

SURVEY OF NEEDS

of textile industry stakeholders – REPORT 2026

Output of the project

Preparing the conditions for the revival of the hemp textile industry in the V4 countries and beyond

Lead Coordinator: CzechHemp



With financial support of

• Visegrad Fund



The project is co-financed by the Governments of Czechia, Hungary, Poland and Slovakia through Visegrad Grants from the International Visegrad Fund. The mission of the fund is to advance ideas for sustainable regional cooperation in Central Europe.

Key Figures at a Glance

26 stakeholders surveyed	V4 + DE geographic scope	79% express interest in sourcing hemp	88% cite sustainability as key benefit
22 survey questions	83% willing to collaborate	76% cite price as main concern	54% very familiar with hemp

This report presents the findings of a structured survey of 26 stakeholders across the natural fibre and textile value chain in the V4 region and beyond. It is a key analytical output of a project supported by the International Visegrad Fund, designed to map needs, identify barriers, and provide evidence for the project's Roadmap for regional hemp textile revival.

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1. Executive Summary

The European textile sector is undergoing rapid transformation driven by sustainability requirements, supply chain resilience, and the search for regionally anchored raw materials. Industrial hemp — once a traditional fibre crop in Central Europe — has re-emerged with strong environmental credentials and growing commercial relevance. Yet the hemp textile value chain remains fragmented, technologically uneven, and constrained by limited processing capacity.

This Survey of Needs consolidates insights from 26 respondents across the textile, natural fibre, agricultural, and machinery sectors. While all responses are included statistically, the interpretation focuses on European stakeholders (EU + UK + wider Europe), ensuring that conclusions reflect the realities of the regional market and regulatory environment.

The findings reveal a sector that is highly motivated but structurally constrained. Most European respondents demonstrate strong familiarity with hemp fibres, and a large majority express interest in sourcing or using hemp. Consumer demand for sustainable textiles is widely recognised as increasing, and companies see hemp as a material aligned with circularity, durability, and local sourcing.

The most significant challenges relate to processing capacity, fibre quality consistency, price competitiveness, and the absence of standardised retting and cottonisation technologies. Human capital shortages — particularly in bast fibre processing — further limit the sector's ability to scale.

Reviving this sector requires a coordinated, ecosystem-level approach — connecting primary producers, processors, manufacturers, and research institutions, and linking regional efforts to broader European value chains. This collaborative potential is the sector's most immediate asset — and the foundation on which a competitive, regionally anchored hemp textile industry can be built.

2. Introduction

2.1 Project Context

This report is a central analytical output of the project “Preparing the conditions for the revival of the hemp textile industry in the V4 countries and beyond.” The project seeks to rebuild a functional, regionally anchored hemp textile value chain by mapping existing capacities, identifying technological and human capital gaps, and supporting cross-border cooperation among key actors in the V4 region and Germany.

The textile industry in Central Europe has undergone significant restructuring over the past three decades. Midstream and upstream segments — decortication, scutching, refinement, and to some extent spinning — have largely disappeared or operate at limited scale. This has created a structural imbalance: companies interested in natural fibres often lack access to consistent, high-quality raw materials, while farmers lack reliable markets for fibre-oriented hemp.

2.2 Survey Methodology

The survey was conducted between late 2025 and early 2026, using a Google Forms questionnaire targeting professionals in the V4 region and Germany. It collected responses to 22 questions from 26 stakeholders, covering technological readiness, market orientation, fibre sourcing challenges, and collaboration potential.

The questionnaire focused on four pillars: (1) organisational profile and awareness; (2) sourcing and supply chain dynamics; (3) technical readiness and processing specifications; and (4) regulatory landscape and collaborative support.

Among the 26 respondents, 24 are from continental Europe with a notable concentration in the V4 region and Germany; one company is based in the UK and one in India. All 26 responses are included in the statistical analysis; interpretation focuses on European respondents. Data were semantically unified to ensure consistent categorisation across open-text responses.

3. Respondent Profile

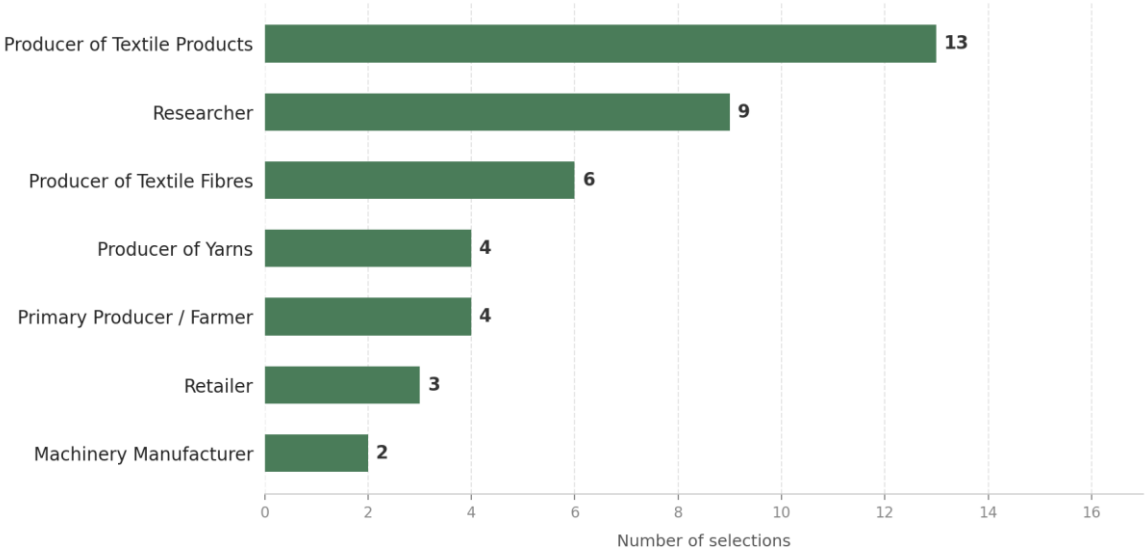
The survey collected responses from 26 organisations spanning the V4 region, Germany, and beyond. Poland represents the largest national contingent with eight respondents, followed by the Czech Republic with seven. Hungary contributes four respondents and Slovakia two. Germany is represented by two organisations. The remaining responses come from the United Kingdom, India, and one respondent that could not be assigned to a specific country.

