

14th General Meeting of the EIHA

28 November 2013 Feierabendhaus, Hürth, Germany 11 pm - 17 pm

Michael Carus
Managing Director EIHA

John Hobson
President EIHA





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Agenda

- 1. Status report on EIHA and Hemp
- 2. Looking back EIHA activities in 2013
- 3. Studies, position papers
- 4. Trade fairs and conferences, marketing support
- 5. Financial report of the EIHA & exclusion of non paying members
- 6. Exoneration and election of the Board of Directors and Election of the financial auditor/treasurer
- 7. Outlook, guidelines and focus of EIHA activities in 2013/14

Welcome to the EIHA and let us determine that the General Meeting has been convened and a quorum is statutory.

First we have to introduce ourselves and to agree on the **keeper of the minutes**.



Present hemp industry

Total Hemp cultivation area in the EU approx. 14.000 ha in 2012.

The European Industrial Hemp Association (EIHA) has 10 regular members (hemp processors) and 75 associate members from 31 countries (2013).

Hemp processors



EIHA members



Non-EIHA members



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The European Industrial Hemp Association (EIHA) - Board of Directors, founded in 2005

- **2011**: At the 10th general meeting on November 24th 2011 in Hürth, the board of directors and the executive committee of the association were elected. John Hobson, Hemp Technology Ltd. (Great Britain) has been approved as President of EIHA for the next two years. Bernd Frank (Bafa, Germany) is first deputy and Olivier Joreau (C.A.V.A.C Biomatériaux, France) is second deputy. The nova-Institut GmbH, Hürth, with its managing director Michael Carus, was assigned by the new board with the management of the EIHA, initially for two years.
- **2012**: At the 12th general meeting of the EIHA on December 5th 2012 in Frankfurt, the board of directors has been enlarged: Welcome Mark Reinders (HempFlax, NL) and Sylvestre Bertucelli (InterChanvre, F) to the board of directors!



The European Industrial Hemp Association (EIHA) – Board of Directors, founded in 2005

John Hobson, since 2005 President, Hemp Technology Ltd. (UK)

Bernd Frank, since 2005 First Deputy Chair, BaFa/bave GmbH (Germany)

Olivier Joreau, since 2011 Second Deputy Chair, CAVAC BIOMATERIAUX (France)

Mark Reinders, since Dec. 2012 HempFlax BV (The Netherlands)

nova-Institute GmbH (Germany)

Sylvestre Bertucelli, since Dec. 2012 InterChanvre (France)

Executive committee & managing director, since 2005 Michael Carus











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Additional six regular members of EIHA in November 2013

Dun Agro B.V. (The Netherlands) **Albert Dun**

HANNAH BIZ d.o.o (Slovenia) **Dejab Rengeo**

Hempro International GmbH & Co. KG (Germany)

Daniel Kruse

Planete Chanvre (France)
Philippe & Antoine Heusele

AGROFIBRE SAS (France)

Mathieu Arlaud

Assocanapa SRL (Italy)

Felice Giraudo





85 (10 regular and 75 associate) members of EIHA in November 2013

- 68 members from 23 European Countries
- 17 members from other countries like Australia, Canada, China, South Africa, South Korea, Ukraine, Uruguay, USA

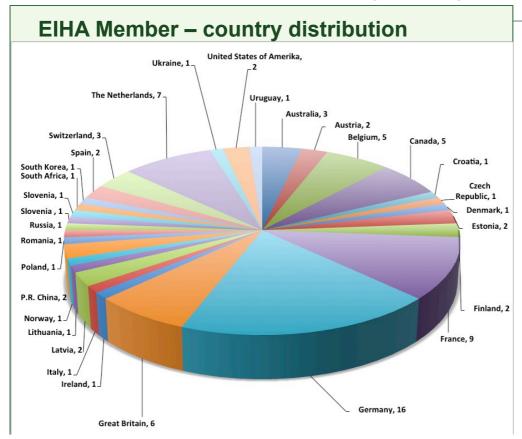
Cooperation with

- · InterChanvre, France
- · Hemp Industries Association, USA
- · Canadian Hemp Trade Alliance, Canada
- · International Hemp Building Association, Ireland

