



Alliance for European
Flax-Linen & Hemp



FLAX-LINEN & HEMP
ECONOMIC OBSERVATORY

ECONOMIC PRESENTATION FLAX-LINEN

Damien DURAND, Economics Director

CIRFS – Brussels, May the 23rd

@flaxlinenhemp



CELC becomes



Alliance for European Flax-Linen & Hemp

The new name in English clearly embodies the organisation's international ambition.

The Alliance for European Flax-Linen & Hemp reflects the solidarity of an industry with European roots which brings together the entire value chain around a common goal:

**MAKING EUROPEAN FLAX-LINEN AND HEMP
THE PREFERRED SUSTAINABLE PREMIUM
FIBRES WORLDWIDE.**



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.
+ 10000 companies – 16 countries



1

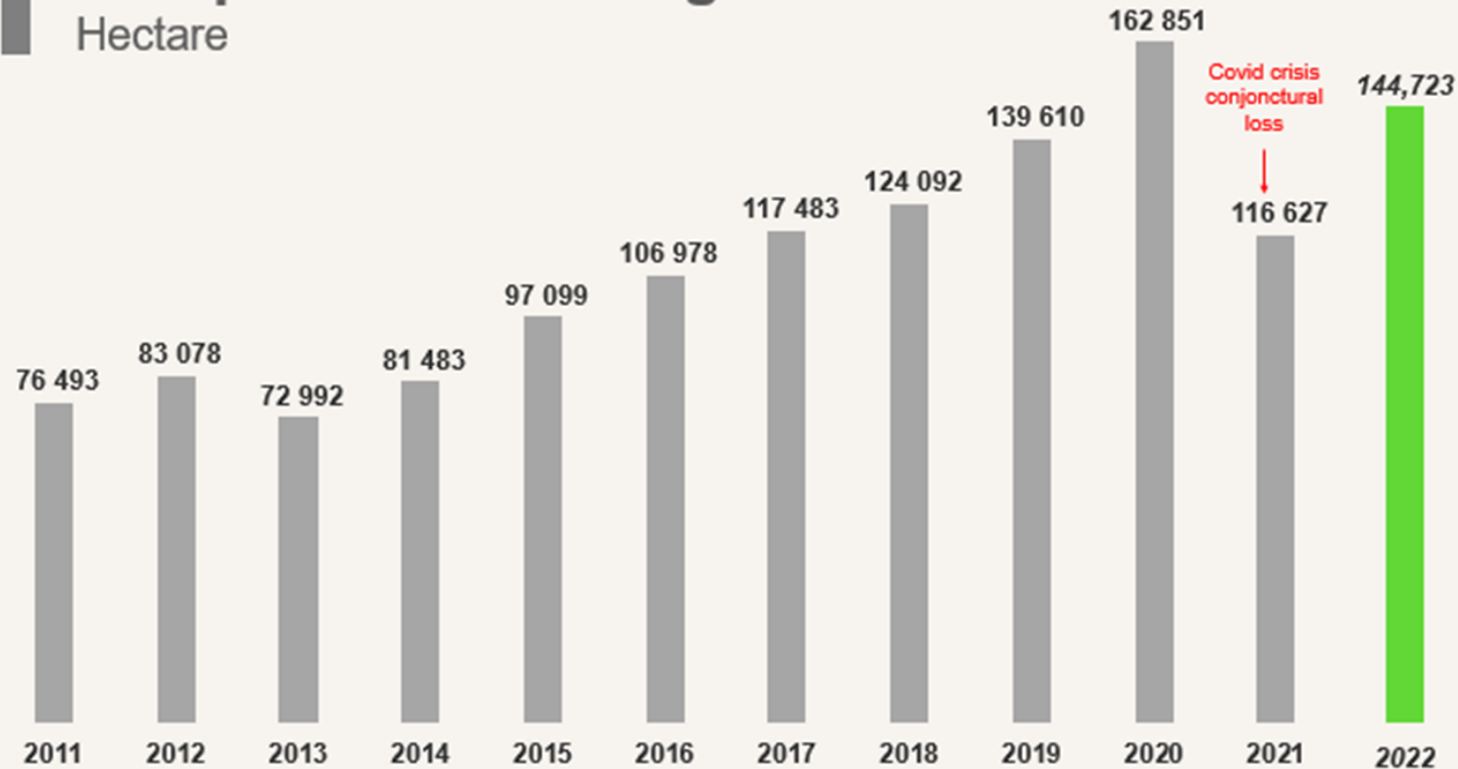
WESTERN EUROPE,
THE WORLD LEADER IN FLAX





