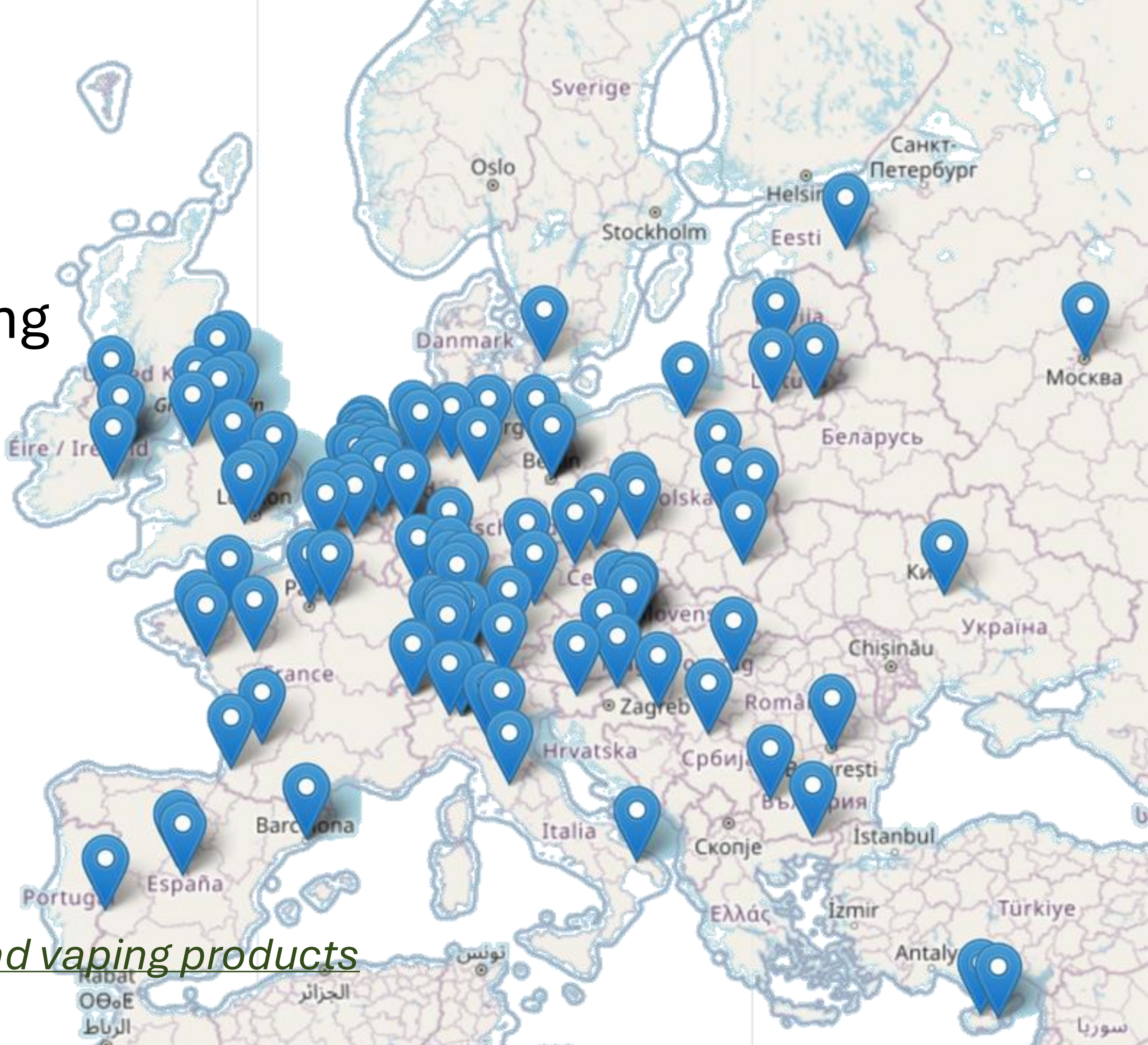
EIHA
European Industrial Hemp Association

We are the European association representing **farmers**, **processors** & **traders** of hemp.

