

John**England**

& JE **Theatrical**

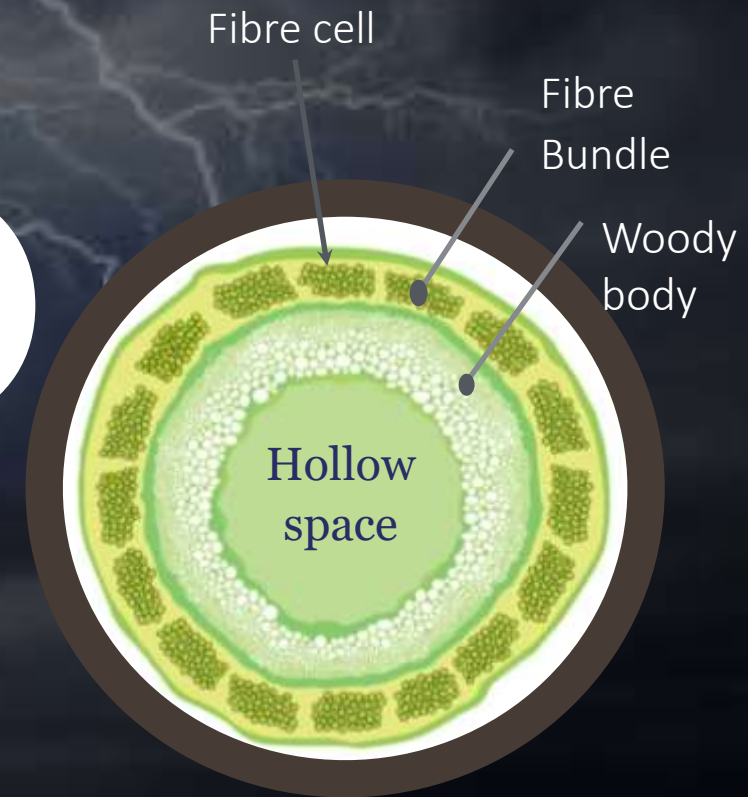
REPORTING ON

**HEMP**

John England

Sustainable Fabrics

HEMP



Cross section of bast fibre

# John England

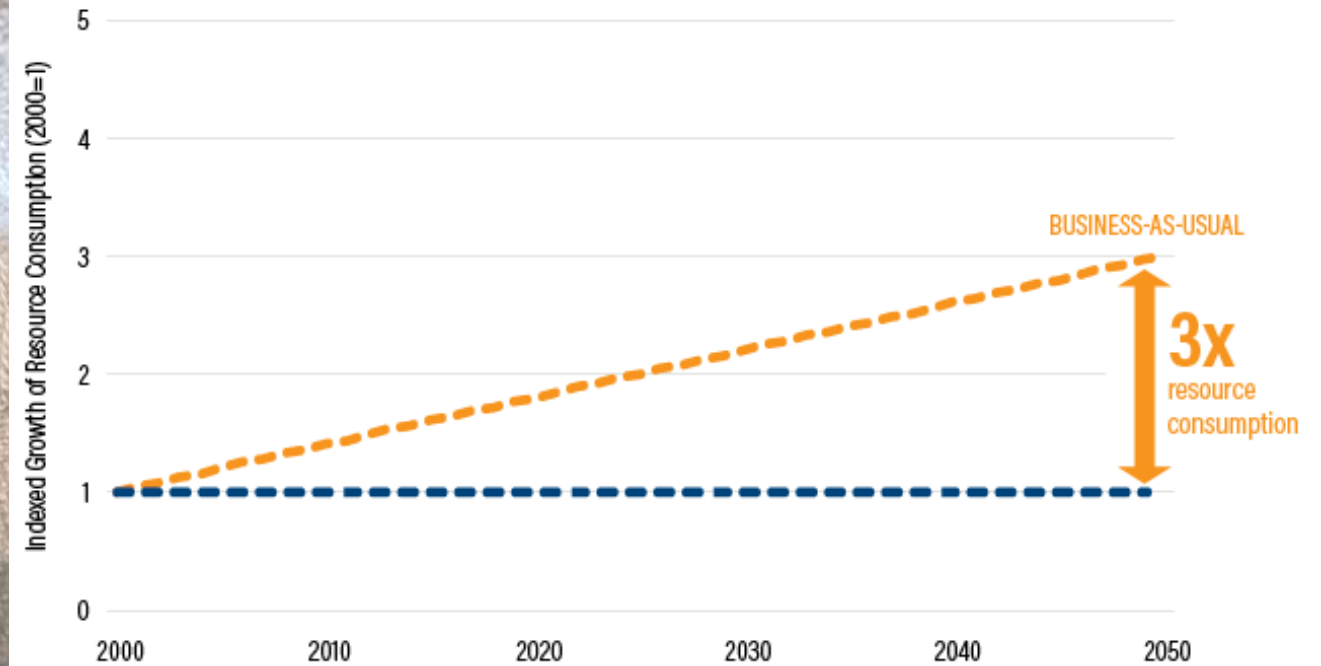
## Sustainability & Hemp

### Problem

World wide fibre consumption has been dominated by non-renewable fibres.

- 62% Oil-based synthetics (acrylic, polyester, nylon, spandex)
  - 26% Cotton
  - 6% Wood-based fibers, such as rayon, modal, and viscose,
  - 1% wool
  - 5% Other natural fibers, including Hemp & linen. Ref M Garside 2019/Statista
- Fashion plays a major role in the global economy with annual revenues totalling [over £1 trillion](#). However it is also one of the most resource-intensive industries in the world
  - The fashion industry is one of the largest polluters in the world, however, some brands have recently announced that they are aiming to become 100 per cent 'circular' by 2030

### Resource Consumption Set to Triple by 2050



Source: OECD; Fischer-Kowalski et al. 2011.



WORLD RESOURCES INSTITUTE



# Opportunity – The Demand

Linen and Hemp are two of the most sustainable fibres. The global Sustainable market is valued at USD 58.3 billion (2018) And is expected to grow at a CAGR of 11.4% during the forecast period (2018 – 2023)

ABCC/Pulse report survey among 5000 consumers in five Countries found that 75% rated sustainability as very or Somewhat important in their purchasing decisions.

38% of consumers have already switched from a favoured brand Because another offered a more positive environmental impact or social stance. Rising to 48% for younger consumers (BCG/Pulse Report)

Hemp has a sustainable and risqué image, making it more attractive to todays consumer, but high quality is not readily available. The Industry is ready for a new market leader in quality hemp fabrics.

John **England**  
is Number 1  
for quality and  
style hemp  