The respondent pool reflects a broad cross-section of the natural fibre textile value chain, with many organisations operating in more than one segment. When counting all selected roles, the largest group consists of producers of textile products (13 selections), followed by researchers (9), producers of textile fibres (6), primary producers/farmers (4), producers of yarns (4), and retailers (3).

In terms of operational profile, the sample includes a strong representation of companies active in textile product manufacturing, fibre processors and primary producers, research institutions covering agronomy and textile engineering, and machinery manufacturers focused on decortication and secondary processing.

Chart 1: Respondent roles in natural fibre textile industry (26 responses)

Q: What is your role in the natural fibre textile industry?



Note: Respondents could select multiple roles. Total selections (n=41) exceed the number of respondents (n=26).

The respondent pool spans the full length of the natural fibre textile value chain. Producers of textile products and researchers form the two largest groups, while primary producers, fibre processors, and machinery manufacturers ensure upstream and midstream perspectives are well represented.

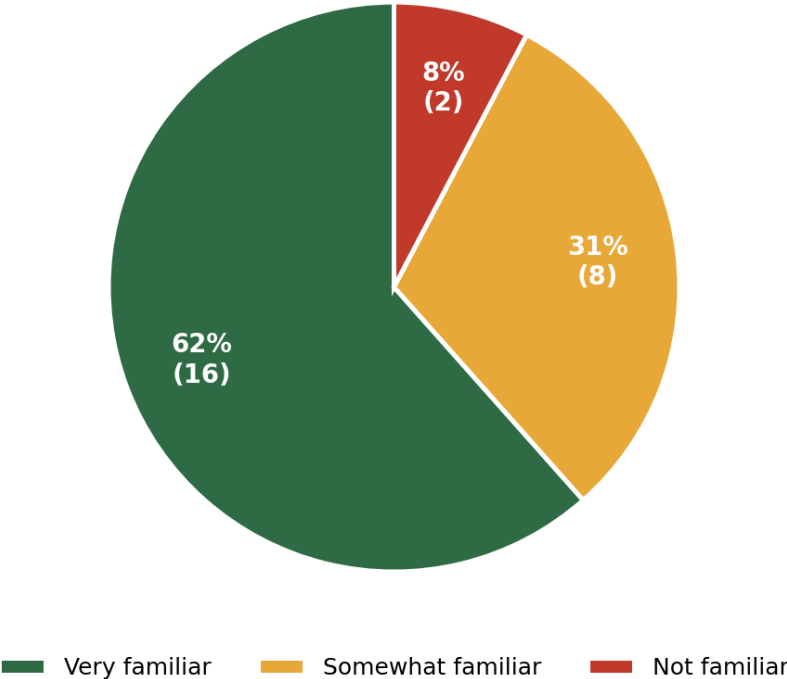
4. Industry Familiarity and Technical Experience

Across all respondent groups, familiarity with hemp is notably high. Among the 24 European respondents, more than half (54%) describe themselves as very familiar with hemp as a raw material, while a further 38% report being somewhat familiar. Only two respondents (8%) indicated limited familiarity. The primary challenge is therefore not awareness, but access to consistent raw material supply and appropriate processing infrastructure.

Note: The chart below includes all 26 respondents (n = 26); the percentages quoted in the text above relate to the 24 European respondents, in line with the interpretive focus set out in Section 2.2.

Chart 2: Familiarity with industrial hemp fibres (26 responses)

Q: How familiar are you with industrial hemp fibres / yarns / textiles?



n = 26 respondents

More than half of respondents describe themselves as very familiar with industrial hemp fibres, and over 90% report at least some working knowledge of the material. The primary challenge is not awareness but the absence of reliable supply and adequate processing infrastructure.

Additional data suggest that the technical proximity of bast fibres (flax vs. hemp) is the primary driver for rapid industrial adoption once processing hurdles are cleared.