250+
members



** We do not cover smokable and vaping products*

1. The sector today

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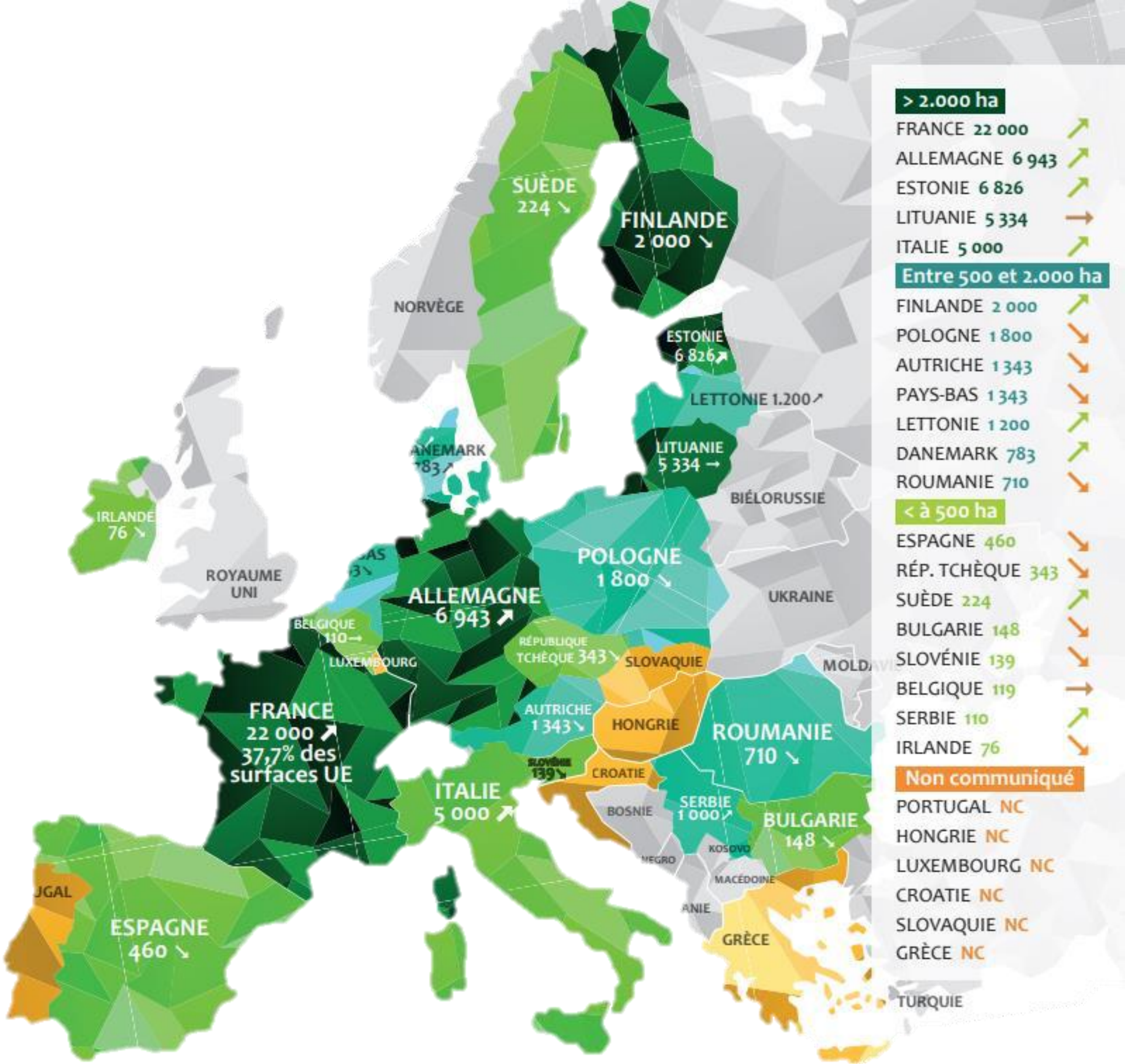
in **Europe**

- Total: **50,000 ha**
- **FR**: biggest producer (increasing)



