



Collective study: **FLAX FIBRE & TEXTILE LINEN**

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**The Alliance for European
Flax-Linen & Hemp unveils the
results of a Flax Fibre & Textile
Linen study and outlines 5 main
issues related to supporting
the transformation of fashion
and decoration markets.**
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During a press conference at the Petit Palais, Paris, the Alliance for European Flax-Linen & Hemp unveiled the results of the study on Flax Fibre & Textile Linen, which reflects the challenges facing an industry that has seen spectacular growth over the past decade.

The study outlines a scenario for building a future together: “Cultivating and growing a European Flax ecosystem that is open to all stakeholders, by involving brands on the issues of growth and reindustrialisation” expands the ambitions of the Alliance as outlined in its strategic plan announced in 2022 during its General Assembly.

To ensure that this scenario will be a success, 5 issues were discussed, which constitute the pragmatic response of a mobilized, committed Alliance determined to play its part in a sustainable transformation of the fashion and decoration markets.



FLAX FIBRE & TEXTILE LINEN:

The first collective study on the strategic issues in a growing industry in an economic context characterized by international tension and an appetite for Linen.

Launched in 2022 by the Alliance for European Flax-Linen and Hemp, the Fibre & Textile Linen study is unprecedented in terms of the mobilisation of industry stakeholders. Over 100 heads of VSB and SME businesses in Europe, China, and India, and over 20 brands, from luxury to mass market, were interviewed by the Kéa Partners teams.

This study accomplishes two goals:

- 1. Mapping the industry to understand and objectively describe what the Flax industry and Flax ecosystem really are.**
- 2. Defining development scenarios for European Flax[®], helping to consolidate growth to strengthen the global market and support reindustrialisation.**

Conducted in the context of clearer issues with supply and demand and reflecting the high expectations of brands that are developing Linen, **the study identified 4 key points:**

- **The strengths and weaknesses of an industry showing very strong growth over more than 10 years (+133% in growing area) in a market that has had tight supply for two years**
- **High expectations with respect to anticipating brand needs (volume, price, creativity, CSR) and brand end markets**
- **Perspectives for growth in Flax-Linen at each link in the value chain**
- **Priority tools that need to be established for:**
 - **Supporting the leading role of Flax fibre production** (3/4 of the world's production of flax fibers comes from Western Europe 80% of which is produced in France) and **opening up to textile Hemp.**
 - **Supporting a reindustrialization of Linen to boost competitiveness** in France and Europe.

In its conclusions, the study describes the conditions for success with respect to priority issues in the short, medium, and long term, and highlights important points through collective and individual recommendations.

The Alliance will thus be able to mobilize the entire Flax and Hemp ecosystem more broadly. A priority issue in the industry's new strategy led the former CELC (European Confederation of Flax and Hemp) to its new identity: Alliance for European Flax-Linen & Hemp. A new identity that is firmly inclusive and embodies the transformation, benefitting European industry players with a presence on global markets.

In full Momentum, the industry would like to serve as a lever for supporting the transformation of brands and of fashion and decoration markets, which are capitalizing on a more transparent, more sustainable, and, if possible, local supply.

Linen and soon, textile Hemp plan on positioning themselves as responses to consumers who base their purchasing decisions on ethical values and sustainability.



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OVERVIEW OF SITUATIONAL AND STRUCTURAL ISSUES IN A GROWING EUROPEAN FLAX INDUSTRY

The unique paradox of Flax is flourishing economic growth in a tense economic climate

Over the past decade, European production of long Flax fibres has seen continuous spectacular growth, driven by progressive demand on the end market, investments in spinning mills in China and India, the Alliance's ambitious collective strategy, a multi-channel marketing campaign, and the development of new uses.

For two years, the industry has been facing an unprecedented paradox: a complex international and geopolitical context, a tough situation with fibre supply - due to temporary shutdowns of processing facilities during COVID and three mediocre harvests - and a flourishing market for Flax at the same time.

Today Flax has been clearly identified by brands and the general public as a fibre with remarkable properties, aligned with modern consumption habits. Nevertheless, it has a very low penetration rate of the end market of less than 2%. For European Flax[®] - certified West European fibre, the potential for growth appears particularly promising.