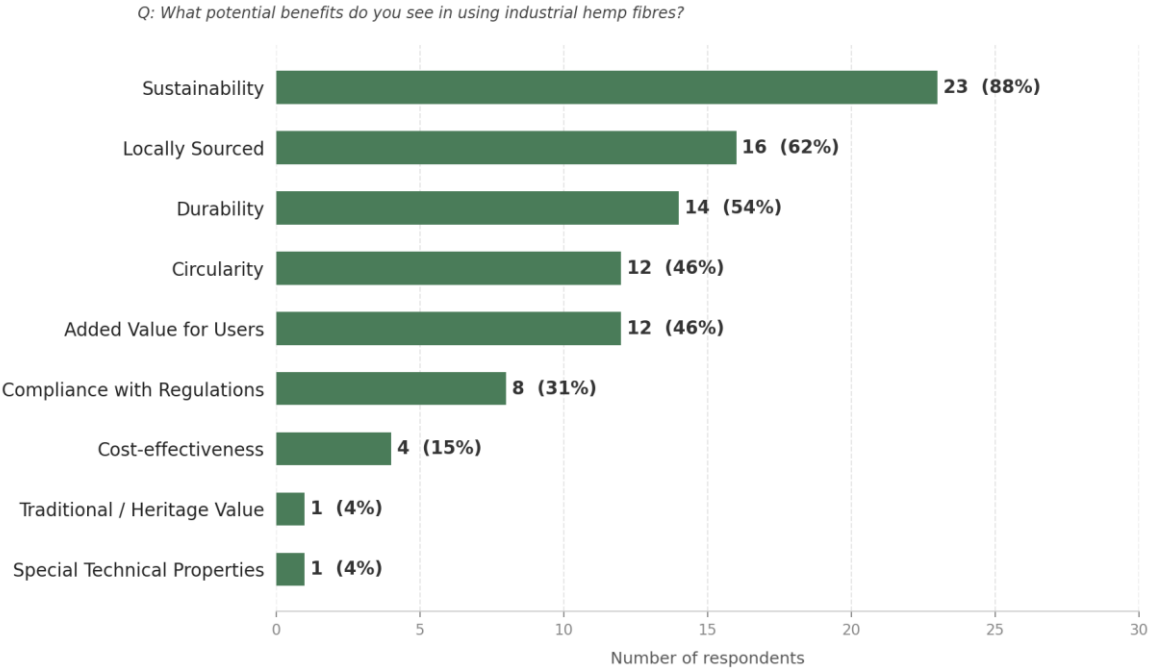
5. Perceived Benefits and Concerns Regarding Hemp Fibres

5.1 Potential Benefits of Industrial Hemp

Respondents identify a consistent set of advantages associated with industrial hemp fibres, clustering strongly around sustainability-related attributes:

- Sustainability (low inputs, environmental performance) — cited by 88% of respondents
- Locally sourced origin (regional availability, reduced transport footprint) — cited by 62%
- Durability (strength, long service life) — cited by 54%
- Circularity (biodegradability, recyclability) — cited by 46%
- Added value for users (natural aesthetics, performance attributes) — cited by 46%
- Compliance with regulations (non-toxic, biobased material) — cited by 31%
- Cost-effectiveness (noted primarily by primary producers) — cited by 15%

Chart 3: Perceived potential benefits of hemp fibre use (26 responses)

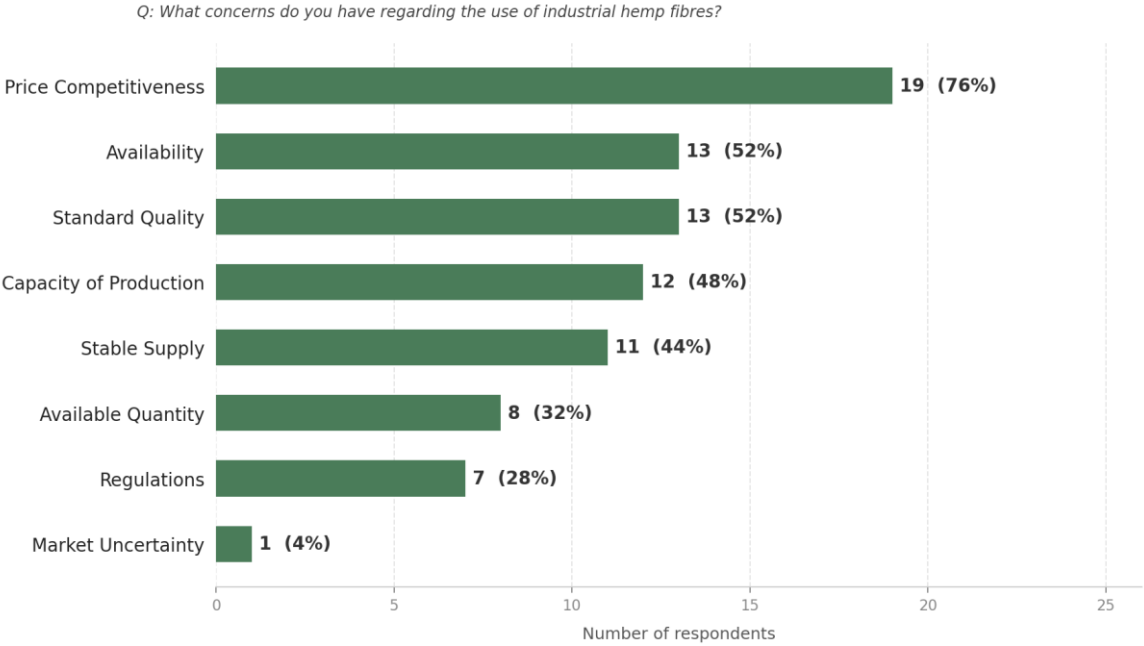


Sustainability is the dominant perceived benefit, cited by 88% of respondents. Locally sourced origin and durability follow as secondary advantages, while circularity and added value are mentioned by nearly half.

5.2 Concerns Regarding Hemp Fibres

Price competitiveness is selected by 76% of respondents (19 of 25), making it the most frequently cited concern. Supply-related concerns are also prominent: availability (52%), stable supply (44%), and available quantity (32%) each affect a substantial share of respondents. Standard quality and capacity of production are both mentioned by 12 respondents (48%).

Chart 4: Concerns related to use of hemp fibres (25 responses)



Note: Respondents could select multiple concerns. n = 25 respondents.