Members of the EIHA

- 2008: 57
- 2009: 68
- 2010: 65
- 2011: 82
- 2012: 81
- 2013: 85 (November)









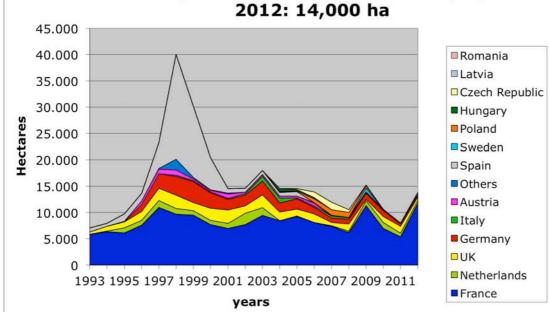


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EU Hemp cultivation area is growing again!

Hemp Cultivation Area in the EU (ha) 2012: 14,000 ha





Canada

 Installation of the first modern pilot decortication line to produce fibres and shivs – in addition to seed production

USA

- Voters legalised recreational use of marijuana in November 2012: Washington State & Colorado
- It can be expected, that other states will follow
- As a consequence, also the cultivation of Industrial Hemp will be legalised in more and more states

China

 The company iHemp is producing the best Hemp yarn ever – enzymatic retting and steam explosion







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- 1. Status report on EIHA and Hemp
- 2. Looking back EIHA activities in 2013
 - Status lobbying in Brussels concerning CAP, LMI and more (Michael Carus, John Hobson)
 - Trend reports form the countries
 - EIHA representation / liaison at CEN TC 411 (Michael Carus)
 - Update EIHA-Leaflet Fibres
 - Natural Fibres in the Automotive Industry (Michael Carus)
 - Life cycle assessment of hemp fibre production and hemp products in Europe - including comparison to other natural fibres (Roland Essel)
- 3. Studies, position papers
- 4. Trade fairs and conferences, marketing support
- Financial report of the EIHA & exclusion of non paying members
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Lobbying in Brussels: Structure and representatives

- John Hobson (Hemp Technology, UK): As a president involved in all lobbying activities.
- Sylvestre Bertucelli (InterChanvre, F): Focus on CAP reform, DG Agriculture and European Parliament.
- Michael Carus (nova-Institut, D): EIHA is part of the "Biobased Expert Group", DG Enterprise – high level committee to steer the Bio-based Economy.
- Lena Scholz & Roland Essel (nova-Institut, D): EIHA is member of CEN/TC 411, Bio-based Products, Certification and Sustainability / LCA.
- Daniel Kruse (Hempro, D) & Sylvestre Bertucelli (InterChanvre, F): Food Drink Europe.

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Commission Expert Group for Bio-based Products Mandates

- to ensure the implementation of the <u>LMI</u> priority recommendations in the current policy framework
- to ensure that the <u>bioeconomy strategy</u> covers the whole value chain from research to market, from biomass to biobased products and considers the specific needs and contributions of the bio-based products sector
- to contribute to the objectives to be outlined in the Roadmap for Bio-based Products in the framework of the reviewed <u>industrial policy</u>





Commission Expert Group for Bio-based Products Main focus

- · Standardisation, certification, labelling
- Public procurement
- · Communication strategy /consumer awareness building
- PPPs (linked with bioeconomy strategy) / EIPs
- Data monitoring (linked with bioeconomy strategy and BE Observatory)
- Contribution to the work of the Bioeconomy Panel

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Commission Expert Group for Bio-based Products Members

- Members:
 - Member States representatives
 - European business associations
 - Representatives from public procurers networks at European level;
 labelling experts, representatives of European chambers of commerce and
 the European Chemical Regions Network (ECRN)
 - · Non-governmental organisations
 - Academics

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EIHA representation at CEN TC 411

(Lena & Roland)