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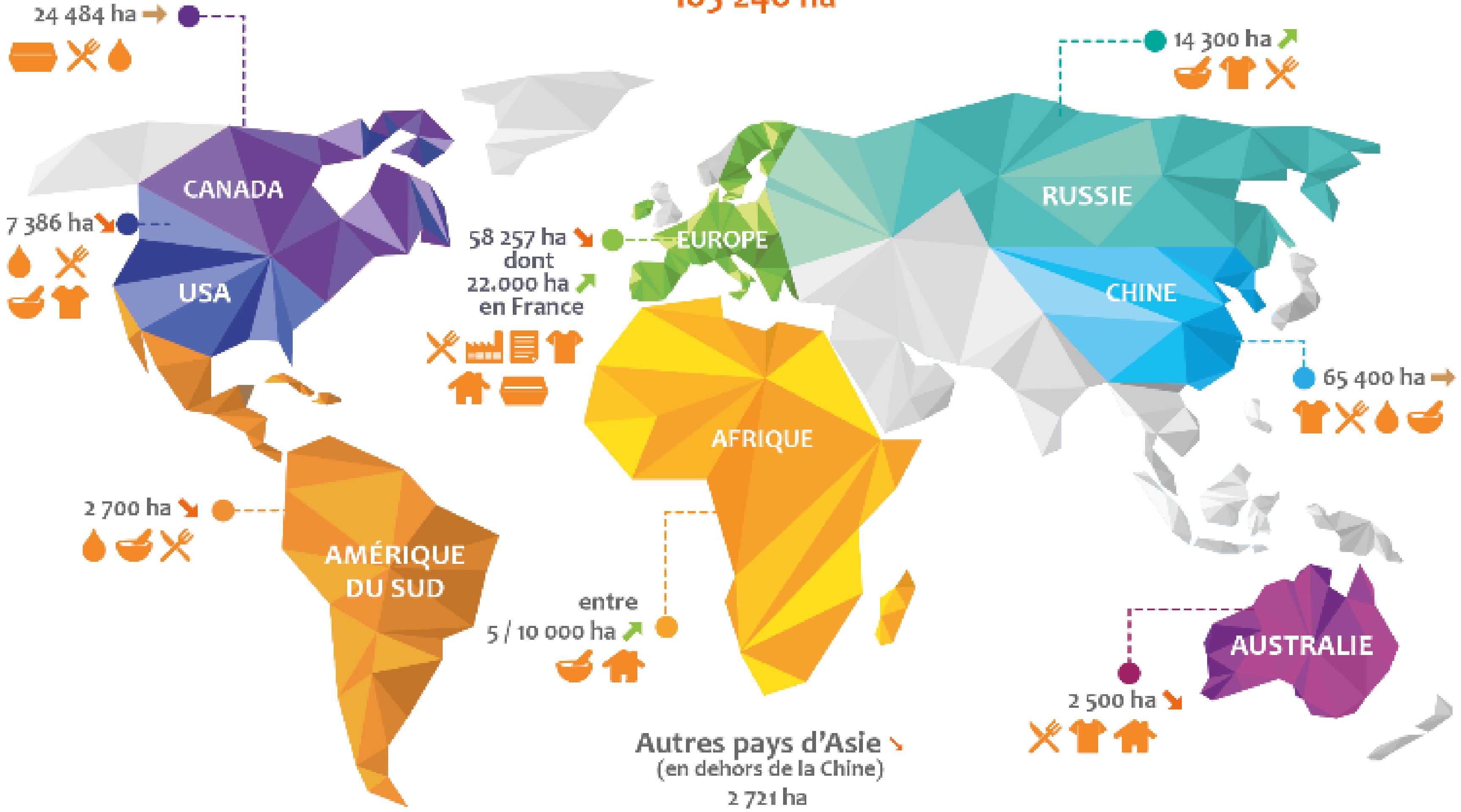
the world

Production mondiale de chanvre en 2022

185 248 ha



Indicateurs de dynamisme : En baisse En hausse Stationnaire

Alimentation *Pharmaceutique* *Bâtiment* *Plasturgie* *Papier* *Textile* *Molécules* *Packaging*

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400,000 ha
(1940)

10,000 ha
(1960- 2000)

44,000 ha
(2022)

Synthetic fibres replaced natural fibres, and Cannabis plant was *demonised* by public policies, resulting in a **huge decrease** of hemp production in Europe

And today? ***Data are scarce …***

Competitive secrecy :

operators reluctant to disclose volumes & prices

>>> Consequence: lack of reliable market data undermines investors & policymakers

EIHA efforts:

- Persuasion → encouraging voluntary data sharing
- Regulation → from **2026**, MS with >1000 ha must disclose hectares, fibre volumes & prices

... but the outlook is positive

Flax operators diversifying in **France** : projects for enhancing hemp **long fibre** farming and scutching ongoing – from few ha in 2020 to **3.000 ha** in 2024. Further increase expected.

