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Australia & New Zealand

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Carrfields is a major New Zealand agribusiness group active in seeds, contracting, machinery and agri-services. The company supports the country's emerging hemp sector through grower relationships, processing investment and supply-chain development.

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La Trobe University in Victoria advances industrial-hemp and medicinal-cannabis research through its ARC Research Hub for Medicinal Agriculture, focusing on genomics, breeding, crop-management and protected-cropping systems to improve quality, traceability and scalable industrial production.

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Forever Green connects industrial-hemp to commercially viable projects by supplying leading-edge harvesting equipment and advocating new end-uses—from animal bedding to green building and bio-composites. We are the distributor for the revolutionary KP-4 hemp cutter.

HEMPBLOCK INTERNATIONAL

HempBLOCK International offers a certified interlocking load-bearing hemp-lime block system and full architectural and engineering support worldwide, transforming construction via carbon-negative materials.

Inflection point

Industrial hemp in Australia and New Zealand is nearing its inflection point as performance, cost competitiveness and supply-chain maturity converge. As with earlier technology shifts, adoption accelerates when capability, design and user value align, and hemp is moving toward that trajectory, with natural materials advancing from emerging opportunity to mainstream relevance.

Material and design potential are clear. Advances in cultivar development, fibre engineering and hurd or shiv processing are enabling materials that pair technical performance with design value. Hemp's properties – thermal stability, moisture regulation, structural integrity and low embodied carbon – support products that meet specification, compete with synthetics and deliver environmental advantages. This positions hemp as a platform for textiles, interiors, construction materials and biocomposites.

The pathway to industrial scale requires discipline. Stable seed systems, consistent decortication and refinement capability, and integrated supply chains delivering specification-driven uniformity are essential. Transparent sustainability data, traceability and regulatory alignment will shape confidence and accelerate adoption.

The commitment to build this industry is shared. Rubisco, Carrfields and Hemp New Zealand have invested in core infrastructure and processing capability, with multi-million-dollar expansions planned across fibre, hurd and composite-grade output. Their ambition is to help shape a modern identity for hemp and natural fibres in New Zealand and Australia, defined by material performance and emerging standards, while other players commit capital and capability, signalling a shift toward genuine industrialisation.

Strong market pull and brand adoption are now essential, supported by processing systems, certification frameworks and product platforms that allow natural materials to integrate at scale. This report provides the evidence required for collective action and confident industry leadership.

Guy Wills is CEO at Rubisco Ltd.

To be a humble cog

Of all the plant species on this planet, industrial cannabis (hemp) has the sole capability to sustain and enrich human life indefinitely. This is a statement I truly believe and know is technically feasible. No other plant species has the multiple assets of cannabis hemp. Without doubt, hemp produces the greatest amount of biomass useful in industry, in food, in medicine, all capable of supporting circular economies and regional autonomy.

Over the past 30 years, I have operated businesses and explored hemp production across nearly every continent. I have met people from every corner of the industry—growers, processors, researchers, manufacturers, advocates—each working to advance hemp's social, economic, and environmental potential. I have seen much, and I have learned even more.

While it may appear that the lawmakers are holding hemp back, the fact is while many strive, others within the industry value chain hold it back. Generally, that is because the understanding and appreciation of what others in the chain need to achieve to survive, let alone be profitable, is often broken. There has never been a truer saying, "united we stand, divided we fall." This publication is step forward in bringing us together.

For hemp to reach its full potential and become a product in high demand, we must research and champion its truly unique technical qualities that no other material can match. These attributes allow hemp-based materials to perform, adapt, and enrich all forms of life.

In the end, it is far more rewarding to be a humble cog in the great evolution of mankind — powered by hemp — than to cling to the narrow greed of a Mr. Burns. United, we can let the fields rise tall under the Australian sun, and with them, a future of abundance, resilience, and harmony.

Phil Warner is Managing Director of the Warner Research Institute

PUBLISHERS

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In rhythm

Every emerging industry reaches a turning point when enthusiasm gives way to structure, and stories give way to data.

That's where Australia's hemp sector stands today. Across the country, growers, engineers, and entrepreneurs are no longer asking if hemp can work, they're proving how it can. Growers now work closely with processors, processors to end users and end users to consumers in homes, textiles and composites. Grain has shown the way; fibre and hurd are now defining the pace.

This report explores what that transformation looks like in practice, from potential regional processing hubs that keep value close to where crops are grown, to the policies and financing models that can enable those hubs into real businesses. It's a story of logistics as much as innovation: how freight radius shapes feasibility, how storage extends a harvest into a year-round operation, and how clear regulation unlocks capital.

The opportunity isn't just in hectares, it's in building the systems that make hemp a normal part of Australia's manufacturing landscape.

If the first phase of hemp was discovery, this one is discipline where coordination, contracts, and confidence set the rhythm for growth.

Matthew Lariba-Taing is the President of the Australian Hemp Council

AUSTRALIA

OVERVIEW

Trials to traction

Early demand cues and better data now give investors a clearer line-of-sight to how Australia's hemp sector can scale

Australia's hemp industry is entering a phase defined not by hype, but by execution. The foundational elements are in place: legal clarity for food markets, growing agronomic data by region and end use, and early downstream demand from builders, bedding suppliers and emerging composite applications. Taken together with the first pockets of processing capacity, these signals give investors something firmer than thesis-driven optimism, even if markets remain thin and uneven.

Each part of the value chain has matured to the point where operators can make decisions on evidence: growers can match cultivar and sowing window to latitude and target product; processors can design intake, drying, and storage around realistic moisture and volume profiles. Some buyers are beginning to specify particle size and density for hurd and bast fibre, rather than purchasing "hemp" as an undifferentiated material -- a sign of movement toward more defined requirements.

STAKEHOLDER VIEW:

"It will be a long, slow road to improvement — but worthwhile in the long run."

Critical years are ahead

The next three years will be shaped by contracts rather than expectations. Even a single operating processor can alter regional dynamics: growers move from trial plots to scheduled hectare programmes; processors commit to dryer capacity, covered bale yards and maintenance routines; buyers can begin to consider repeat orders because supply becomes dependable. Trials continue, but attention shifts to sustained hectarage and steady volume. The system starts to resemble manufacturing, with throughput targets, maintenance cycles and production planning replacing one-off demonstrations.

Expect fibre and hurd to lead

Australian hemp grain remains important—it sustains brands, keeps hemp visible in retail, and provides a cash crop with established food-safety protocols—but grain alone cannot sustain operations beyond the harvest

window. Fibre and hurd can. Decortication changes the economics. It converts a bulky, low-value stalk into several saleable streams: hurd for building materials and animal bedding; bast fibre for non-wovens and technical composites; and fines for absorbents and fillers. As new processing plants move from concept to design, the priority must shift toward reliable, repeatable performance. Better yields, fewer rework cycles, and a wider range of offtake partners strengthen unit economics.

Textile-grade bast could evolve into a premium, high-value market as capability and quality improve. But hitting consistent textile specifications in Australia will still demand further technical development.

Unraveling the mysteries

National variety trials and university programmes are shortening Australia's learning curve. Region-specific maturity windows, biomass expectations, and grain yields are replacing guesswork. The mysteries of equipment settings—header height, cutterbar configuration, conditioning, baling density—are being unravelled. This matters to investors because it turns agronomy from a variable into something measurable. Once sowing windows, moisture targets and storage-loss expectations are defined, operators can plan around them and investors can assess performance on known conditions rather than assumptions.

STAKEHOLDER VIEW:

"Growers are keen to try — but without processing, the industry will stagnate."

Putting simple tools to work

As processors publish intake specifications and buyers publish product specifications, trade becomes more stable. Misalignment between "what the field can produce" and "what the market needs" closes. Australian operators are adopting simple but powerful tools—a shared specification sheet, QC sample retention, and batch coding—that allow problems to be traced and fixed quickly. These are small steps with outsized impact on credibility.

CBD in Australia: Pharma play only

CBD is legal in Australia, but access is controlled under the federal medicinal-cannabis system.

To make CBD, companies need Office of Drug Control (ODC) licences; once extracted, CBD becomes a therapeutic good regulated by the Therapeutic Goods Administration (TGA). Industrial-hemp licences allow grain and fibre only — not flowers and leaves — unless a specific CBD-cultivation licence is obtained.

In most states, flowers and leaves must be removed and destroyed, and differing rules have created a widely misunderstood situation. As long as flowers and leaves are removed, stalks for fibre or hurd are not restricted, but they can still fall into cannabis-adjacent oversight, and state sampling requirements remain inconsistent.

CBD products are legal but largely prescription-only, supplied through the Special Access Scheme or Authorised Prescribers. The TGA created an OTC pathway in 2020, but no product has met the evidence standard.

The economics for growers improve when there is a guaranteed buyer for stalk. With a processor nearby, the decision shifts from "harvest grain and abandon the straw" to "optimise for stalk and sell multiple fibre outputs." Forward contracts can create confidence to adjust rotations, invest in baling equipment, and plan labour with fewer surprises. In Australia, this is where hectares can move from "interesting" to "bankable": farmers plant to a buyer, not to a promise.

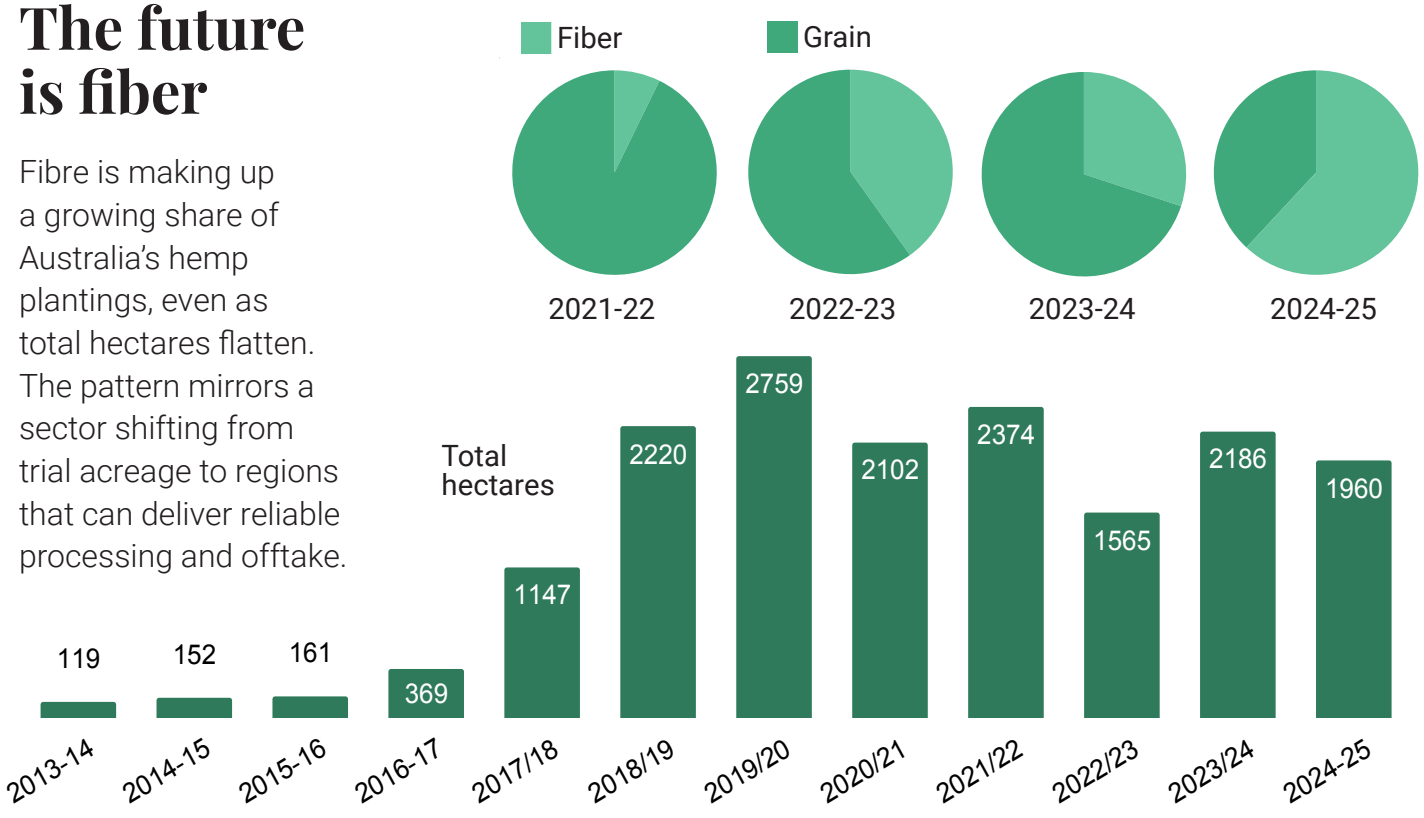
Proof now means repeatability

Australia does not need the most hemp hectares; it will need to consistent planting area within an economical radius of processing. Because stalks are freight-sensitive, feasibility depends on transport distance, storage, and thwroughput—not on theoretical land availability. The credible path to national significance is a network of regional hubs that run year-round, each anchored by nearby growers and diversified offtake. Scale will emerge from reliable clusters, not from maps coloured by potential.

Australia's challenge is to make hemp run—at volume, on schedule, and to specification. That is the test investors apply. The projects that meet it will look less like agricultural experiments and more like small, disciplined manufacturing businesses with agricultural supply.

The future is fiber

Fibre is making up a growing share of Australia's hemp plantings, even as total hectares flatten. The pattern mirrors a sector shifting from trial acreage to regions that can deliver reliable processing and offtake.



SOURCES: State licencing/regulatory authorities

Flagship: Food

Australia's hemp industry is anchored by one of the world's most advanced hemp food frameworks.

When Food Standards Australia New Zealand (FSANZ) approved low-THC hempseed as a food ingredient in 2017, it placed hempseed products directly into mainstream food law—not into supplements or novelty categories. Hemp foods immediately became subject to the same rules as any human food: testing and contaminant limits, traceability, labelling, and compositional standards.

The decision gave the sector early legitimacy. Before 2017, hemp was an emerging crop defined mostly by potential. After approval, it became a regulated, shelf-ready ingredient. Manufacturers had to meet HACCP requirements, implement batch tracking, and test THC and CBD against defined thresholds. When the crop consistently met those standards, retailers, insurers, and investors viewed hemp with greater confidence.

Once hempseed foods were legalised, Australian companies moved quickly. Producers of hemp oil, protein powders, and other ingredients gained access to major supermarket chains and specialty health-food stores. By 2019, research from the University of Adelaide showed that 72% of Australians were aware of hemp foods and 26% had purchased hempseed, oil, or protein products.

In 2022, FSANZ completed a national audit of hemp food products: 96% met THC requirements, and all products complied with CBD limits—reflecting a disciplined supply chain unusual for a new agricultural sector.

Sales are difficult to measure because data are held by private retailers, but analysts estimate that Australia produces roughly 10% of the world's hempseed for consumption. Product ranges continue to expand, major retailers stock hempseed foods, and processors are exporting seed and oil into Asia.

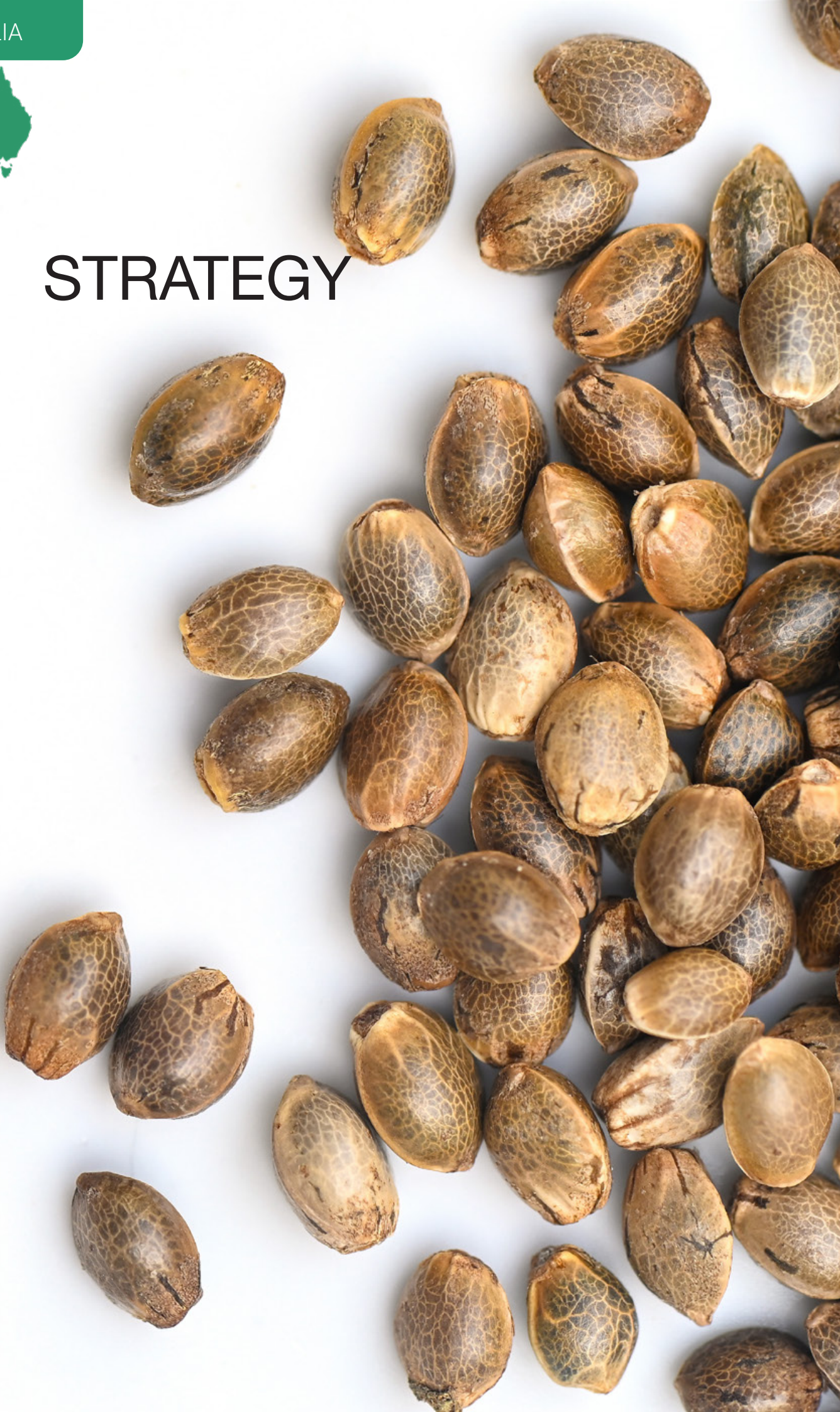
What seed has done for Australian hemp

Australia's hemp food sector has demonstrated three things that underpin broader hemp industry potential:

- **Proof of compliance** capability: The food sector showed that hemp can operate under strict regulatory conditions, a key precedent for processors seeking finance for stalk-based applications.
- **Brand credibility** and consumer normalization: Hempseed food accelerated social acceptance; consumers encountered hemp not as a novelty crop, but as a healthy staple.
- **Early revenue** and investment logic: Food created a, year-round demand signal—critical before fibre and hurd markets matured.

AUSTRALIA

STRATEGY



A two-way split

Grain can move across states and extend harvest windows. Fibre and hurd succeed only when processors sit close to farms.

Hemp in Australia splits into two distinct logistics systems. Grain behaves like a commodity: it can be dried, cleaned, placed into cold or refrigerated storage, and shipped efficiently, enabling multi-state sourcing to smooth intake. Fibre and hurd are bulky and low-value until processed, and uneconomic to freight long distances. Treating these as one market creates planning errors; designing for their differences creates viable businesses. Hemp is grown for a purpose, so biomass crops and seed crops should never be treated as interchangeable.

STAKEHOLDER VIEW:

"Hemp lacks an anchor use — a base market would let everything else spin off naturally."

The freight radius for stalks is tight. Beyond a modest distance, transport costs erase margin. Given that stalk biomass would almost never cross state lines, Australian processors are designing for a defined draw area and sizing storage to bridge the gap between harvest peaks and steady plant throughput. The efficient pattern is simple: a ring of growers within freight range, covered bale yards or bunkers, drying solutions that fit local climate, and intake systems capable of handling variability without clogging or quality loss.

Grain travels better than fibre

Grain extends the season by geography; fibre extends the season by infrastructure. Fiber operators planning facilities are designing for storage and materials handling because those assets—not interstate sourcing—keep plants running outside the harvest window. The investment shows up in business plans as square metres of covered storage, airflow rates for drying, and turnaround time for receiving and sampling. These are the levers that convert a seasonal fibre crop into a 12-month operation.

For grain, Australia's geography can be an asset. Processors could source from warmer zones earlier and cooler zones later, reducing downtime and improving plant utilisation. That reduces downtime at the margins.

But even with that geographic spread, grain remains a single-event harvest stream with limited processing hours and only one primary product. It cannot, on its own, keep a plant supplied or commercially viable year-round. The bottleneck for grain is regulatory variance at borders—movement permits, sampling, and lab schedules—not transport economics.

For fibre and hurd, the inverse holds: even perfect regulations cannot make long-haul bale transport economic. Fibre must be processed near where it is grown; value-added products then travel to market.

Designing for regional manufacturing

The strongest Australian fibre projects that will emerge will treat hemp as a raw material for regional manufacturing, not as an agricultural novelty. In the regional-hub model, a decorticator is specified to create steady revenue across three outputs—hurd, bast fibre, fines—and to feed downstream industries that already exist or are growing: hemp-lime builders, insulation producers, animal-care suppliers, and non-woven composite makers. Floral material is a separate stream entirely, and any extracts derived from flowers or leaves—CBD and other cannabinoids—should be regulated and treated like any natural or organic product under the Therapeutic Goods Administration (TGA). Because industrial hemp is defined at <1.0% THC, THC content is not the regulatory issue; product category and end use should dictate the regulatory pathway.

STAKEHOLDER VIEW:

"This industry needs technical efficiency — from harvest through to processing."

As more Australian buyers publish product specifications, and as processors show they can meet them consistently, offtake can start to move from exploratory orders to more regular business -- a prerequisite to scale.

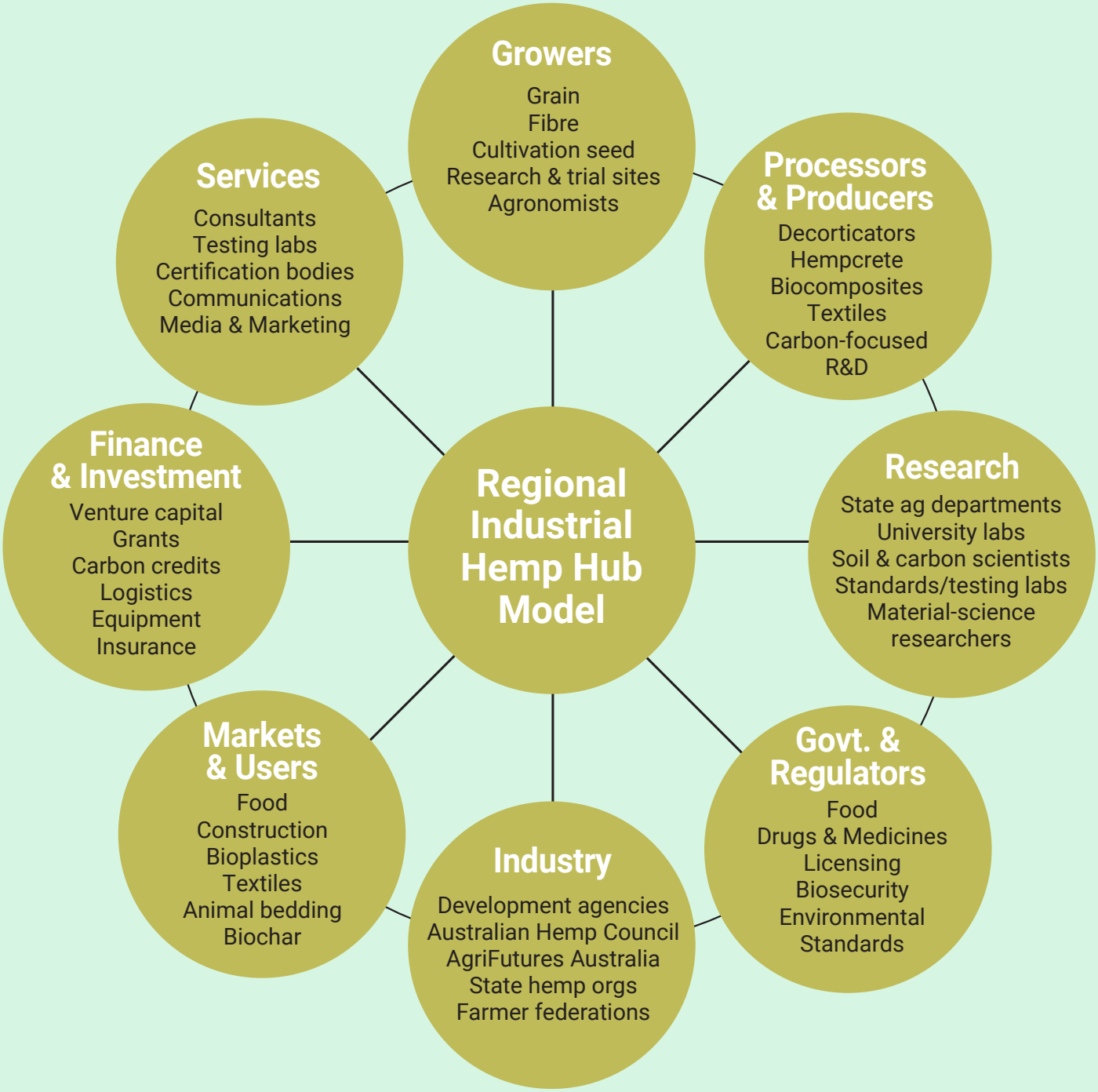
The processor makes the market

Once a plant is operating in a region, growers can adjust rotations, contractors can justify investing in balers and trailers, and local trades can begin to treat hemp materials as "normal." The region becomes a small manufacturing ecosystem.

For Australia, the path to national significance is not deregulation and not a single dominant player—it is fit-for-purpose regulation and multiple robust hubs that turn local hectares into industrial inputs and jobs.

Opportunity identified

The most powerful accelerator for industrial hemp in Australia has been identified as farm-based processing and strategically located regional hubs. Essential players who must work together to make it happen:



Guaranteed inputs = finance. Regional hubs mean volume, enabling offtake contracts.
Co-location accelerates scale. Decortication, storage, R&D, logistics, from a single node.
Full-plant utilisation. Bast, hurd, fines and seed can move into markets without waste.
Replicable model. Hubs can be repeated in multiple regions, building a national network.
Regional economic development. New jobs and business opportunities in rural areas

POLICY & REGULATION

Fit-for-purpose

Hemp is advancing on every front except the one that matters most: consistent, workable regulation

Australia's hemp industry has two strong regulatory pillars, but they were not designed to work together as a system. One governs hempseed as a food commodity. The other governs cultivation as an agricultural activity. The gap between them—created where legacy drug law overlaps with industrial policy—creates uncertainty that slows investment and complicates business planning. Operators are not asking for deregulation. They are asking for regulation that reflects what hemp is actually used for.

A missing link

The first pillar went up when Food Standards Australia New Zealand (FSANZ) approved low-THC hempseed foods in 2017. The result was immediate legitimacy. Retailers could stock hemp hearts and protein powder, and consumers could treat hemp as food rather than a curiosity.

STAKEHOLDER VIEW:

"There is massive confusion about hemp seed oil versus CBD oil. Councils don't know the difference."

The second pillar sits under agricultural licensing. Every Australian state and territory now maintains an industrial hemp regime that permits cultivation of hemp at or below the THC threshold. Licensing frameworks outline the application process, audit requirements, sampling, and reporting. These laws gave growers a clear path to operate and signalled to insurers and councils that hemp is a legitimate agricultural crop.