Price competitiveness is the most frequently cited concern, flagged by 76% of respondents. Supply-related issues together form a second cluster of concerns, reflecting persistent doubts about the reliability and scalability of hemp fibre sourcing.

Manufacturers express a willingness to pay a premium for hemp if quality stability is guaranteed — particularly for sustainable and eco-fashion segments.

5.3 Supply Chain and Sourcing

5.3.1 Current Sourcing Challenges

Respondents report several recurring challenges in sourcing bast fibres, yarns, and textiles:

- Low availability of raw materials — 10 respondents, including limited domestic production and difficulty sourcing textile-grade hemp yarns.
- Price and cost competitiveness — 8 respondents, with fluctuating prices complicating planning relative to synthetic fibres.
- Inconsistent or unstable quality — 7 respondents, reflecting concerns about batch-to-batch variability and limited standardised producers.
- Missing market infrastructure — 6 respondents, including absence of contract-based supply chains and reliable intermediaries.
- Limited processing capacity — 4 respondents, especially in primary processing (retting, scutching, decortication).
- Dependence on imports — 3 respondents, relying on cottonised hemp from China or other non-EU suppliers.

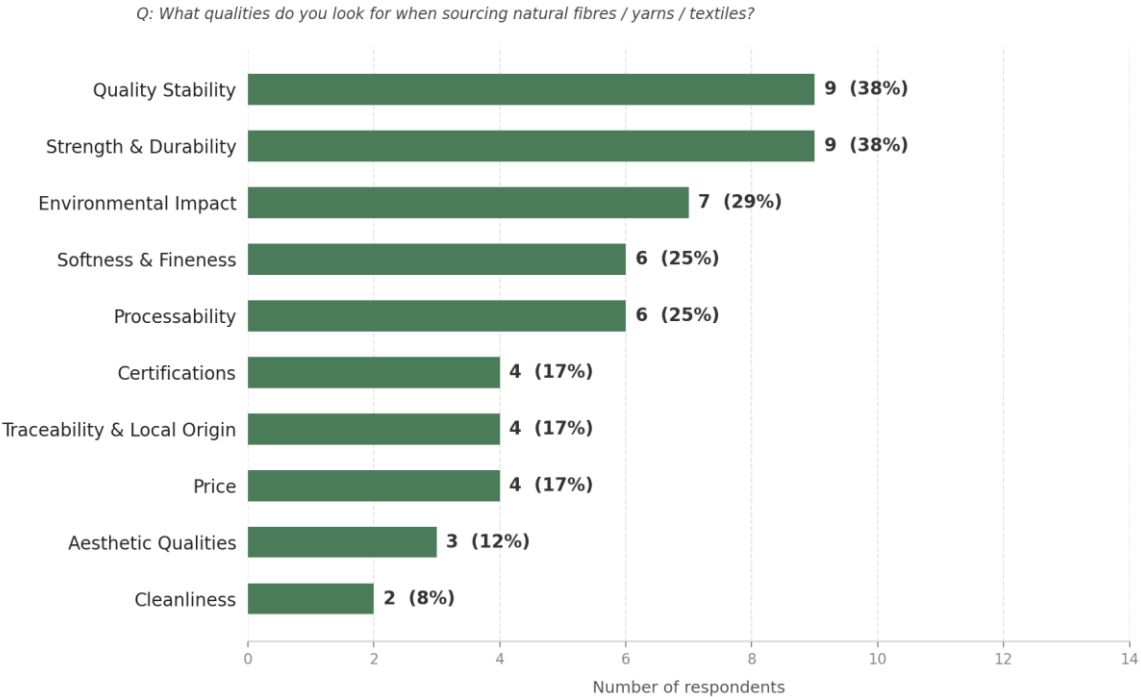
Regulatory barriers — flagged by 7 respondents — further complicate sourcing. A smaller but notable group highlights a lack of technical know-how, with some companies reporting insufficient expertise to process bast fibres effectively.

Taken together, these challenges underscore the fragmented state of the regional hemp textile value chain, where upstream and midstream bottlenecks continue to limit the supply of consistent, competitively priced raw materials.

5.3.2 Qualities Sought When Sourcing Natural Fibres

Quality stability and strength are the most frequently cited requirements (9 respondents each). Environmental impact ranks third, followed closely by softness and fineness, and notably by processability (6 respondents) — underscoring that fibre compatibility with existing machinery is as important as intrinsic material properties.

Chart 5: Qualities sought when sourcing natural fibres and semi-products (24 responses)



Note: Respondents could mention multiple qualities. n = 24 respondents (2 not applicable excluded).

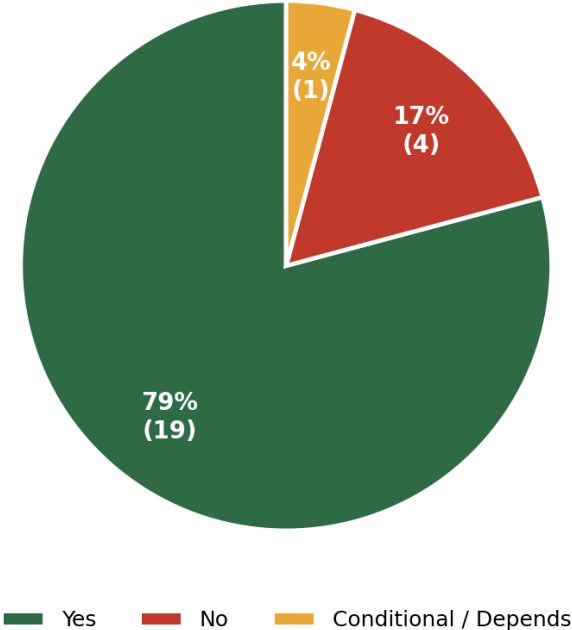
Quality stability and mechanical performance are the leading sourcing criteria. The prominence of processability reflects the practical constraint that even high-quality fibre is of limited value if it cannot be integrated into existing production lines.