Big farming **cooperatives and breeders** are looking into investing in hemp programs (Netherlands, Germany, Poland).

Short fibre production volumes and surfaces unchanged in the EU, but big **French coops** claim to possibly **double** their production **by 2030**. Today 50.000 ha in total and around 120/130.000 tons of straws.

No stalk processing …

… no construction products

Active **decortication** lines in the EU:

FR (6>7); **NL** (2); **PL** (1); **DE** (2); **RO** (2); **LT** (1); **SE** (1)...

used for automotive, paper,

construction

Well **established** flax sector

(FR, NL, BE : 120.000 ha) producing around **180,000 tons** of long fibre per year accounting for **85% world production** and capable of transforming hemp long fibre.

First **3,000** hectares planted in France

2. Market potential

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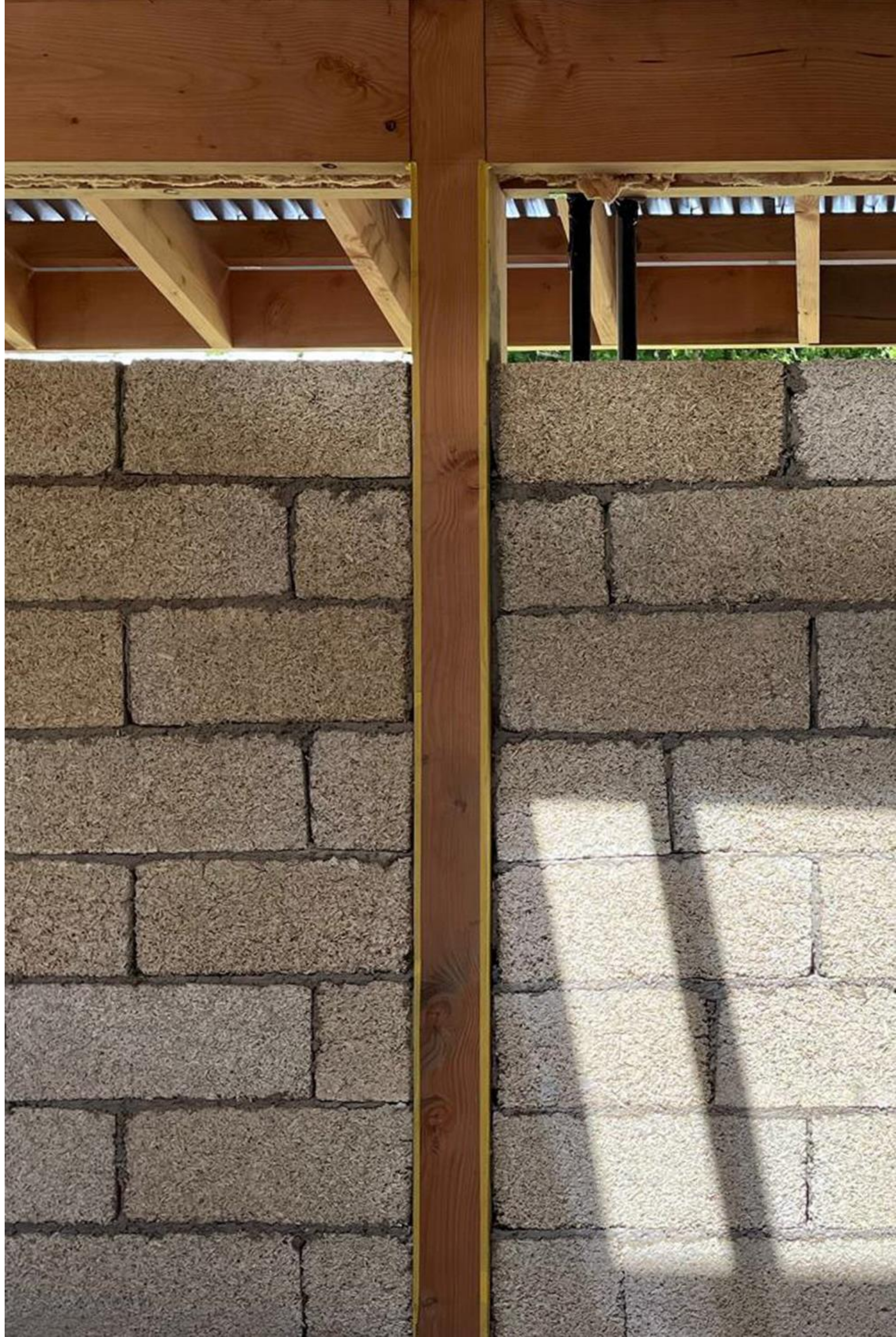
EU countries ere in an **ideal position** to take a *leadership* role in the rebuilding of a local hemp industry...

