

12th General Meeting of the EIHA

5 December 2012
AVK, Frankfurt, Germany
2 p.m. - 6 p.m.

Michael Carus
Managing director
nova-Institute GmbH
John Hobson
Sales Manager
HempTechnology Ltd



www.eiha.org

Agenda

1. **Basic facts on EIHA & the European Hemp Industry**
2. **Looking back on activities in 2012**
3. **Financial report of the EIHA & exclusion of non paying members**
4. **Enlargement of the board of the EIHA**
5. **Outlook, guidelines and focus of EIHA activities in 2013**

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**.

Good news: WELCOME InterChanvre as full regular member!

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Present hemp industry

Total Hemp cultivation area in the EU approx. **8.000 ha in 2011** (15.000 ha in 2009).

The European Industrial Hemp Association (EIHA) has 9 regular members (hemp processors) and 72 associate members from 29 countries (2012).

Hemp processors

-  EIHA members
-  Non-EIHA members



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

John Hobson

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



Bernd Frank

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



Olivier Joreau

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



Executive committee & managing director, since 2005

Michael Carus

Managing director, nova-Institute GmbH (Germany)



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Additional seven regular members of EIHA in November 2012 (in addition to Hemp Technology & CAVAC)

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



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



HempFlax BV (The Netherlands)
Mark Reinders



Hempro International GmbH & Co. KG (Germany)
Daniel Kruse



Planete Chanvre (France)
Philippe & Antoine Heusele

AGROFIBRE SAS (France)
Mathieu Arlaud



Assocanapa SRL (Italy)
Felice Giraud

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81 (9 regular and 72 associate) members of EIHA in November 2012

- 63 members from 22 European Countries
- 18 members from other countries like Canada, Australia, China, South Korea, Ukraine, Uruguay, USA

Cooperation with

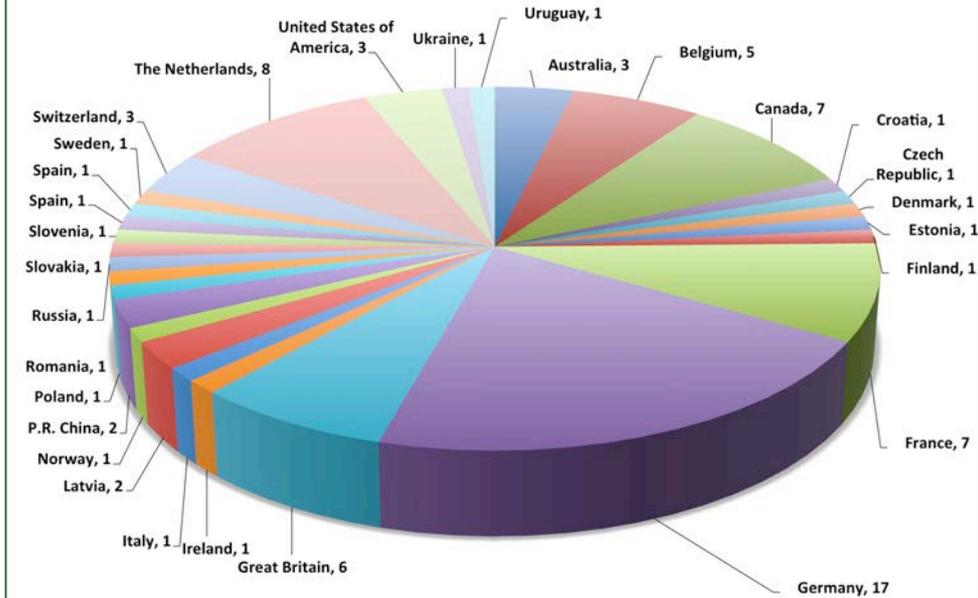
- InterChanvre, France
- Hemp Industries Association, USA
- Canadian Hemp Trade Alliance, Canada
- International Hemp Building Association, Ireland