WESTERN EUROPE, THE WORLD LEADER IN FLAX

European linen acreage Hectare



Source : CELC

- During the 2010 decade, flax acreage rise at a high rate : +133% in ten years
- After the conjonctural shock of 2021 (post-Covid), acreage restart in 2022
- Conclusion : despite conjonctural shocks, we are living a structural trust



WESTERN EUROPE, THE WORLD LEADER IN FLAX



IN QUANTITY

3/4 of the world production long fibres

in Europe :

145000 ha in 2022 (whose 80% in France
127 000ha)

152 000 t of long fibres in 2022 (whose 125 000 t in
France)

+133% Increase in surface area 2010-2020

Flax-Linen Fibre represents today
<0,5% of world textile fibre production

(long and short fibres)

*Alliance Economic Observatory 2022

IN QUALITY

Terroir
+ Climate
+ European know-how
=
Flax-Linen cultivation that
cannot
be relocated elsewhere

9 spinning mills in Europe/Euromed
and 3 projects spinning mills
(France and Portugal)

IN RESPONSABILITY

- Virtuous life cycle
- Respect people
- Respect the planet
- Traceability



WE INSPIRE

International industry and creation



30%
HOME
INTERIOR
LIFESTYLE
In volume



10%
TECHNICAL
APPLICATIONS
AND
CO PRODUCTS
In volume

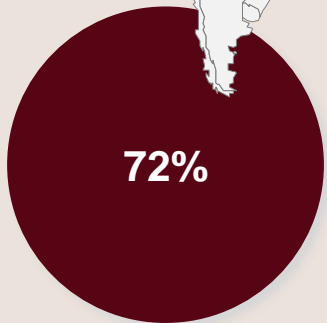
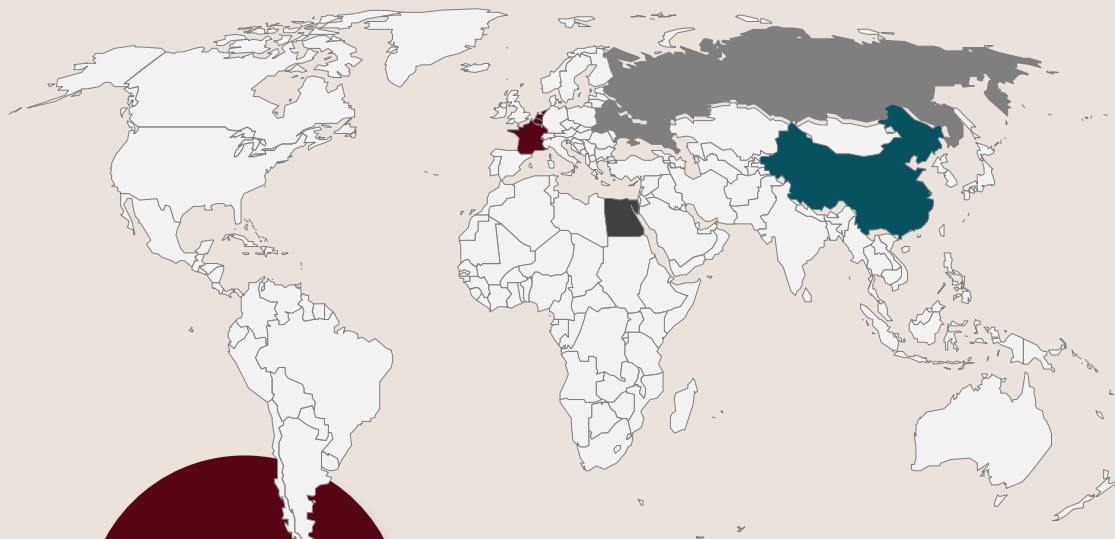