Brands have high expectations

In this context of tension, Flax fibre, which is marginal in the global landscape of textile fibres (<0.5%) risks falling victim to arbitrage when brands pick raw materials. This is why brands are expressing a need for stronger dialogue with the Flax industry.

Their need is two-pronged: preparing for their calendar by securing supply and sourcing materials as close to each link in the value chain as possible

Flax has two major advantages for brands:

- **The traceability and properties of European Flax[®]** - make a difference in the decision-making process when selecting materials
- **Textile innovation and creativity** (blends, weaves, ennobling, etc.) **are also crucial for designers of luxury and premium brands**

An overview of issues in the development of the industry and its markets helped converge towards a scenario: Cultivating and growing a European Flax ecosystem that is open to all stakeholders, **by involving brands on the issues of growth and reindustrialisation**



THE SCENARIO FOR BUILDING A FUTURE TOGETHER:

“Cultivating and growing a European Flax ecosystem that is open to all stakeholders, by involving brands in the issues of growth and reindustrialisation”

In order to expand European leadership in fibre production in the current context, maintaining the status quo is not an option. By identifying solid major points, the study helps outline a scenario that expands the ambitions of the Alliance, outlined in its strategic plan unveiled in 2022.

For the first time, the study creates a model of the size of the potential market and of the penetration rate by market segment.



The study also raises some points for closer analysis and discussion regarding price volatility, anticipating the fibre supply, and supply and demand mechanisms. These hotly debated issues that can facilitate discussion in a Flax industry made up of entrepreneurs who are used to constantly having to reinvent themselves.

The study and its recommendations are fully in line with the 3 pillars of the Alliance’s roadmap:

1. Expanding our virtuous ecosystem of solidarity that caters to European Flax and Hemp
2. Becoming an innovative and sustainable international reference
3. Guaranteeing quality & embodying desirability

The scenario of “cultivating and growing a European Flax ecosystem that is open to all stakeholders, by involving brands in the issues of growth and reindustrialisation” also implies creating collective and individual strategies at all levels of the value chain.

To ensure that this scenario will be a success, 5 priority issues were discussed, forming the pragmatic response of a mobilized, committed Alliance determined to play its part in a sustainable transformation of the fashion and decoration markets.



THE ALLIANCE FOR EUROPEAN FLAX-LINEN & HEMP OUTLINES 5 PRIORITY ISSUES

2 issues related to Agriculture and Fibres

1. Producing better – In the face of climate challenges, the Alliance wishes to strengthen agricultural R&D and innovation while continuing to focus on biodiversity conservation with an efficient agricultural technical itinerary.

2. Producing more – How can we get better at anticipating the demand on the fibre market? To address this challenge, two tools must be activated:

- Easing the tight supply would lead to an increase in production capacity (harvesting equipment, more efficient primary processing tools) by innovating at the scutching phase and analysing potential expansions of production areas.
- Supporting the development of a European textile Hemp sector while respecting the current Hemp sector and its current markets.

1 common issue at the Fibres and Spinning levels

3. Defining and developing a common reference for describing fibre quality, which complements existing sensory references thanks to R&D in optical imaging.

This work is being performed jointly by European scutchers and weavers through a working group.

1 issue related to French and European Spinning

4. Creating a competitive advantage for local industry thanks to R&D investments to reduce production costs and decrease the need for labour at spinning mills in both wet and dry spinning (mechanization, automation, etc.). This is an industrial approach involving local machinery manufacturers and operators. These investments would help promote the creation of companies with a higher production capacity and being included in sourcing references for premium and luxury brands.

1 issue for the Industry & Brands

5. Creating a dedicated framework for brands to enhance exchanges with each link of the Flax value chain. Many common themes have been identified: digital traceability, the European Flax[®] and Masters of Linen[®] certifications, anticipating Flax supply, the changing presence of Linen in collections, etc.

By focusing its actions on these 5 issues, the Alliance and its businesses will be in a good position to maintain French and European leadership and sovereignty in Flax fibre production, to ensure the competitiveness of a leading European textile industry, and to play their part in a supply chain harnessed in support of brands and their global markets.