Members of the EIHA

- 2008: 57
- 2009: 68
- 2010: 65
- 2011: 82
- 2012: 81

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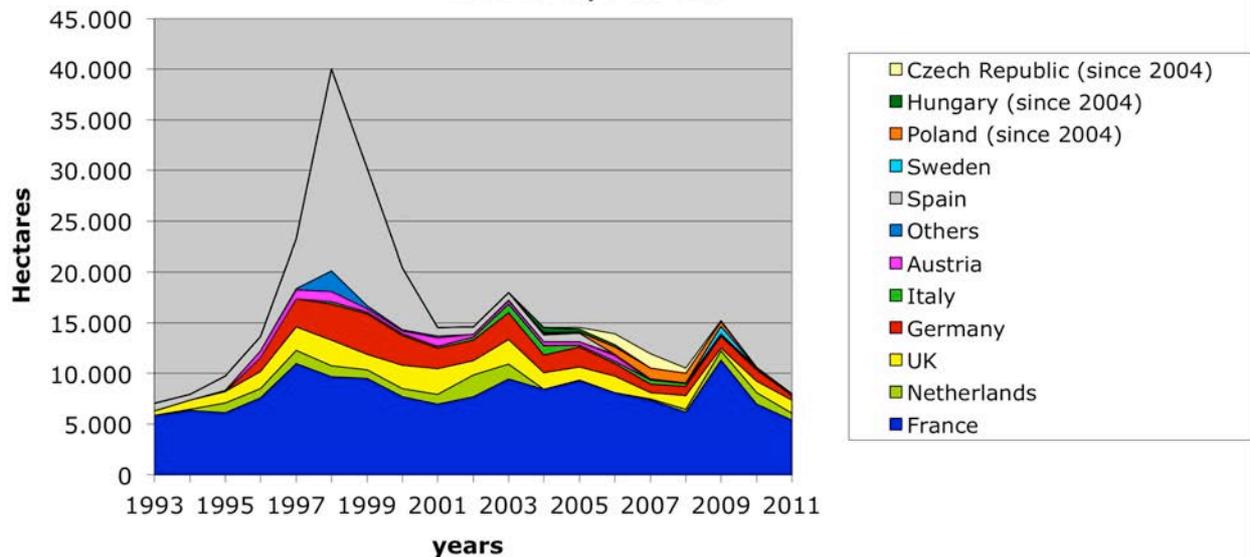
EIHA Member – country distribution



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Hemp cultivation area in the EU (ha)

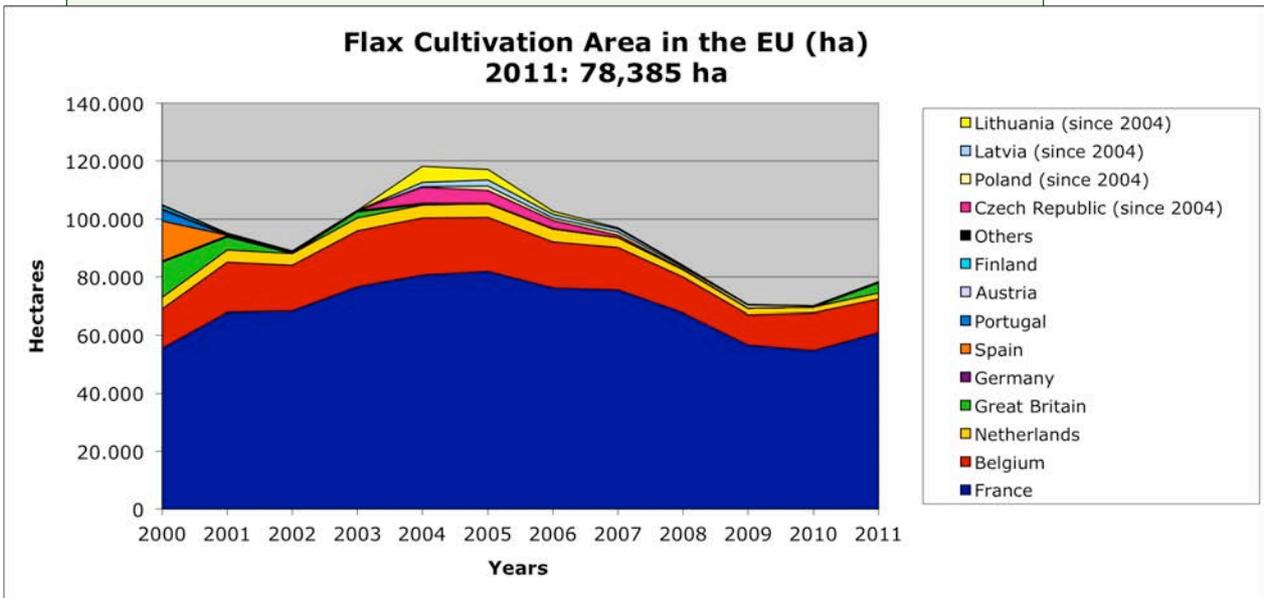
Hemp Cultivation Area in the EU (ha)
2011: 8,000 ha



2009: approx. 15.000 ha, 2010: approx. 10.000 ha. Decreasing demand from cigarette paper industry (switch to wood pulp) and competition to bioenergy and exotic fibres