While these two pillars—food law and agricultural licensing—create legality and market access, they do not yet create efficiency.

Between farming and food

Between agricultural licensing and food law sits a residue of drug-control regulation that applies to hemp flowers, even when THC content is below the legal threshold. But THC is not the operational issue for industrial hemp. The regulatory friction arises when floral material is processed into

extracts—CBD or other cannabinoids—because those extracts fall under therapeutic product rules. Meanwhile, stalks intended for fibre or hurd are still entangled in cannabis-adjacent oversight, even when they are baled, mulched, or processed into building materials.

STAKEHOLDER VIEW:

"The pet and equine food market is worth hundreds of millions, but hemp can't enter because of regulatory uncertainty and industry cowboys."

The result is inconsistent pathways: different sampling rules between states, varying permit requirements for moving material, and confusion over terminology. And given that biomass almost never crosses state lines—because processors must be located within freight radius—these inconsistencies add cost without delivering public benefit.

End use should define regulation

Recent grower submissions to the Senate inquiry show that when rules are clear, markets respond. The demand exists. Growers will scale when regulation allows planning.

Industry stakeholders consistently argue for a simpler rule: regulate hemp based on what it becomes, not based on plant anatomy. If the seed is destined for food, it should follow food law. If the stalk is destined for fibre or hurd, it should be treated as an industrial raw material.

Only when floral material is being used to produce cannabinoid extracts should it fall under the Therapeutic Goods Administration (TGA) pathway, just like any other natural or organic extract regulated for therapeutic use.

Other agricultural sectors already operate this way. Grapes can become wine, raisins, or juice. Corn can become ethanol, feed, or a packaged food ingredient. Only hemp is regulated based on the presence of a flower, rather than the product being made.

Why this matters for business decisions

Growers planning hectares focus on timing and predict-

Hemp's promise for cleaning soil

Trials are exploring how industrial hemp can be used to clean up contaminated soils — a process known as phytoremediation.

A recent University of Newcastle study showed that hemp plants absorbed PFAS in three phases: gradual uptake during vegetative growth, rapid uptake at flowering, then slower uptake as growth plateaued.

Other research highlights hemp's high biomass, deep roots and tolerance to harsh conditions — characteristics that make it suitable for extracting or stabilising heavy metals, organic pollutants and emerging contaminants.

The appeal is twofold: hemp can remediate degraded land while producing biomass that may be used for fibre, biochar or construction materials, potentially adding value to remediation. However, rules for disposal or safe use of contaminated biomass are still needed. Unlocking those gaps could position hemp as a tool for land restoration and circular economy bio-inputs in Australia.

ability. They need to know when sampling must occur, which laboratory will run the tests, and how quickly results will be returned because those details influence harvest scheduling and baling. Processors are concerned with logistics and compliance. They need clarity on the documentation required to move material, whether councils will treat hemp processing as agricultural infrastructure, and whether rules will remain consistent over the life of their financing. Lenders look for stability, and they see uncertainty as the most expensive cost in the value chain.

Regulation shapes confidence at every level

When rules change by jurisdiction, growers hesitate to commit. When growers cannot commit, processors cannot depend on a steady flow of input materials. Without that, capital does not move. The crop is legal, but the system is not yet coordinated enough to behave like a supply chain.

Australia does not need deregulation—and certainly not the kind of deregulation associated with financial markets. It needs fit-for-purpose regulation: regulation that reflects use, supports markets, and gives investors confidence to build the infrastructure that makes hemp real.

Hempcrete tech specs in the works

Hempcrete in Australia is moving toward formal recognition.

Work is underway at Standards Australia to develop a Technical Specification for hemp-lime material that will establish parameters for mix design, performance, durability and testing. Once completed, it will provide the foundation for hempcrete to be referenced in the National Construction Code (NCC) — the key step that allows building officials, engineers and insurers to treat hempcrete as a compliant, certifiable material.

At present, hempcrete is used mainly in small-scale residential projects and relies on performance solutions, creating extra cost and documentation. Australia has a growing cohort of builders and material suppliers, but the absence of national standards limits its scale. NCC recognition would unlock mainstream adoption by giving designers and certifiers a clear pathway, reducing risk, lowering approval friction and enabling hempcrete to compete directly with conventional walling systems.

AUSTRALIA

INVESTING & FINANCE

Keys to capital

Growers commit hectares only when rules are stable; processors secure finance only when hectares are contracted.

Australia's hemp industry has reached the stage where capital decisions no longer hinge on belief. Enough information has been developed to let investors understand the agronomy. The potential demand from construction and composites is increasingly visible in trials and early applications, though full commercial pull is still emerging. Data on yields and fibre quality are available. What they need—what every capital provider needs—is steady volume.

Processing proposals are now evaluated as manufacturing businesses. The discipline has changed: investors want stable flows of raw materials, and customers who take product at specification, not by aspiration.

STAKEHOLDER VIEW:

"Investors have been burnt. If regulation were predictable, investment would follow."

Investors now ask operational questions

Three years ago, investor meetings focused on brand stories, environmental benefits, and sector potential. Today, the conversation is far more concrete. Savvy investors want to know how many tonnes can be dried and stored on site, what the intake rate is per hour and per shift, how many hectares are already contracted rather than projected, and whether offtake is diversified. In other words, financiers want to see volume mapped to time.

Investors and banks also want to ensure that the agricultural side of industrial hemp is treated separately from the processing business plan. The cultivation operation provides raw materials; the processing facility must demonstrate commercial independence—its own cost structure, intake plan, and revenue logic.

Bankability requires three conditions

In interviews across multiple Australian processing proposals, lenders use remarkably consistent language about what makes a project bankable. They look for signed grower commitments within freight distance rather than expressions of interest. They require defined product specifications such as

consistent moisture levels, particle uniformity, and quality testing for hurd and fibre streams. And they want to see real offtake agreements—purchase contracts or repeat orders. Without those conditions, a processing facility remains a concept. With them, it becomes a business.

Agriculture expands on speculation. Manufacturing expands on contracts. Australia's hemp sector now straddles both. Growers plan in hectares, while investors assess monthly throughput. Hemp succeeds when those units converge — when contracted hectares deliver the volume needed to load a plant to capacity.

STAKEHOLDER VIEW:

"Our broad-acre capacity is our greatest agricultural asset; targeting resilient varieties is critical to making hemp competitive."

Without clear separation between growing and processing operations, cashflow modelling becomes unreliable—bankers view that as a structural risk.

Storage and intake planning reduce seasonal risk

Processing facilities cannot operate only during harvest; to run year-round, they must be able to dry, store, and stage biomass. Forward-looking Australian stakeholders are designing facilities with dedicated storage bays or bunkers for baled stalk, moisture-control systems sized to local climate and anticipated volume, and flexible intake bins that allow hurd, bast fibre, and fines to be separated as material enters the plant.

Fibre harvesting occurs within a short seasonal window to ensure retting quality. Managing this window over large areas creates operational challenges, reinforcing the importance of well-planned storage and staged intake systems.

Two years ago, storage was something processors hoped to add later. Today, it is a prerequisite for financing. Investors understand that hemp is harvested once a year, and they want to see exactly how a processor plans to avoid being a three-month-a-year business.

NRF recognition is a strategic plus

Industrial hemp is formally recognised in Australia's federal National Reconstruction Fund (NRF).

This inclusion – under the "value-add in agriculture" investment priority — a category designed to support downstream processing, manufacturing and commercialisation – is significant: it signals that hemp is viewed not just as a crop, but as a platform for new Australian industries in fibre, composites, construction materials, food ingredients and bio-based manufacturing.

Being listed in the NRF gives hemp a strategic foothold in investment planning. It creates a pathway for government funding, co-investment and support for infrastructure to turn raw hemp into higher-value products. For companies and investors, NRF recognition reduces perceived policy risk and strengthens the case for capital deployment. It positions hemp as part of Australia's sovereign manufacturing and regional-development agenda, rather than a niche agricultural activity.

Continuous operation also requires allowance for scheduled maintenance—typically one day per week—and adequate dry storage to maintain raw materials flow across the remaining days.

Distance determines viability

Freight radius determines bankability. This reality makes spot sourcing impractical and reinforces the need for grower contracts. When the flow of raw materials becomes assured, contracting follows. Those contracts enable financing, and financing allows facilities to be built. The industry does not grow because capital suddenly becomes generous. It grows because the system becomes stable.

STAKEHOLDER VIEW:

"To grow market share, hemp must be more competitive on price and certified for consistency in the supply chain."

Assumptions around transport radius and throughput must remain realistic—claims of fibre hubs producing exaggerated revenue levels are viewed sceptically by financiers, especially when equipment lists, labour requirements, or product specifications are undefined. Processing five tonnes per hour, twenty-four hours a day, 313 days per year requires established offtake; without it, even a well-built facility would face insolvency within its first year.

Multiple Senate submissions reinforce that finance will not flow until processors can prove contracted hectares and year-round production. While Australia now has a number of small decorticators, none are yet scaled due to inconsistent regulation, lack of uniform standards, and absence of procurement signals. This aligns with investor behaviour in Australia: capital is available, but only when raw materials contracts, processing capacity, and offtake are all validated.

Regulatory alignment accelerates contracting

Growers hesitate to sign multi-season agreements when testing schedules, sampling rules, or movement permits differ by state. Even small inconsistencies—such as a two-week difference in sampling requirements or a change in permit paperwork at a border—can disrupt harvest timing, baling, moisture levels, and intake plans at the processor. Uniform rules lower transaction cost. Lower transaction cost reduces perceived risk.

Projects are not delayed because business cases are weak; they are delayed because administrative pathways are slow and inconsistent. Investors are not looking for enthusiasm. They are looking for predictability.

The case for carbon

Moves are underway that could open hemp's biggest carbon opportunity — carbon credits — but the pathway is not yet complete. Australia already has a functioning carbon-credit market, the Australian Carbon Credit Unit Scheme (ACCU), and farmers can participate.

What hemp lacks is an approved methodology that allows cultivation and hemp-based carbon storage to generate tradeable credits. That requires long-term agronomic data, lifecycle carbon accounting, durability testing, and verified permanence — all now being assembled.

Eco Profit, based in New South Wales, is the first organisation to begin the formal groundwork required for hemp to gain recognition. Their roadmap outlines the staged process: inclusion of hemp in the national crop attributes list, coordinated multi-state data collection, creation of a national reporting pipeline, and eventual calibration of hemp within the FullCAM carbon-accounting model once sufficient field evidence exists. This aligns with discussions around a proposed new IPCC category for Harvested Non-Wood Biomass Products, which would allow durable hemp materials to be counted as long-term carbon stores.

Early signals are encouraging: interest is rising in low-carbon construction materials and biochar applications, areas where hemp can participate as supporting evidence builds. The technical, commercial and data pieces are forming, but full value will unlock only when hemp is recognised in national accounting and, ultimately, in the ACCU methodology library.

Projected CO_2 removals from hemp

If hemp cultivation scales in line with these projections, permanent carbon storage in hemp products becomes small but measurable at the national level — a critical requirement for hemp to eventually qualify for ACCU-eligible carbon methodologies.

Year	Hectares hemp	Dry kilotonnes of biomass/yr	CO2 removed growing biomass*	CO2 permanently stored*	Permanent removals**
2025	1,960	20	0.03	0.0144	0.0033%
2026	2,940	29	0.04	0.0216	0.0052%
2027	5,145	51	0.08	0.0378	0.0097%
2028	10,290	103	0.15	0.0755	0.0207%
2029	20,580	206	0.30	0.1511	0.0443%
2030	30,870	309	0.45	0.2266	0.0715%
2031	46,305	463	0.68	0.3399	0.1159%
2032	69,458	695	1.02	0.5098	0.1892%
2033	104,186	1,042	1.53	0.7647	0.3114%
2034	156,279	1,563	2.29	1.1471	0.5172%
2035	234,419	2,344	3.44	1.7206	0.8690%

** Metric tons; ** As a % of Australia's total emissions*

[Source: Eco Profit]

CONCLUSIONS

The path ahead

Following a long period of trials, alignment and adjustment, here's where the Australian industrial hemp sector stands today:

1. **Australia's key asset is its evidence-driven foundation.** National cultivar trials and AIHPR research have replaced trial-and-error with region-specific data, giving growers and processors clarity on yield potential, timing, and risk.
2. **Regulatory misalignment remains the sector's biggest drag.** Food law, agricultural licensing, and drug-control rules still operate as partially disconnected systems; until they align with actual end uses, friction will continue to limit investment and interstate commerce.
3. **Processing capacity is still too thin to support demand.** Continuous decortication, reliable throughput, and moisture-stable outputs are needed before downstream users — especially construction and non-wovens — can scale up confidently.
4. **The regional manufacturing model is sound but underbuilt.** Australia's geography favors local processing hubs tied to local material streams. The model works on paper and in early practice, but requires more plants operating year-round with secured intake.
5. **Storage and moisture-control remain a critical missing link.** Without dependable storage and intake infrastructure, facilities face downtime outside harvest windows. This limits contracting and undermines bankability.

6. **Demand is emerging, and based on performance.**
   Builders, bedding manufacturers, non-wovens producers, and compostable-material suppliers want more hurd and fibre — and their interest is based on functional results and embodied-carbon scoring, not speculation.

7. **The investment lens is focused on key metrics.**
   Capital is now assessing operators by manufacturing metrics — throughput, quality consistency, storage, logistics, and contracts — which raises the bar but strengthens the sector's credibility.

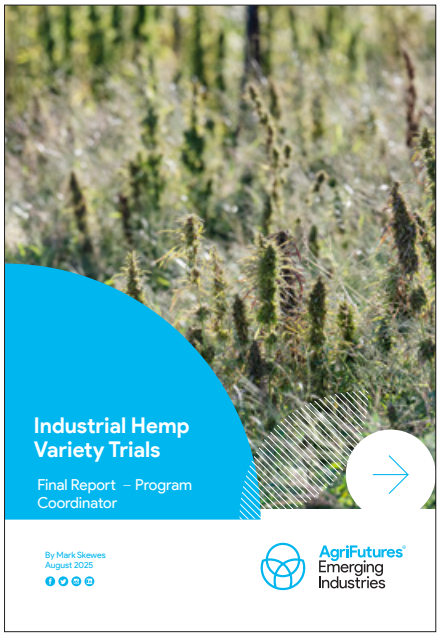
8. **Fibre-first agronomy skills are still developing.**
   Growers are experienced with grain, but fibre crops require different sowing windows, plant density expectations, and baling practices. The learning curve is a bottleneck in some regions.

9. **Most coordination tasks still fall on individual businesses.**
   Standards, logistics, testing protocols, and QC tracking are being built company-by-company, creating duplication and slowing the emergence of shared infrastructure.

10. **Carbon-accounting can strengthen strategic position.**
    Embodied-carbon procurement rules, LCAs, and biogenic carbon accounting are gaining traction; hemp materials map directly onto these requirements.

11. **Private capital is available once throughput is proven.**
    Investors are looking for carbon-aligned industrial assets. Demonstrated stability in intake, storage, and output quality unlocks financing far more easily than in past years.

12. **Overbuilding remains a risk if supply is not secured.**
    If new facilities outpace contracted hectares or agronomic readiness, the sector risks underutilized infrastructure and reputational damage — a risk operators and investors are now acutely aware of.



Industrial Hemp Variety Trials (IHVT)

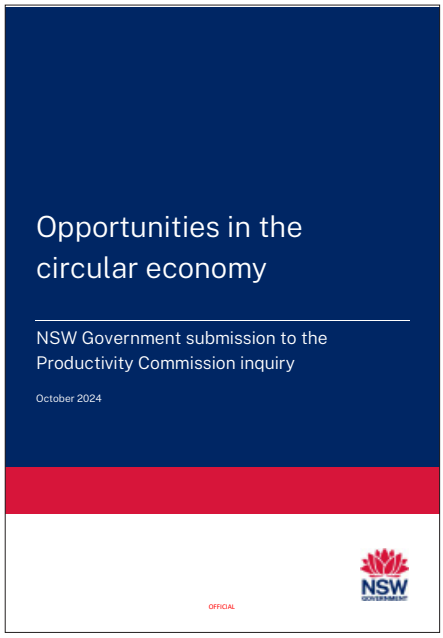
AgriFutures (2025)

National trial testing grain and fibre cultivars across latitudes, sowing windows, and end-use.

Hempcrete panels for Afforcable carbon housing

La Trobe Business School (2025)

Analysis of Australia's hempcrete panel supply chain, scaling barriers, and carbon impacts.



Opportunities in the circular economy

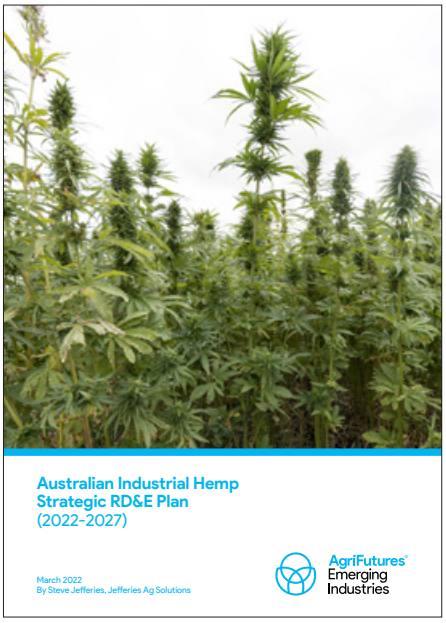
New South Wales Govt. (2024)

Policies, barriers, and actions to accelerate a statewide circular economy.

NSW Hemp Industry Development Plan

New South Wales Govt. (2025)

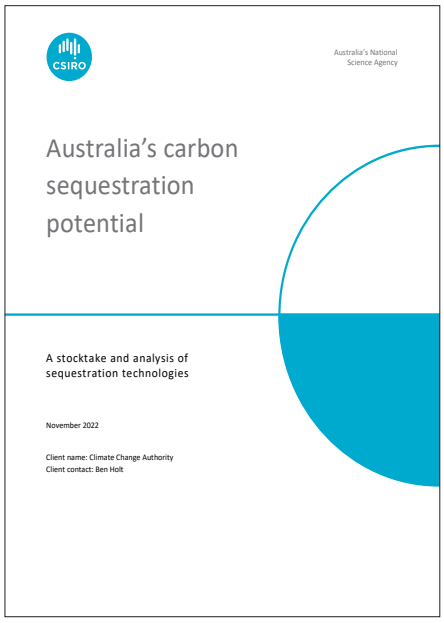
Strategic draft plan guiding growth of a mainstream, sustainable hemp industry in NSW.



Australian Industrial Hemp Strategic RD&E Plan

AgriFutures (2022)

Five-year strategy to advance Australia's industrial hemp production and innovation.



Australia's carbon sequestration potential

CSIRO (2022)

Analysis of Australia's carbon-removal technologies and the sectors' economic potential.

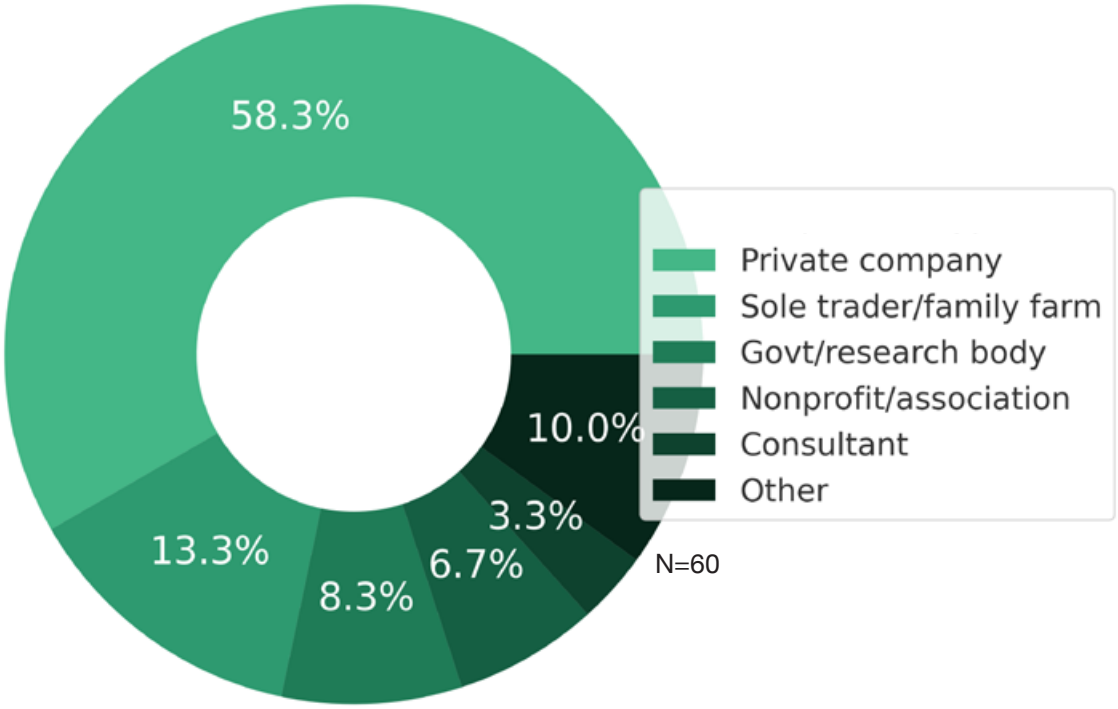
2025 Industrial Hemp Stakeholder Survey

In Autumn 2025, Australian stakeholders were invited to complete a survey to help clarify the progress, challenges and opportunities shaping hemp in their country, and to develop a snapshot of the industry to inform investors, policymakers and industry partners worldwide.

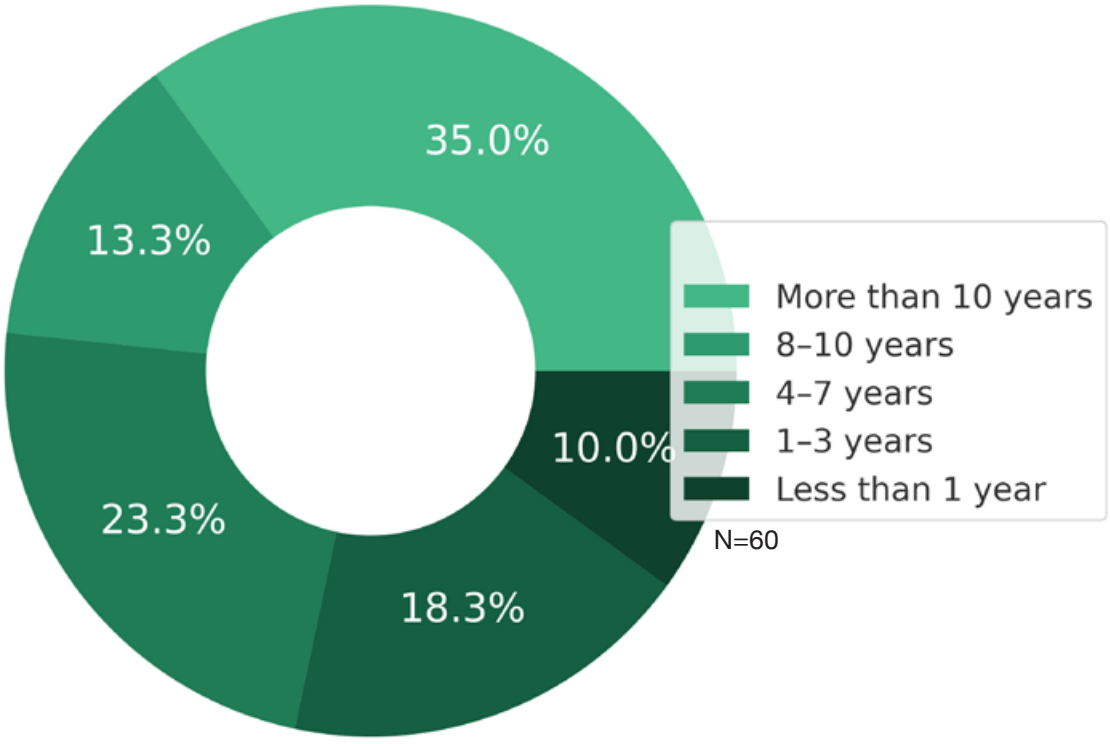
Prospective participants were contacted at least four times between Sept. 8 and Oct. 11, 2025; 26 of 34 invited stakeholders responded (~76%). Several provided additional comments to deepen or qualify their answers.

Their responses offer qualitative, directional indicators of how operators view the path to scale. Moreover, the high level of participation reflects a sector that takes its development seriously.

Organisation type

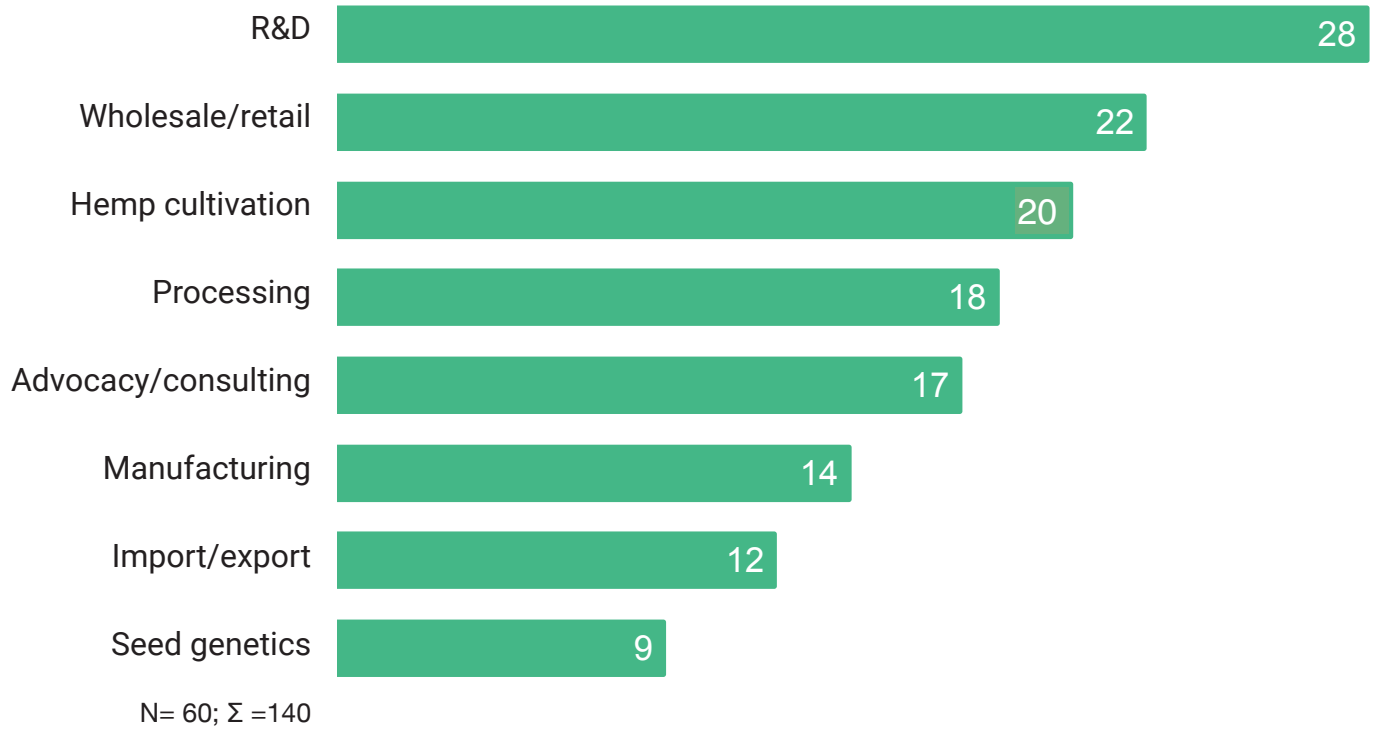


How many years have you been involved in hemp?