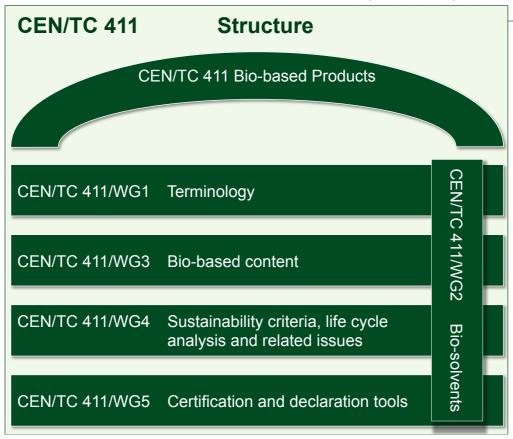
CEN/TC 411 Bio-based Products

Priorities (/Tasks):

- To develop standards concerning terminology, methods, criteria, guidance and tools, applicable to bio-based products [...].
- Accelerating the development of the European market for bio-based products by developing a consistent terminology for bio-based products.
- Development of standards for horizontal aspects, including sampling, bio-based content, application of LCA, sustainability criteria for biomass.
- Developing (a) certification scheme(s) for bio-based products, identifying which characteristics can/should be assessed and how they should be reported.

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CEN/TC 411 Outcome

Project Reference	Title	Current status	Date of availability
FprCEN/ TS 16640	Bio-based products - Determination of the bio-based carbon content of products using the radiocarbon method	Under approval	2014-02
	Bio-based products - Overview of available and possible methods and techniques for determination of the total bio-based content of products	Under Drafting	2014-11
prEN 16575	Bio-based products - Vocabulary	Under Approval	2014-02
	Bio-based products - Sustainability criteria	Under Drafting	2016-04
	Bio-based products - Life Cycle Assessment	Under Drafting	2016-04

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CEN/TC 411 Position

How we represent EIHA

- Awareness of hemp as an important resource for bio-based products – keep hemp in the family of bio-based products
- Opposition to concentrate only on "new" products / products from the chemical industry
- No discrimination against resources that could also be used as food / feed
- Pro "biomass content" (vs. "only bio-carbon content")
- · Critical to thresholds for bio-based content
- Sustainability (to include and or emphasise in the criteria catalogue):
 - Agro biodiversity
 - Eutrophication
 - CO₂ storage



CEN/TC 411 Agreement of Liason



AGREEMENT OF LIAISON

CEN, the European Committee for Standardization, an International Non-Profit Organization incorporated under Belgian law the registered office of which is at 17, avenue Marnix, 1000 Brussels, duly represented by Mrs Elena Santiago Cid, acting in capacity of Director General,

on the one hand,

and the Organization, indicated as the Liaison Organization in the "Agreement Specific Terms" hereafter, on the other hand,

AGREEMENT SPECIFIC TERMS

The Liaison Organization

Name	European Industrial Hemp Association (EIHA)	
Legal status	Association	
Registered in	Brühl, Germany	
Registration number	VR 1397	
Represented by	Michael Carus	

Administrative Details

Registered address	EIHA c/o nova-Institut GmbH, Chemiepark Knapsack, Industriestraße 300, 50354 Hürth, Germany	
Telephone	+49 2233 48 1449	
E-mail (official communication)	dominik.vogt@eiha.org	
E-mail (daily management)	dominik.vogt@eiha.org	

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EIHA 2013: Update on acticities

(processing status: November 2013)

Activity	Budget (net)	Processing status
International Business Directory for Bio- based Materials (iBIB2014/15)	700 EUR	done
CEN Membership – new in June 2013	approx. 500 EUR	done
Sustainability Certification (ISCC) in the framework of Multihemp?		in progress: would it be possible to make a certification within Multihemp? -> 2014
Address list automotive sector for systematic marketing	2.000 EUR	in progress – almost ready -> 2014
Update leaflet	2.000 EUR	First draft ready -> 2014
New business cards for borad of directors	approx. 300-400 EUR	in progress -> 2014
New letter paper	To be asked	in progress -> 2014
New EIHA web database: Wordpress system	4.000 EUR	in progress -> 2014
Technical workshop on Bio-Composites 2014 with CELC – concept after Meeting Jörg Müssig & CELC; AcXys Technologies SA www.acxys.com (Plasma treatment)	3.500- 4.500 EUR	Seems to be very complicated, how to proceed?
Booth at 6th International Conference on Bio- Based Materials	1.100 EUR	done
DVD on Industrial Hemp (Donations approx. 220 EUR)	2.300 EUR	done
Donation 20013	12.000 EUR plus 3.000 EUR	done



Life cycle assessment of hemp fibre production and hemp products in Europe - including comparison to other natural fibres

Presentation by Roland Essel, head of sustainability department, nova-Institute

Comprehensive work on hemp insulation material (Meta-LCA) can and will be done by nova-Institute in the framework of MultiHemp!