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THE POSITION OF THE PRESIDENTS



"We are optimistic because everyone is speaking of Flax with love, and so together, we can translate our ambitions into success.

I would like to say to brands: place your bets on Flax. The public authorities are supporting our efforts to develop Flax and Hemp, and the announcement of an AMI (Call for Expression of Interest) is fantastic news. We, members of the sector, can be agents for change during this transformation."

Bart Depourcq,

President of Alliance for European Flax-Linen & Hemp



"What inspires us, the farmers of Normandy, is a passion for this fibre and the desire to produce it. Today, our industry also needs to address the issue of leveraging spinning. This is why we are launching an AMI for three regions, Normandy, Hauts de France, and Grand Est – we will also be inviting the region of Brittany – to encourage innovation in the production of tools in order to increase productivity, decrease costs of yarn production, and regain our competitive edge. In order to grow, the industry must continue to innovate, as it has done with the R&D project on modelling fibre descriptions. The four regions need to take part in this work.

In the longer term, I also believe in creating a sovereign fund to create a buffer stock and to guarantee certain volumes and prices. Factories need to be able to count on having the necessary raw materials for operations, and we need to prevent these from being sold elsewhere. To support the sector, we will also need to discuss major luxury players who need to spearhead this issue by involving designers and creators in order to offer more Linen in their products."

Hervé Morin

President of the Région Normandie



"The Hauts-de-France region believes in Flax, because I am convinced that we have entered a transformative decade in which Flax can take its rightful place. The close links between producers and processors should lead local communities to work together, and that is the only path to success. This is why we are participating in the Call for Expression of Interest and, together with the Normandy and Grand Est regions, opening up a specialized Flax desk to allow the sector to locate the right contact points, tools, and financing.

We must do our part as local communities, as long-term sources of financing, to become an accelerator and set up a pro-development ecosystem. An ecosystem which will promote investment and will allow us to focus on issues related to markets, the high-end segment, and the sector's success. Our goal is to allow Linen and the sector to take its place, creating jobs and value, while also contributing to the transformation of our regional economies."

Xavier Bertrand

President of the Région Hauts-de-France



ABOUT

The Alliance for European Flax-Linen & Hemp is the only European agro-industrial organization that serves as a global reference and brings together all players in the European Flax-Linen and Hemp value chain.

A platform for reflection, market analysis, dialogue, and strategic orientation, the Alliance for European Flax-Linen & Hemp presides over an industry of excellence in a globalized context. It encourages dialogue with national and European public authorities.

The Alliance for European Flax-Linen & Hemp creates an environment that fosters competitiveness of industrial businesses as part of its three-fold mission of informing members, brands, and consumers, supporting the European ecosystem and European expertise, and promoting European Flax-Linen and Hemp as the preferred sustainable premium fibres worldwide.

It connects 10,000 businesses in 16 European countries and bases its work on the values of solidarity, innovation, scientific validation, and respect for people and planet.

It promotes, initiates, and organizes strategic reflections and research on its fibres to be able to provide all of its

interlocutors with evidence-based economic data, environmental information, and reliable scientific evidence.

The Alliance for European Flax-Linen & Hemp strives to increase the international visibility of its fibres, whose technical and environmental properties inspire global creation and open new opportunities for industrial innovation. It guarantees the traceability of Flax fibre thanks to the EUROPEAN FLAX® and MASTERS OF LINEN® certifications.

The Alliance for European Flax-Linen & Hemp is the new name of the CELC, an association founded in 1951. Western Europe is the number one Flax-producing region in the world [France, Belgium, and the Netherlands account for 80% of production].

EUROPEAN FLAX®: A traceability guarantee for premium Flax fibres grown in Western Europe for all markets. It is a plant-based fibre, the product of ecofriendly agriculture grown without irrigation or GMOs.*

MASTERS OF LINEN®: Traceability guarantee for Flax processed by European businesses on European and Euromed 1 sites. A plant-based, responsible, and local textile at all stages of production: from European Flax® fibre to thread and fabric.

*guaranteed by Alliance at 99% today, tomorrow to be evaluated according to climate change.

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