It's a local crop

- It can be grown everywhere in Europe
- Local sourcing = lower environmental impact (less transport, fewer imports)
- Adds resilience: reduces dependency on imports, hedges supply chain risk
- Opportunity for European industry: ensure material variability & security

It's sustainable
and performative

- Economically and environmentally
- Chance to bring back fibre production to Europe (industrial reshoring)
- Lead product innovation with hemp composites and other products
- Enhance EU competitiveness in sustainable materials



Bioeconomy products are the **most promising** applications with the **biggest output markets** in perspective...

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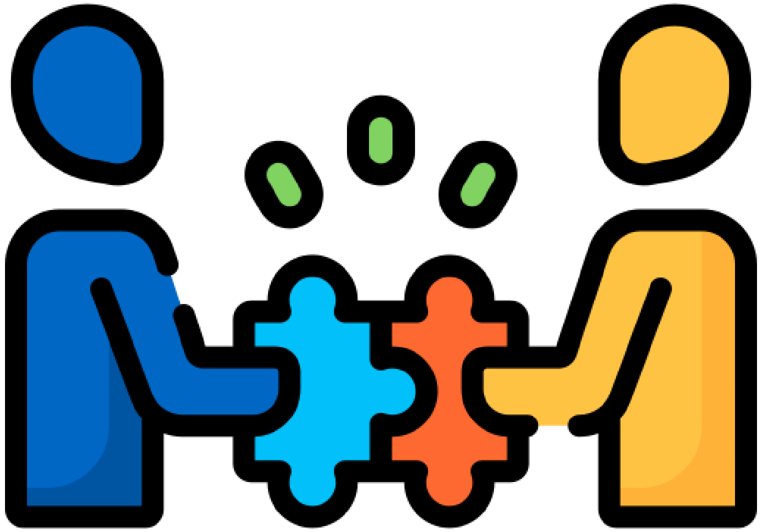
Developing the value chain is KEY



- Value chain: farm → decortication → processing → product
- Advantages: efficiency, traceability, knowledge transfer
- All stakeholders to work together

3. Hemp in construction

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A positive legislative framework