world- wide





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## The Solution – Fashion needs a sustainable alternative

- Hemp would give fashion brands a new story to tell their customers, one that is first and foremost sustainable and good for the planet.
- “Hemp is a more sustainable, organic and regenerative agricultural crop and most everything that you can make with cotton can be made with hemp, with way less impact on the Earth,” Morris Beegle, cofounder and president of WAFBA (We Are For Better Alternatives) [Forbes.com](https://www.forbes.com/2017/05/17/hemp-fashion-sustainable/) /Natalie Parletta.\*
- “The question is no longer whether it is necessary to improve sustainable business practices, but rather how long it will take before consumers stop buying from brands that do not act,”\*

# EARLY ADOPTION HEMP FABRIC DESIGN AND MANUFACTURING

- What we are doing
  - As early adopters it is our aim is to develop a strong brand synonymous with hemp and sustainability. Which customers feel confident in purchasing, because of their desirability, functionality and fashion.
  - We aim to become the market leader in High quality, luxury Hemp Fabric design and manufacturing
- How
  - Apparel is just one industry competing for natural resources, but it's important that it starts transforming its business models now given the industry's projected growth. Companies must do more than improve efficiency to sustainably meet demand in the years ahead.  
The global textile market players are shifting focus towards sustainability. The Hemp range is one of those radical new ideas, a tool if you will, to achieve the goal.
- Why
  - The market is ripe, hungry for sustainable, responsibly made hemp fabrics and products. John England is uniquely positioned take up the challenge and become the foundation building block, the 'go to', trusted, promotable brand for quality sustainable fashion fabrics.