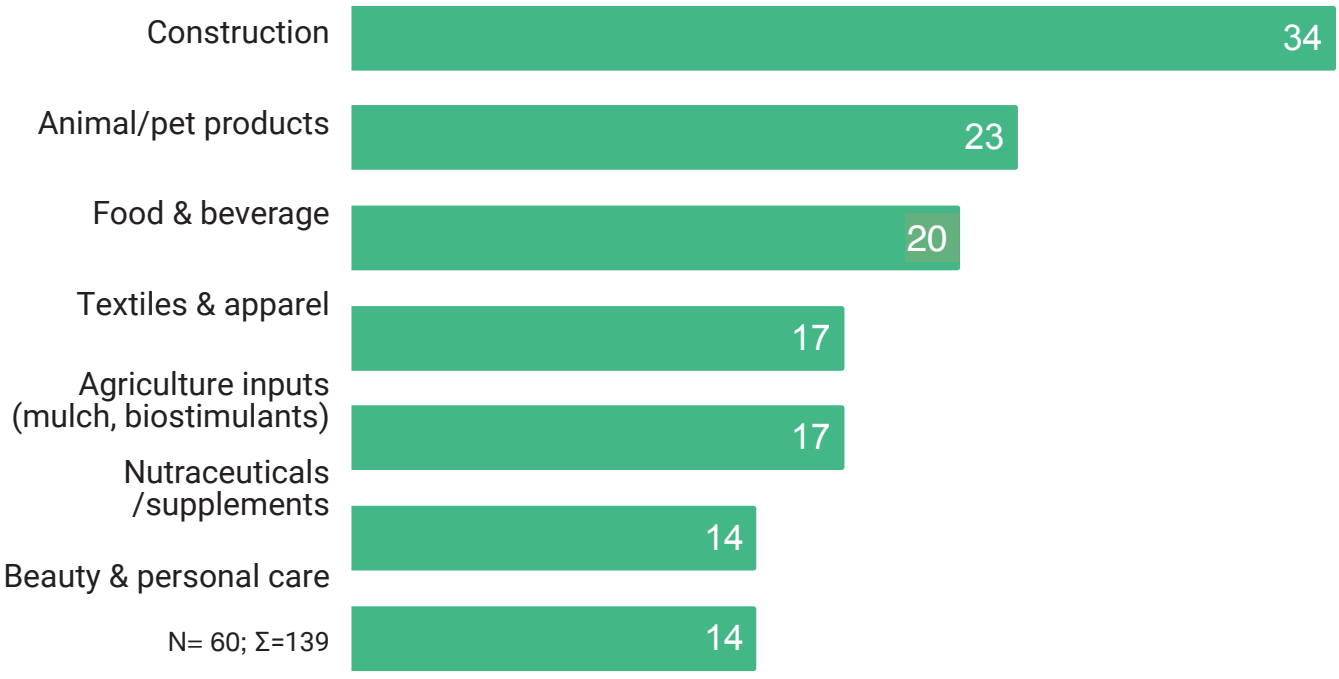


N = number of respondents; **Σ** = number of responses (multiple-answer questions)

What are your main activities?

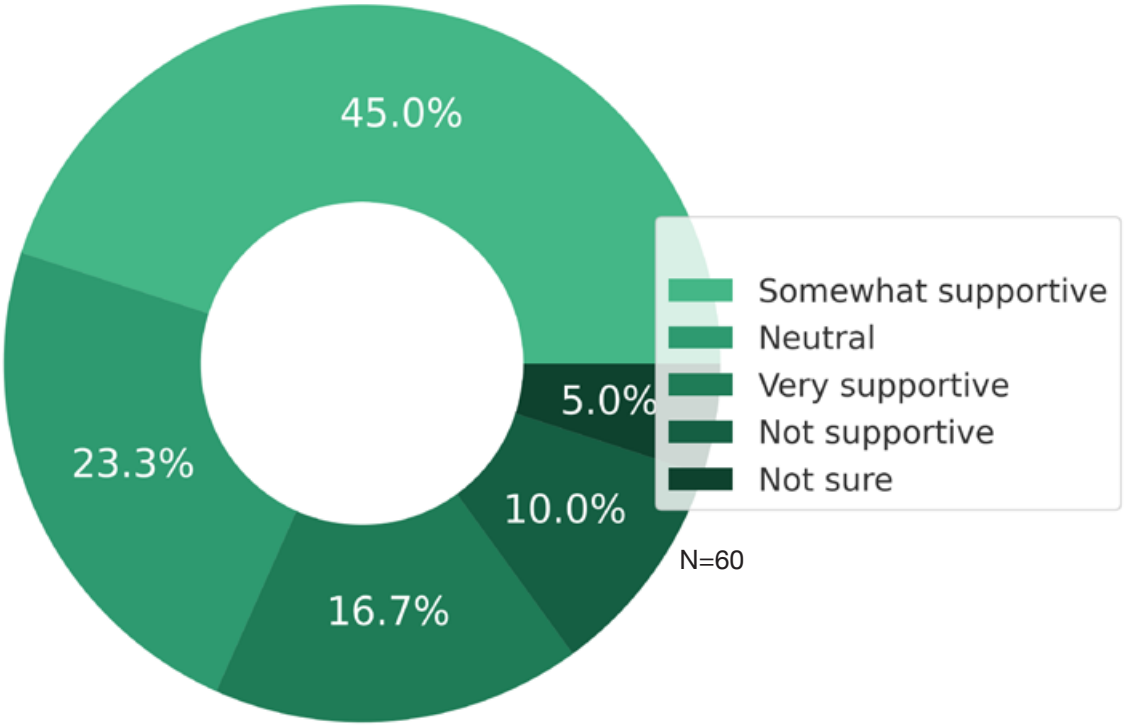


Products & services

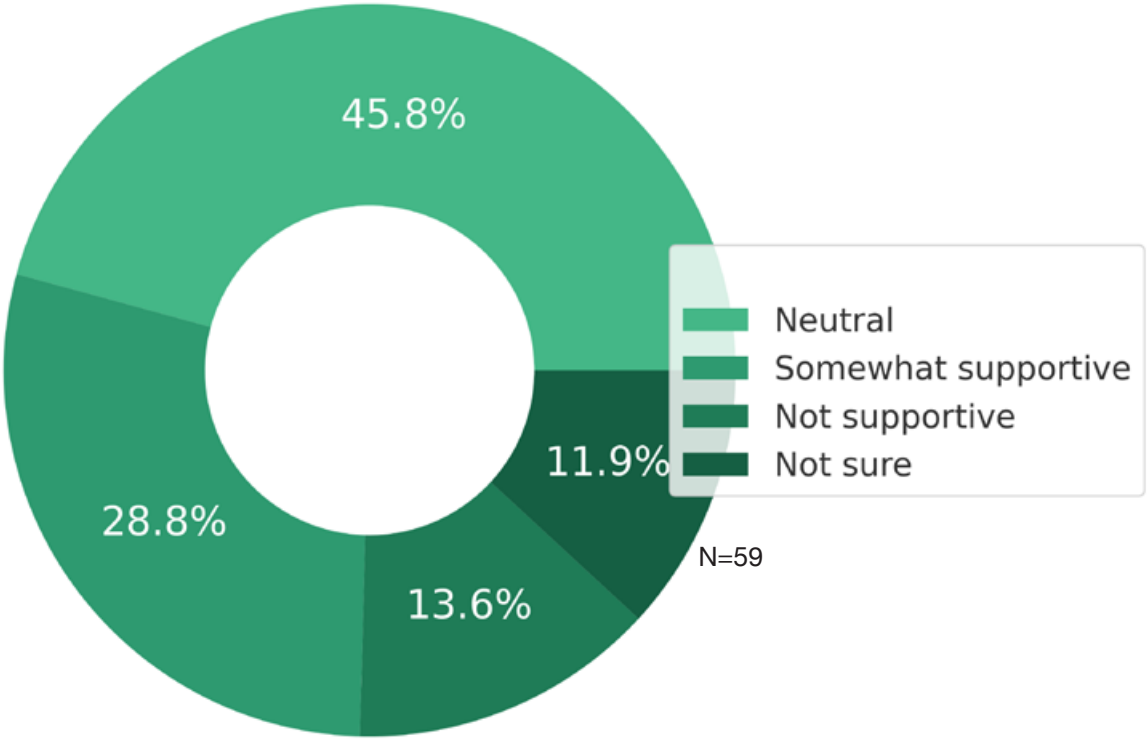


N = number of respondents; **Σ** = number of responses (multiple-answer questions)

How supportive is the state/regional government of hemp industry development?

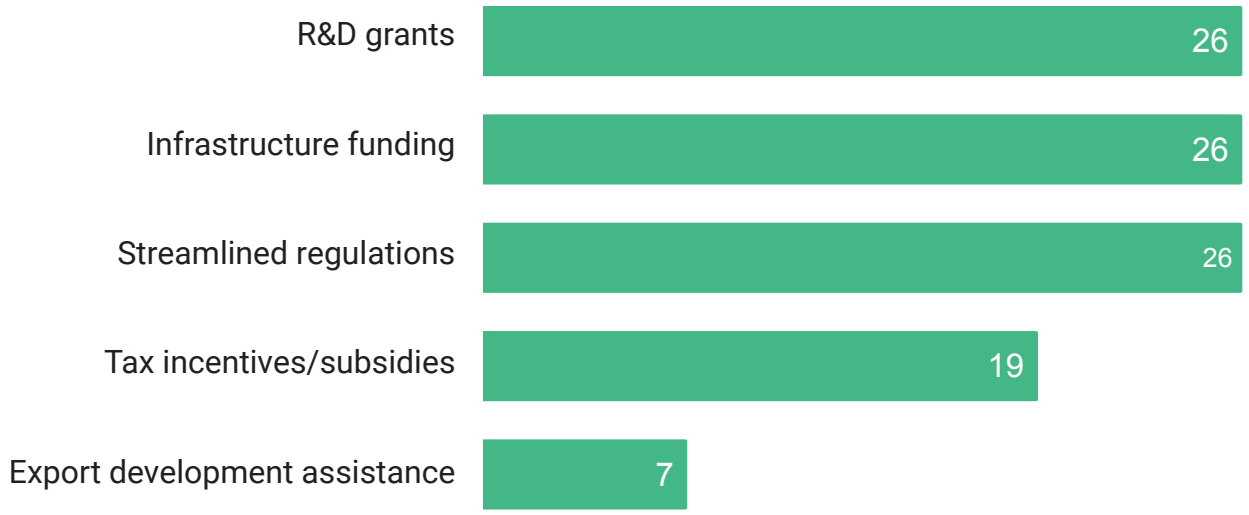


How supportive is the federal government?



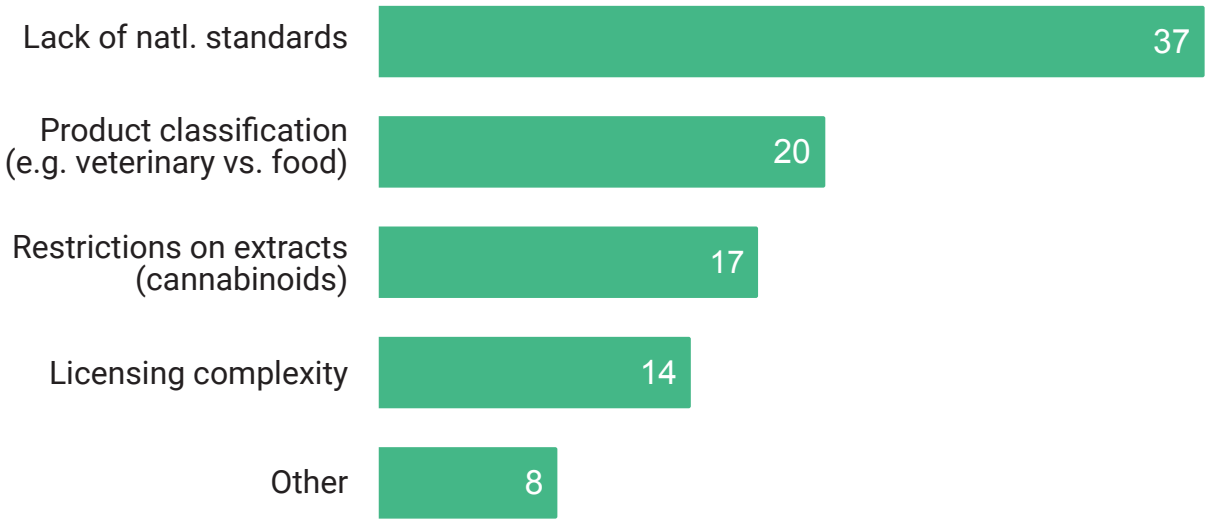
N = number of respondents; **Σ** = number of responses (multiple-answer questions)

What kind of government support would help your business most?



N=58; Σ =104

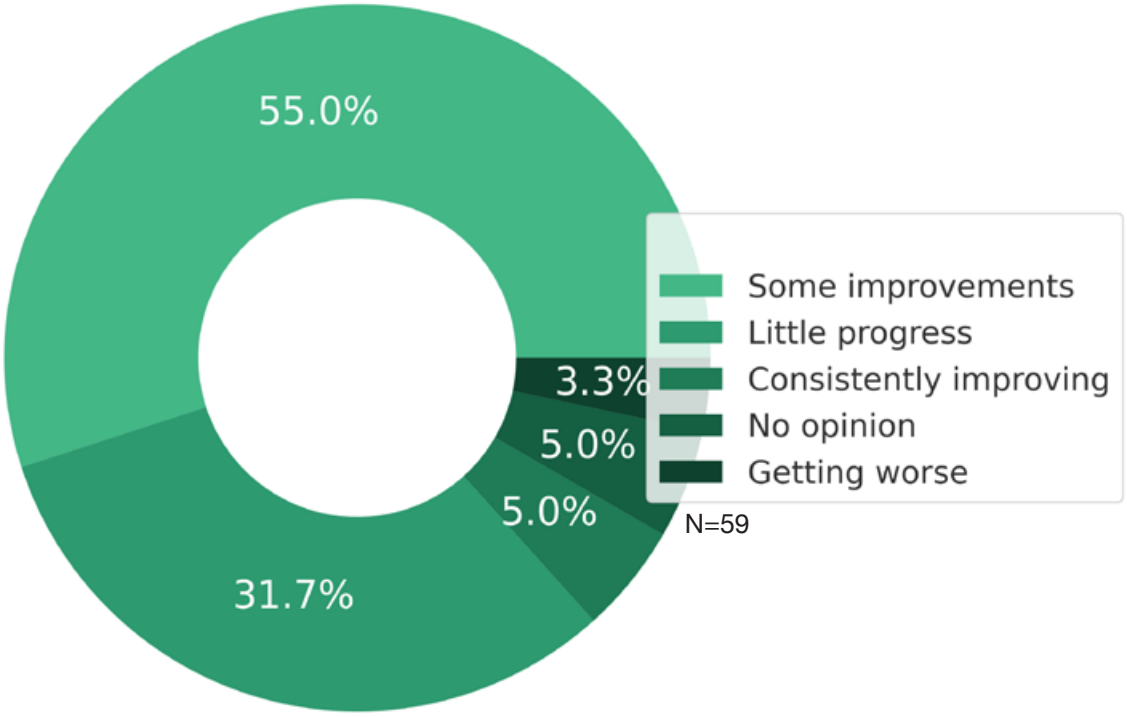
What is the biggest regulatory barrier for your business?



N=59; Σ =96

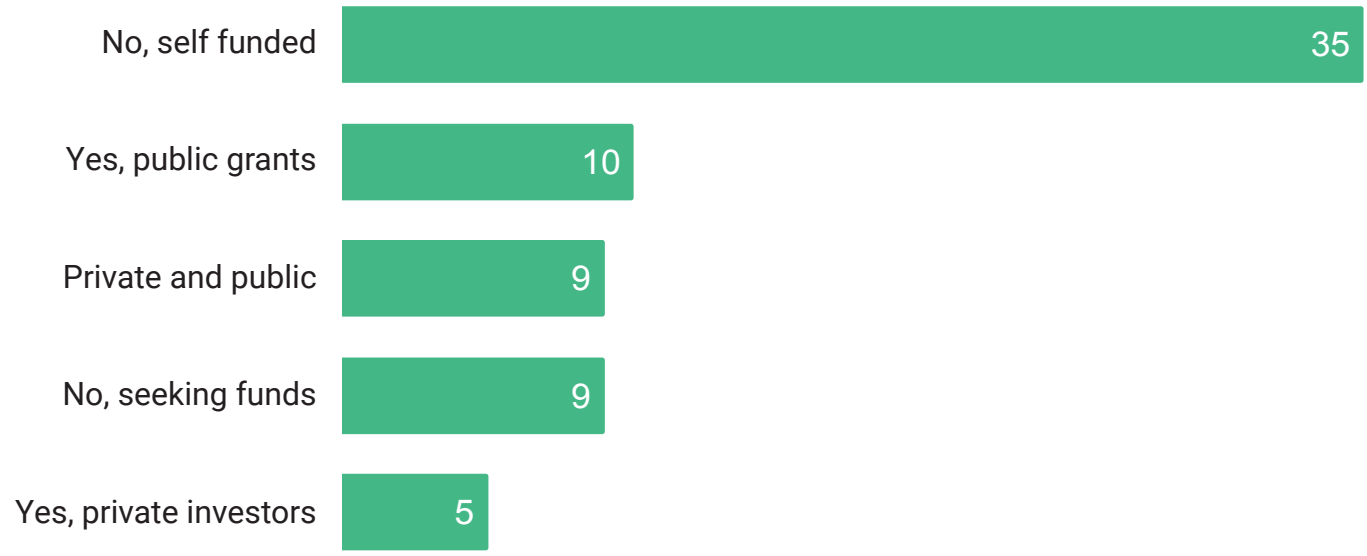
N = number of respondents; **Σ** = number of responses (multiple-answer questions)

Which best describes your view of the national regulatory environment for hemp?



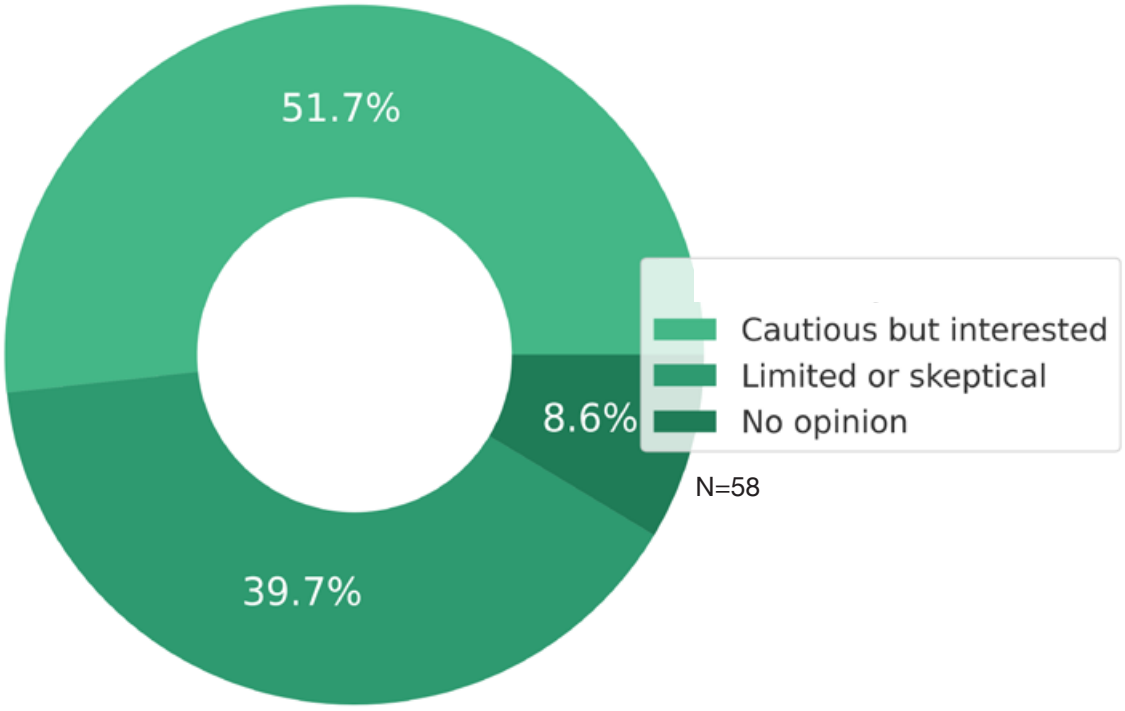
N = number of respondents; **Σ** = number of responses (multiple-answer questions)

Have you received external funding?



N=60; Σ =68

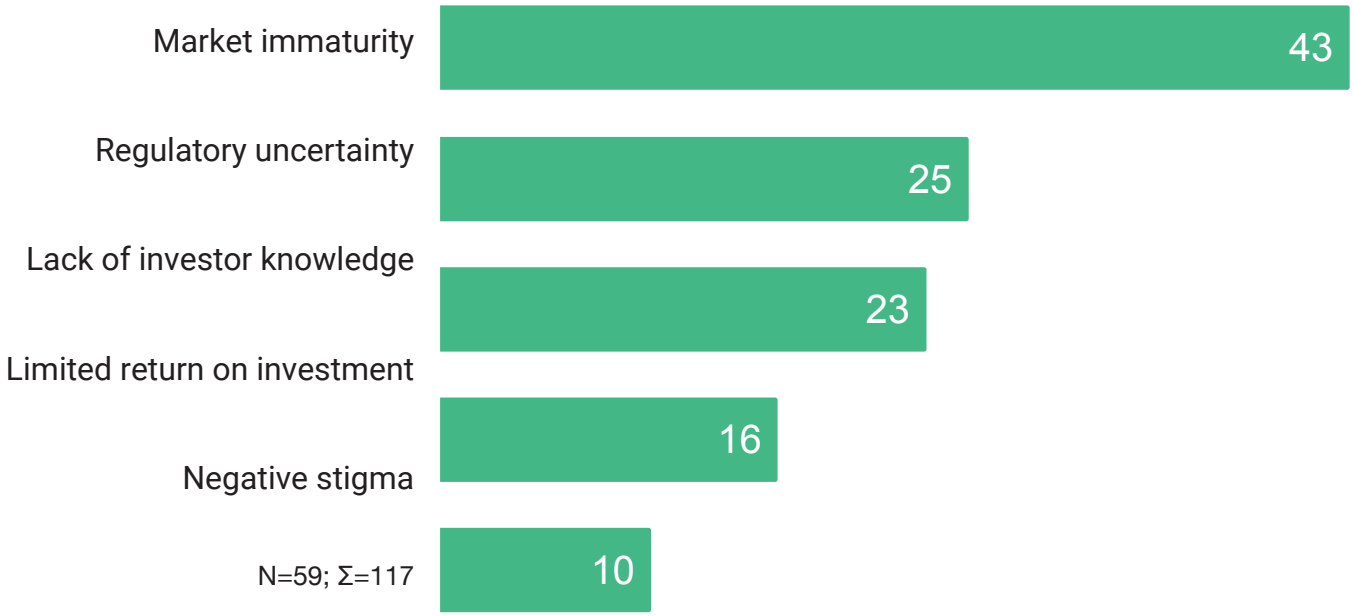
How would you describe the current investment climate for hemp in Australia?



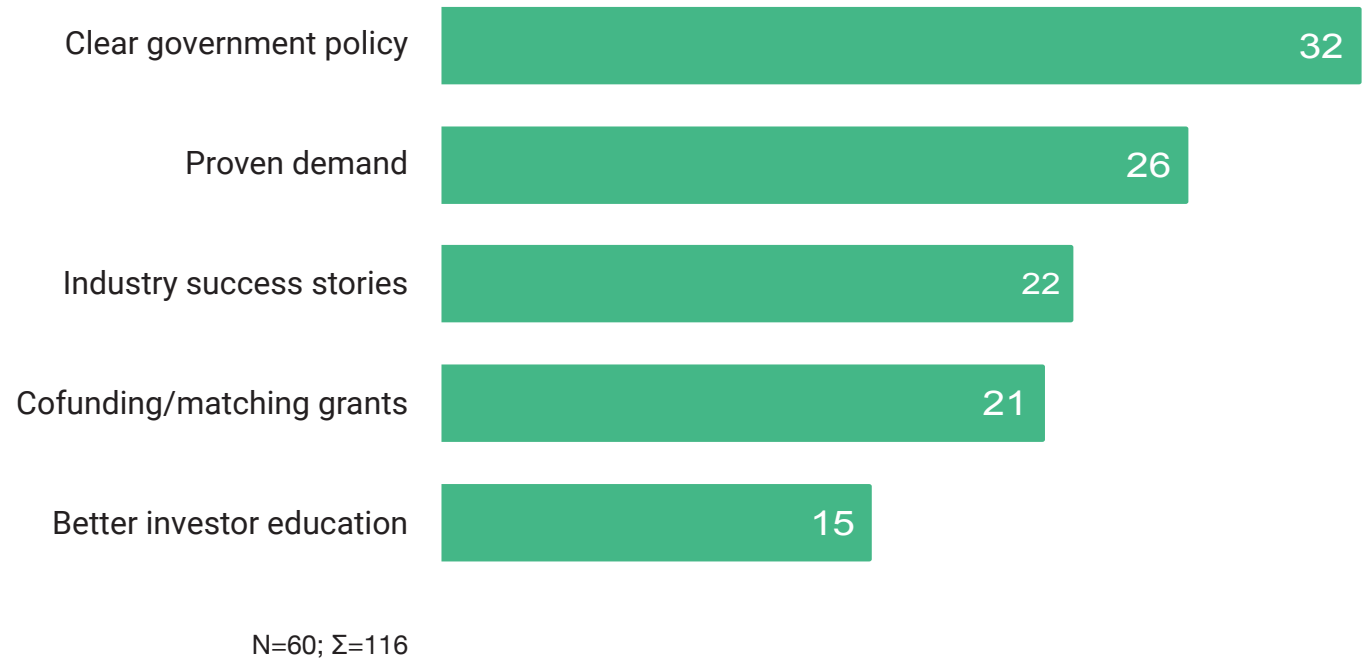
N=58

N = number of respondents; **Σ** = number of responses (multiple-answer questions)

What is the greatest barrier to investment?