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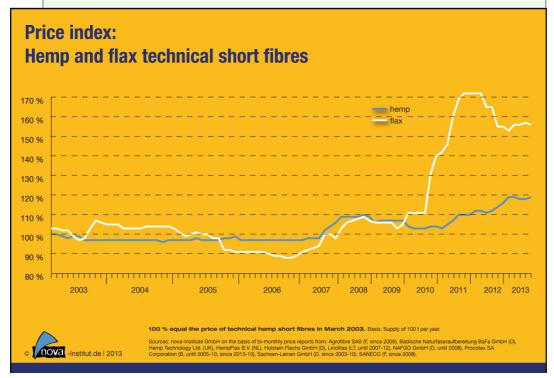


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Price index: Hemp and flax technical short fibres



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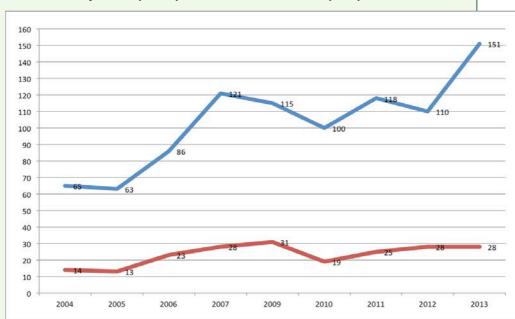


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Record participation in 2013!

151 Participants (blue) from 28 countries (red)





Booth at the

6th Int. International Conference on Bio-based Material, Cologne, April 2013 (www.biowerkstoff-kongress.de). Record numbers with nearly 200 participants over three days.



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Int. Business Directory for Innovative Biobased Plastics and Composites: iBIB2014/15

www.bio-based.eu/iBIB





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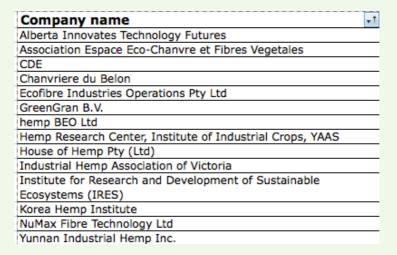
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Report on current financial situation	
Current balance (07 November 2013)	15,490.08 €
Membership fees not paid yet (2013)	5,350.00 €
Expenditures / costs since 13th General Meeting (Mai 2013 – November 2013)	
DVD	2,674.00 €
Banking fees	approx. 400.00 €
Notary and court costs	approx. 100.00 €
Traveling costs to Brussels	approx. 300.00 €
General Meeting May 2013	747.00 €



List of non-paying members



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Assessment of the votes

1. Regular member

until 800 ha: 1,500 € and 10 votes
800 – 1,600 ha: 1,650 € and 11 votes

• 1,600 – 2,400 ha: 1,800 € and 12 votes

2. Associate member

Each member has 1 vote

Application for membership:	2012-01
European Industrial Hemp Association	(EIHA)
The applicant	wants to enter the EIHA as a
Pregular member with contracted hemp cultivation area this year of	
Regular membership is restricted to those legal entities or companies, which pe and hurds/shives or hemp raw material like fibres, hurds/shives, seeds or flow	
Regular members have a base of ten votes until 800 ha of area under hemp cul- in the current year. Regular members must provide, to the Executive Direct processing of hemp and on the use of their material by product line by, at than annual membership fee for regular members is as follows:	or of EIHA, data on their cultivation and
until 800 ha: 1,500 €/10 votes 800 - 1,600 ha: 1,650 €/11 votes 1,600 -	2,400 ha: 1,800 €/12 votes
Associated membership: Any person or institution may become an associate r annual EIHA meetings, having the right to speak and to make proposals ther members is $300 \in (r)$ voluntarily a larger fee).	