60%
FASHION
All Segments
In volume

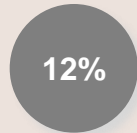


WORLD MAP : GROWING/SCUTCHING & SPINNING

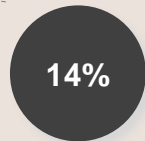
FLAX LONG FIBER PRODUCTION (% , 2021)



France, Belgium,
The Netherlands



Belarus
Russia, Ukraine



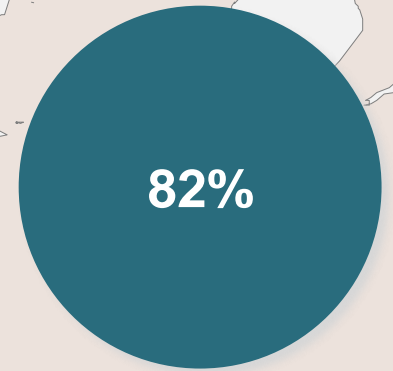
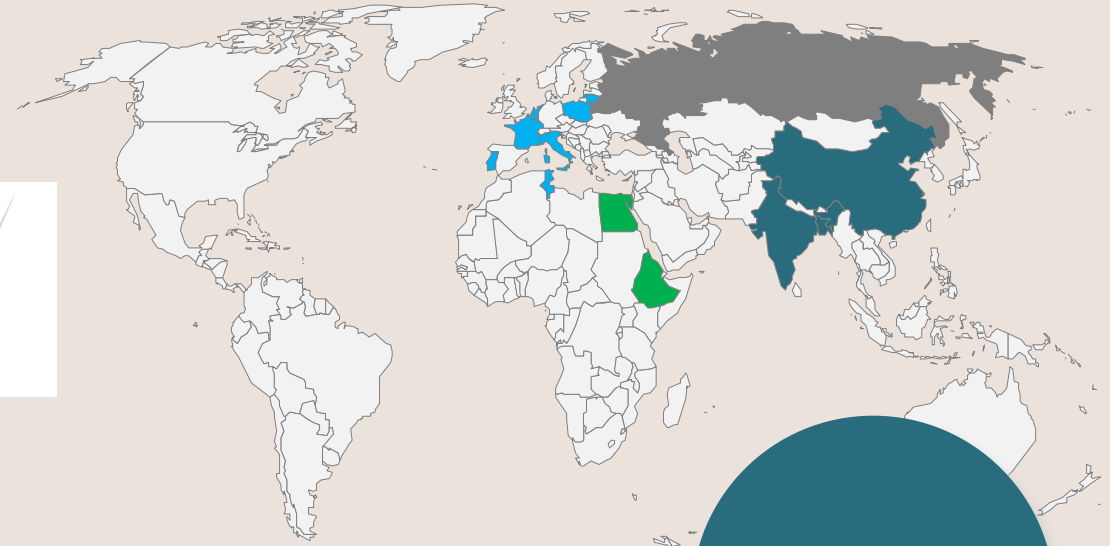
Egypt



China



FLAX SPINNING CAPACITIES (% NUMBER OF SPINDLES, 2021)



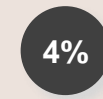
China
India, Bangladesh



France, Poland,
Lithuania, Italy
(+Tunisia)