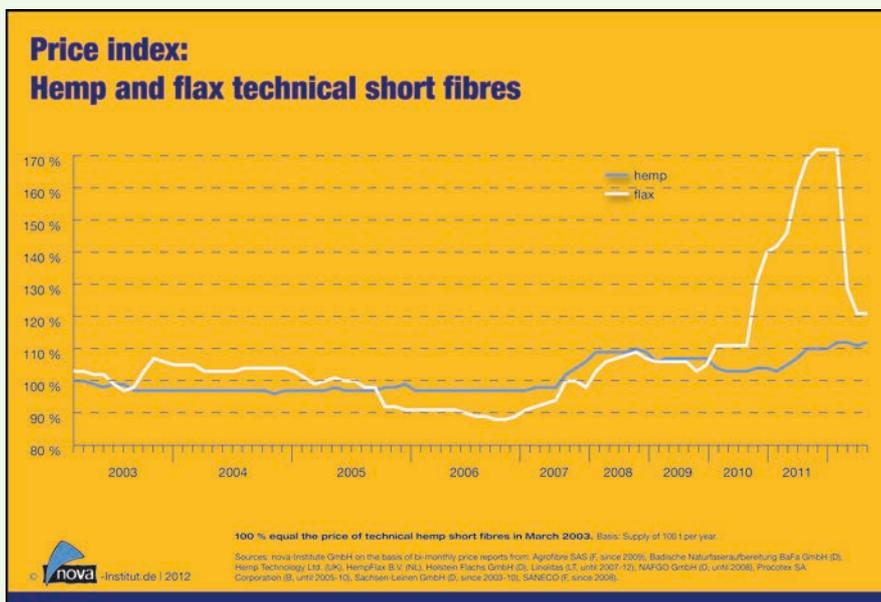
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Flax cultivation area in the EU (ha)



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Price index: Hemp and flax technical short fibres



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Looking back on activities in 2012

(very limited budget in 2012)

1. Overview on planned activities
2. Lobbying in Brussels (DG Agri, DG Enterprise (LMI, bio-based Economy), DG Research & Innovation, InterChanvre: EP)

Updated position paper on European Hemp
3. Summer survey on industrial hemp production and applications in Europe
4. Page in iBIB 2012/13 and booth at International Conference on bio-based plastics and composites
5. Starting the Sustainability Certification in contact with ISCC and a kick-off workshop (failed)

Focus of activities of EIHA in 2012

old
done (new)
open

Increasing the awareness of industry on hemp and its potential as bio-based material

Exhibitions

- March 2011: International Congress on Bio-based Plastics and Composites, Cologne (booth)
- June 2011: German Electro-Mobility Congress, Bonn (booth)
- March 2012: International Congress on Bio-based Plastics and Composites, Cologne (booth)
- **More this year? Limited budget!**

Yearly EIHA conference & executive office

- Conference: Sending invitation to 10.000 potential customers
- Conference: The meeting point for international hemp industry
- Executive office & information platform for members
- Updating the EIHA-Webpage and the book keeping system
- Attract new regular and associated members

EIHA publications & PR

- 2011-01: "Assessment of Life Cycle Studies on Hemp Fibre Composites" in: bioplastics MAGAZINE Vol. 1/2011
- 2011-05: Application form - One page on EIHA to put in the other leaflets
- 2011-05: Leaflet LCA Meta-Analysis on Hemp Fibre Products, summary (done), long version (done)
- 2011-05: Press release on: EIHA conference & META LCA & Hemp Fibre Availability
- 2011 & 2012: Press Release on CAP and the general Hemp situation, and showing all our new reports (see other slide)
- 2012-03: One page in iBIB2012/13 - International Business Directory

Increasing the awareness of policy on hemp and its potential in bio-based economy

Support the
Hemp Industry!
Join EIHA!
(www.eiha.org)

Informing, networking and lobbying in Brussels

- 2011-05: Ecological benefits of hemp and flax (report - Albert Dun)
- 2011-05: CAP options for support of hemp (report)
- 2011: Cooperation with other associations (Hemp & Flax, FAO and Reinforced Plastics, Bio-based Material & Plastics, Biotechnology)
- 2011-05: Position Paper on THC feed limits (-> EU Commission)
- 2011-10: Meeting with COPA-COGECA and EU Commission
- 2012-02: EIHA position paper on CAP
- 2012: Visit different DGs of the EU Commission and Parliament, DG Environment (DG Enterprise, DG Agri and DG Research is done)
- Cooperation with the French Hemp & Flax branch for lobbying in Brussels

Membership in Standardization / Certification Working Groups

- 2011/2012: Observer, Lead Market Initiative (LMI) - ad-hoc advisory group (DG Enterprise)
- 2009/2010 and 2012: CEN Standardization programme for bio-based products

New activities

- Market survey on Hemp cultivation, processing and applications
- ? Sustainability Certification for Hemp Fibres as the first Natural Fibre world wide! First steps done ... ISCC certification scheme (ca. 15.000 €)
- ? Additional leaflet on EIHA activities

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Document for The Commission & The Parliament, 10th February, 2012

Despite growing demand from automotive and (bio-)plastic industries the Hemp Fibre Sector is suffering from the wrong policy framework

EIHA is supporting the "Greening" in Brussels CAP reform: It is a step in the right direction. Concerns about transition period.