5.3.3 Interest in Sourcing Hemp Fibres and Yarns

Demand-side interest is strong: 19 of 24 respondents (79%) express clear willingness to source or continue using hemp. One respondent (4%) indicates conditional interest; four (17%) report no current interest. The constraints moderating this interest — supply reliability, quality consistency, and price competitiveness — are structural rather than attitudinal.

Chart 6: Interest in sourcing hemp fibres, yarns or textiles (24 responses)

Q: Would you be interested in sourcing industrial hemp fibres / yarns / textiles?



n = 24 respondents

A large majority of respondents express clear interest in sourcing hemp, with 79% indicating willingness to incorporate hemp into their operations. The share of negative responses is concentrated among companies focused on synthetic fibres or those reporting insufficient market differentiation relative to linen.

6. Technical Barriers, Processing Requirements, and Human Capital

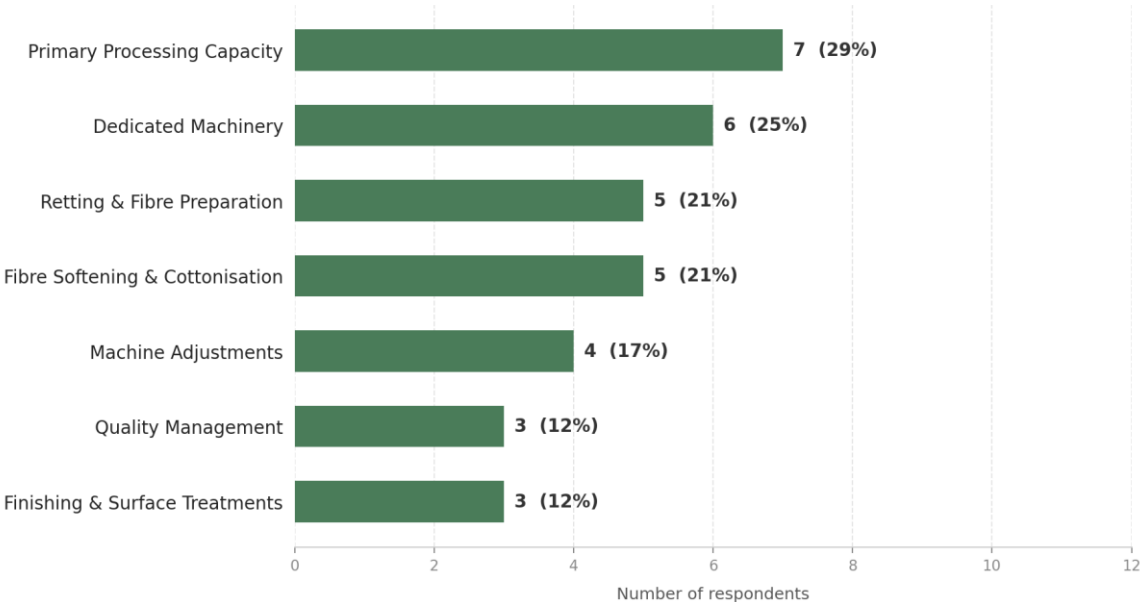
6.1 Required Technologies and Process Adjustments

A notable finding is that six respondents report no significant production adjustments would be required on their part — predominantly downstream manufacturers and primary producers already experienced with hemp. This reinforces that the primary barriers lie upstream, in the consistent supply and preparation of raw material.

Among those identifying specific requirements, the most pressing needs relate to: primary processing infrastructure (7 respondents); dedicated machinery for hemp-specific operations including cleaning, carding, cottonisation, and airlay processing (6 respondents); improvements in retting and fibre preparation (5 respondents); adjustments to spinning and weaving equipment (4 respondents); and quality management systems and fibre softening and cottonisation (3 respondents each).

Chart 7: Technological and processing requirements (24 responses)

Q: What adjustments / processing techniques or technologies are required to incorporate hemp fibres into your operations?



Note: Respondents could mention multiple requirements. n = 24 respondents.

Primary processing capacity and dedicated machinery are the most frequently cited technical requirements, reflecting the immaturity of upstream infrastructure rather than downstream manufacturing limitations.

The data reinforce a consistent theme: the technological readiness of downstream manufacturers is considerably higher than the maturity of upstream processing.

6.2 Human Capital and Skills Development

One respondent notes that their company “has machinery but not the necessary knowledge required to process bast fibres” — reflecting a broader pattern. Technical expertise in controlled retting, cottonisation, scutching, and fibre quality assessment has contracted significantly as hemp textile production declined.

Know-how and experience sharing is cited by 11 respondents (50%), while technical skills training is mentioned by 6 (27%). Together these form the most relationship-oriented support categories in the survey — reflecting a sector where tacit knowledge is as important as formal qualifications.

The human capital gap is structural rather than peripheral. Addressing it requires coordinated investment in training, cross-border knowledge transfer, and access to shared pilot facilities.