Participants & Votes of the 13th General Meeting of the EIHA

3 members have 11 votes:

33

- Ok Sylvestre Bertucelli CAVAC, France
- Ok Mark Reinders Hempflax, The Netherlands
- Ok Bernd Frank Planet Chanvre, France

3 members have 10 votes:

30

- Ok Albert Dun Dun Agro Hemp, The Netherlands
- Ok Sylvestre Bertucelli InterChanvre, France
- · Ok Daniel Kruse Hempro, Germany

5 members have 1 vote:

5

- Ok Michael Carus nova-Institut GmbH, Germany
- Ok Bernd Frank Bave GmbH, Germany
- Ok John Hobson, Plant Fibre Technology, UK
- Ok Mantas Miezanskas Consus Agro, Lithuania
- OK Frank Reiche Naporo, Austria

First of all the identification of the voting rights of the participants is done: 68 votes altogether



Exoneration/discharge of the Board of Directors for their work in 2013

0 votes against its exoneration68 votes for its exoneration0 abstention

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Election of the new Board of Directors

President: John Hobson
First Deputy: Bernd Frank
Second Deputy: Olivier Joreau
Board member: Mark Reinders
Board member: Sylvestre Bertucelli

Proposal: Block/group voting on the existing Board of Director

- 0 votes against block/group voting
- 68 votes for block/group voting
- 0 abstentions

Continuing with the existing board

- 0 votes against the board
- 68 votes for the board
- 0 abstentions

Expansion of the board of EIHA by Daniel Kruse esp. for the food sector

- 0 votes against the board expansion
- 58 votes for the board expansion
- 10 abstentions



Election of the financial auditor/treasurer

Proposal: Michael Carus:

- · 0 votes against his re-election
- · 56 votes for his re-election
- 12 abstention

Proposal: Bernd Frank:

- 0 votes against his re-election
- 56 votes for his re-election
- 12 abstentions
- · Block voting, all agree, abstention by Michael and Bernd

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Outlook, guidelines and focus of EIHA activities in 2013 & 2014

- Lobbying in Brussels DG Agr, DG Enterprise, DG Energy, EP Executive office
- 2. Next step towards Sustainability Certification EIHA is hoping to raise this subject with the FP7 MultiHemp project, additional support could by necessary

? 5,000 €

3. Systematic marketing in the Automotive sector? Updated list of addresses

2.000 €

4. Improve and update the EIHA web page and database to the modern WordPress system

4 000 €

5. Update of the EIHA leaflet / business cards / letter paper: Update EIHA regular members, show the new board of directors, more detailed data on applications (from summer survey 2012)

Executive office

plus costs for layout and print: ca. 3,000 €

6. Booth at the 7th Conference on Bio-based Materials in Cologne ? 1,000 €

All planned activities are easy possible within the existing budget – even 19,000 € will be left for additional activities!! See next slide.



Financial overview in 2014 Expected budget in 2014 9 regular members x 1,500 € (or more) 13,500.00 € 75 associate members x 300 € (or more) 22,200.00 € Total approx. 35,500.00 € Expected costs in the End of 2013 and in 2014 approx. 31,400.00 € General Meeting (November 2013) 500.00 € 700.00€ International Business Directory for Bio-based Materials (iBIB2014/15) EIHA website: Wordpress 4,000.00€ Booth at 7th International Conference on Bio-based Materials 2014 (??) 1,100.00 € Systematic marketing in the automotive sector - address list 2,000.00€ Travelling costs & meetings 2,000.00€ approx. 500.00 € **CEN Membership** 600.00€ Banking fees and credit card payment provider 3,000.00 € Update leaflet / business cards / letter paper Sustainability Certification, additional support (??) 5,000.00 € 12,000.00 € Donation