Belarus
Russia

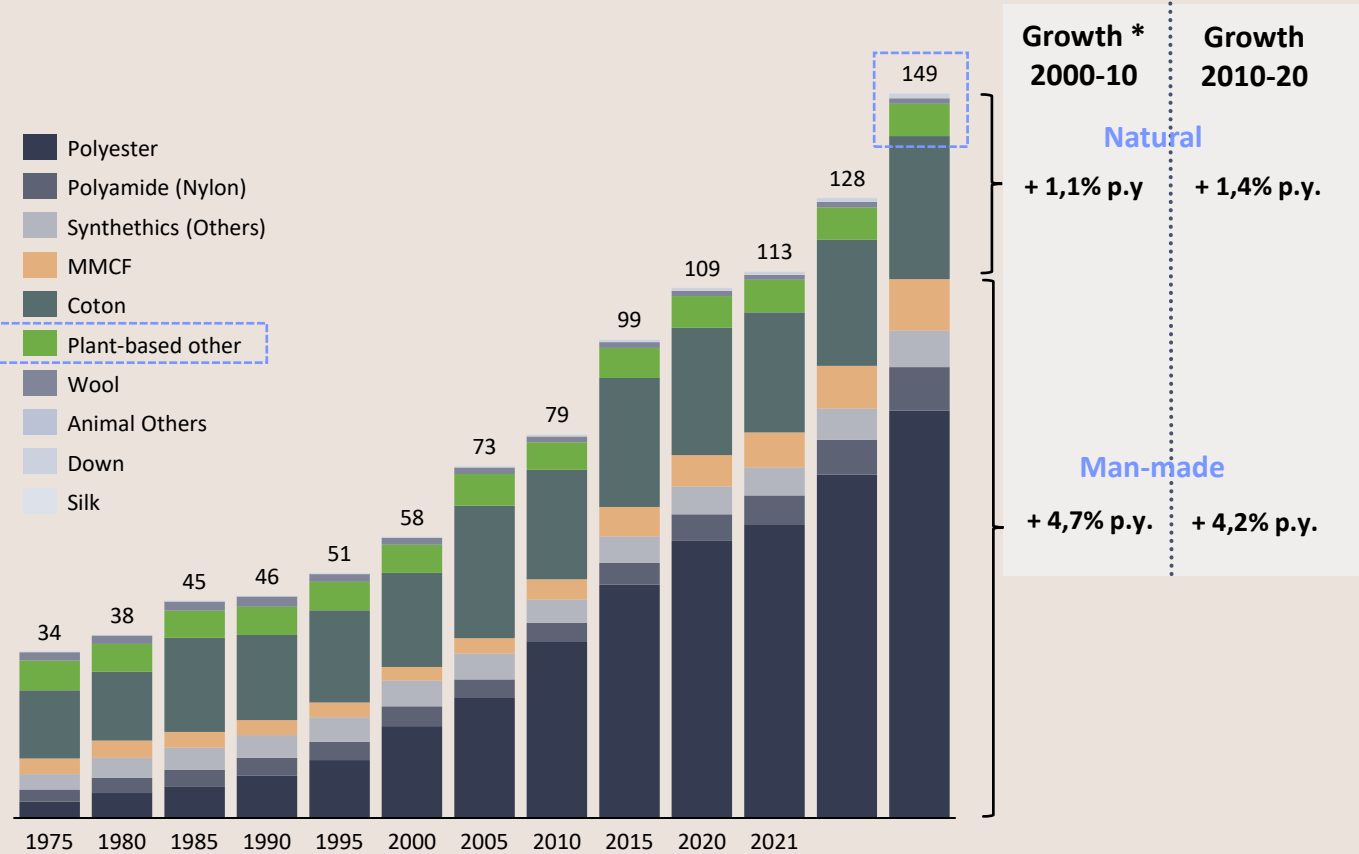


Egypt
Ethiopia

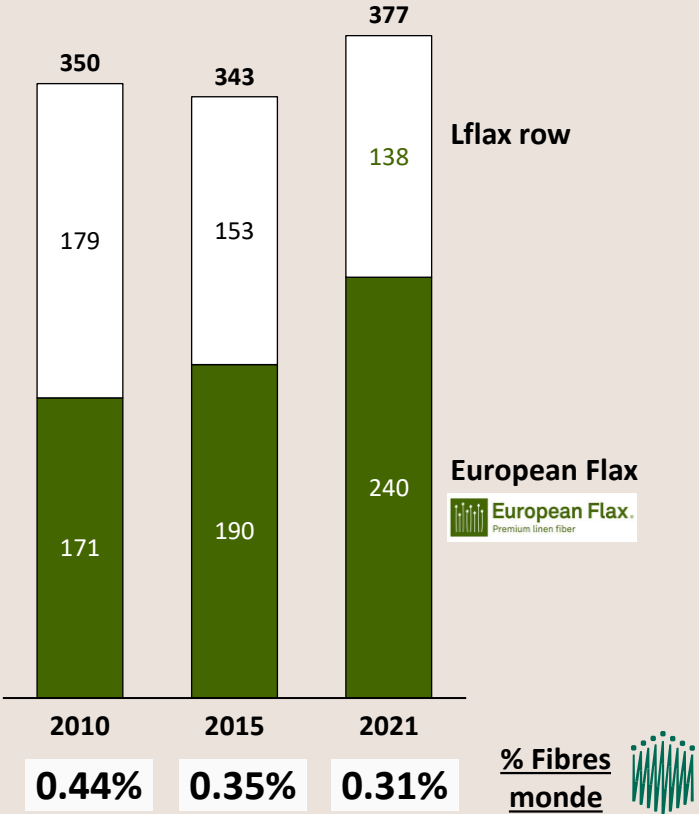
FLAX PRESENCE AMONG THE FIBER WORLDWIDE MARKET

SOURCE :  Kea
Partners
for transformation

TEXTILE PRODUCTION WORLDWIDE EVOLUTION (MT)