EIHA sees an urgent need for a level playing field for bio-based materials

But despite this growing demand and interest, European hemp fibres cannot profit from this development, in contrast: the whole European Natural Fibre industry is suffering from the wrong policy framework and the cultivation areas of hemp have been decreasing over the last few years!

There are two main reasons for this unwanted development in contrast to the aim of greening European industries

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First reason

Hemp is suffering from the strong ongoing support of bioenergy and biofuels during commercial production (quotas 2020: 10% biofuels & 20% renewables incl. bioenergy, tax incentives, green electricity regulations and more). Without comparable support bio-based materials will suffer from under investment from the private sector. Recent policy leads to a market distortion regarding feedstock availability and costs: The increasingly high prices for arable land can only be afforded by highly subsidised energy crops. Under the existing policy framework hemp cannot offer the same profit for farmers, the result is an ever decreasing cultivation area.

Because of this situation EIHA is strongly supporting the Policy paper on Bio-based Economy in the EU: “Level Playing Field for Bio-based Chemistry and Materials”, written by different bio-based experts and supported by many associations, companies and universities involved in the bio-based economy. (see www.bio-based.eu/policy/en)

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Second reason

On the other hand European hemp fibres are completely unprotected by the competition from imported exotic fibres like jute, kenaf or sisal, which cannot even show a sustainability certification like imported biofuels. The social and environmental standards of these tropical fibres are often low. EIHA is claiming for a binding sustainability certification for all imported (and domestic) natural fibres to guarantee fair competition.

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EIHA welcomes the new CAP reform

Changes in the political framework should be made as soon as possible. The “Greening” in the new Common Agricultural Policy (CAP) reform is a step in the right direction and hemp as an environmental friendly niche crop will profit from this greening of the 1st pillar. EIHA is therefore supporting the new CAP reform, particularly for the following reasons (see position paper, free available at www.eiha.org)

Concerns about the transition period

There are grave concerns because of the transition period before the CAP is reformed. This year another financial challenge has to be overcome: The processing aid for hemp (already minute compared to bioenergy and biofuel support), which could partly rebalance the unfair competition to energy crops and imported exotic fibres, will end. This could lead to a crucial and worrying situation for the European hemp fibre industry, despite the great demand and potential for green materials. The challenge is to stay alive until the greening in the new CAP actually takes place.

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Brussels revisited for lobbying (John & Michael)

- The new position paper emailed to twenty senior civil servants within the Commission
- EIHA subsequently invited to present the European Industrial Hemp Industry to DG Enterprise & Industry (2 times), DG Agricultural (2 times) and DG Research & Innovation (2 times).
- Outstanding visits: DG Environment and European Parliament (we are already in contact)
- Ongoing close cooperation with French Hemp (Interchanvre) & Flax branch (CELC and others).

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Future of the processing aid

- It is lost on EU level (along with all others direct aids)
- It will be continued for Belgium, France and The Netherlands (only for one year) (-> non level playing field)

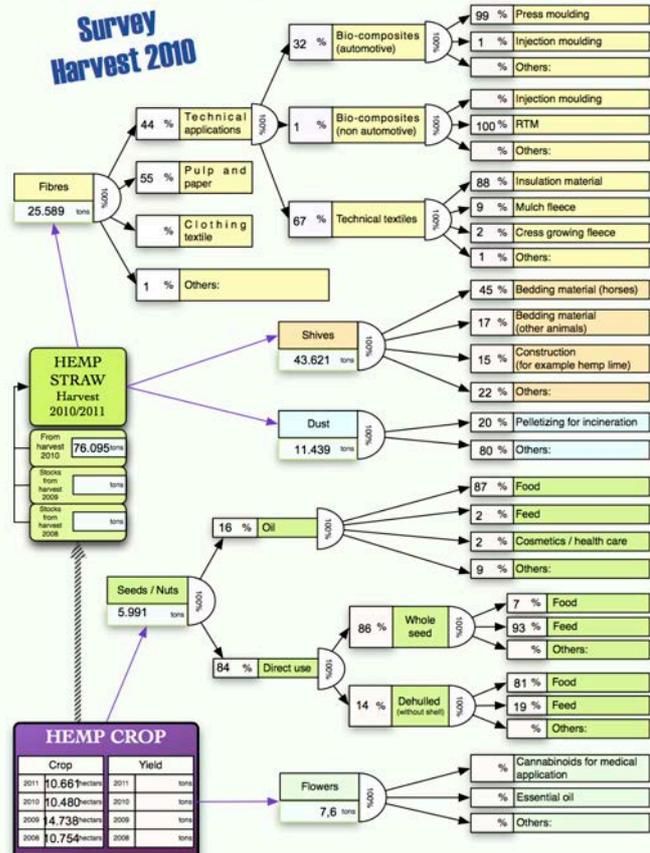
Three clear approaches

- New CAP: Keep the “greening” in the First Pillar
- New CAP: Second Pillar support to get regional development funds
- Keep the hemp branch in the family of bio-based economy.
Bio-based Economy – Lead Market Initiative