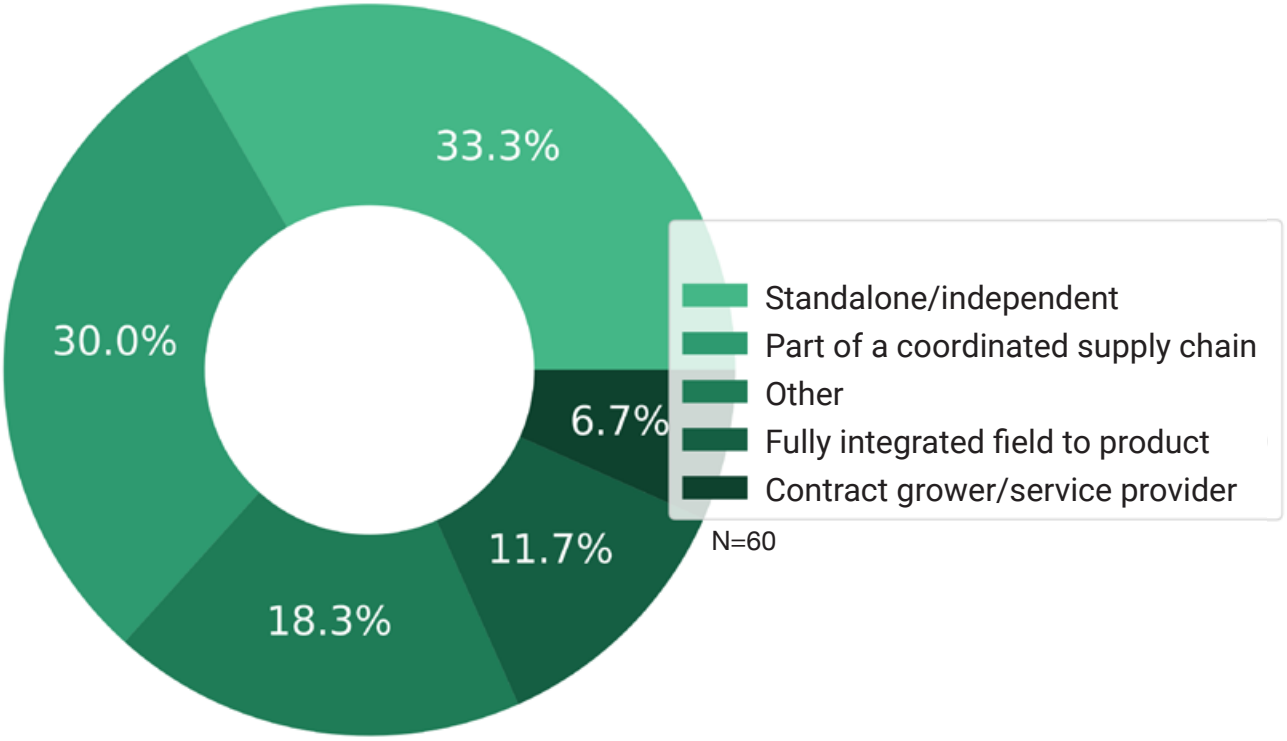


What would most help attract investors to your business?

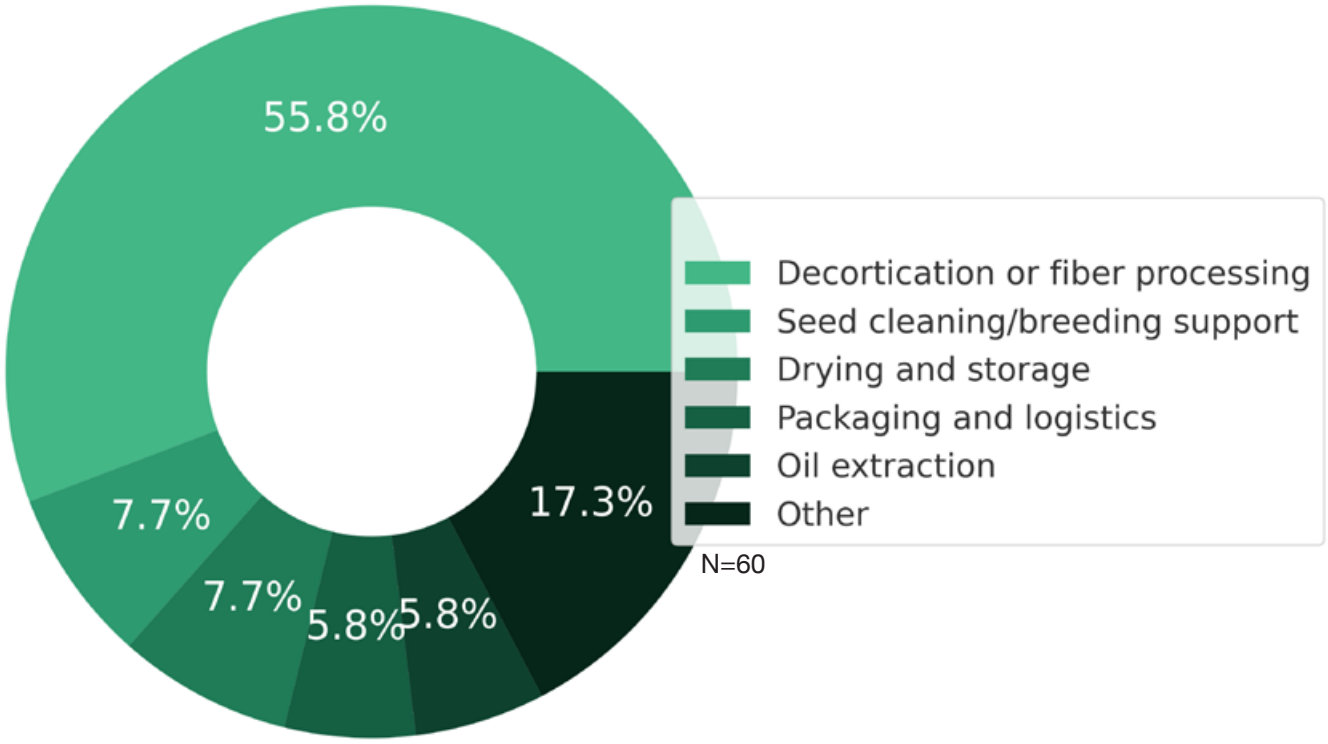


N = number of respondents; **Σ** = number of responses (multiple-answer questions)

What best describes your current operational model?

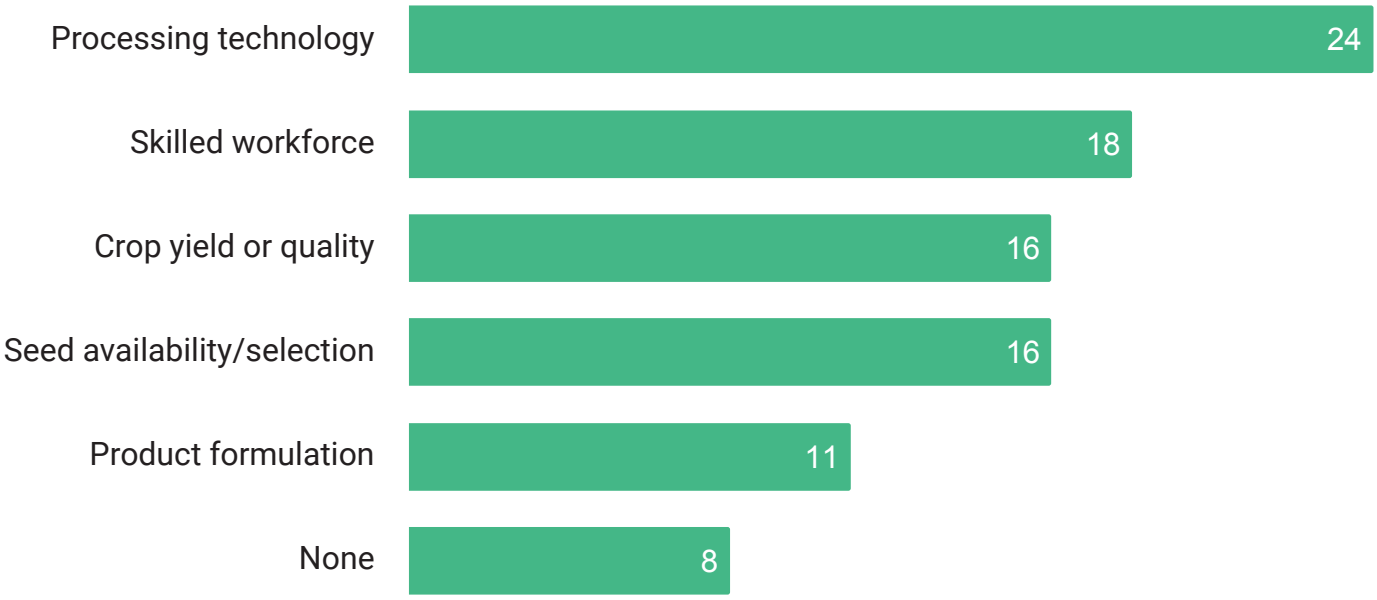


What type of infrastructure is most urgently needed?



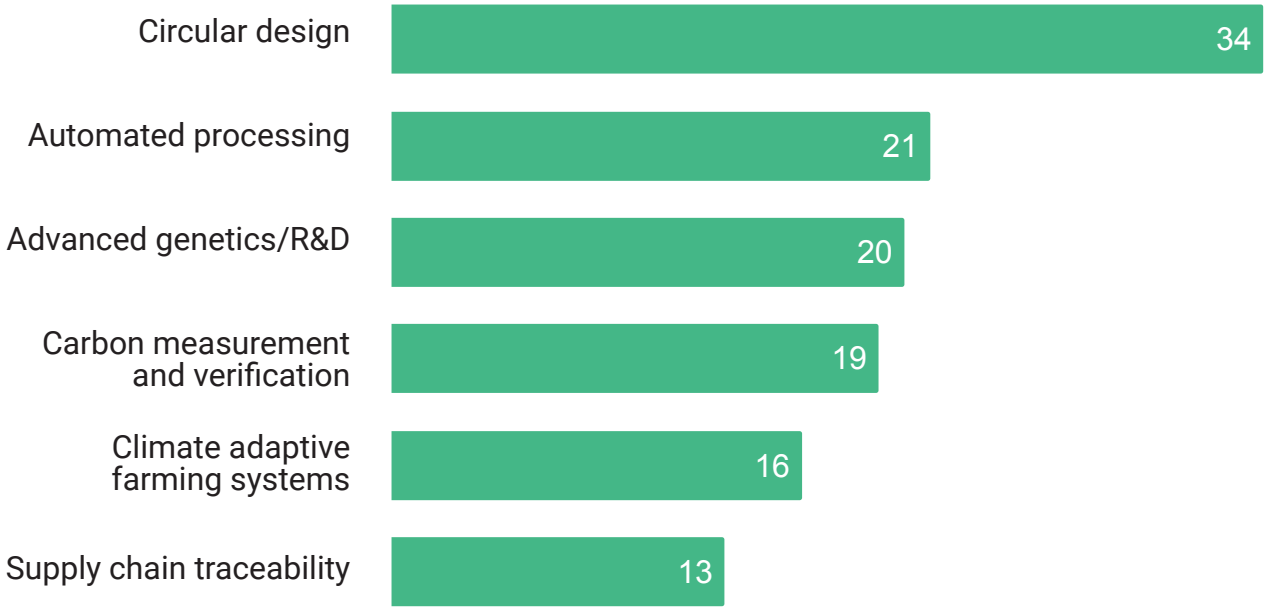
N = number of respondents; **Σ** = number of responses (multiple-answer questions)

What are the key technical barriers in your operation?



N=60; Σ=93

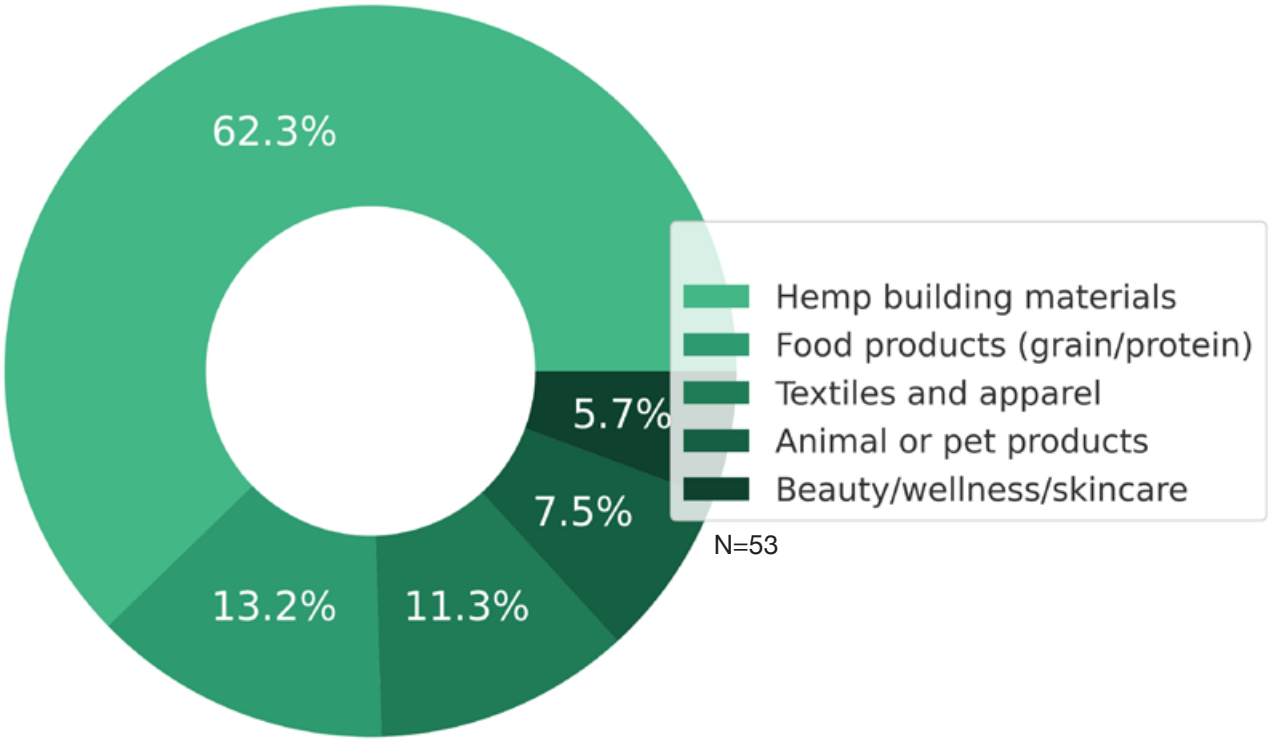
Which technologies are most important for the future of the industry?



N= 60; Σ=93

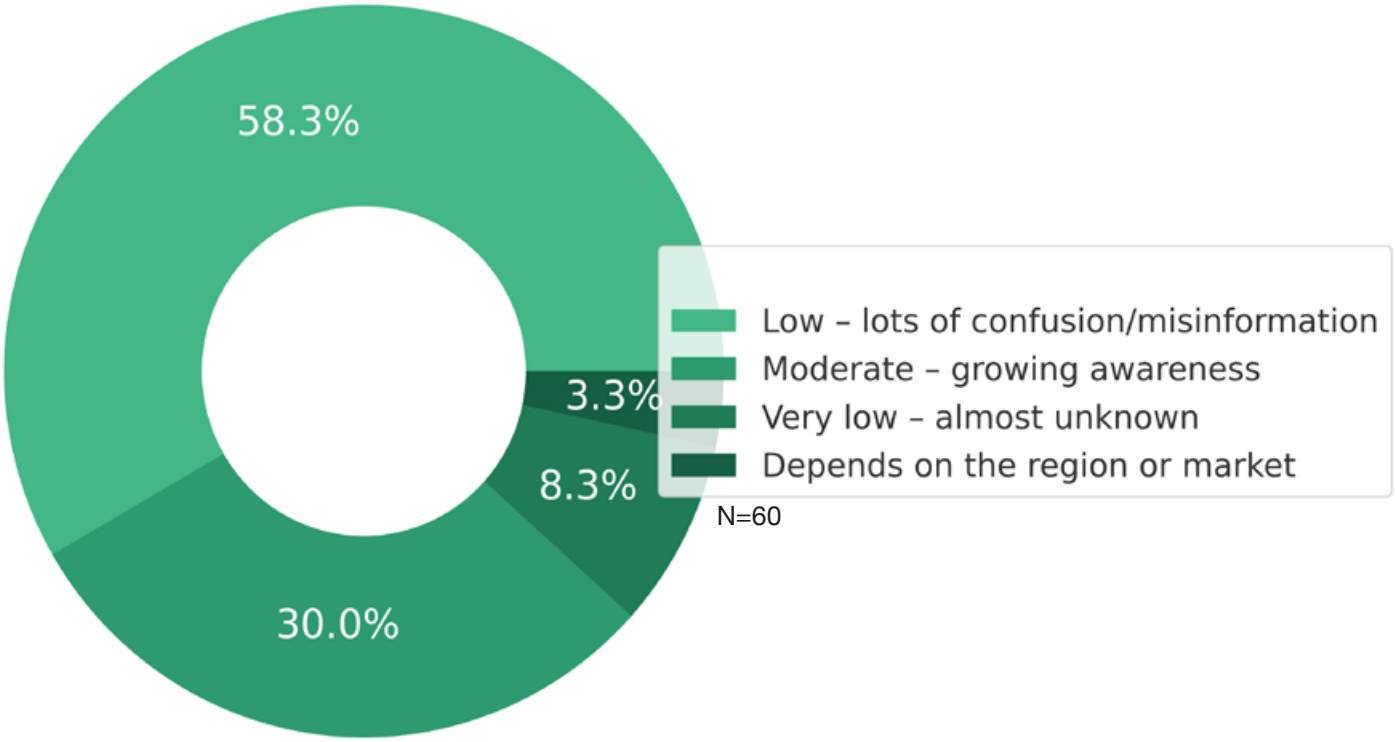
N = number of respondents; **Σ** = number of responses (multiple-answer questions)

Where are you seeing the strongest market interest?



N=53

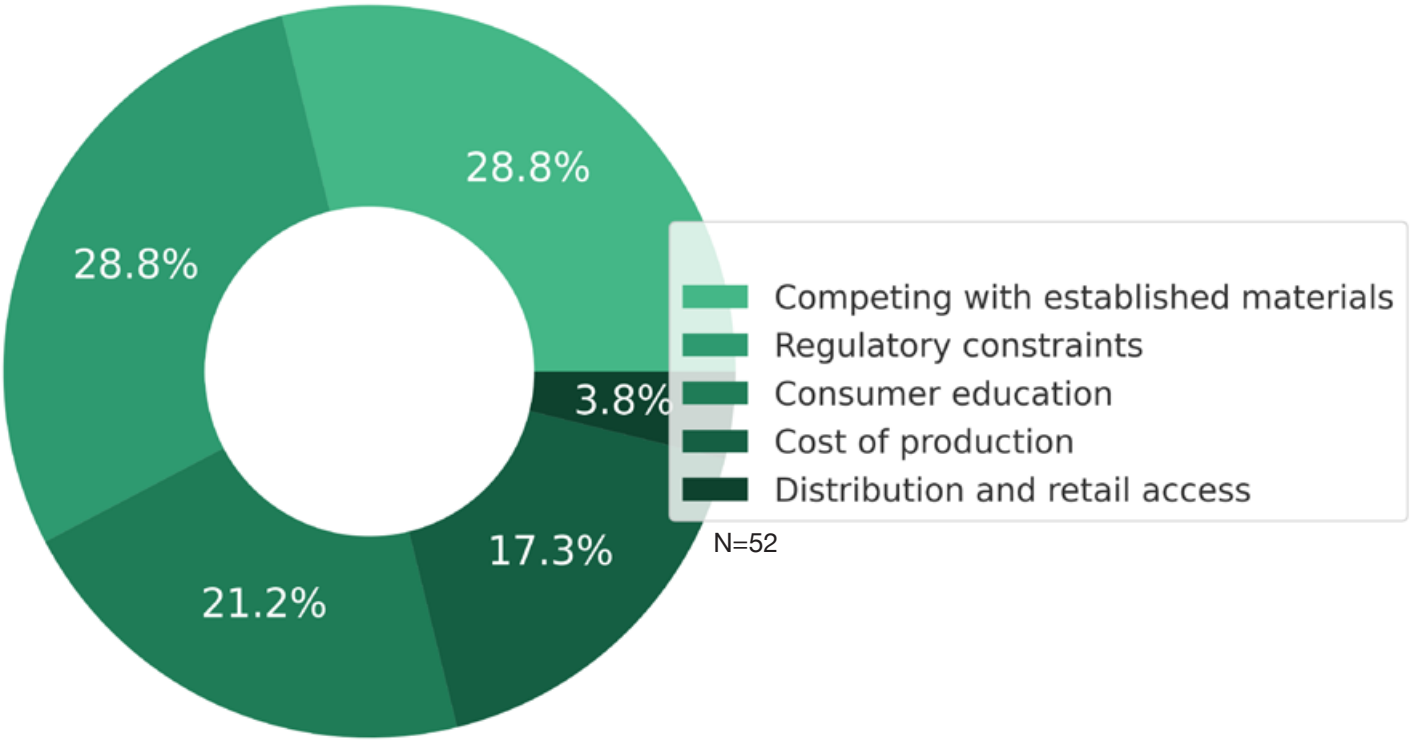
How would you describe consumer knowledge of hemp?



N=60

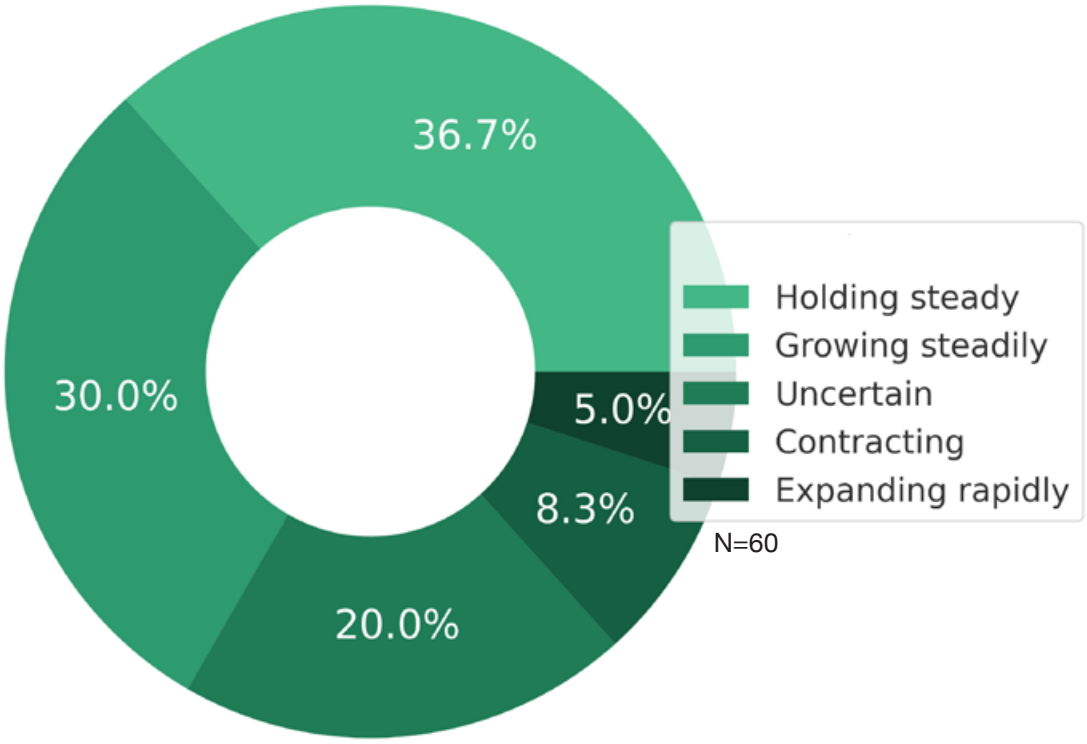
N = number of respondents; **Σ** = number of responses (multiple-answer questions)

What is the greatest challenge in selling hemp-based products?



N=52

What is your current business trajectory?

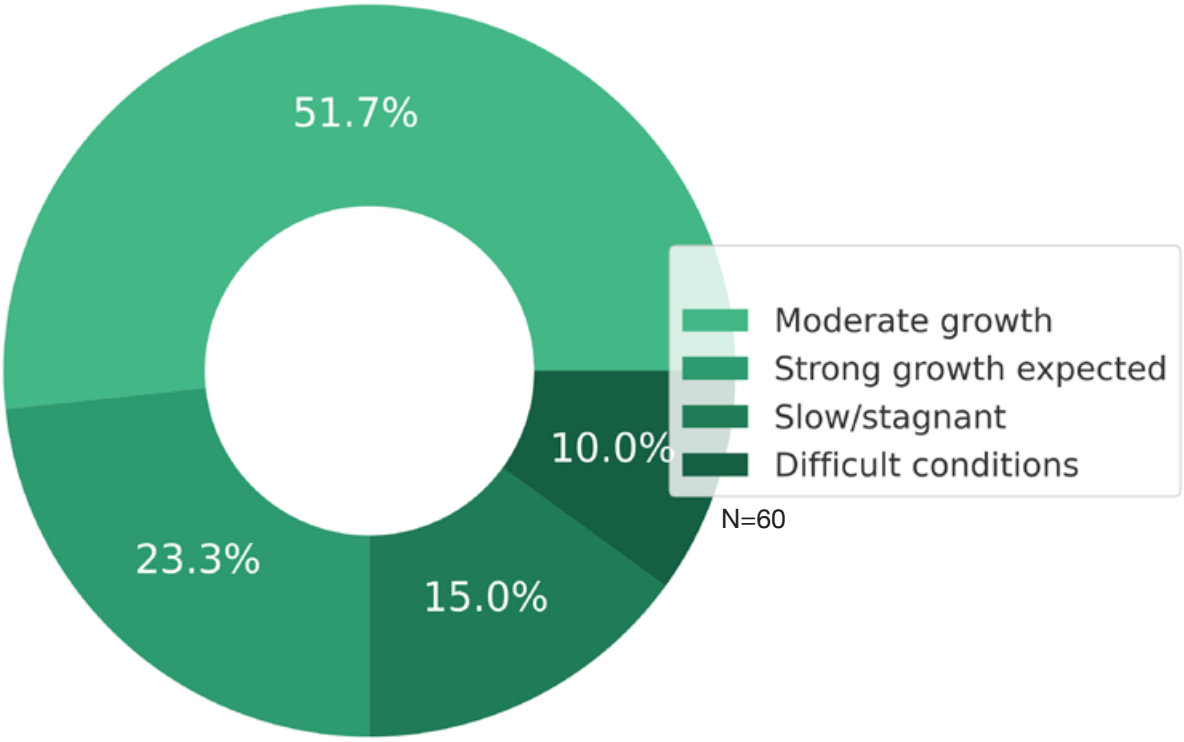


N=60

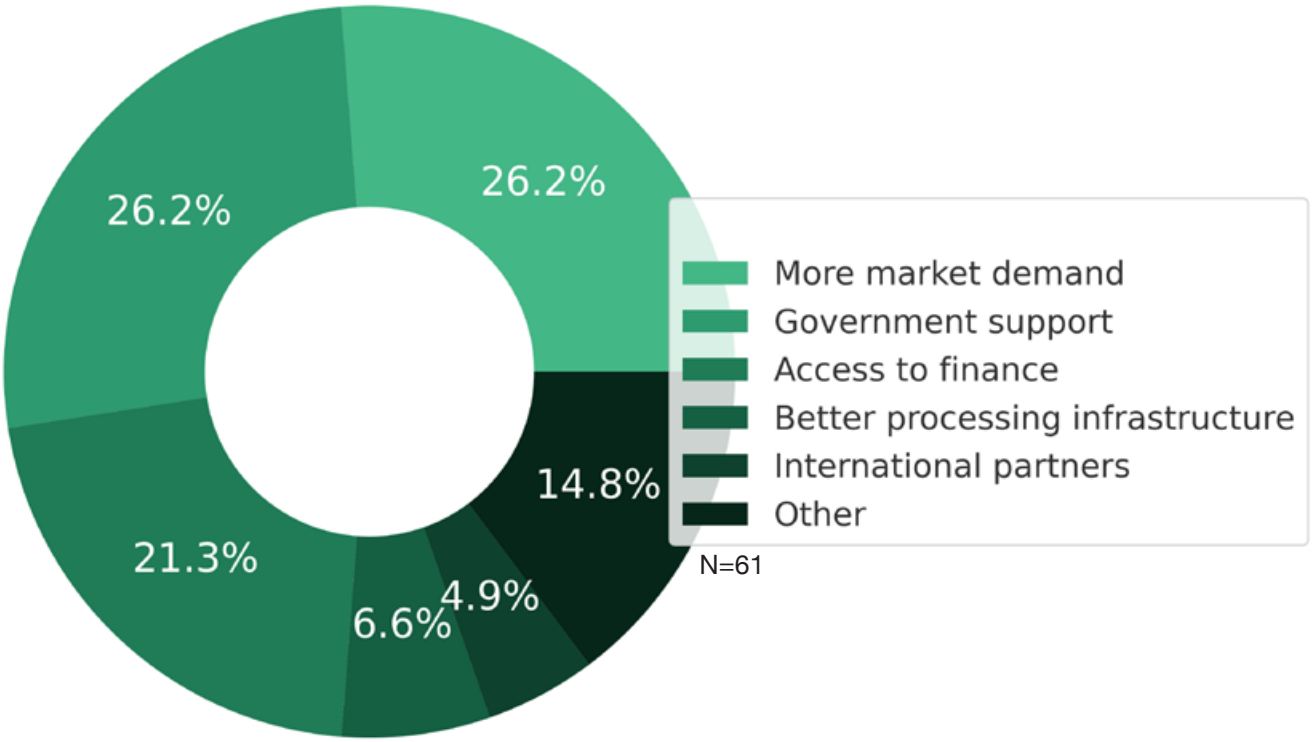
N=26; Σ=62

N = number of respondents; **Σ** = number of responses (multiple-answer questions)

What is your business outlook for the next 3-5 years?