FLAX FIBER WORLDWIDE PRODUCTION

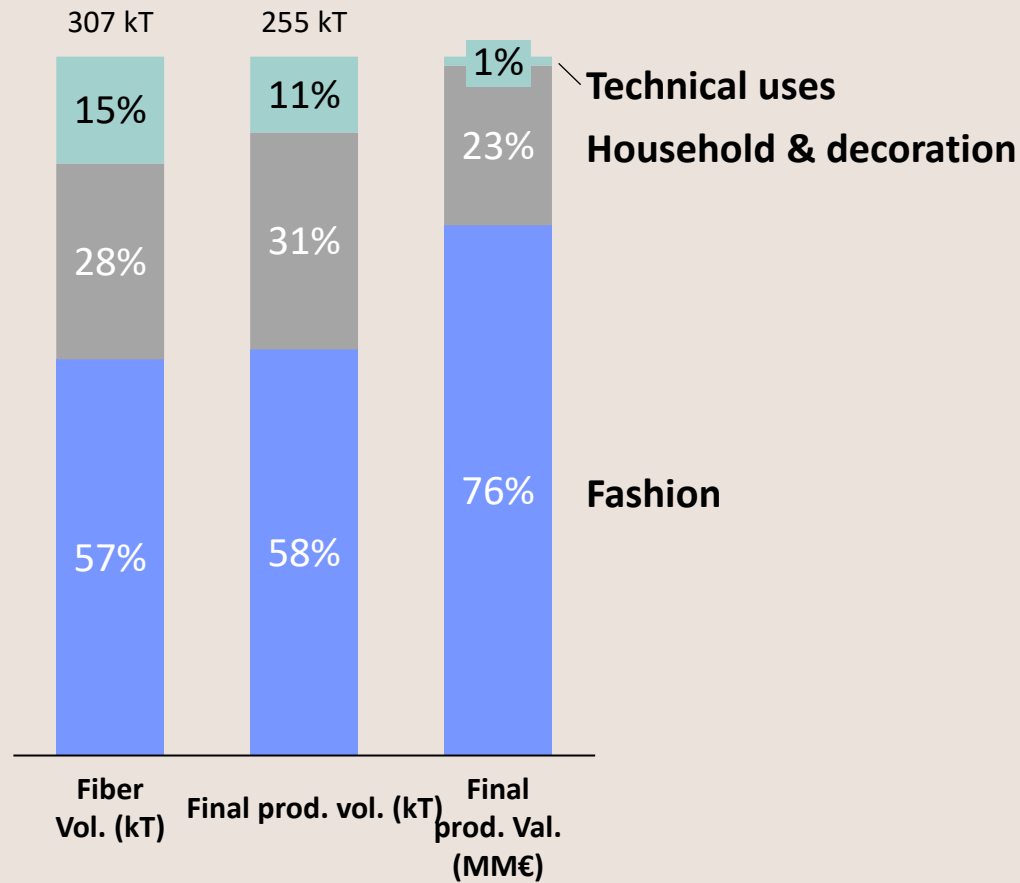


Source : Alliance for European Flax-Linen & Hemp,

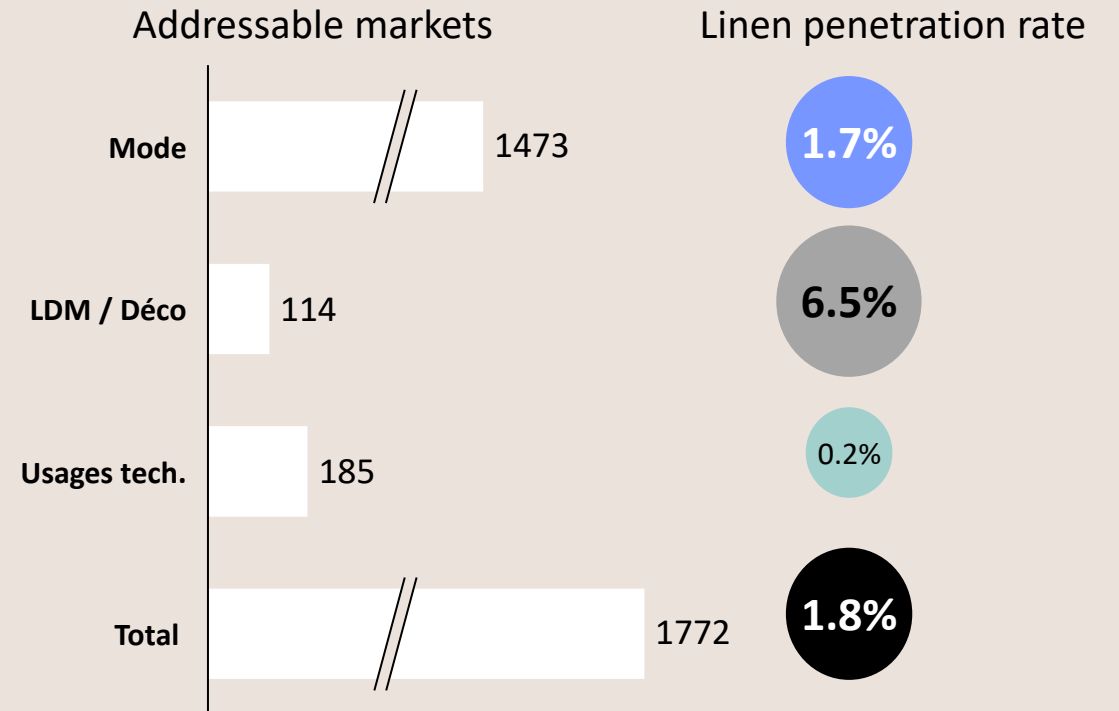
OUTLETS FOR THE FLAX-LINEN

SOURCE :  Kéa
Partners
for transformation

TARGETING FLAX FIBERS TO END MARKETS (VOL ET VAL, 2021)