Plus from 2104: 4,000 € + 15,000 € left over from 2013 = 19,000 €

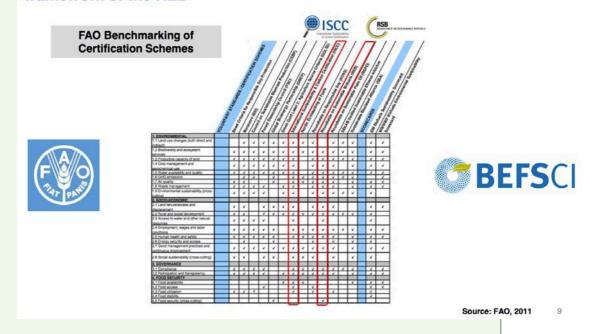






ISCC plus for bio-based Chemicals and Plastics

ISCC goes beyond the sustainability requirements of the regulatory framework of the RED

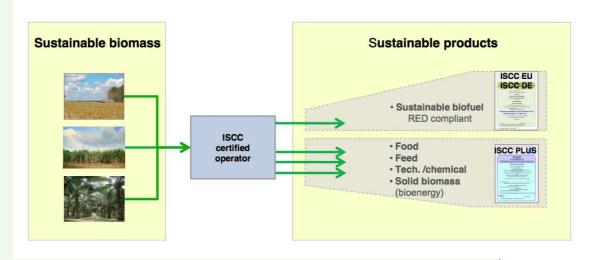


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ISCC offers one stop shopping for all kinds of biomass and their uses – ISCC DE/EU for regulated markets and ISCC PLUS for all other applications



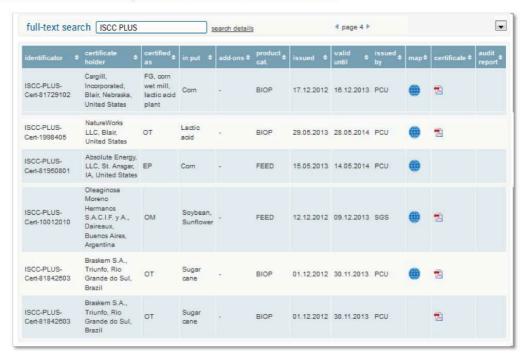




ISCC is a non profit organisation steered by an association – open to new members ABENGOA BIOENERGY BUNGE BIOPETROL VDB alcogroup ADM VdG AGROINVEST SA ERRMA UIC UNIVERSITY OF ILLINOIS AT CHICAGO BEROL bp Bayer CropScience O canola Plantation ED&F BBE Tereos GLOBALG.A.P. BR PETROBRAS Illinois Corn DANONE Greenergy wilmar **PETROTEC®** COUNCIL Grofor Mission NewEnergy Limited Sal **CBH**GROUP M.B.F. **GLENCORE OVID** *NESTE OIL* - BASF Cargill Morgan Stanley NORTH W Nature Works LLC TOEPFER INTERNATIONAL SEA GROUP Kraul & Wilkening u. Stelling AMBRIAN © ISCC System GmbH



ISCC PLUS certificates are listed on the ISCC website – 35 certificates have been issued by now with more to come





Costs

- Developing of a ISCC plus sustainability certification scheme for European Hemp – fibres, shivs and seeds
- Costs: 20,000 € (one time) EIHA is hoping to raise this subject with the FP7 MultiHemp project, additional support by EIHA could be helpful
- Costs for nova are covered by the MultiHemp project
- The certification based on the developed scheme for a single company 1,000 – 2,000 €/year depending on the local certification body
- Each Hemp processing company in Europe can use the certification scheme (not only EIHA members)

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Benefits for EIHA members?

- All questions and requests from the industry (approx. 200 per year) are circulated to all EIHA members, creation of a hemp market place
- Free access to the huge EIHA database, more than 350 presentations, reports and documents
- Help the Hemp Industry to grow! Help lobbying!
 Don't let the policy forget Hemp!
- With your support EIHA can realise
 - Information leaflets on hemp
 - Position Papers to Policy
 - Lobbying in Brussels
 - Studies & Reports on Hemp helping the whole industrial hemp sector, internationally





11th International Conference of the European Industrial Hemp Association (EIHA)

May 21st – 22nd 2014, Rheinforum Wesseling (near Cologne, Germany)



Save the date and call for papers!

11th International Conference of the European Industrial Hemp Association

21 - 22 May 2014, Wesseling near Cologne, Germany

www.eiha-conference.org