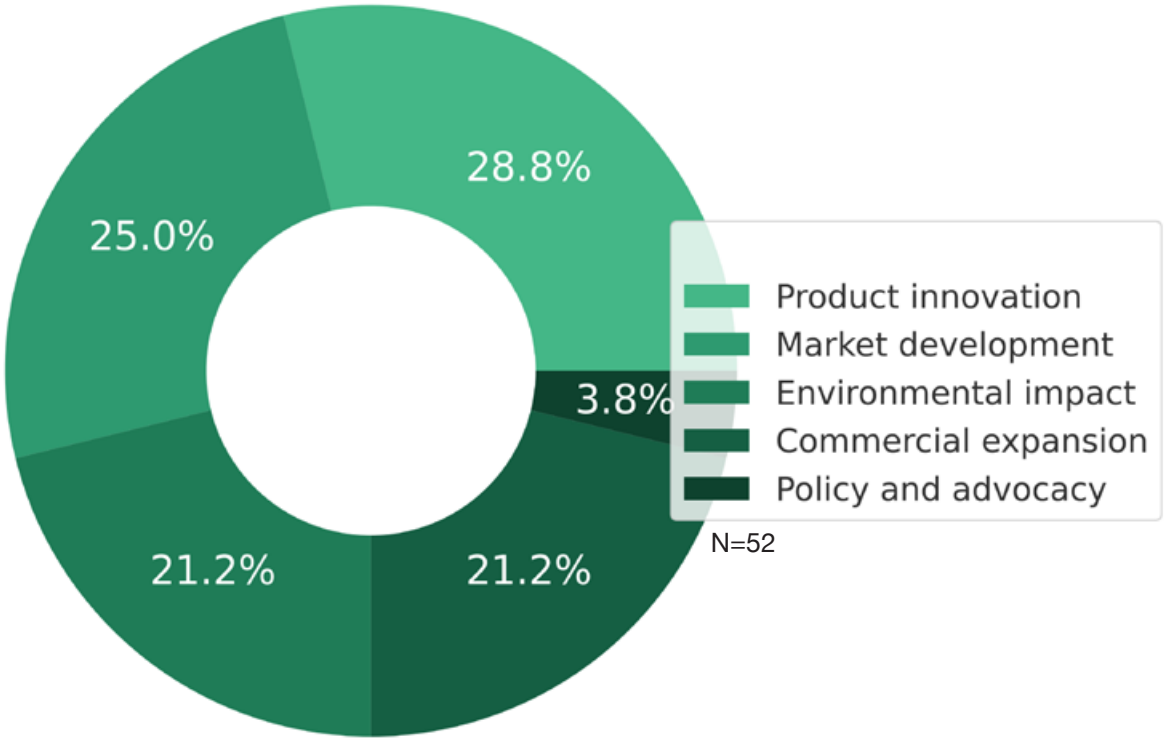


What would most accelerate your growth?



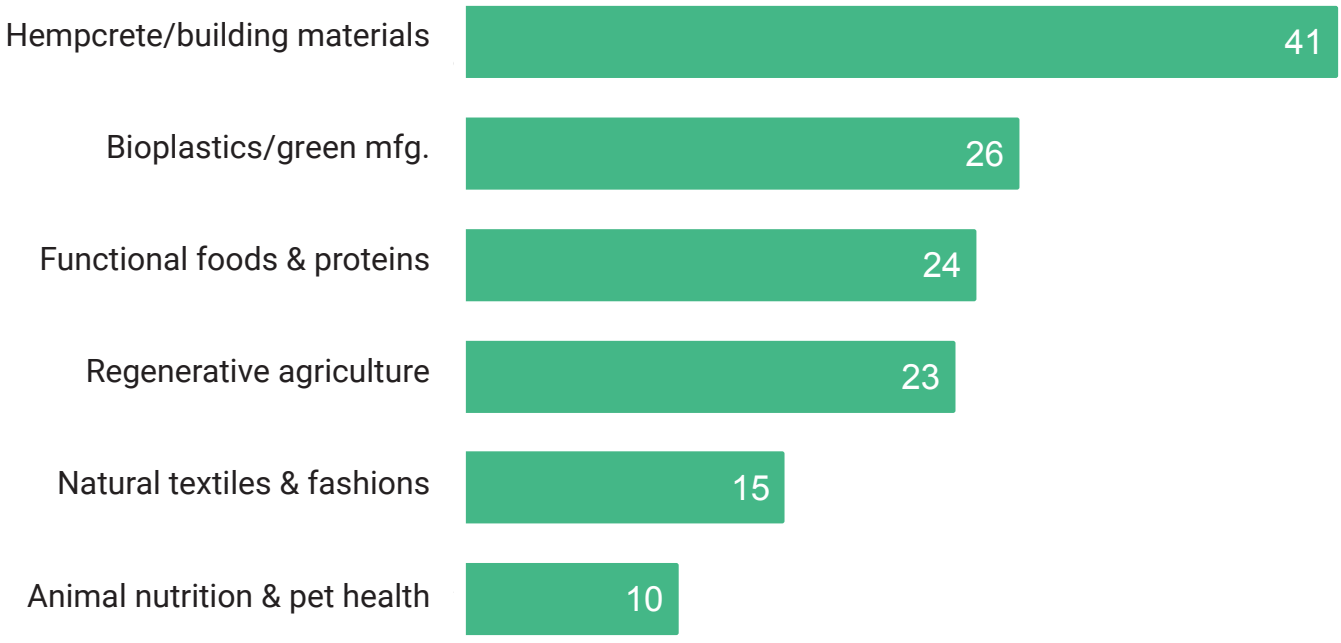
N = number of respondents; **Σ** = number of responses (multiple-answer questions)

What is your top long-term priority?



N=52

Where do you see the greatest opportunity for Australian hemp over the next decade?



N=60; Σ=139

N = number of respondents; **Σ** = number of responses (multiple-answer questions)

[iHemp New South Wales]
Founded: 2021
Headquarters: Leadville
President: Jaimie Milling
Email: info@ihempnsw.org.au

[Victorian Hemp Association]
Founded: 2017
Headquarters: Melbourne
President: Sherri Smith-Hoyer
Email: secretary@victorianhempassociation.org.au

[Industrial Hemp Western Australia Association Inc.]
Founded: 2015
Headquarters: Margaret River
Contact: Linelle Fields
Email: admin@ihempwa.org

[Industrial Hemp Association South Australia]
Founded: 2018
Headquarters: (South Australia; city not listed)
President: Mick Andersen
Email: contact@ihasa.org.au

[Queensland Hemp Association]
Founded: 2021
Headquarters: Brisbane
President: Lauchlan Grout
Email: lauchlan.grout@qldhempassociation.com.au

[Northern Territory Farmers Association]
Founded: 2012
Headquarters: Coolalinga
Deputy CEO: Andrew Bourne
Email: dceo@ntfarmers.org.au

Tasmanian Hemp Association
Industry advocacy, grower support, education, events, development.

The Tasmanian Hemp Association drives a credible, profitable and sustainable hemp industry by supporting growers, improving regulation, building markets and positioning Tasmania as a national and global leader in renewable materials.

Key contact: Executive Officer
Email: eo@tasmanianhempassociation.org.au
Tel: +61 49 924 4367

X-Hemp
Hemp Fibre Processing Mill

X-Hemp is a women-run company based in the heart of Tasmania, Australia. Operating a hybrid-model perfectly suited to their specific region, X-Hemp grows fibre varieties while also processing hemp grain stubble from seed crops that was previously burned as waste.

Key contact: Andi Lucas
Email: info@xhemp.au
Tel: +61 41 338 8470

Rachel Payne
Member of Parliament
Legalise Cannabis Victoria; member for South-Eastern Metropolitan Region

Key Contact: Nelly Thomas
Email: nelly.thomas@parliament.vic.gov.au
Tel: +61 3 9651 8972

Hemp Inside PTY LTD
Australian Industrial Hemp Processing Facility

A circular manufacturing venture transforming Australian hemp into raw materials suitable for premium textile fibre, building materials, composites and non-woven applications.

Key Contact: Colin Steddy
Email: admin@hempinside.com.au
Tel: +61 407 195 340

Forever Green
Innovation, Technology/BC, Canada

Vertically integrated hemp grower and processor that operates decortication equipment and supplies technology including a specialized hemp harvester, the KP-4.

Key Contact: Peter Düshop
Email: getforevergreen@gmail.com
Tel: +1 250 567-5673

HempStrategist
Media & marketing communications

We specialize in creating winning strategies for leading global companies operating in the industrial hemp space.

Key Contact: Kehrt Reyher
Email: kehrt@hemptoday.net
Tel: +48 602 336 6865

HurdMaster
Technology, Construction/Latvia

A compact, durable micro-decorticator designed to separate hemp stalks' woody core (hurd) from bast fibers.

Key Contact: Kristaps Eglitis
Email: kristap@inbox.lv
Tel: +371 28 680 139

Midlands Seed
A trusted producer of high-quality Hemp seed for sowing and Hemp seed grain for further processing, supported by proven expertise, complete traceability, and rigorous international quality standards.

Key contact: Dave Bell
Email: dave.bell@midlands.co.nz
Tel: +61 408 164 098

Uma Hemp
Your common thread for hemp fibre

Uma Hemp is building partnerships with hemp processors across Australia to meet a growing demand for textile quality fibre

Key Contact: Yang Yao
Email: yang@umahemp.au
Tel: +61 47 603 999

Hemp Collective
Hemp Health & Beauty

Hemp Collective is an award-winning Australian-made and owned brand from the Byron Shire, manufacturing hemp hair, body, and pet care products that stand out for their quality and sustainability.

Key Contact: Maxine Shea
Email: hello@hempcollective.com.au
Tel: +61 424 488 784

Ashford Hemp Industries Pty Ltd
Processing, technology

Suppliers of building grade hurd, short bast fibre, fines and hemp pellets, AHI also manufacture and supply hemp processors based on their original, effective design.

Key contacts: Leon and Connie Minos
Email: connie@ashfordhempindustries.com
Tel: +61 47 781 2163

The Hemp Masonry Company
Building materials and training

Australian-made hemp-lime building materials and consultancy advancing low-carbon construction.

Key Contact: Klara Marosszeky
Email: klara@hempmasonry.com.au
info@hempmasonry.com.au
Tel: +61 42 756 9642

HempBlock International
Construction

Natural building-systems company delivering hemp/lime "HempBLOCK" composites for sustainable construction projects worldwide.

Key Contact: Johan Tijssen
Email: admin@hempblockinternational.com
Tel: +61 1300 814 834

Shah Hemp Inno-Ventures
Construction, Food, Health & Beauty/Nepal

SHIV focuses on using the hemp plant to produce basic necessities for living like food, clothing, housing, body-care products, bio-fuels, etc.

Key Contact: Dhiraj Shah
Email: info@shahhempinnoventures.com
Tel: +977 980 331 9991

Building quietly

New Zealand's industrial hemp (iHemp) sector has never been defined by size, but by intention. Here, progress has always come from careful steps, not loud claims — from proving what works, not stretching into what doesn't.

The operators who make up this industry have built their foundations quietly: validating markets before planting more hectares, understanding their regions before expanding into new ones, and pursuing value where New Zealand can genuinely lead.

What we see now is an industry ready for its next phase, having overcome policy settings that didn't match how modern hemp is grown or used. Across the country, innovators are identifying where hemp fits into food products, advanced materials, precision manufacturing, and low-carbon construction — areas where New Zealand's strengths matter more than scale. We know the opportunities are real; our challenge is accessing the full plant, the full market, and the full returns that iHemp can deliver.

This report captures that moment. It outlines where capability already exists, where processing networks can emerge, and where coordinated standards will be essential for long-term adoption. It also highlights the practical pathway ahead: clear rules, repeatable processing, and consistent product specifications that give end users confidence.

With the right policies now in place, the sector can shift from constrained potential to a stronger role in our circular and low-carbon economy.

Richard Barge is Chair of the New Zealand Hemp Industries Association (NZHIA).

OVERVIEW

Value first

The win isn't growing more hemp. It's directing each harvest to the application that generates the best return.

New Zealand's position in industrial hemp differs from the typical path of emerging agricultural sectors. Many industries begin by proving that a crop can be grown, harvested and processed at all. That proof already exists for hemp—internationally through decades of commercial cultivation in Canada and Europe, and locally through New Zealand's own cultivation history and research.The question here is not whether the crop works, but how it can be used to generate the greatest return.

STAKEHOLDER VIEW:

"Education is paramount - public and government. There is huge potential . . . , but government has to understand this, which it doesn't seem to."

Where is the value?

Because New Zealand is not in the validation phase, it can start with a more strategic question: Where is hemp genuinely valuable, and what should the country do with it?

Instead of pushing hectares into the ground to create the appearance of momentum, the focus is on determining where hemp creates the strongest return for the least logistical strain. Economic modelling and sector analyses consistently point toward the same conclusion: the upside is not in sheer biomass, but in directing biomass into applications that multiply value. The benefit of hemp lies not in how much can be produced, but in how intelligently each tonne can be used. When the stem, seed and co-products each have different commercial destinations, the crop behaves less like a commodity and more like a portfolio.

Investment logic: A subtle inversion

Because of that, New Zealand's first objective has not been scale. It has been clarity. Developers, researchers and advisors are studying where hemp outperforms existing materials—not emotionally, not abstractly, but in terms of cost, performance, emissions intensity and circularity. They are approaching hemp not as a crop searching for a market, but as a material evaluating markets. That inversion is subtle, but it changes the investment logic. It reduces wasted effort and prevents the over-building of capacity before demand exists.

The introduction of hemp foods into New Zealand's mainstream retail channels in 2018 provided an important data point. When consumers adopted hemp protein, hemp oil and hemp flour without hesitation, it demonstrated that hemp can succeed on the strength of function, not novelty. Food is not the long-term economic engine of the sector, yet its success proved something larger and more durable: hemp products can enter established categories without needing education campaigns to justify their presence. That matters because it shifts hemp from being a concept that consumers must understand to an option that consumers simply choose.

STAKEHOLDER VIEW:

"When consulting with land owners we are often asked about hemp as a land use choice."

Research reinforces economics

Evidence from research and full-plant utilisation studies reinforces that the real economic advantage appears when every part of the plant can be monetized. When only one part is usable, the crop behaves like a specialty commodity. When the stem, seed and co-products can all be directed into different markets, the business case becomes more resilient. It is this flexibility—this optionality—that characterizes the emerging opportunity in

NZ, Australia under united food rules

Hemp food in New Zealand sits inside an unusual regulatory system shared with Australia under Food Standards Australia & New Zealand (FSANZ).

Australia's six states and two territories hold nine votes while New Zealand holds one, meaning NZ is often outweighed in joint decisions. When New Zealand joined FSANZ in 2000, hemp foods were banned across both countries.

Because NZ already had a small iHemp industry, regulators allowed hemp seed oil to remain a food product domestically, but all other hempseed foods — hearts, protein, cake and hulls — were restricted to animal feed only. That remained in place for nearly two decades. The breakthrough came in 2018, when FSANZ approved low-THC hempseed foods for human consumption.

The change aligned New Zealand with global markets, but also ended the ability to feed hempseed co-products to animals.

New Zealand. The decisions being made at this stage are not about how much hemp can be grown, but what opportunities can justify cultivation in the first place.

Selectivity, not speed

What distinguishes New Zealand's early development to this point is not speed, but selectivity. If a use case cannot compete with incumbent products on performance, price or environmental advantage, the idea is set aside. There is no impulse to force expansion or "prove momentum" through hectarage. The discipline is to walk away from anything that does not make economic sense. This approach keeps fixed costs low, prevents the build-out of infrastructure for unproven markets and keeps attention focused on applications where hemp clearly outperforms alternatives.

STAKEHOLDER VIEW:

"If there's one thing we've learned, it's that hemp rewards the growers who pay attention. Anyone treating it like a 'set and forget' crop gets a rude awakening."

Smarter deployment of the plant

In other words, New Zealand is not trying to build a hemp industry. It is trying to build an industry that uses hemp when hemp is the superior answer. That distinction is the foundation of the country's emerging strategy. Hemp is not treated as a cause. It is treated as an input to be allocated with intent. The business case strengthens not when more hemp is grown, but when each harvest is directed into the highest-value pathway available. If the country succeeds, its competitive position will not be defined by scale, but by the intelligence of its allocation.

Robust research 'global from Day 1'

New Zealand's research ecosystem is unusually active in industrial hemp.

Since trials began in 2000, government and university researchers have evaluated varieties for local conditions, mapped agronomic performance, and generated detailed data on hempseed nutrition, food innovation, fibre traits, and processing pathways. Much of this work sits inside public-sector science, giving the industry a long, evidence-based foundation. That knowledge base continues to expand, with new research planned in end-use applications, and to support commercialisation in food, fibre, and advanced materials.

Trade-facing government organisations strengthen this ecosystem further. Agencies such as New Zealand Trade and Enterprise and Crown Research Institutes provide technical support, export readiness, and innovation funding. Their "global from Day 1" approach means hemp ventures have access to the same tools, mentoring, and international networks available to New Zealand's broader high-growth sectors.

STRATEGY

Proving the logic

Regions must prove hemp belongs. If markets, logistics and processing align, hectares will follow.

New Zealand's hemp sector is not unfolding as a nationwide rollout. It advances only where conditions make sense. Instead of applying a single strategy across the country, activity emerges locally, as if each region is auditioning to determine whether hemp fits its economic reality. A location explores whether it can move material efficiently, match supply to demand and integrate hemp into existing and new production infrastructure and farming rotations. If those answers are encouraging, the region progresses. If not, it quietly steps back and waits for a local champion, a philanthropic investor, suitable technology, and demand and other market conditions to improve.

Regional feasibility, not national ambition

The objective is not to grow hemp everywhere. It is to identify where hemp actually belongs. In some areas, the crop fits within farming rotations and aligns with local capacity to handle biomass. In others, limitations such as haul distances, labour access, lack of processing infrastructure or downstream market readiness make hemp a poor candidate. The tendency is not to force participation where the fundamentals do not support it.

Testing before scaling

New Zealand treats early activity as a discovery phase instead of a launch phase. Trials are used to understand how the plant behaves in the local context — not just agronomically, but economically. Regional participants ask practical questions: Who am I going to sell it to and what is the path to the buyer? What is the haul distance? Where is the material dried, stored and processed? Can I produce to the spec-

Bringing it all together in NZ

Ashburton-based agribusiness Carrfields Group is creating a regional structure for hemp fibre and seed innovation.

At its newly acquired Spring Farm site near Ashburton, Canterbury, the company is establishing a purpose-built R&D farm complete with glasshouses, nurseries, trial plots and seed-breeding.

Simultaneously, Rubisco, its fibre-materials unit, is relocating its decortication line to Ashburton in early 2026, placing seed-to-fibre operations physically inside the production zone to slash logistics costs, improve scale-up and drive commercialisation.

This integrated hub presents a model for how New Zealand's hemp industry can move from trial phase to full-value chain: co-location of grower base, processing lines and innovation facilities signals maturity and helps attract capital, cluster synergies and export readiness.

ification of the market and maintain continuity of supply? What is the right capital equipment required to make fit-for-purpose products and where is the cap-ex budget to buy it?

This prevents the industry from falling into a build-first, justify-later trap. With regulatory barriers reduced, the discipline has shifted from "can we get permission?" to "does this logic hold?

Logistics as strategy

Logistics carry the weight here. Transport cost, storage access, integration with existing supply chains and proximity to processing centers drive decisionmaking. If those factors align, planting commitments can appear organically.

When downstream value is clear, growers commit hectares with confidence rather than optimism. The reason to plant is not to stimulate an industry but to meet an identified need. This sequencing reverses the common pattern in emerging crops. Instead of expanding hectarage in the hope that markets materialise, New Zealand waits until markets prove they deserve hectarage.

Regulatory simplification removes friction, but it does not replace the need for disciplined sequencing.

A network, not a map

This approach also protects the industry from overexpansion. By scaling where product can be absorbed, the risk of stranded capacity is reduced. Regions that cannot support hemp disengage early, minimizing sunk costs and preventing enthusiasm from outrunning economics.

The goal is not a linear rollout but a constellation of capable regions. Over time, these clusters could connect, creating a distributed network of supply and processing without centralizing risk. The map will look sparse at first, then coherent once enough regions demonstrate that hemp fits their logic.

Hemp thrives in vineyards

A Marlborough study shows hemp performs strongly as a mid-row cover crop in Sauvignon Blanc vineyards.

Hemp established without irrigation, even in drought conditions where other covers failed, and pushed taproots more than 30 cm into tractor wheel tracks, relieving compaction and adding organic matter at depth.

Soil pits showed higher organic matter and significantly higher total carbon at 40–80 cm, indicating deeper sequestration than typical cover crops. Crucially, hemp did not compete with vines: water status, nutrition, canopy growth, fruit weight, ripening and yields were unchanged across all three seasons.

Grapes beside hemp carried more diverse native yeasts and produced better wine in 2019, suggesting hemp can enhance soil structure, vineyard resilience and fruit quality.

POLICY & REGULATION

Unlocking the plant

December 2025 reforms fundamentally change the long-term investment outlook for industrial hemp enterprises

Under changes made in December 2025, New Zealand eliminated one of the industrial hemp sector's longest-standing structural constraints: drug-style regulation of a non-intoxicating crop. Industrial hemp will no longer be managed through a licensing regime under the Misuse of Drugs Act when grown for food, oil, fibre and health products, and oversight has been realigned to reflect hemp's low risk profile.

STAKEHOLDER VIEW:

"Positive regulatory change is essential to fulfull the potential of the hemp industry in NZ and Australia."

For nearly two decades, hemp cultivation operated inside a framework designed for controlled substances. A crop containing less than 0.35% THC was regulated through narcotics-era rules governing licensing, handling, transport and storage. That classification, rather than agronomy or market demand, shaped the economics of the sector.

Regulation defines economics

Under the previous system, each movement of hemp material carried administrative overhead: licences, approvals and compliance steps unrelated to production risk. These frictions added cost without adding value. For an industry competing with established materials on price and performance, compliance costs eroded margins before products reached the market.

With the removal of licensing requirements, those artificial cost layers have been stripped out. Hemp is now regulated in line with other agricultural crops, allowing commercial decisions to be driven by logistics, processing efficiency and end-market demand rather than regulatory permission.

Classification, not cultivation

New Zealand did not face a technology barrier. It faced a classification barrier. Treating industrial hemp as a controlled drug constrained full-plant utilisation and limited the ability to monetise even co-products not intended for ingestion.

STAKEHOLDER VIEW:

"Every season the same thing happens — someone says, 'I didn't know hemp grew that well here.' It's like they still expect it to fail, and then it doesn't."

The December 2025 reforms directly addressed that mismatch. By lifting hemp out of the drug-licensing framework and raising the allowable THC threshold to 1.0%, the regulatory system now reflects how hemp is grown and managed in the field, rather than an arbitrarily low legal line vulnerable to genetic and climatic variation.

A pathway that fits the product

The revised framework distinguishes between low-THC industrial hemp and intoxicating cannabis based on risk, not taxonomy. Growers are no longer required to obtain licences to cultivate or handle industrial hemp, provided crops remain below the 1.0% THC. Instead, growers must notify relevant authorities prior to planting, while existing food, biosecurity and safety rules continue to apply.

CBD is medicine in New Zealand:

CBD is legal, but it sits entirely inside the Medicinal Cannabis Scheme

THC is a controlled drug under the Misuse of Drugs Act, and CBD is a prescription medicine under the Medicines Act 1981, so the Ministry of Health regulates all CBD activity. To make or sell CBD, companies must operate under the Medicinal Cannabis Agency and meet Medsafe's Minimum Quality Standards covering GMP manufacturing, testing and product release.

This system is separate from the industrial-hemp programme: hemp licences allow seed and fibre only, not flower or leaf. Any company wanting to extract CBD from hemp must shift into the medicinal-cannabis framework with full GMP and supply-chain controls.

CBD products can be prescribed and dispensed by pharmacies, but New Zealand has no over-the-counter CBD because no product has completed the approval pathway. For investors, CBD is a pharmaceutical-compliance market, not an agricultural one.

Hemp seed-derived materials with no psychoactive potential are now able to move through supply chains without being treated as controlled substances. This alignment allows processing, storage and transport decisions to follow commercial logic.

STAKEHOLDER VIEW:

"I'm confused by the reference to national industry road map – which industry? Hemp construction? Hemp nutrition? Hemp biocomposites? This is the beauty and challenge of hemp. It's NOT one industry. How do we encourage growth in ALL the hemp industries (plural)?"

Unlocking the whole plant

With drug-style licensing removed, regulation is no longer the primary throttle on the sector. Hemp can now behave like an agricultural input rather than a prohibited plant. When stem, seed and co-products can enter commerce without artificial barriers, the crop shifts from a single-output commodity to a multi-output enterprise.

The revenue profile improves. Risk distributes. Decisions move from "can we operate?" to "which application offers the highest and best use?" The regulatory reset does not guarantee growth, but it removes the structural constraint that previously capped it.

The 2025 announcement by the Ministry of Regulation frees up growers and establishes a supply chain. The challenge now is to create the best value chain to market, and scale up to meet continuous demand.

INVESTING & FINANCE

Certainty scales

Capital moves when risk drops. When performance is repeatable, finance appears — not before.

Investment into new industries rarely hesitates because potential is unclear. It hesitates because the path from concept to revenue cannot be seen. Hemp in New Zealand is no exception. To attract capital, the industry must prove not only that the crop can be grown, but that it can be moved, processed and sold. Investors do not fund the beginning of a narrative. They fund the ending — the point where biomass becomes product and product becomes income.

Under changes made in December 2025, a critical barrier was eliminated: licensing and drug-style compliance costs that previously distorted project economics and amplified perceived risk were removed. That does not remove the need for proof. It changes what proof investors demand first.

STAKEHOLDER VIEW:

"Once it's out of the paddock, it's like dealing with any other product. The buyer sets the rules, and you either meet them or you don't."

Evidence before enthusiasm

Project feasibility documents and economic modelling show that capital enters only after a region demonstrates repeatable throughput — sowing, harvest, processing and delivery to a buyer.

Instead of funding the "possibility of scale," investors look for evidence of repeatability: consistent harvest, consistent intake, consistent output specification. They want to see whether a region has demonstrated the discipline to run through a full cycle — sowing, harvest, drying, processing, delivery — and whether the buyer accepts the material as specified. When that sequence has been executed more than once, capital attaches quickly; when it has not, capital waits.

This can be a long-term proposition, particularly for fibre applications. Initially, champions and investors with long-term views are needed to break through the "chicken and egg" dilemma; to provide the working capital and

capital expenditure to help fund and prove the development of this full cycle.

Certainty scales

Capital moves when risk drops. When performance is repeatable, finance appears — not before. With licensing removed, the dominant uncertainty shifts from "can we operate?" to "can we execute consistently at commercial scale?" The financial risk lies not in the field — it lies in the gap between the field and the buyer.