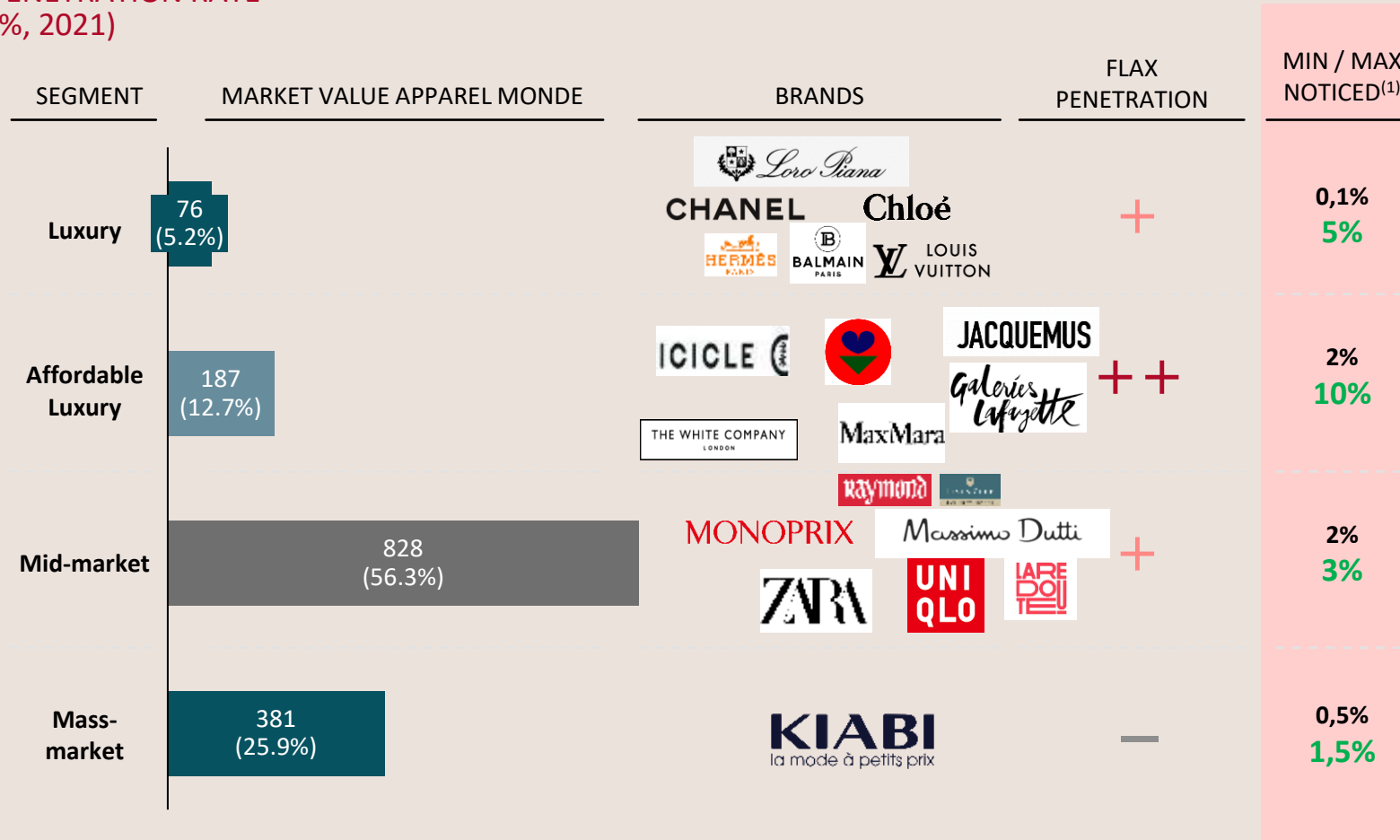
WORLD FLAX FIBER PRODUCTION (LF + SF) (KT)



PENETRATION RATE VARIATION DEPENDING TO BRANDS

SOURCE :  Kea
Partners
for transformation

PENETRATION RATE
(%, 2021)