Survey Summer 2012



Survey Harvest 2010

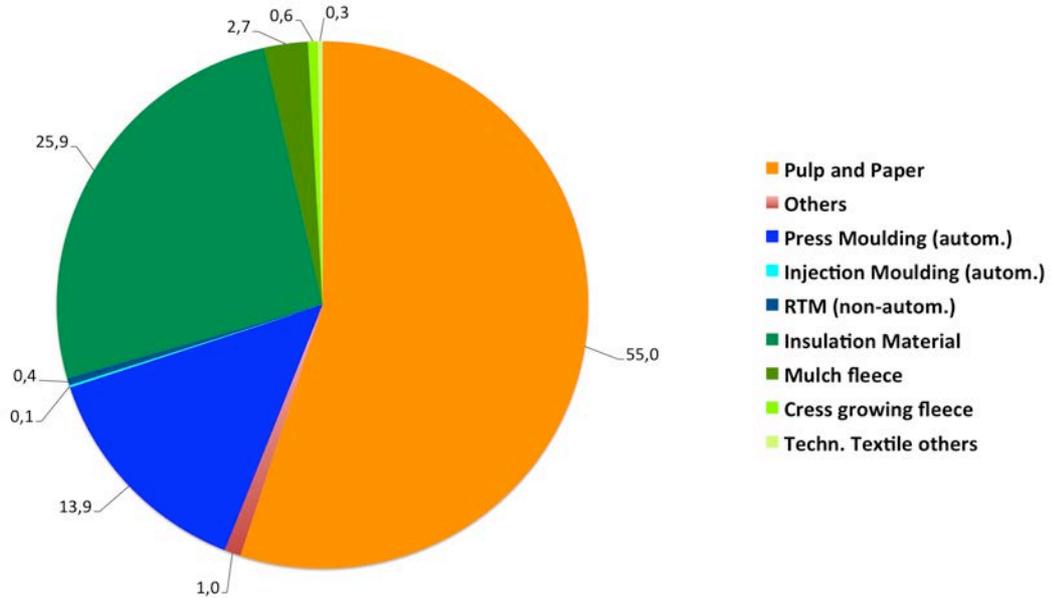


Overview on existing hemp applications due to EIHA survey summer 2012 (most detailed analysis ever done)

Detailed data on European Hemp 2010 EIHA survey summer 2012

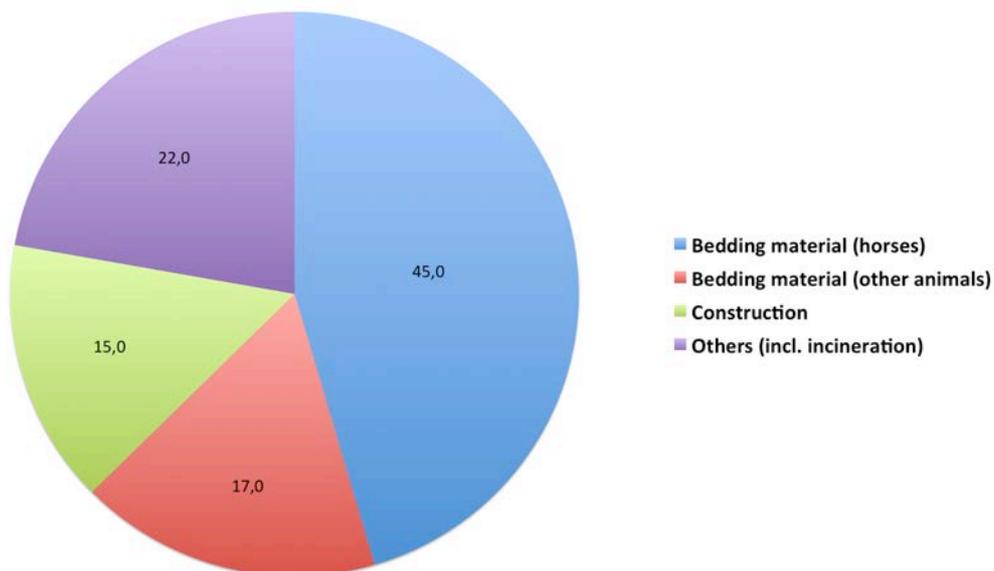
- The survey covers the harvest 2010
- Hemp straw from harvest 2010: 76,095 tonnes from 10,661 ha
- Average straw yield: 7.2 t/ha
- **Fibres: 25,589 tonnes**
- **Shives: 43,621 tonnes**
- **Shives : Fibres = 1.7 : 1**
- **Dust: 11,439 tonnes (20%: pelletized for incineration, 80%: others)**
- **Seeds: 5,991 tonnes**
- **Flowers: 7.5 tonnes (medical applications, essential oil)**