A crop is not a business

Planting seed does not create a financial case. A business case appears only when the sector shows how a tonne of biomass becomes a tonne of revenue-generating product. For investors evaluating hemp, the question is not how many hectares could be planted but whether each tonne harvested can be converted into inventory someone will pay for. The financial risk lies not in the field — it lies in the gap between the field and the buyer.

STAKEHOLDER VIEW:

"We've had plenty of interest over the years, but money only shows up once someone can point to a working line and say, 'That's where it goes.'"

What attracts finance is not promise but pattern. When an operation has demonstrated that it can process material and deliver dependable throughput, investors can finally model cash flow. At that point, decisions are no longer based on enthusiasm; they are based on numbers. In Australia, investor confidence only began to firm once processors demonstrated continuous throughput. In New Zealand, the same dynamic holds: capital remains cautious until operators can show reliable, commercial-scale processing.

Investors are evaluating optionality

Capital is being drawn to opportunities that offer multiple revenue streams across the plant. When fibre, hurd, seed and co-products have different potential destinations, the business becomes more resilient and less sensitive to fluctuations in one market. Optionality is not just a strategic advantage — it is a hedge. Investors view flexibility as insurance: if the highest-value application is temporarily unavailable, the plant can pivot to the next best use without stranding biomass or cash.

New Zealand's slower capital flow is not necessarily a weakness; it also serves as a filter, preventing build-outs based on enthusiasm. In that sense, it protects the sector from overexpansion, stranded infrastructure and distressed asset sales. A cautious investment climate forces operators to validate the business case before attempting scale. In the long term, this avoids the boom-and-bust pattern that high-growth crops often experience when capital runs ahead of logic.

Finance accelerates when risk declines

Once the pathway from plant to product is proven, the sector no longer needs to convince investors. The numbers do that work. Hectarage, processing and capital all accelerate at the same moment — when uncertainty is removed.

STAKEHOLDER VIEW:

"You can grow a good crop and still lose your shirt if the handling isn't sorted. The people writing checks want to see that part nailed down."

The December 2025 regulatory reset materially improves the investability of the sector by reducing compliance drag and regulatory risk, but it does not substitute for processing capability, buyer pull, or quality consistency. At that point, the crop is no longer a proposition. It becomes an asset for NZ Inc, which complements other primary industries — wool, farming, forestry, horticulture and food production.

As New Zealand is a net exporter, the hemp industry can raise productivity by adopting a global-first approach — transitioning from a commodity exporter to an exporter of high value-added finished goods and ingredients, thus underscoring New Zealand's global reputation for high quality and world-class primary industry practices.

Potential in indigenous economy

The indigenous Māori Economy is an emerging economic powerhouse in Aotearoa/New Zealand. And the potential for investment and building capacity has not escaped the attention of Iwi (tribal groups) and philanthropic investors with similar long-term aspirations to create a new industry, driven by exports and local demand, that complements our existing primary sector, while creating employment and economic opportunities in the regions.

With regulatory barriers reduced, the remaining investment question becomes execution: who can build the repeatable, specifications-driven supply chains that convert hemp's versatility into bankable revenue.

CONCLUSIONS

True drivers

After years of tight rules, selective growth and cautious scaling, here's the current shape of New Zealand's industrial hemp sector

1. **Constructive regulatory reform.** Changes enacted in December 2025 dismantled New Zealand's drug-style regulatory framework for industrial hemp, ending nearly two decades of structural constraint. By eliminating licensing requirements and adopting a 1.0% THC threshold, hemp was effectively repositioned as an agricultural crop—immediately improving farm-level participation, enabling full-plant utilization, restoring export pathways and fundamentally reshaping economic viability across the value chain.
2. **Restricted utilisation of the plant caps profitability.** Operators are forced to leave viable outputs on the table because current rules limit what can be sold, processed, or moved — suppressing margins and discouraging investment.
3. **Regional processing gaps prevent meaningful scale.** Limited access to appropriate processing equipment remains the biggest practical hurdle; without it, new markets cannot form and growers cannot expand.
4. **Low hectares do not reflect lack of potential.** Farming area stays modest because downstream pathways are incomplete, not because the crop underperforms — a dynamic that will shift only when processing and regulatory barriers are removed.

5. **Focus on high-value niches aligns with NZ core strengths.** Producers concentrate on applications where precision, quality, and differentiation matter, positioning the country for materials and composites that reward capability rather than volume.
6. **Full-plant thinking is embedded early.** Operators evaluate each harvest as a bundle of possible outputs — fibre, hurd, seed, co-products, advanced materials — which positions the sector well once regulations open.
7. **Acceptance of hemp foods confirms market viability.** Hempseed foods entered mainstream retail with minimal resistance, demonstrating the crop's ability to succeed as a consumer staple.
8. **Investment discipline is strong and prevents overreach.** Investors expect demonstrated repeatability — grow, process, deliver — before committing funds, reducing the risk of stranded assets.
9. **Carbon and circular-materials demand supports long-term opportunity**. Global interest in biogenic carbon storage, natural fibres, sustainability and low-emission materials matches the direction of New Zealand's aspirational product categories.
10. **End-users need consistent specifications before adoption expands.** Construction, composites, and advanced manufacturers require stable quality and performance data; continuity of supply and delivering this consistency is essential for wider market uptake.

Planting the seeds for carbon credits

Hemp has major carbon potential, but New Zealand cannot yet convert that performance into credits.

Under the NZ Emissions Trading Scheme, only forestry can earn carbon credits, leaving hemp outside the formal system. Regulators are now examining whether voluntary carbon markets could lift farmer returns while a full methodology is developed for an Emissions Trading Scheme.

Research institutions and industry are quantifying hemp's carbon flows and trialling digital tracking tools needed to verify storage. Hemp supports a wider circular-economy market in carbon products — including soil conditioners, absorbents, filtration media and emerging health applications.

Once New Zealand defines a methodology that recognises cropping and biogenic storage, hemp can move from a sustainability crop to a revenue-generating carbon crop.

Commercial expansion of hemp production in NZ

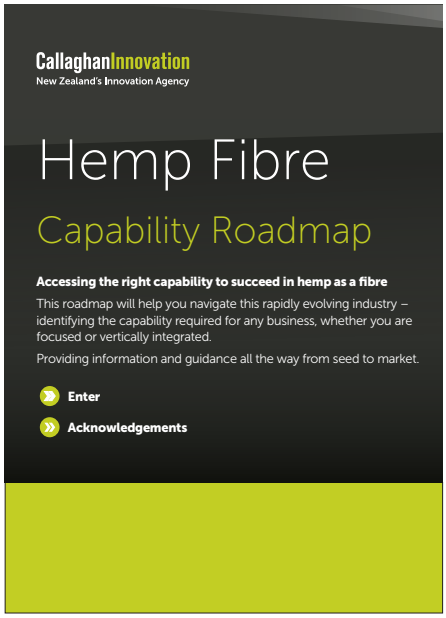
Perrin Ag Consultants (2023)

Study evaluating costs, markets and development needs in Australia's hemp industry.

Hemp Fibre for Construction

Venture Taranaki (2022)

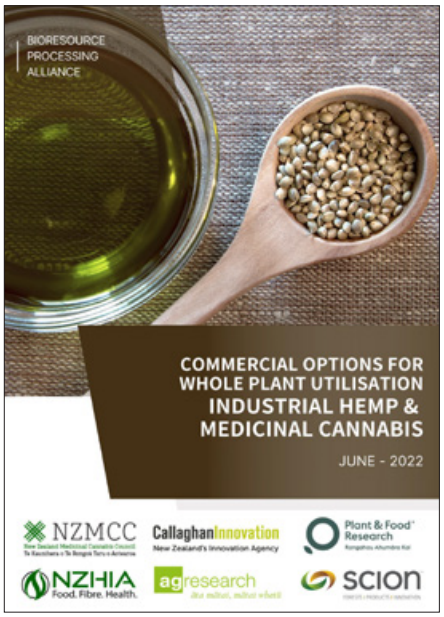
Assessment of plant-fibre reinforcement for greener, higher-performance construction.



Hemp Fibre Capability Roadmap

Callaghan Innovation (2021)

Outlines strategy, capability and value-chain steps to scale NZ's fibre-based hemp industry.



Commercial options for whole plant utilisation

Callaghan Innovation (2022)

Industry-led review of full-plant pathways for NZ hemp and medicinal cannabis.

Hemp as a cover crop in NZ vineyards

Krasnow/Harkness (2019)

Research demonstrating hemp's potential as a vineyard cover crop with added value.

NZ Hemp Export Driven Investor Report

NZHIA (2020)

Outlines New Zealand's export-led hemp opportunity, growth drivers and markets

2025 Industrial Hemp Stakeholder Survey

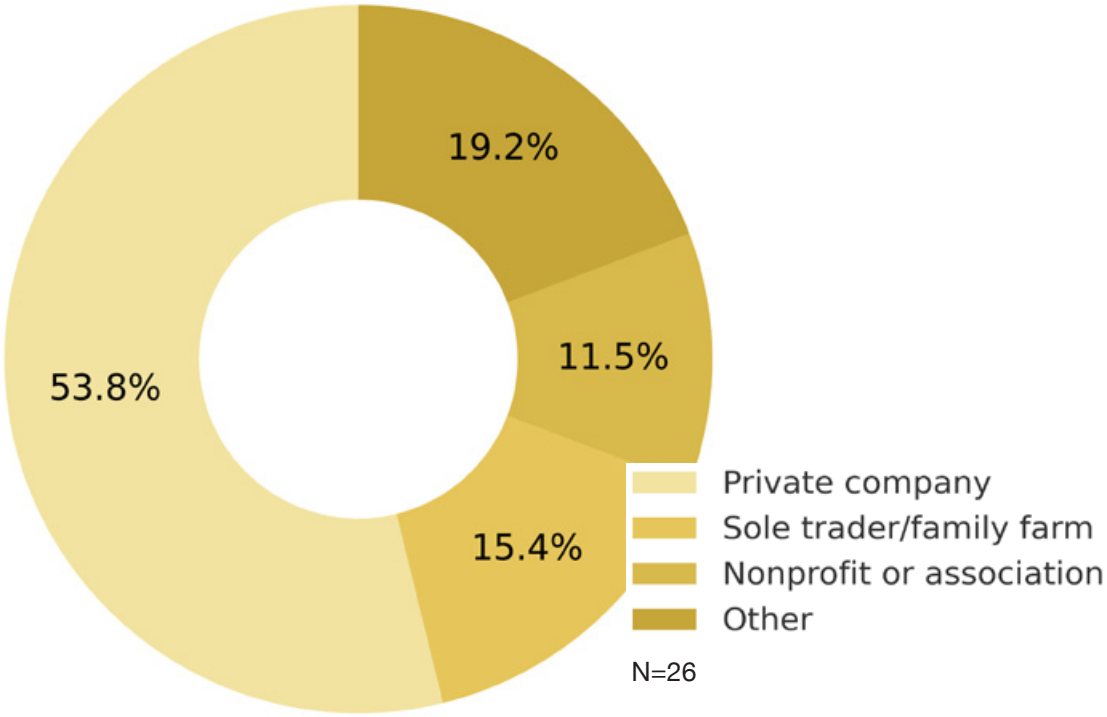
To build an accurate picture of New Zealand's hemp sector, a stakeholder survey was conducted among operators throughout the value chain in Autumn 2025.

Prospective participants were contacted at least four times between Sept. 8 and Oct. 11, 2025. In total, 26 of 34 invited stakeholders responded, with several offering additional context to clarify or qualify their answers.

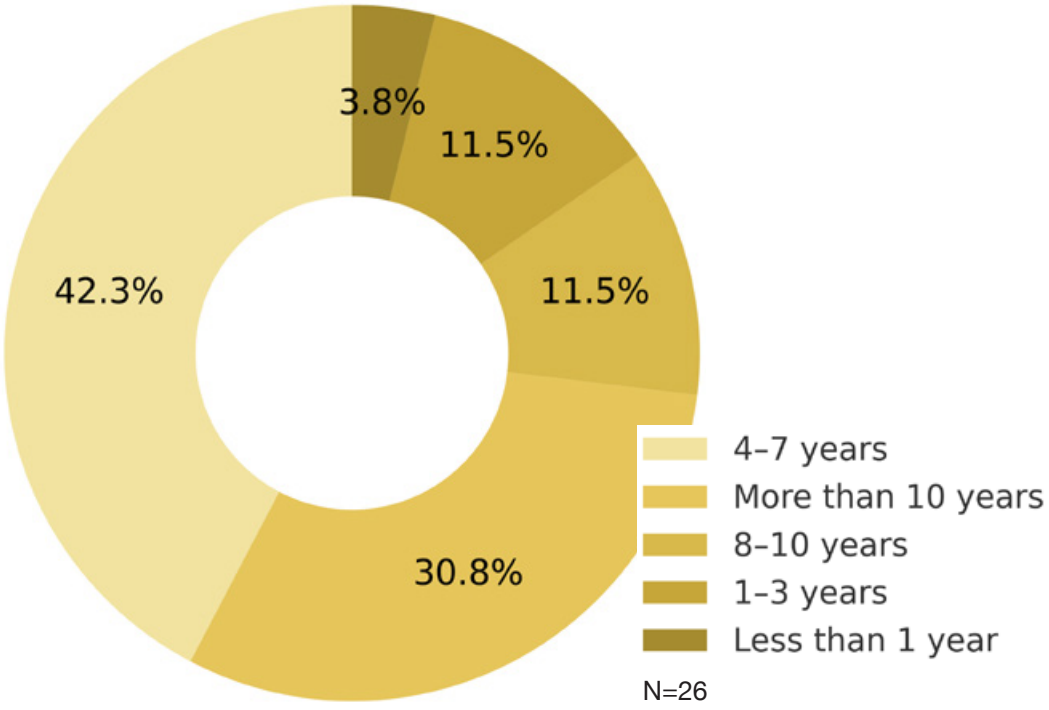
Taken together, the responses map out how industry participants manage current regulatory constraints and consider the prerequisites for broader growth. They also reflect the thinking of a sector that continues to innovate around its limits, finding workable paths even when formal permissions are narrow.

EDITORS NOTE: *This survey was conducted prior to regulatory changes adopted in December 2025 that removed licensing requirements for industrial hemp and raised the allowable THC threshold to 1.0%. As a result, survey responses reflect operating conditions, constraints and perceptions under the previous regulatory framework and do not capture the effects of the updated rules.*

Organisation type

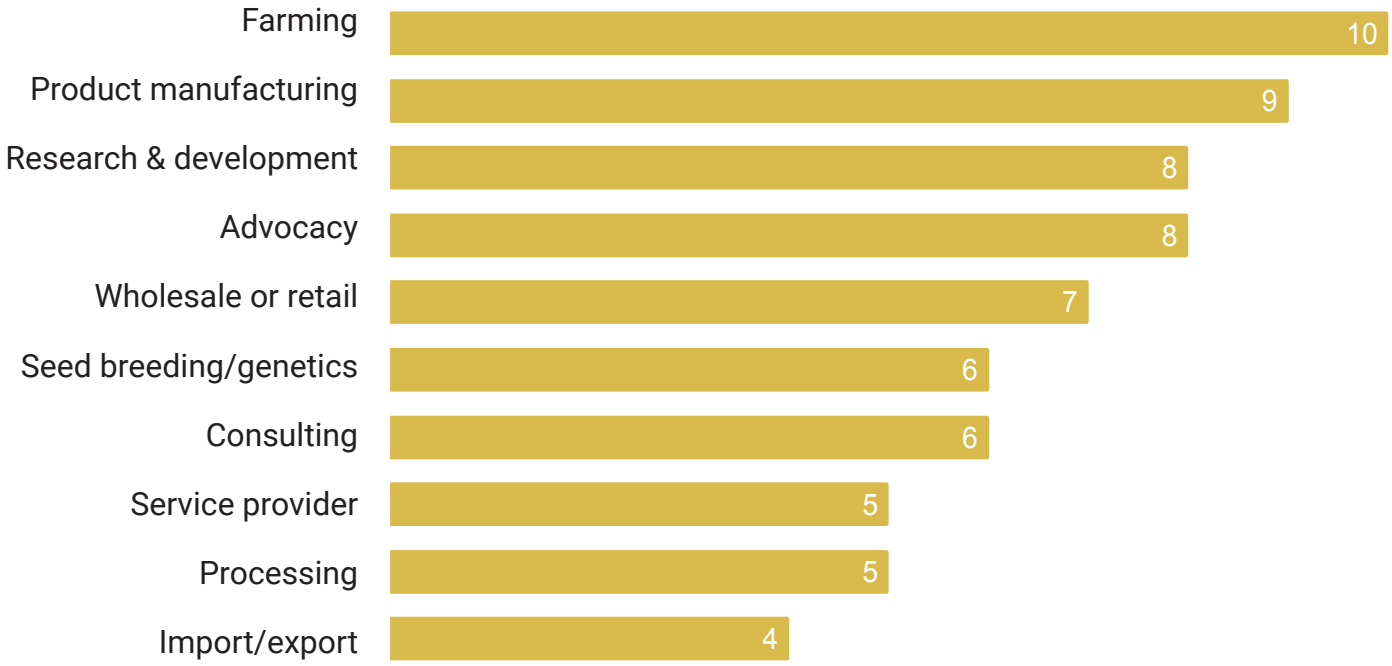


How many years have you been involved in hemp?



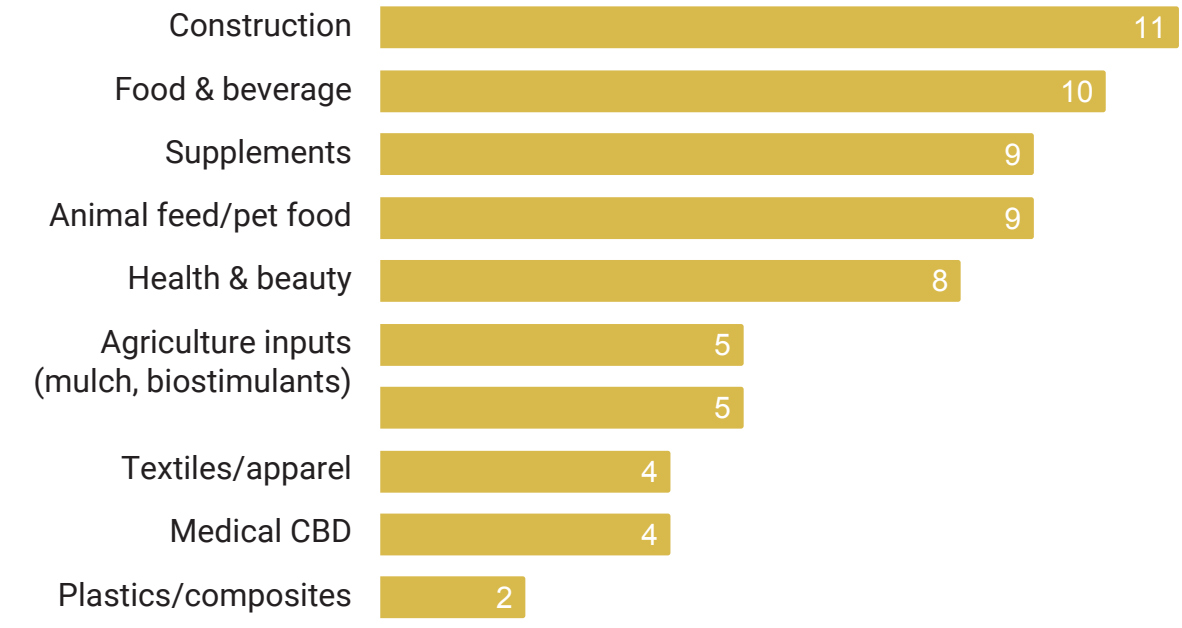
N = number of respondents; **Σ** = number of responses (multiple-answer questions)

What are your main activities?



N=26; Σ=68

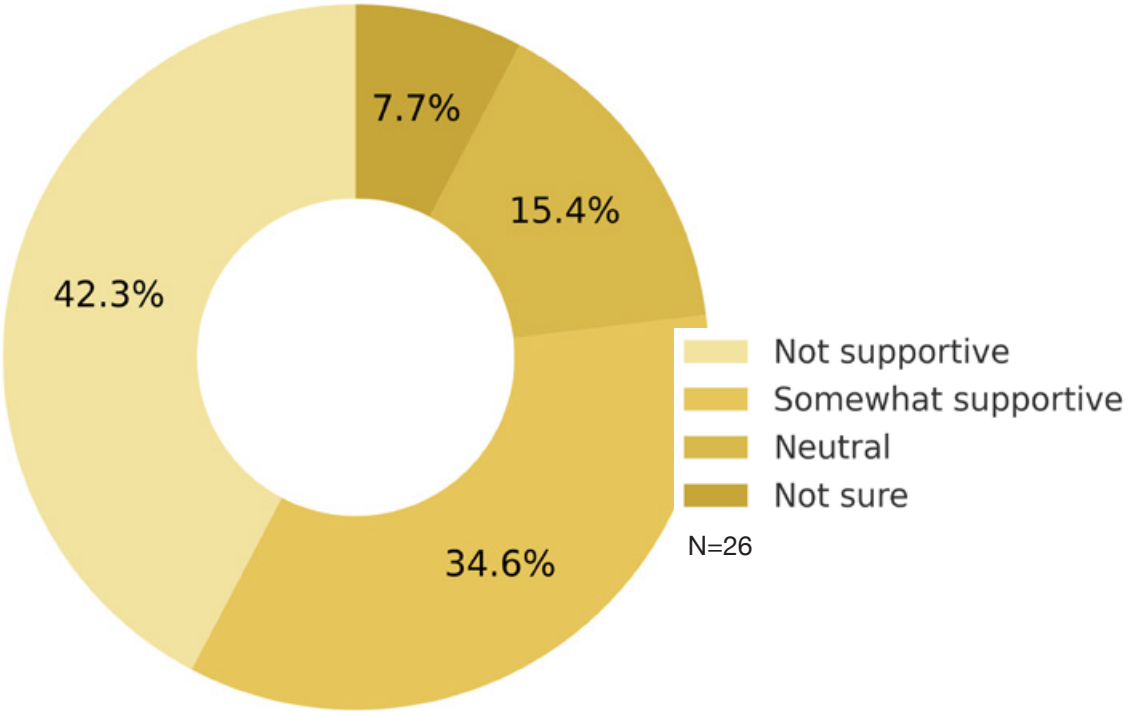
Products & services



N=26; Σ=67

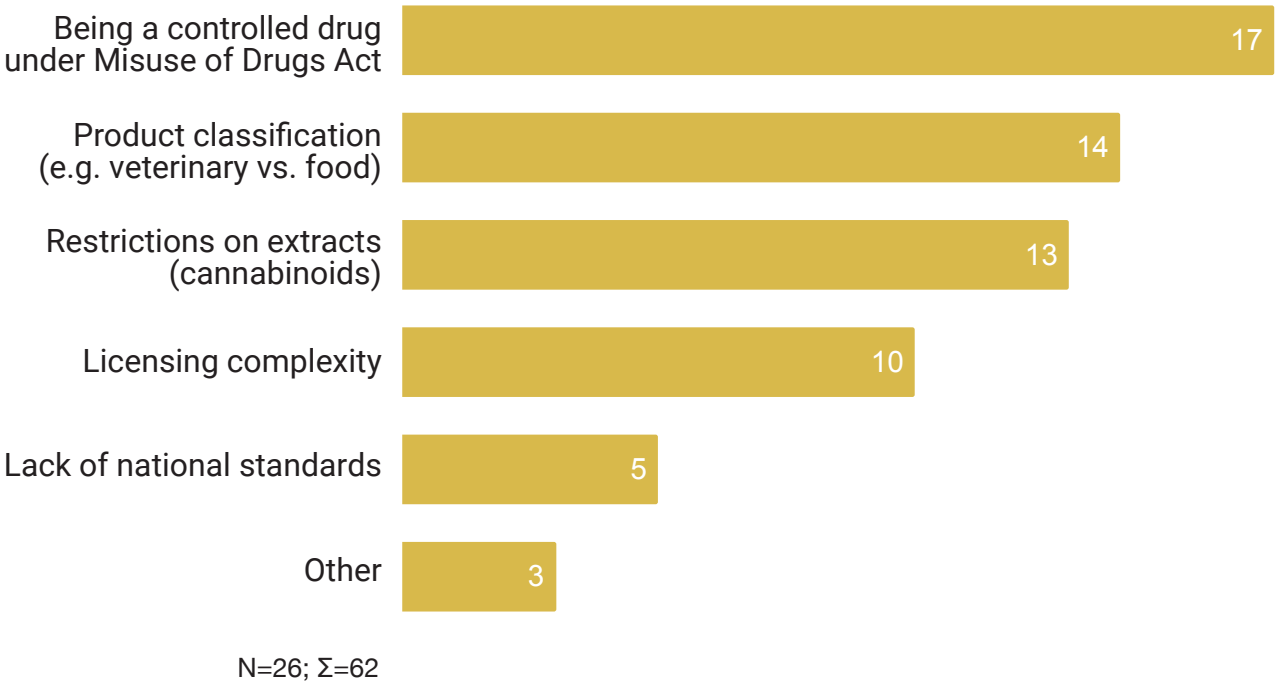
N = number of respondents; **Σ** = number of responses (multiple-answer questions)

How supportive is the government of hemp industry development?*



**Reflects conditions under New Zealand's industrial hemp regulations as they existed prior to the December 2025 reforms.*

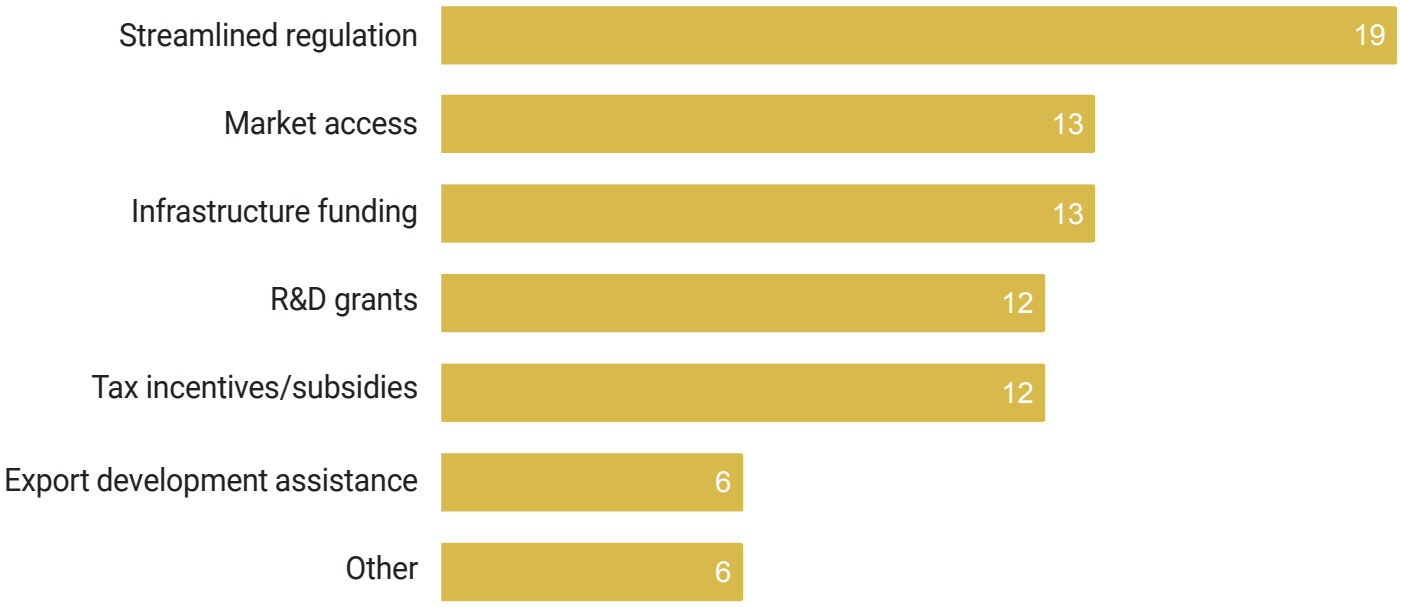
What is the biggest regulatory barrier for your business?*