# Realising Opportunities

Our new high-quality hemp fabrics give brands a new business model and positive narrative for their customers, one that is sustainable and better for the environment. Plus a promise to deliver fabrics woven with passion and care in the foot hills of the Mourne Mountains in N.Ireland (UK) utilizing skills that have been handed down since 1854.



© Ralph Lauren

# Evolving

Currently hemp fabrics are on the whole considered coarse and unsuitable for the high fashion market.

This is a great untapped opportunity to any company with the right blend of skills.

We have those skills and have completed trial fabrics that are shocking and impressing the industry.

We are taking *a wrong side of the tracks* reputation and moving hemp in to the mainstream Market, making it acceptable

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# Underlying Magic – Hemp goes Mainstream

- Unique and bespoke Hemp designs
  - Prepared for Print Hemp
  - Certified, guaranteed and trusted Quality
  - Made by an established business who have an Excellent Reputation
  - Hemp is marketed to high end customers by a company they already trust
  - Available capacity to ramp up hemp production without effecting existing groups markets
  - We will be the market leaders in a hungry market
  - Competition is artisan
- Over 175year of experience commercially weaving bast fibres
  - Possess the uniquely skills, capability and technology required to weave Hemp
  - Weave trials already successfully completed
  - Excellent reputation for design structure and quality.
  - Experience working collaboratively with high end designers, wholesalers, retailers
  - Following the creation of a preliminary range of 40 hemp fabric designs for a 'Dip a Toe in the Water' campaign all indications are that there is support for Hemp fabrics in the industry.



# Proprietary Technology Expertise & Accreditation

Jacquard looms - 165 – 300cm wide, Humidity controlled environment

Fabric Finishing - Sustainable finishing in house

CTM - (Cut Make & Trim)department, Table Top / household

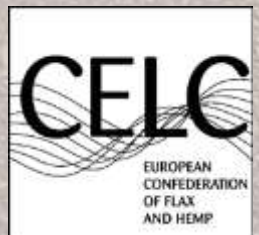
Sampling - Fully stocked

Drop shipping available to customers

Short lead time, low MOQ's

Vast experience collaborating with designers at all levels on their fabric designs

Experienced work force



# Competitor Market Analysis

The High end quality & fashion markets have difficulty finding suppliers. The market is ripe for the taking and needs a new market leader.

## Chinese suppliers

### Weaknesses

- Unreliable availability
  - Large MOQ's
  - Unreliable quality
  - No flexibility
  - Unable to collaborate easily
  - Long unreliable lead times
  - Working conditions & environmental impact
  - Large carbon foot print
  - Unable to supply high end /quality market
- **Strengths**
    - Pricing



# Competitor Market Analysis

The competition from around the world for anything other than burlap or artisan weaves is very limited. The High end fashion markets are not being serviced.

## Indian suppliers

### Weakness

- Unreliable supply chain/availability
- Large MOQ's
- Unreliable/low quality
- No flexibility
- Unable to collaborate easily
- Long unreliable lead time
- Working conditions & environmental impact
- Large carbon foot print
- Unable to supply high end / quality market

### Strengths

- Pricing



GROWTH - USA hemp industry passes \$500 mil bench mark & USA farmers quadrupled the acres of land planted with industrial hemp between 2018 and 2019 (\*USDA). That represents a 368 % growth, larger than any other cash crop in the same time period



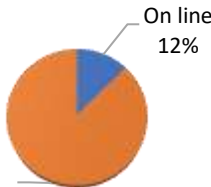
GOVERNMENT SUPPORT – Industrial hemp is an emerging industry, and governments across the world are keen to work out the best way to harness that potential and turn it into economic benefit.

# Market Projections and Growth



Global Sales Via Ecommerce

Sales in Trillion USD	
On line	3.535
Physical	25.04



Annual Growth %

Sales in Trillion USD	
On line	18.5
Physical	4.5