Hemp Fibre Applications, European Hemp 2010, 25,589 tonnes (EIHA 2012)



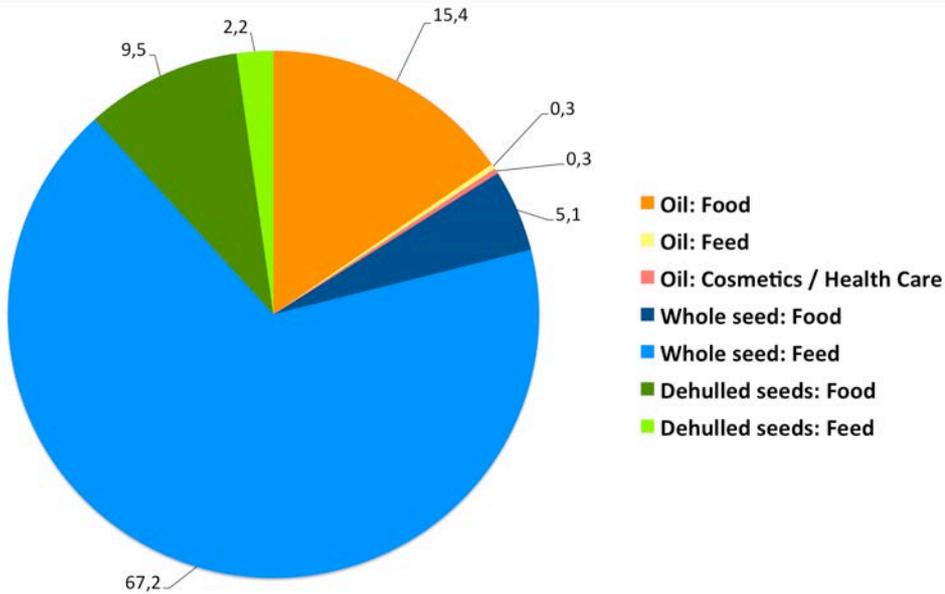
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Hemp Shives Applications, European Hemp 2010, 43,621 tonnes (EIHA 2012)



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Hemp Seed Applications, European Hemp 2010, 5,991 tonnes (EIHA 2012)



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Int. Business Directory for Innovative Bio-based Plastics and Composites: iBIB2012/13

www.bio-based.eu/iBIB

iBIB2012/13
 International Business Directory for Innovative Bio-based Plastics and Composites

new issue 2012/13
 80 subscribers
 15% more than 2011

Published by nova-Institute GmbH and bioplastics MAGAZINE
 in cooperation with agrohouse
www.bio-based.eu/iBIB

Agencies - Associations - Clusters - Councils


 European Industrial Hemp Association

EUROPEAN INDUSTRIAL HEMP ASSOCIATION (EIHA)

Association
 EIHA was originally founded as an association of the members of the European Hemp Industry. Regular members include primary Hemp processors in the EU. Associate members may be associations, research organisations and companies and individuals working in the area of Hemp and other natural fibres. Founded in 2005, EIHA today has 8 regular and more than 74 associated members from 28 countries. EIHA was founded to give industry a voice at the European Commission in Brussels. It has rapidly become a respected industry association that provides effective lobbying and serves as an information bank.
 The annual EIHA conference www.eiha-conference.org/ (more than 100 participants from 30 countries) has become an attractive opportunity for members and visitors to meet, learn about developments and exchange views with their colleagues. The conference is the most important event on industrial Hemp – worldwide!

Founding
 ■ 2005

Members
 ■ Regular members: 8
 ■ Associate members: 74

Key services
 ■ Effective lobbying at the European Commission in Brussels
 ■ Consulting
 ■ Networking
 ■ Huge EIHA database, more than 300 presentations, reports and documents

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Contact person

 Michael Carus
 Managing Director

European Hemp Fibres are available for your bio-based products! Today, China, Canada and Europe are the main Hemp cultivation areas in the world. In 2010 the total cultivation area in the European Union was around 10,000 ha. These areas produce around 24,000 t Hemp fibres. All by products like shivs (woody part of the Hemp stem) and dust are used. Main countries for Hemp production are France, UK, Germany, The Netherlands and Poland. Hemp fibres, ready to use in your bio-based products are price competitive to other domestic and exotic fibres for technical applications. Different qualities are available.

European Hemp fibre is currently used mainly in technical applications like specialty paper (cigarette paper, technical filters), insulation material, natural fibre reinforced plastics (automotive, industrial and consumer goods), much and cultivation fibres. Especially insulation and plastic reinforcement show promising market increases. Different options for feeding Hemp fibres in injection moulding processing are available today.
 The EIHA Hemp processors produce on average each year between 10,000 and 15,000 tonnes of technical Hemp fibres. As Hemp is an annual crop this quantity can be easily increased according to demand!