**Reflects conditions under New Zealand's industrial hemp regulations as they existed prior to the December 2025 reforms.*

N = number of respondents; **Σ** = number of responses (multiple-answer questions)

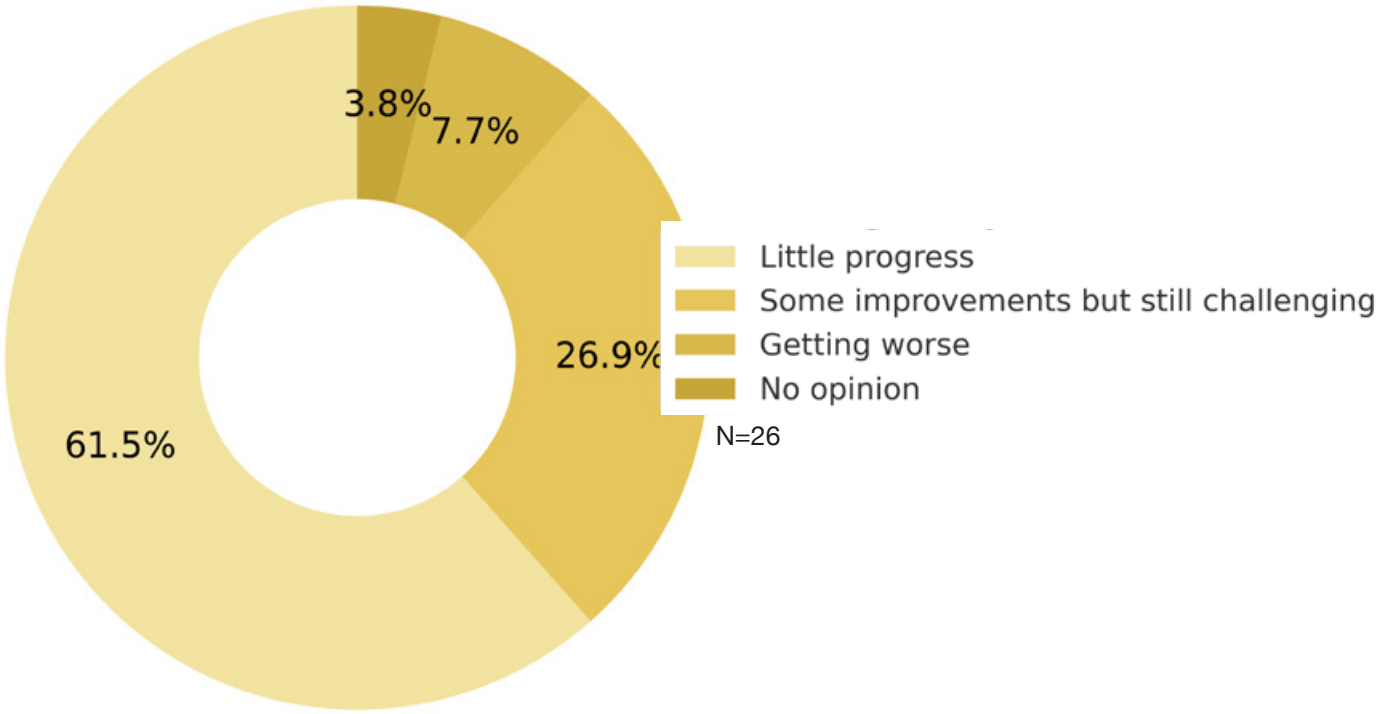
What kind of government support would help your business most?*



N=25; Σ =81

**Reflects conditions under New Zealand's industrial hemp regulations as they existed prior to the December 2025 reforms.*

Which best describes your view of the national regulatory environment for hemp?*

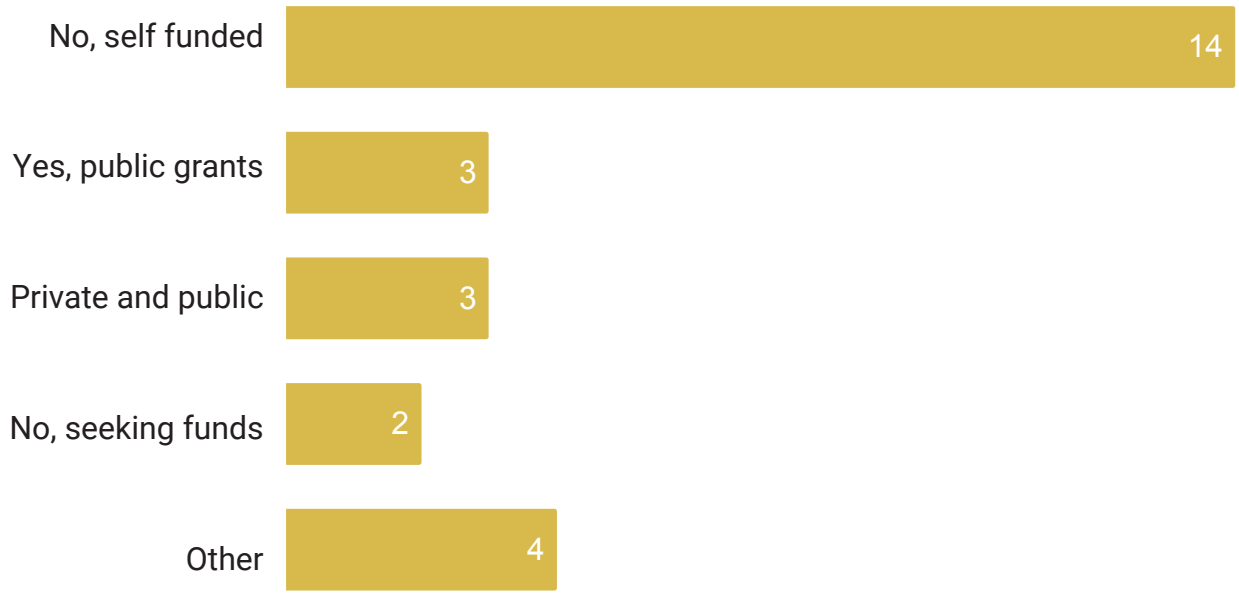


N=26

**Reflects conditions under New Zealand's industrial hemp regulations as they existed prior to the December 2025 reforms.*

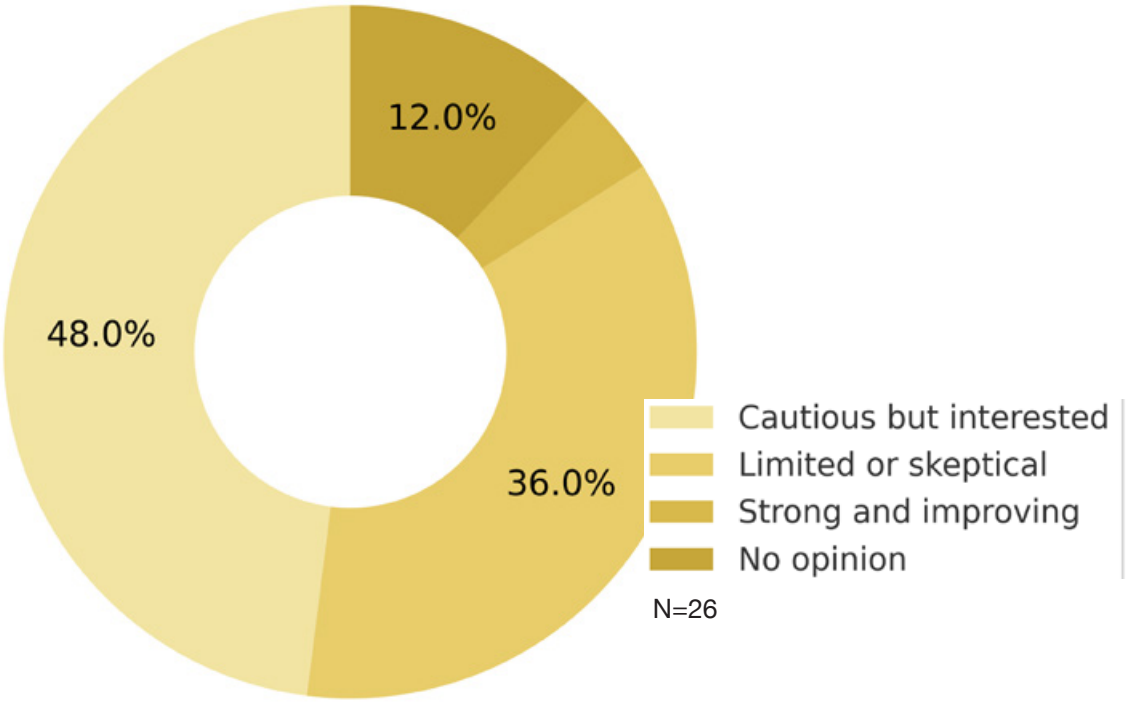
N = number of respondents; **Σ** = number of responses (multiple-answer questions)

Have you received external funding?



N=26; Σ =26

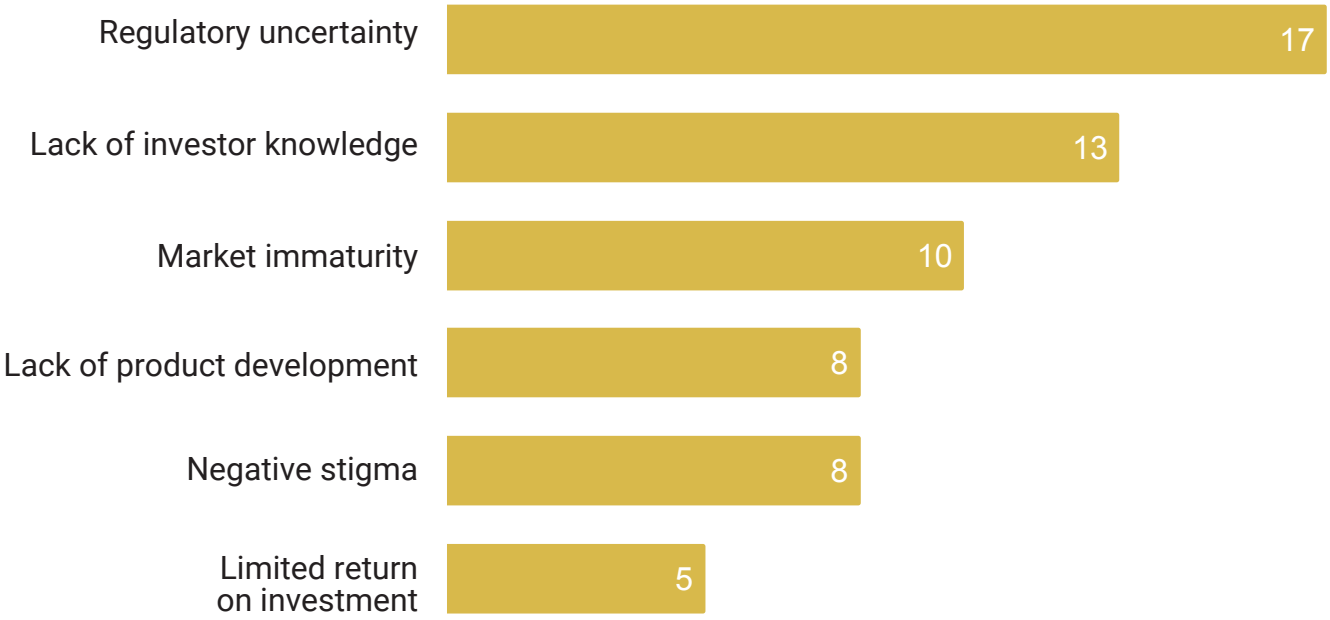
How would you describe the current investment climate for hemp in New Zealand?



N=26

N = number of respondents; **Σ** = number of responses (multiple-answer questions)

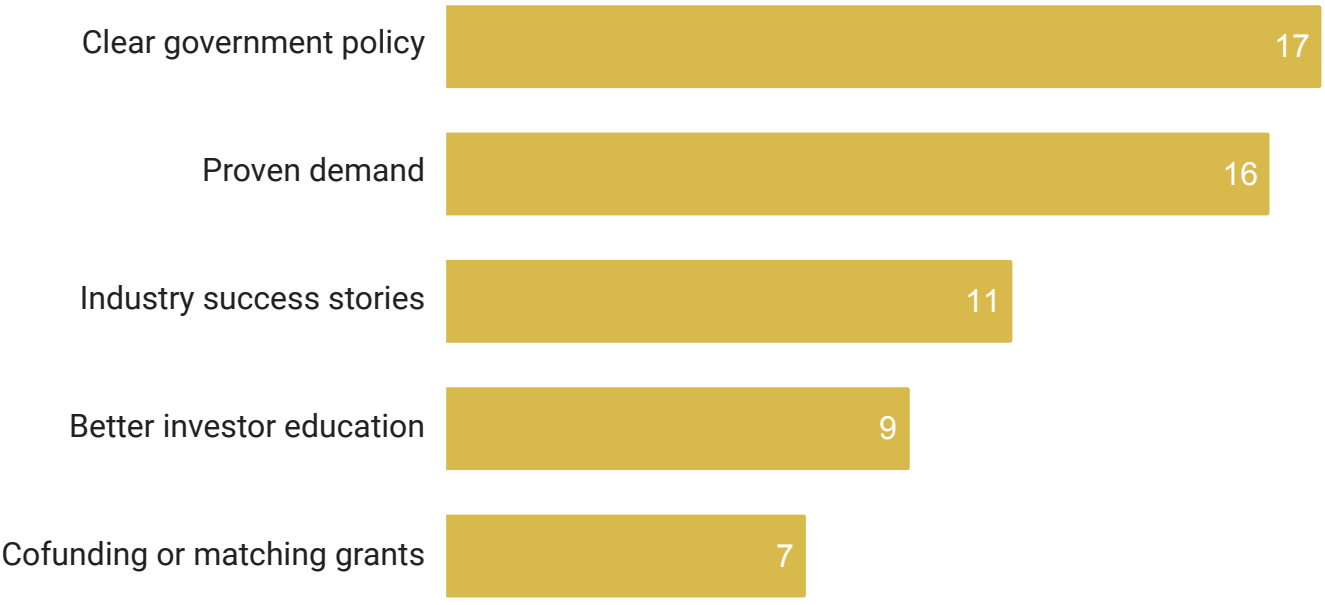
What is the greatest barrier to investment?*



N=26 ; Σ=61

**Reflects conditions under New Zealand's industrial hemp regulations as they existed prior to the December 2025 reforms.*

What would most help attract investors to your business?*

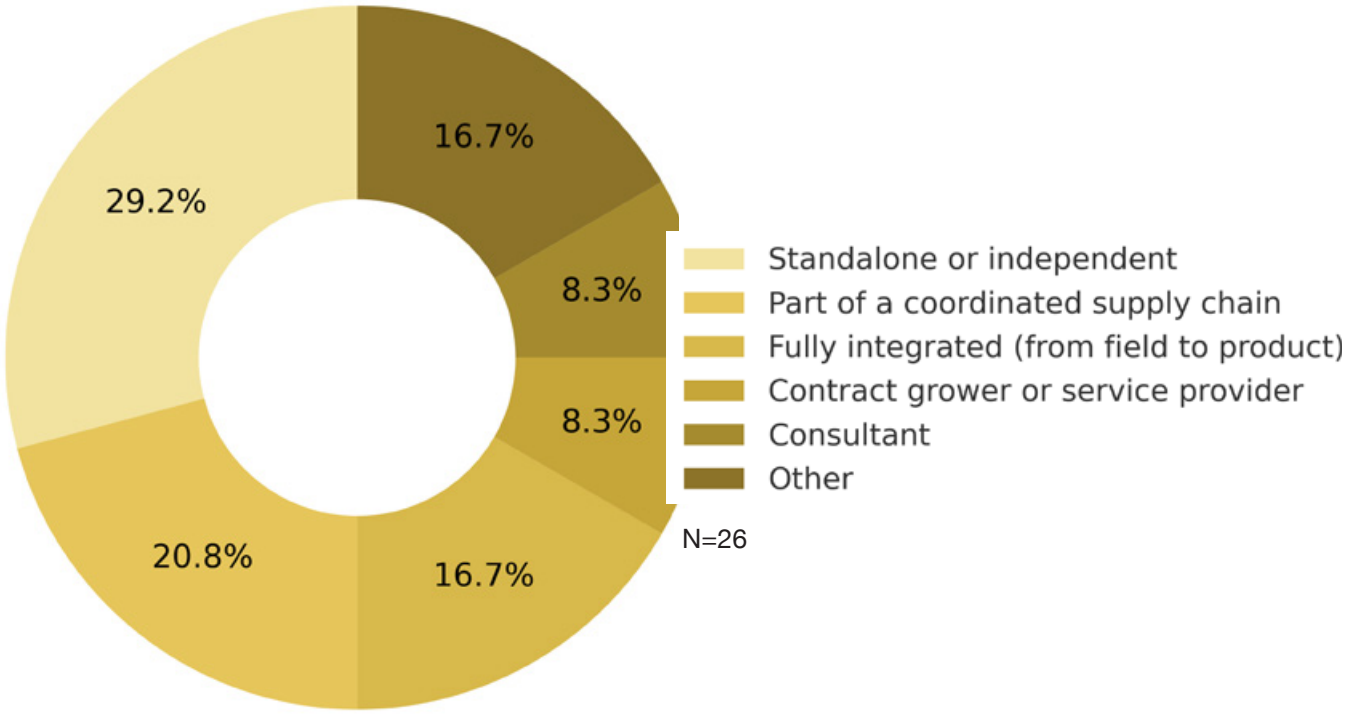


N=26 ; Σ=60

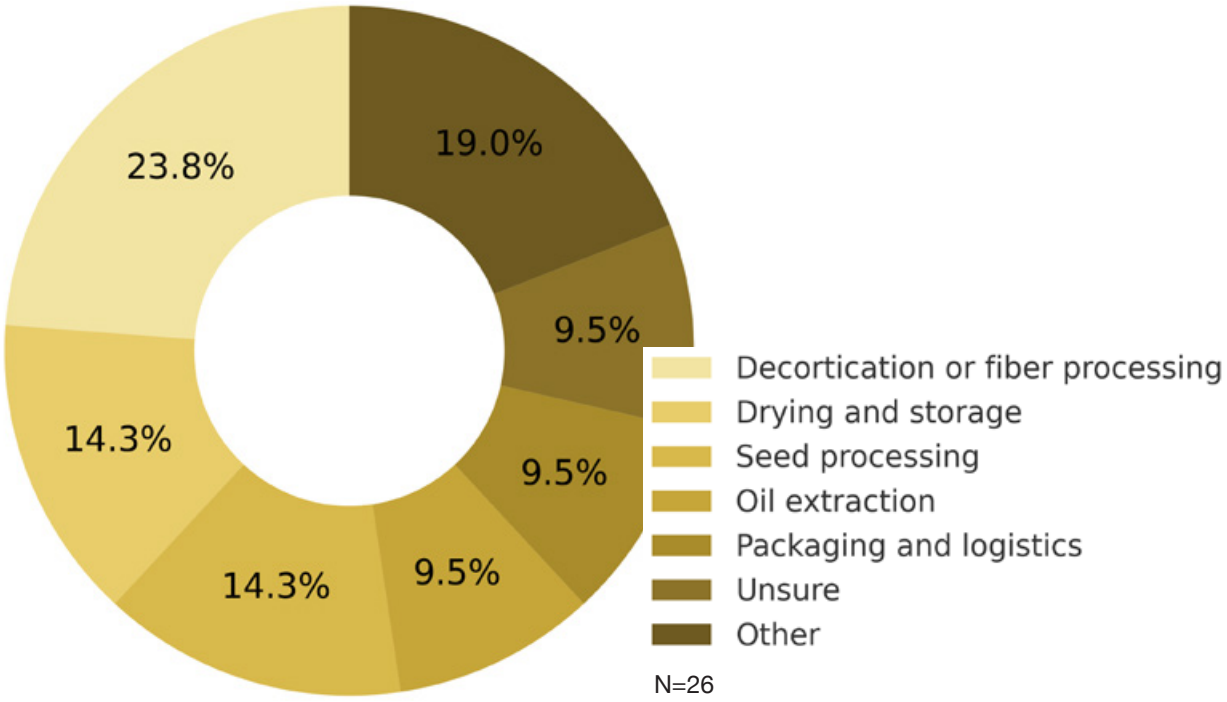
**Reflects conditions under New Zealand's industrial hemp regulations as they existed prior to the December 2025 reforms.*

N = number of respondents; **Σ** = number of responses (multiple-answer questions)

What best describes your current operational model?

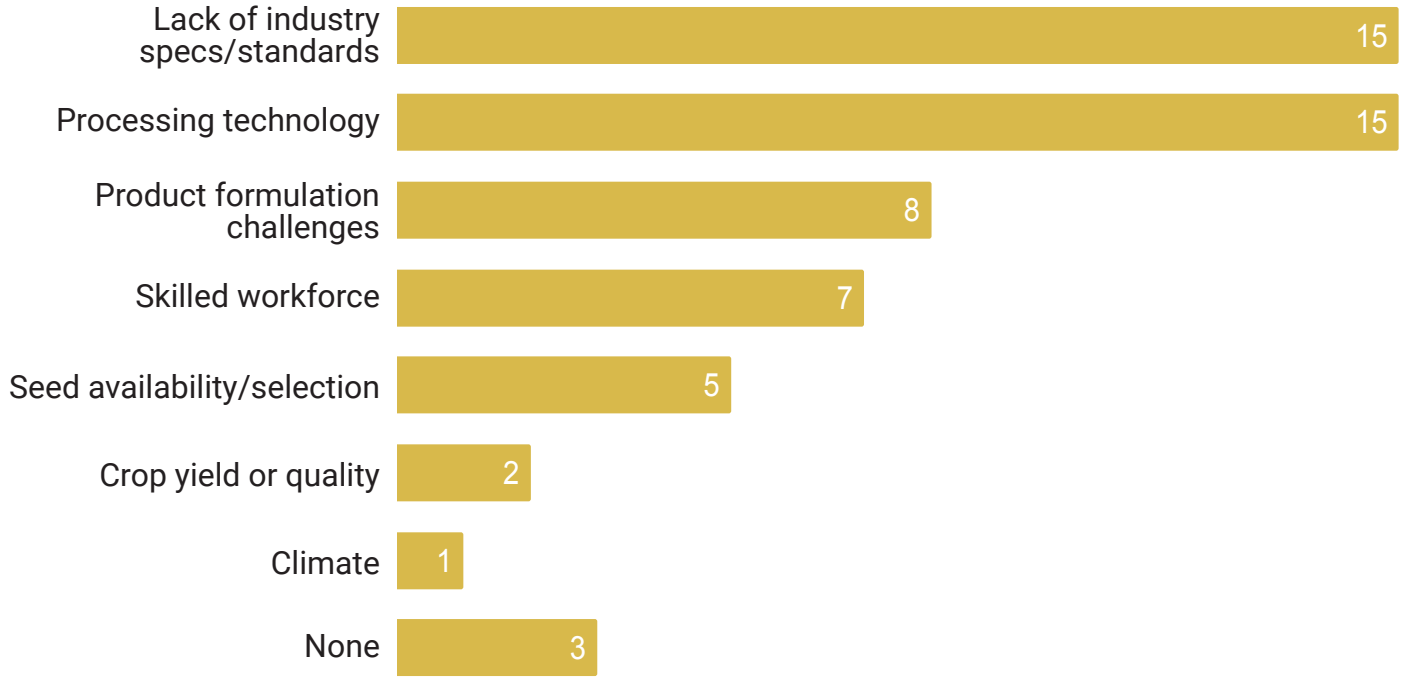


What type of infrastructure is most urgently needed?



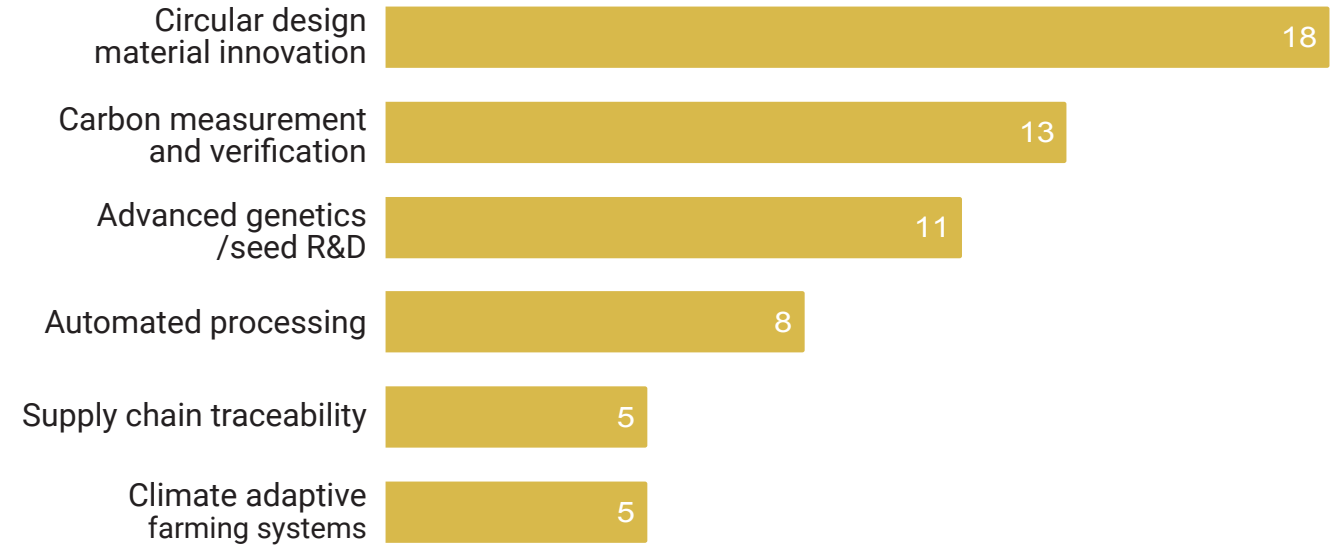
N = number of respondents; **Σ** = number of responses (multiple-answer questions)

What are the key technical barriers in your operation?