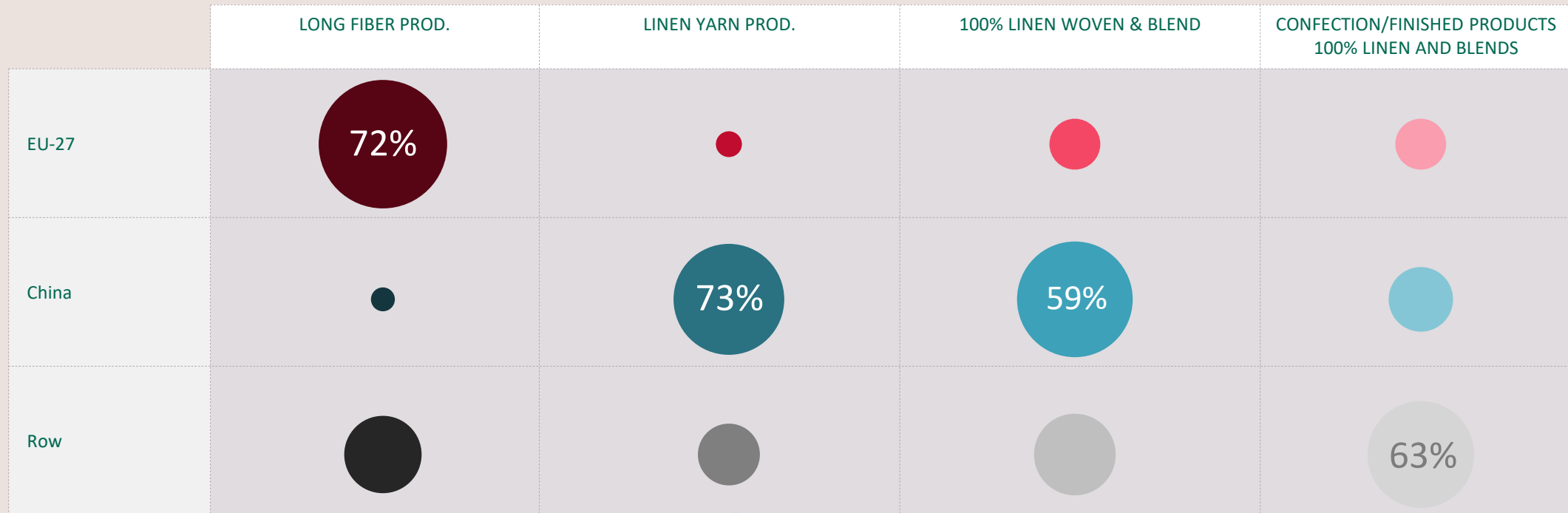


Note: (1) Except 100% linen brands
Source : Statista Apparel Market 2021, Kea & Partners



FLAX-LINEN : AN EUROPE-ASIA CODEPENDENCE


VOLUME DISTRIBUTION LONG FIBERS BY VALUE STAGE & MACRO-GEOGRAPHY



European competitive advantages in flax growing and scutching: pedoclimatic context, human expertise / machines

China's competitive advantages in spinning: massive industrial tool, lower labor costs, government support for investments, energy, forex



A woman is shown from the waist up, wearing a light-colored, ribbed, long-sleeved top and a matching flax-linen jacket. She is also wearing a large, ornate brooch on her chest. She is standing in a field of tall green grass and yellow flowers under a blue sky with light clouds. Her arms are raised, and she is looking down.

FLAX-LINEN GUARANTEES & CERTIFICATIONS



WE ENSURE ORIGIN & TRACEABILITY

Through our labels



**European
Flax®** Premium
linen fibre

The Guarantee of traceability for premium quality flax fibres grown in Western Europe for all end uses. A plant fibre, produced through farming that is respectful of the environment, without irrigation* or GMOs.



100% MADE IN EUROPE

Guarantee of traceability for linen made by European companies on European and Euromed 1 sites. A textile of excellence, local at all stages: from the vegetal European Flax® fibre, to yarn and fabric.



COMPANIES CERTIFIED WORLDWIDE

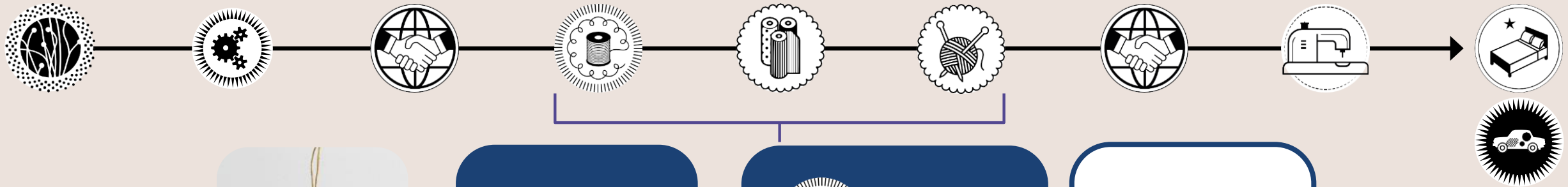



845
companies

34
Countries


718
textile-manuf.

+765%
Jan. 2020- Janv 2023




40
companies

=

 **8**
  **32**

+39%
Jan. 2020- Jan.2023





THANK YOU

CONTACT :

DAMIEN DURAND

Economics Director

ddurand@allianceflaxlinenhemp.eu

@flaxlinenhemp