Please find the Hemp processors for your demand on www.eiha.org


 Pictures (left to right):
 Wiese & Lindner, Heep, Lufas.com



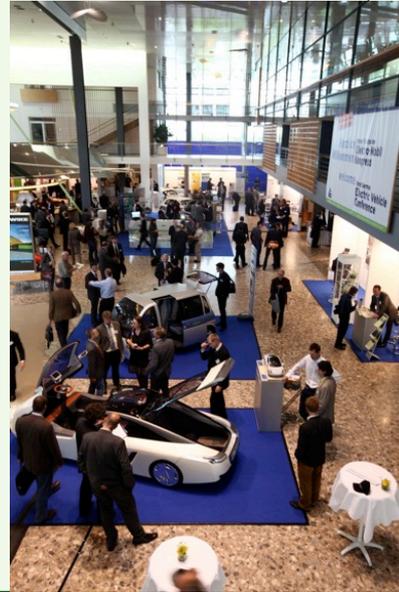
107

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Cologne, March
 2012, 5th Int.
 Congress on Bio-
 based Plastics &
 Composites

Bonn, June 2010 & 2011
 Electro-Mobility



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Registered:

- Polyvlies
- Johnson Controls
- Institute for Composites

Interested:

- BMW
- Ford
- Isowood

**All from Germany –
 no interest from the
 French Automotive
 Sector**

**European Hemp Fibre - The first natural fibre
 with a "Sustainability Certification"?**

+++ The workshop has been cancelled due to the low number of participants! +++

Dear automotive expert,

We - the European Industrial Hemp Association (EIHA) - would like to invite you to a workshop on European Hemp Fibre - The first natural fibre with a "Sustainability Certification"

Venue

AVK - Federation of Reinforced Plastics
 Frankfurt Central Station (Am Hauptbahnhof 10, 60329 Frankfurt am Main)
Appointment: 5 December 2012, 10:30 - 14:30

Topics of the workshop

Status of the European Hemp Industry, Michael Carus (Managing Director of nova-Institute and EIHA)

- Hemp production, HempTechnology (UK), John Hobson (President of EIHA and sales manager of HempTechnology)
- ISCC+ The Sustainability Certification for bio-based products and intermediates, Michael Carus (Managing Director of nova-Institute and EIHA)
- Discussion on interest and demand from automotive industry

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Report on current financial situation

Current balance (November 5th, 2012)	5.181,61 €
Not yet paid fees, Membership fees not paid yet (2012)	2,300.00 €
Expenditures / costs since 11th General Meeting (May 2012 – November 2012)	
Donation to the executive committee (2012) - final rate	2,000.00 €
Banking fees approx.	315.00 €
Internship Alexandre Kauffmann	1,190.00 €
IT services nova	1,683,85 €
Costs for court & notary	91,66 €
General Meeting 22 May 2012	755,10 €
Meeting Board of Directors (16 September 2012)	36.00 €

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Financial in 2012

Expected budget in 2013	
9 regular members x 1,500 € (or more)	13,500.00 €
72 associate members x 300 € (or more)	21,600.00 €
Total	approx. 35,100.00 €
Expected costs in 2013	approx. 18,600.00 €
General Meeting (May 2013)	500.00 €
General Meeting (November 2013)	500.00 €
Donation Executive committee nova 2013 (M. Carus, D. Vogt, St. Piotrowski, L. Scholz)	12,000.00 €
Exhibition booths	1,000.00 €
Travelling costs & meetings	2,000.00 €
IT and Layout	2,000.00 €
Banking fees and credit card payment provider	600.00 €
Others (Sustainability Certification)	???? €

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Exclusion of non-paying members - for 1 year unpaid:

- Andre Noel
- Yunnan Industrial Hemp Inc.
- Chidi Chidi-Umeh
- Dr. Jürgen Quandt
- Dermot Kavanagh
- Drew Gourdie
- J. Pfeiffer
- Patrick Vielle

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Assessment of the votes

1. Regular

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

2. Associate

Each member has 1 vote

2012-01

Application for membership: European Industrial Hemp Association (EIHA)

The applicant wants to enter the EIHA as a

- regular member with contracted hemp cultivation area this year of ha
 associate member with an annual membership fee of EUR (minimum 300 €)

Regular membership is restricted to those legal entities or companies, which perform the processing of hemp straw to fibres and hurds/shives or hemp raw material like fibres, hurds/shives, seeds or flowers.