projected production increase

more processing facilities

increasing consumers market

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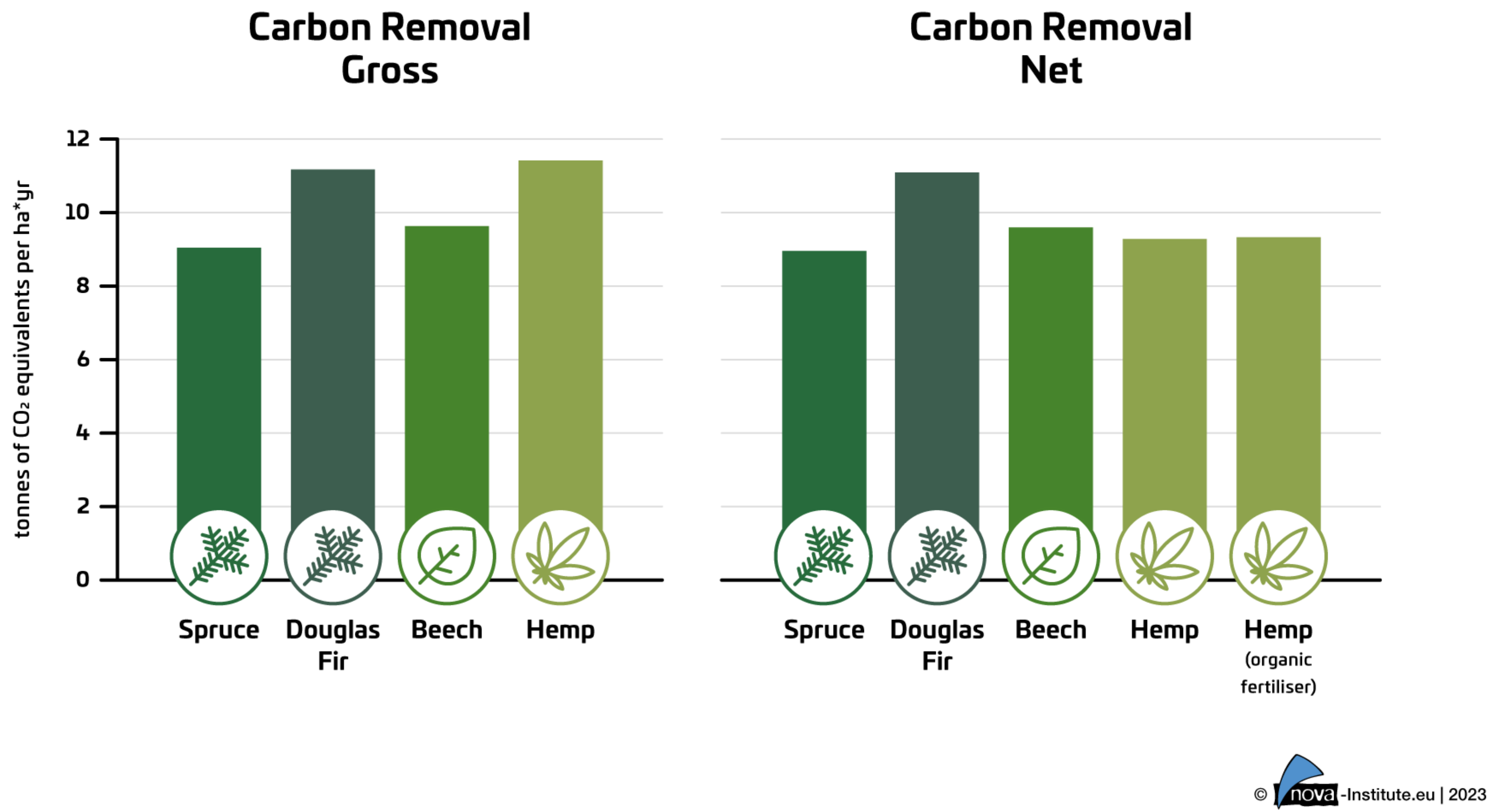
Carbon capture as a main driver

EIHA committed a study on carbon storage in the raw material to Nova Institute (DE).