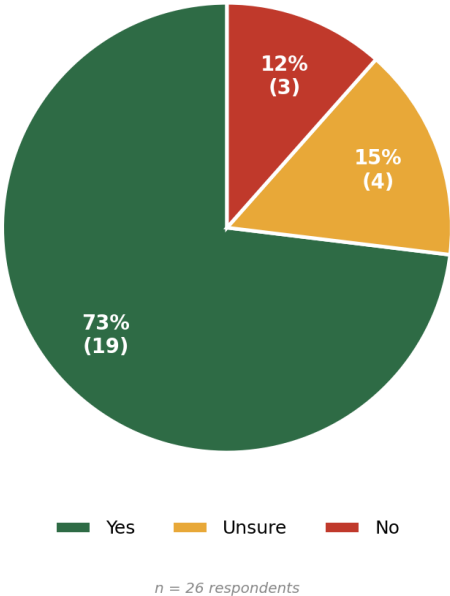
7. Market Dynamics: The “Sustainability Pull”

7.1 Consumer Demand

Consumer demand for sustainable textiles is widely recognised as increasing. Among European respondents (n = 24), 71% report a noticeable rise in interest. Across all 26 respondents, the share rises to 73%. Hemp is seen as a material aligned with sustainability, durability, and local sourcing.

Chart 8: Consumer demand for sustainable textiles (26 responses)

Q: Have you noticed an increase in consumer demand for sustainable fibres / yarns / textiles?



Nearly three quarters of respondents report a noticeable increase in consumer demand for sustainable fibres and textiles — a strong signal of market pull that positions hemp favourably.

7.2 Sustainability Positioning

Among all 26 respondents, 22 (85%) indicate they would market hemp-based products as part of their sustainability strategy; among the 24 European respondents, the figure is 20 (83%). Hemp’s regenerative properties, low water requirements, and potential for carbon sequestration make it an attractive material for sustainability differentiation.

Respondents emphasise that sustainability claims must be credible and supported by traceability data and recognised certifications, to avoid greenwashing risks. Two respondents highlight a practical marketing

barrier: the word 'hemp' remains restricted on major social media advertising platforms in certain markets.

7.3 Pricing Expectations

Pricing data were provided by approximately ten respondents and should be read as indicative. A clear price differentiation emerges along the processing chain: raw or non-retted short fibres cluster at 0.38–1 EUR/kg; retted fibre at 1–3 EUR/kg; textile-grade yarns show the most consistent cluster at 10–15 EUR/kg, with 10–12 EUR/kg cited most frequently as the threshold for broader market adoption.

Price acceptability is inseparable from quality consistency and supply reliability — a premium is acceptable if the material performs predictably.

8. Regulatory Framework and Certification

8.1 Regulatory and Administrative Challenges

Regulatory issues and administrative burdens are identified as a concern by 28% of respondents (7 out of 25), mainly related to primary production.

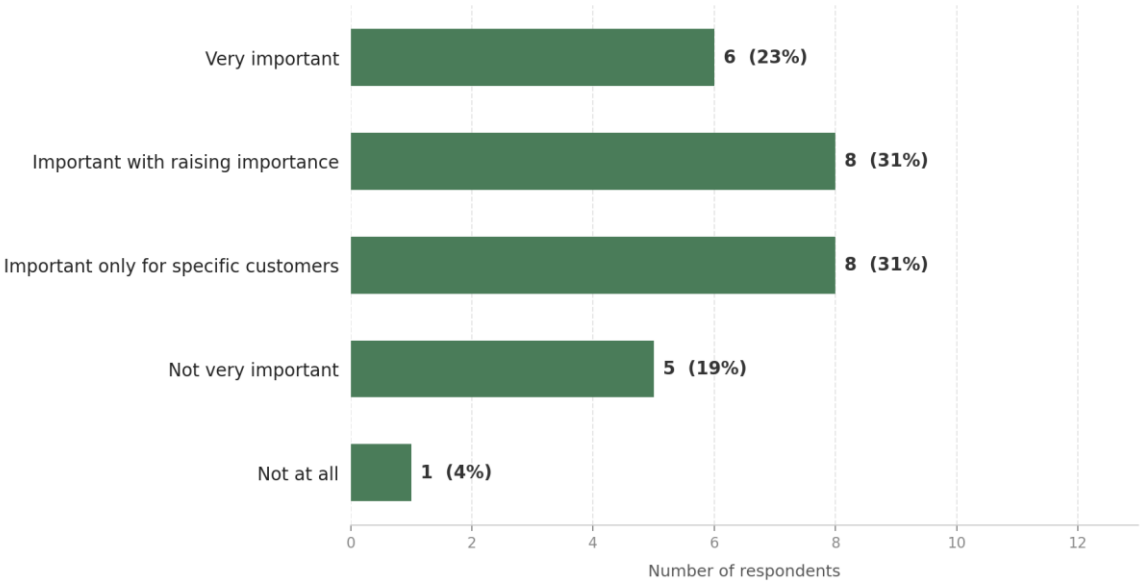
- Administrative burden of cultivation — complex permit procedures, mandatory declarations, and rigorous seed controls create high entry barriers for new growers (notably in Poland and the Czech Republic).
- THC thresholds and variety restrictions — inconsistent THC limits across countries may complicate cross-border trade and create legal uncertainty across V4 jurisdictions.
- Fragmented EU-level rules — hemp straddles agricultural, industrial, and textile frameworks simultaneously, with member states applying them inconsistently. Cross-border movement within the single market remains administratively complex.
- Limited institutional support — absence of public co-financing, subsidies, or tax incentives reduces the attractiveness of transitioning to fibre-oriented hemp cultivation.
- Complications in end-product certification — chain-of-custody documentation requirements do not align consistently across regulatory boundaries.