Regular members have a base of ten votes until 800 ha of area under hemp cultivation contracted by its processing plant(s) in the current year. Regular members must provide, to the Executive Director of EIHA, data on their cultivation and processing of hemp and on the use of their material by product line by, at the latest, 1. April of the following year. The annual membership fee for regular members is as follows:

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 member. Associate members may attend the annual EIHA meetings, having the right to speak and to make proposals there. The annual membership fee for associate members is 300 € (or voluntarily a larger fee).

Participants & Votes of the 12th General Meeting of the EIHA

2 members have 11 votes:

- John Hobson – Hemp Technology Ltd, UK
- Helene Primout – Agrofibre, France

4 member have 10 votes:

- Margherita Baravalle & Felice Giraudo – Assocanapa, Italy
- Mark Reinders – Hempflax, The Netherlands
- Bernd Frank – Planete Chanvre, France
- Olivier Joreau – Cavac, France

5 members have 1 vote:

- François Desanlis – CDE, France
- Talis Laizans – Latvian Industrial Hemp Association, Latvia
- Michael Carus – nova-Institut GmbH, Germany
- Sylvestre Bertucelli - InterChanvre, France

First of all the identification of the voting rights of the participants is done: 67 votes altogether

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Election

Enlargement of the board of the EIHA

Proposal: Mark Reinders (HempFlax, NL) and Sylvestre Bertuceli (InterChanvre, F) should become additional board members

Name:

- 0 votes against their election
- 55 votes for their election
- 11 abstention

Welcome Mark and Sylvestre to the board of the EIHA!

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

1. Lobbying in Brussels – how to continue?
 - a. Waiting for the final CAP to develop a new strategy
 - b. Linking to bio-based economy
 - c. Reform of the Renewable Energy Directive (RED) – Open the RED for biomaterials
 - d. Report on European Hemp markets (from summer survey) & integrated position paper & InterChanvre focus strategy (zero chemical club)
 - e. Ready end of January

Executive office budget
2. Next step Sustainability Certification (ISCC) – help from MultiHemp?
 - Official letter to Stephano Amaducci

Executive office budget
3. Page in iBIB 2013/14, booths at Conferences and fairs?
 - a. JEC (Exhibition & Conference) **Dominik will present prices**
 - b. Collecting the right events for exhibition & presentation **Dominik will present prices**
 - c. iBIB 2013/14 – **700 € YES**

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

1. Systematic marketing in the Automotive sector? Updated address list
 - a. Which branches?
 - b. Not only automotive
 - c. Costs for the survey **Michael will present a proposal**
 - d. Sharing the list only for regular member?
2. 10th International Conference of the European Industrial Hemp Association 2013 in Wesseling (organized by nova-Institute); see preliminary program **nova-budget**
3. 11th International Conference of the European Industrial Hemp Association 2014 in France? (Francois Desanlis) **Decision at the next General Meeting in May 2013**
4. Improve and update the EIHA web database to a modern system like WordPress **Michael will estimate the costs**
5. Workshop for EIHA members composite industry **Michael will present a concept and an estimation of the costs**
6. Update of the EIHA leaflet: Update EIHA regular members, show the board of directors, more detailed data on applications (from summer survey 2012) **Executive office budget plus costs for layout and print**
7. New business cards, if possible with Hemp paper from Latvia / Talis **Dominik will check the costs for layout, print and paper**

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European Industrial Hemp Association

10th International Conference of the European Industrial Hemp Association (EIHA)

May 22nd – 23rd 2013, Rheinforum Wesseling (near Cologne, Germany)

Home

Programme

Registration

Service

Previous conferences

Terms and Conditions

Contact/Imprint

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Venue

Rheinforum
Koelner Straße 42
50389 Wesseling
Germany

Organizer



Partner

10th Int. Conference of the EIHA

May 22nd-23rd 2013, Rheinforum, Wesseling near Cologne, Germany

The conference will present the latest technology developments and applications of industrial hemp for bio-composites, food, feed, insulation and construction.

The International Conference of the European Industrial Hemp Association (EIHA) is established as the largest meeting of experts on industrial hemp in Europe and indeed worldwide. Specialists from all over the world will meet in order to exchange information regarding the latest developments in hemp and in other natural fibres and moreover on the applications for fibres, shivs, seeds and oil.

Participants will range from cultivation consultants, primary and further processors, traders, scientists and engineers, and investors to numerous small and medium-sized enterprises and to international automotive companies and suppliers. The conference language will be English. We expect 150 international participants.

Conference fee

For non-members the fee for participation is 400 EUR plus 19% VAT (including lunches, snacks and dinner buffet). EIHA members are also required to pay this fee but they will get a credit voucher of 100 EUR which will be deducted from the EIHA Membership fee for 2014.

++ Cultivation ++ Processing ++ Economy ++ Sustainability ++ Innovation



Sponsor



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Leaflet of the Conference



Media-Partner



www.bio-based.eu/news



ONLINE MAGAZINE

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Benefits for EIHA members?

- All questions 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 300 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