Hemp stores as much carbon as a forest

nova Institute
for Ecology and Innovation

SCAN ME



Carbon Removal Gross
Carbon Removal Net
tonnes of CO₂ equivalents per ha*yr
12
10
8
6
4
2
0
Spruce
Douglas Fir
Beech
Hemp
Spruce
Douglas Fir
Beech
Hemp
Hemp (organic fertiliser)
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	Units	Conifers					Deciduous trees		Hemp			
		Spruce	Fir	Douglas fir	Pine	Larch	Oak	Beech	Straw	Straw (organic fertiliser)	*Straw + Seeds (mass)*	*Straw + Seeds (eco)*
GHG removal (stock increase)	kg CO2eq./(ha*yr)	7,500	8,000	9,300	5,500	6,200	6,200	8,000	11,400	11,400	9,500	9,500
Average emissions (stock increase)	kg CO2eq./(ha*yr)	129	138	160	83	91	92	81	2,500	2,200	2,200	1,500
Max emissions (stock increase)	kg CO2eq./(ha*yr)	207	220	255	128	145	173	122	2,900	2,400	2,500	1,700
Min emissions (stock increase)	kg CO2eq./(ha*yr)	60	64	74	37	42	50	33	2,100	2,100	1,800	1,300
Net removal (average) (stock increase)	kg CO2eq./(ha*yr)	7,400	7,900	9,100	5,400	6,100	6,100	7,900	8,900	9,200	7,300	8,000
Net removal (max) (stock increase)	kg CO2eq./(ha*yr)	7,300	7,800	9,000	5,400	6,100	6,000	7,900	8,500	9,000	7,000	7,800
Net removal (min) (stock increase)	kg CO2eq./(ha*yr)	7,400	7,900	9,200	5,500	6,200	6,100	8,000	9,300	9,300	7,700	8,100
Steady state forestry												
GHG removal (steady state)	kg CO2eq./(ha*yr)	9,000	9,600	11,200	6,600	7,500	7,400	9,600	11,400	11,400	9,500	9,500
Average emissions (steady state)	kg CO2eq./(ha*yr)	155	167	192	99	109	109	95	2,500	2,200	2,200	1,500
Max emissions (steady state)	kg CO2eq./(ha*yr)	247	266	305	154	174	203	144	2,900	2,400	2,500	1,700
Min emissions (steady state)	kg CO2eq./(ha*yr)	72	77	89	45	51	59	38	2,100	2,100	1,800	1,300
Net removal (average) (steady state)	kg CO2eq./(ha*yr)	8,900	9,500	11,000	6,500	7,400	7,300	9,500	8,900	9,200	7,300	8,000
Net removal (max) (steady state)	kg CO2eq./(ha*yr)	8,800	9,400	10,900	6,500	7,300	7,200	9,500	8,500	9,000	7,000	7,800
Net removal (min) (steady state)	kg CO2eq./(ha*yr)	9,000	9,500	11,000	6,600	7,400	7,300	9,600	9,300	9,300	7,700	8,100

A positive legislative framework

STRATEGIC PLAN

Bioeconomy Strategy

Details

Publication date 27 November 2025

Author Directorate-General for Environment

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What we achieved:

For the first time, the Strategy explicitly **recognises hemp** among priority bio-based materials, notably in textiles and construction.

Concrete (still vague) measures are proposed to encourage **investments** and **market** boost

What is it? The EU long-term **roadmap** to replace fossil-based materials with sustainable, bio-based solutions.

- ***boost industrial deployment***,
- ***mobilise*** public and private ***investment***,
- ***strengthen*** EU strategic ***autonomy***,
- ***build*** competitive ***markets***.

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Attracting investment through

- **new** EU **tools** to de-risk industrial scale-up dedicated to bio-based industries (Bioeconomy Investment Deployment Group, Scale-up Europe Fund, etc.)
- and recognition under sustainable finance and the EU **Taxonomy**

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Building markets through

- **Public procurement** favouring bio-based materials
- Industry **demand pooling** (Bio-based Europe Alliance)
- **Product rules**

Removing barriers through:

- Faster **authorisations**
- Harmonised **standards**
- Support for industrial **clusters** and rural value chains (Industrial Symbiosis Valleys)

There is no association advocating for biobased construction materials in Brussels (except the wood sector).

No voice = zero chances of impacting the EU intiatives
No ears = no information on the relavant regulatory changes


HIGH LEVEL
CONSTRUCTION
FORUM

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BUY BETTER
TO BUILD BETTER

a *coalition of stakeholders* aimed at transforming **public procurement** in the construction sector into a strategic tool to decarbonise, innovate, and increase competitiveness across the EU.

Why? Because the directive on Public Procurement will be revised in the coming years

Who? Led by ECOS, the initiative should be supported by NGOs and trade associations involved in green building materials.

What? Four pillars...

1. ***Simplify Procurement***:

- Harmonise EU GPP criteria focusing on whole-life carbon and circularity
- Foster fair competition through performance-based green standards

2. ***Reform Procurement Rules***:

- Focus from lowest price to best value for money
- Promote lifecycle tools (EPDs, BIM, LCA)

3. ***Improve Monitoring***:

- Standardise EU-wide GPP tracking and reporting
- Enable better policymaking and competition on green tenders

4. ***Support Authorities***:

- Provide training, tools, and best practice exchange
- Ensure GPP is embedded in daily procurement processes

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Thank you …

and let’s work **together**