8.2 Importance of Certifications

Respondents differ in how important certifications are when evaluating new natural fibre sources. A notable finding is that “important with raising importance” is as frequently selected as “important only for specific customers,” suggesting certification requirements are gradually extending beyond premium niche segments.

Chart 9: Importance of certification (26 responses)

Q: How important are certifications (e.g., organic, fair trade) when considering new natural fibre sources?



Note: Some respondents selected multiple options. Total selections (n=28). Respondents: n = 26.

Certifications are relevant but not universally decisive. The majority of respondents assign them at least moderate importance, with growing relevance being the most common stance.

Certificates most frequently cited as market “door-openers” include: GOTS, EU Ecolabel, OEKOTEX® Standard 100, Cradle to Cradle, LCA documentation; REACH, EN 1021 (safety); ISO 9001, ISO 14001 (quality); Fairtrade, EcoVadis, Sedex (ethical); FSC for composite applications.

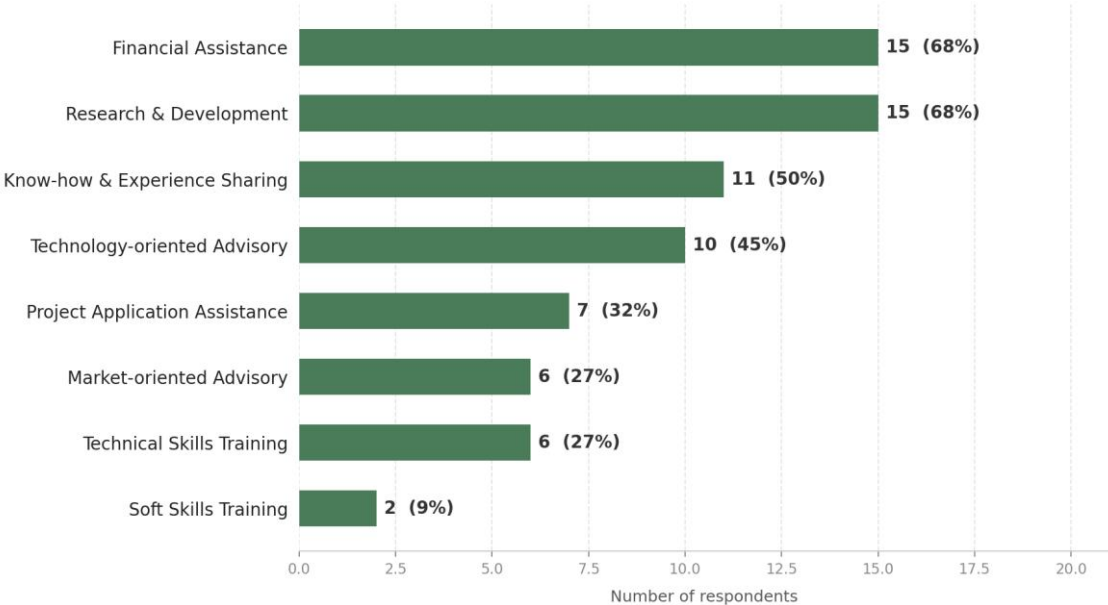
9. Support Needs, Partnerships, and Collaboration

9.1 Support Needed to Integrate Hemp Fibres

Respondents identify a broad range of support needs reflecting the early-stage character of the regional hemp textile ecosystem. Financial assistance and R&D support are the most frequently cited, each selected by more than two thirds of respondents (n = 22). Technology-oriented advisory and know-how sharing follow closely (45% and 50% respectively). Technical skills training is identified by 6 respondents.

Chart 10: Support needed to incorporate hemp materials (22 responses)

Q: What type of support would you need to incorporate hemp fibres / yarns / textiles into your operations?



Note: Respondents could select multiple options. n = 22 respondents who provided substantive answers.

Financial assistance and R&D support are the two most frequently requested forms of support, each cited by 68% of respondents — alongside a broad range of technical, advisory, and knowledge-sharing needs.

9.2 Beneficial Resources and Partnerships

Respondents consistently point to the need for structured, cross-sector collaboration spanning the full length of the value chain. Key themes include: stable partnerships with certified fibre processors and textile manufacturers; R&D collaborations with universities; industry networks connecting farmers, processors, and end-users; access to certification and testing facilities; and exchange of processing know-how including retting, decortication, and cottonisation.

One respondent calls for “a more traceable vertical from seed to fibre.” The development of a regionally anchored ecosystem — where processing capacities, research infrastructure, human capital, and market linkages are co-developed — is seen as a necessary condition for competitiveness within the broader European natural fibre value chain.

9.3 Interest in Collaborative Initiatives

Interest in collaborative initiatives is high. Among all 24 respondents who answered this question, 20 (83%) express willingness to engage in joint activities. Among the 22 European respondents, 18 (82%) express the same willingness.

This broadly shared collaborative disposition is among the most actionable findings of the survey — and a direct foundation for the cross-border partnership development, joint standardisation efforts, and pilot initiatives that the project’s Roadmap is designed to support and structure.

10. Conclusion of the Survey Findings

The Survey of Needs provides a consolidated, data-driven picture of the current state of the hemp textile value chain in the V4 region and Europe. The results show a sector with strong motivation, relevant technical experience, and growing market pull — but also one constrained by structural gaps that prevent hemp from becoming a stable, scalable textile raw material.

Across the respondent pool, familiarity with hemp fibres is high, and more than 79% of companies express interest in sourcing hemp materials. Sustainability is the dominant perceived advantage, cited by nearly 90% of respondents, aligning with broader market trends toward circularity, traceability, and low-impact materials.

At the same time, the survey highlights persistent barriers. Price competitiveness is the most frequently cited concern, followed closely by supply-related issues. These challenges reflect the limited capacity of primary processing infrastructure — controlled retting, decortication, scutching, and refinement — which remains the weakest link in the regional value chain.

Despite these constraints, the survey reveals strong collaborative potential. More than 80% of respondents express willingness to participate in joint initiatives, R&D projects, and cross-border partnerships.

Reviving the hemp textile value chain in the broader CE region is not a matter of filling individual technological gaps — it requires a coordinated, ecosystem-level approach that integrates primary production, processing infrastructure, human capital development, and market linkages into a coherent whole. The full potential of regional ambition can be unlocked through active connection to the broader European natural fibre value chain: standards, certifications, and traceability requirements will increasingly determine market access. Targeted investment, cross-sector collaboration, and sustained development of skills and know-how will be essential to transform hemp from a niche material into a competitive, regionally anchored textile fibre with a credible role in the European bioeconomy.

The project is co-financed by the Governments of Czechia, Hungary, Poland and Slovakia through Visegrad Grants from the International Visegrad Fund. The mission of the fund is to advance ideas for sustainable regional cooperation in Central Europe.

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- **Visegrad Fund**
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Project Partners

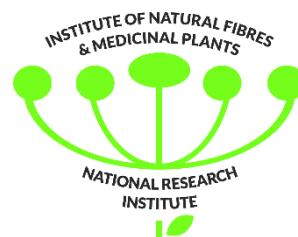
Project Leader



22



TEXTILNÉ
CENTRUM
100%



Annex: Survey Questionnaire

The following questionnaire was used to collect data from 26 stakeholders across the natural fibre and textile value chain in the V4 region and beyond. The survey was conducted between late 2025 and early 2026 using Google Forms. The original online version is available at:

https://docs.google.com/forms/d/e/1FAIpQLSc8VjiltqSc1LFvVOT0huCWtaVV6Qbggj5v_wqtDd7-MI27AwA/viewform

SECTION 1: RESPONDENT PROFILE

Q1. What is your role in the natural fibre textile industry?

- Producer of textile products
- Producer of textile fibres
- Producer of yarns
- Retailer
- Researcher
- Primary producer
- Other (please specify)

Q2. What types of fibres / yarns / textiles do you currently use in your operations?

— Open text response

Q3. How familiar are you with industrial hemp fibres / yarns / textiles?

- Very familiar
- Somewhat familiar
- Not familiar

SECTION 2: BENEFITS, CONCERNS & SOURCING

Q4. What potential benefits do you see in using industrial hemp fibres?

- Sustainability
- Circularity
- Durability
- Locally sourced
- Added value for users
- Compliance with regulations
- Cost-effectiveness
- Other (please specify)

Q5. What concerns do you have regarding the use of industrial hemp fibres?

- Availability

- Standard quality
- Available quantity
- Stable supply
- Capacity of production
- Price competitiveness
- Regulations
- Other (please specify)

Q6. What challenges do you face in sourcing (bast) fibres / yarns / textiles currently?

— Open text response

Q7. What qualities do you look for when sourcing natural fibres / yarns / textiles?

— Open text response

Q8. Would you be interested in sourcing industrial hemp fibres / yarns / textiles? Why or why not?

— Open text response

Q9. What quantities would you expect to look for when sourcing hemp fibres / yarns / textiles?

— Open text response

SECTION 3: TECHNICAL READINESS

24

Q10. What adjustments would be necessary in your production process to incorporate industrial hemp fibres / yarns?

— Open text response

Q11. What specific processing techniques or technologies are required for hemp fibres / yarns / textiles to meet your company's needs?

— Open text response

Q12. What specific processing techniques or technologies are required for hemp fibres / yarns / textiles to meet the sector's needs?

— Open text response

SECTION 4: MARKET & SUSTAINABILITY

Q13. Have you noticed an increase in consumer demand for sustainable fibres / yarns / textiles?

- Yes
- No
- Unsure

Q14. Would you consider marketing products made from industrial hemp fibres as a sustainability initiative?

— Open text response

Q15. What price (per kg or per metre of raw material) do you consider reasonable / competitive for hemp fibres / yarns / textiles?

— Open text response

SECTION 5: REGULATORY & CERTIFICATIONS

Q16. What regulatory challenges do you encounter regarding the use of hemp fibres?

— Open text response

Q17. How important are certifications (e.g., organic, fair trade) when considering new natural fibre sources?

- Very important
- Important with raising importance
- Important only for specific customers
- Not very important — there are different qualities that have higher importance
- Not at all

Q18. What types of certificates do you consider to be door-openers for markets?

— Open text response

SECTION 6: SUPPORT & COLLABORATION

Q19. What type of support would you need to incorporate hemp fibres / yarns / textiles into your operations?

- Financial assistance
- Project application preparation assistance
- Sharing know-how and experiences with other partners
- Market-oriented advisory
- Technical skills training
- Soft skills training
- Research and development
- Technology-oriented advisory
- Other (please specify)

Q20. Are there specific resources or partnerships you would find beneficial?

— Open text response

Q21. Would you be interested in participating in collaborative initiatives to promote industrial hemp fibres?

— Open text response

Q22. Do you have any additional comments or suggestions regarding the revival of the hemp fibre textile industry?

— Open text response