N=26 ; Σ=56

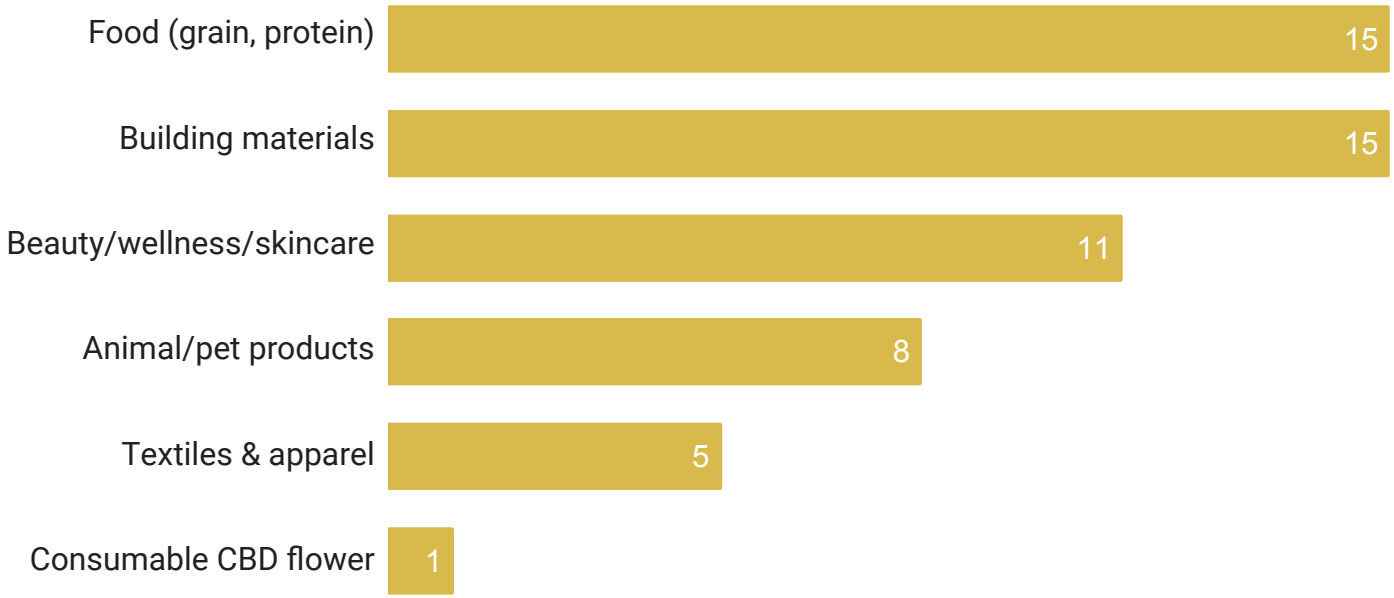
Which technologies are most important for the future of the industry?



N=26; Σ=60

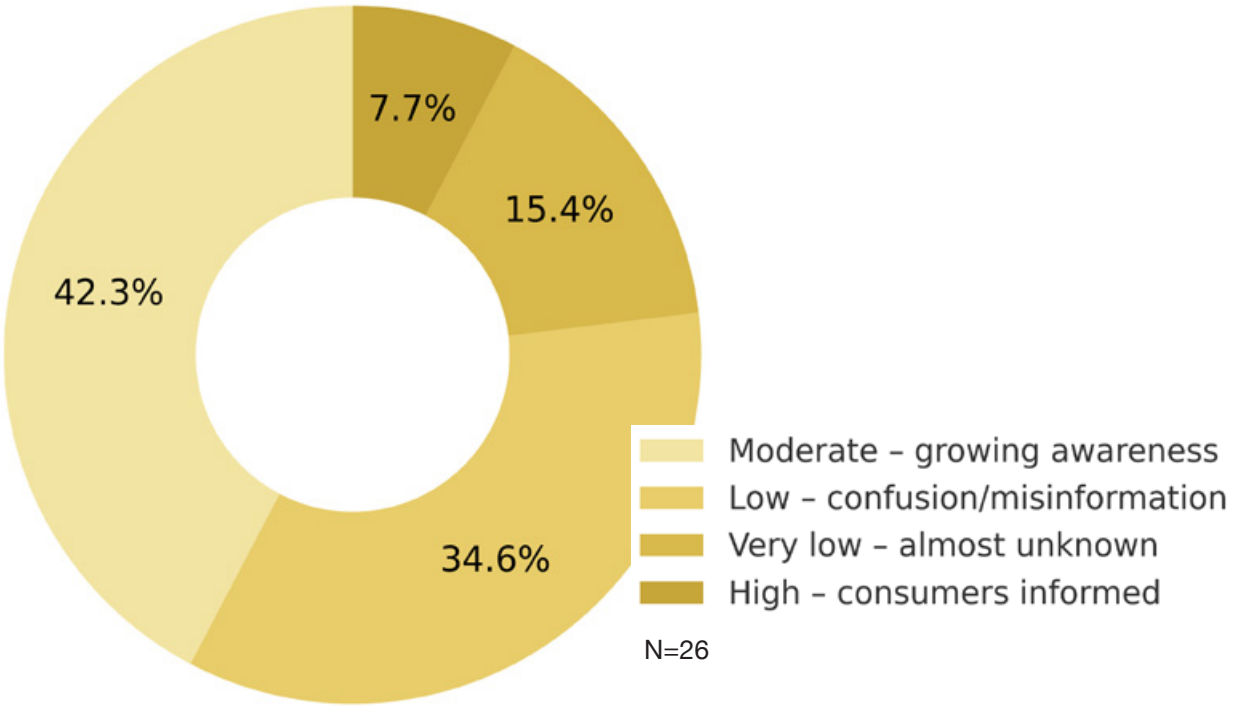
N = number of respondents; **Σ** = number of responses (multiple-answer questions)

Where are you seeing the strongest market interest?



N=26 ; Σ=55

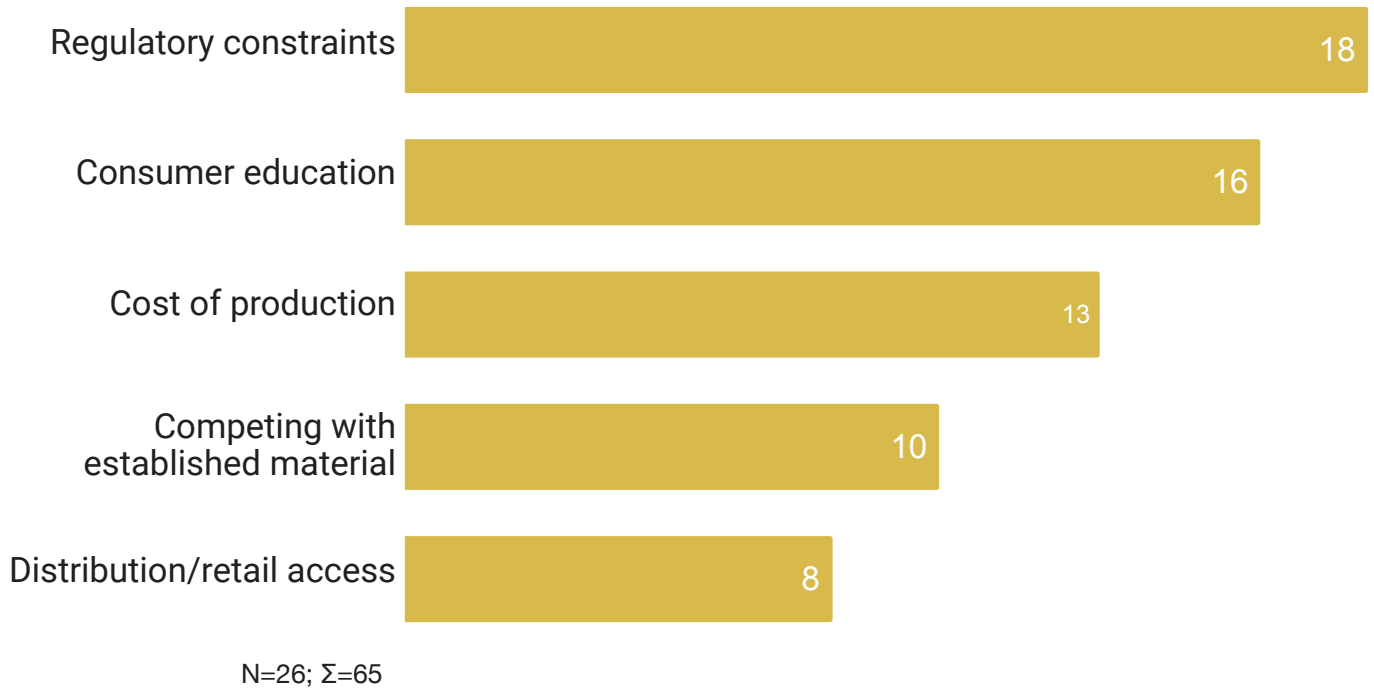
How would you describe consumer knowledge of hemp?



N=26

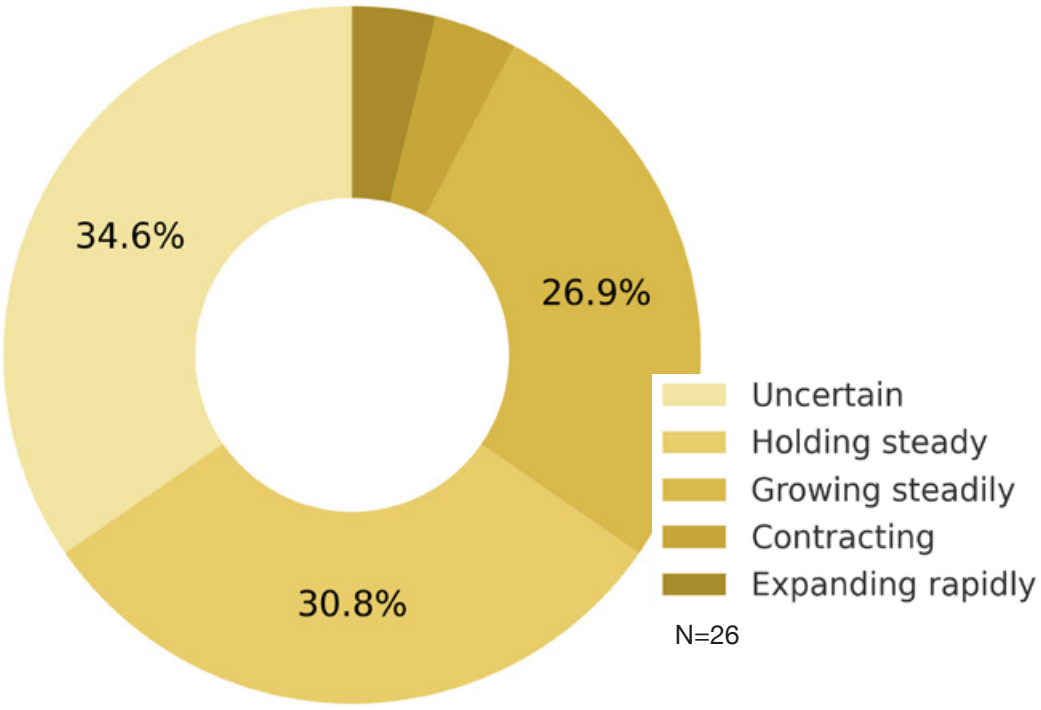
N = number of respondents; **Σ** = number of responses (multiple-answer questions)

What is the greatest challenge in selling hemp-based products?*



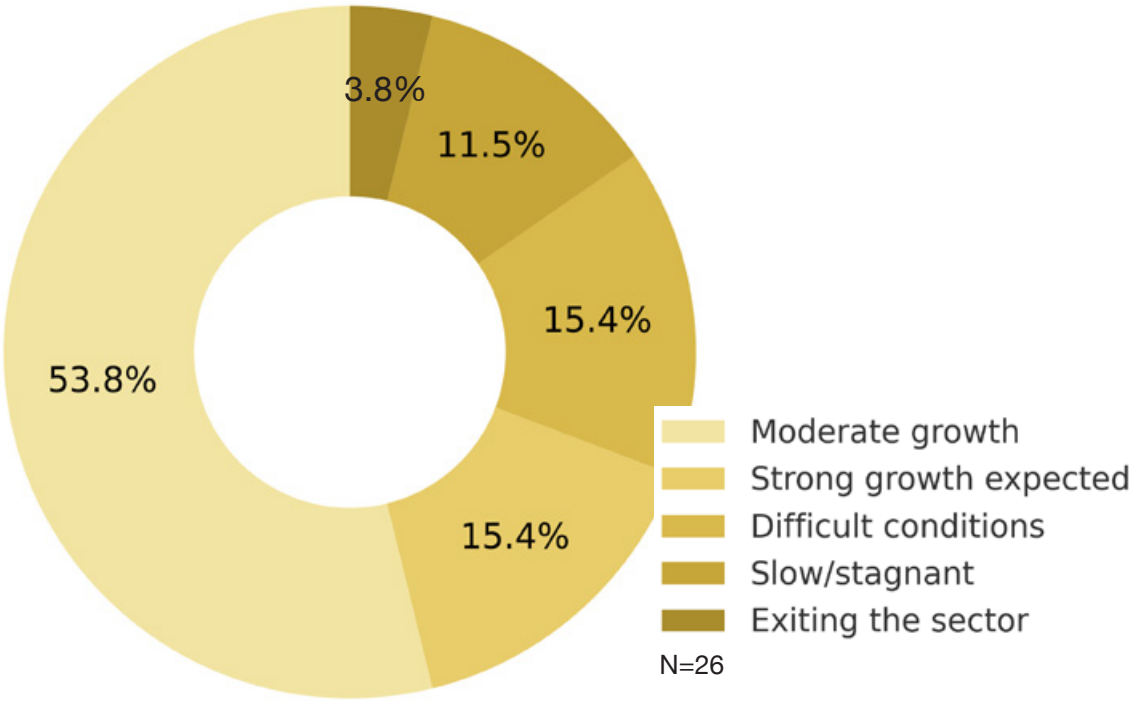
**Reflects conditions under New Zealand's industrial hemp regulations as they existed prior to the December 2025 reforms.*

What is your current business trajectory?

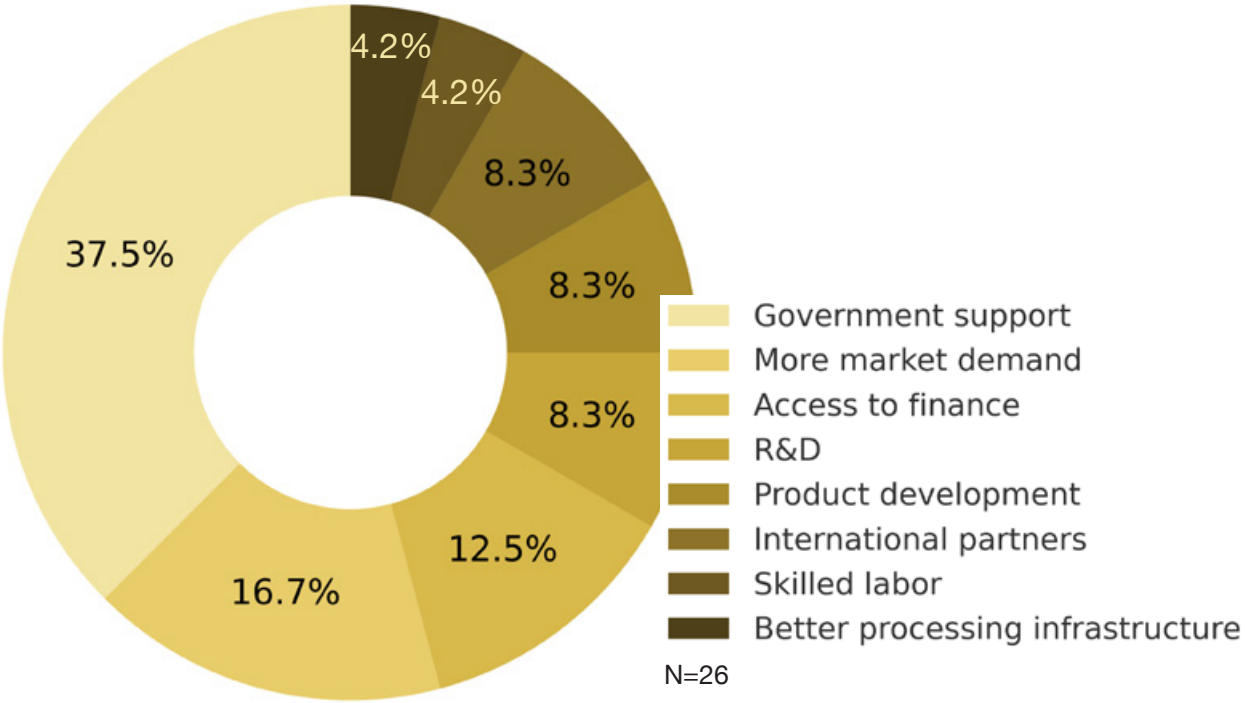


N = number of respondents; **Σ** = number of responses (multiple-answer questions)

What is your business outlook for the next 3-5 years?

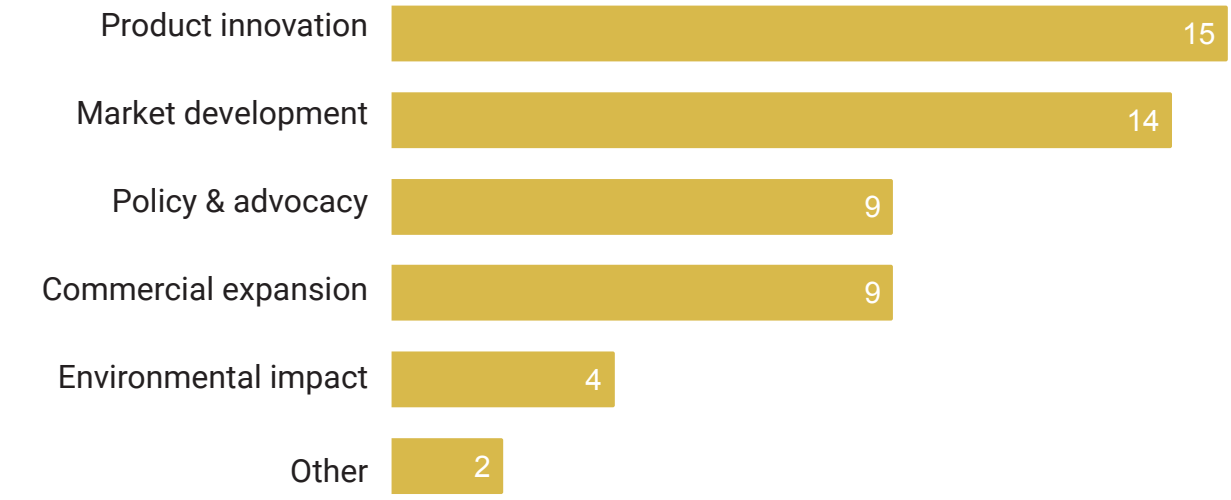


What would most accelerate your growth?



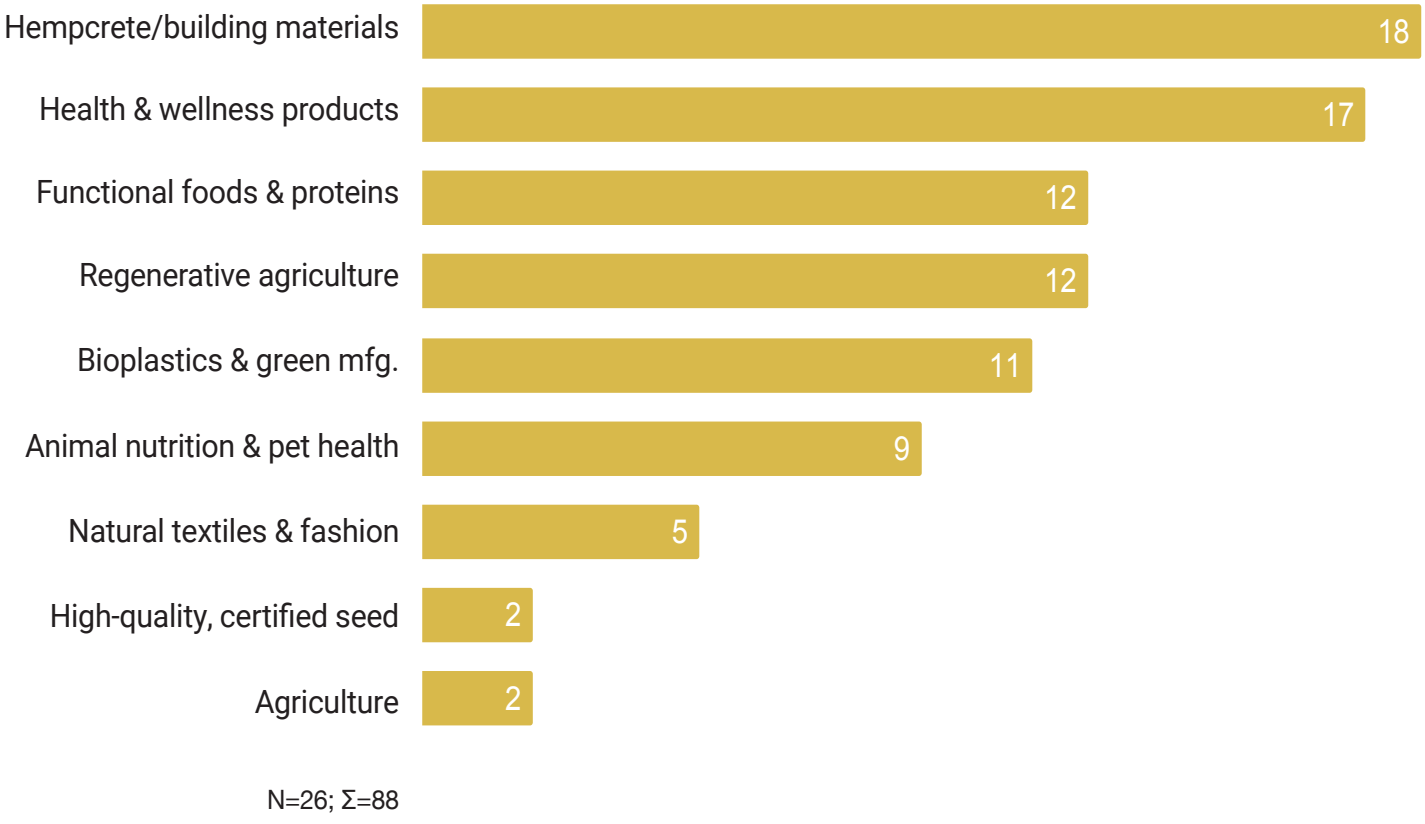
N = number of respondents; **Σ** = number of responses (multiple-answer questions)

What is your top long-term priority?



N=26; Σ=53

Where do you see the greatest opportunity for NZ hemp over the next decade?



N=26; Σ=88

N = number of respondents; **Σ** = number of responses (multiple-answer questions)

Hemp New Zealand™ Limited

Foods; wellness

Secure, trusted and traceable supply. 100% New Zealand. Hemp NZ, home to the iconic Hemp Farm brand, offers sustainable hempseed superfoods and wellness products - including oil, protein, and gut-health blends. Bulk and retail supply.

Key Contact: Nigel Hosking
Email: nigel@hempnz.co.nz
Tel: +64 27 767 6688

Hemp Building Association NZ

Advocacy; construction

Hemp Building Association New Zealand promotes safe, high-quality hemp construction by supporting standards, training, and collaboration across builders, designers, and suppliers to grow a credible, sustainable hemp-based building sector.

Key Contact: Jo Say
Email: hellohbanz@gmail.com
Tel: +64 27 655 2219

Midlands Seed

A Southern Hemisphere pioneer in Hemp seed production and Certified sowing seed, delivering world-leading quality through full traceability, research excellence, and superior growing conditions.

Key Contact: Steve Williams
Email: stephen.williams@midlands.co.nz
Tel: +64 27 553 0846

Midlands Nutrition

A premium processor of New Zealand-grown Hemp seed, producing nutritious oils, proteins, and specialty foods with complete traceability, strict quality assurance, and a commitment to natural, high-integrity products.

Key Contact: Lynnie Scamell
Email: lynnie.scammell@midlands.co.nz
Tel: +64 27 460 4943

new hemisphere

New Hemisphere creates premium New Zealand Hemp seed oil and foods with superior nutrition, full traceability, and fresh processing, delivering pure, natural products backed by decades of research and industry leadership.

Key Contact: Lynnie Scammell
Email: info@newhemisphere.co.nz
Tel: +64 3 308 1265

Aotearoa Hemp Alliance

The Aotearoa Hemp Alliance is a collective of innovative New Zealand companies working with wider industry and government to open commercial pathways for lowTHC Hemp products through regulatory reform.

Key Contact: Andrew Davidson
Email: andrew.davidson@midlands.co.nz
Tel: +64 27 539 5863

Australia

AFNOR — NF DTU 68.4: Execution of Hempcrete Walls (2022)
AgriFutures Australia — Industrial Hemp Program of Research: RD&E Plan 2022–2027
AgriFutures Australia — Industrial Hemp Variety Trials (IHVT) 2021–2024
AgriFutures Australia — Seasonal Industrial Hemp Grower Returns, 2022–2024
Australian Hemp Council — Submissions to federal inquiries (2024–2025)
Clean Energy Regulator — Australian Carbon Credit Unit (ACCU) Scheme guidance (2024)
CSIRO — Decarbonisation Pathways and Circular Biomaterials Program (2023–2024)
DPIRD Western Australia — Hemp Composite Building Board LCA Report (2023)
EcoProfit — Carbon sequestration and carbon-accounting technical brief (2024)
Food Standards Australia New Zealand — Application P1042: Low THC Hemp as Food (2017)
Food Standards Australia New Zealand — Food Standards Code (Standard 1.4.1 and Schedule 4)
Government procurement guidelines — NSW and SA (low-carbon and circular materials, 2024)
Government of New South Wales — Circular procurement and low-carbon materials program (2024)
HempToday — Surveys, reporting, interviews and industry analysis (2024–2025)
Industrial hemp legislation — NSW (2017), WA (2004), VIC, TAS, QLD, SA, NT, ACT (2017–2024)
NSW Department of Primary Industries — Industrial Hemp Licensing Framework (2025)
Regional manufacturing and funding proposals — DPIRD (WA), PIRSA (SA), NSW DPI (2023–2025)
Southern Cross University — Australian Industrial Hemp Program of Research (AIHPR) 2023–2028
Tassie Hemp Co — Submission to the Rural and Regional Affairs and Transport References Committee (2025)
Tridge Market Intelligence — Australia: Hemp Seed Suppliers & Market Trends (2023)
University of Adelaide — Consumer Insights for Australia's Hemp Food Industry (2019)
FSANZ — Survey of Low-THC Hemp Seed Foods (Stage 2, 2022)

New Zealand

AgriFutures Australia — Circular Biomaterials / Biogenic Carbon Storage Program (2023–2024)
BioPacific Partners/Coriolis — Thirty Opportunities: Emerging & Future Platforms in New Zealand's Bioeconomy (2021)
Callaghan Innovation — Whole Plant Utilisation White Paper (BPA2138) (2023)
EcoProfit Pty Ltd. — Carbon Accounting for Hemp Cropping and Durable Biomaterials — Preliminary Framework (2024)
Food Act 2014 — Hemp Seed as Food: Regulatory Guidance Update (Ministry for Primary Industries, 2022)
Internal industry materials — NZHIA briefings, stakeholder interviews, and internal memoranda (2024–2025)
Medicinal Cannabis Scheme — Ministry of Health/Medsafe regulatory guidance (2020–2024)
Ministry of Health -Medsafe — Misuse of Drugs (Medicinal Cannabis) Regulations 2019
Ministry for the Environment (NZ) — About the New Zealand Emissions Trading Scheme (NZ ETS) (2024)
Ministry for Primary Industries/Te Uru Rākau — Carbon Accounting for the New Zealand ETS (2023)
Kelogg Rural Leadership Course — Industrial Hemp and Its Potential for New Zealand (1999)
NZHIA — Guides, internal briefings, and sector observations (1998–2024)
Perrin Ag — Potentially Hemp: Opportunities for the commercial expansion of hemp production in New Zealand (2023)
Tassie Hemp Co — Submission 63 to the Australian Senate Inquiry on Hemp (2024)
University of Waikato — Biochar Research Group — Biochar in Pastoral Agriculture Trials (2023)
Venture Taranaki — Hemp Fibre for Construction: The Opportunity for Taranaki (2022)

Federation of International Hemp Organisations — A global umbrella group coordinating national and regional hemp associations to present unified policy positions and accelerate international market development.

European Industrial Hemp Association — Europe's leading hemp trade association representing growers, processors and downstream companies, advocating science-based regulation and market expansion for fiber, grain and cannabinoids.

International Hemp Building Association — A global network promoting hemp-based construction materials and standards, supporting research, certification and best practices for commercial adoption of hemp in sustainable building.

Warner Research Institute – An Australian not-for-profit advancing sustainability by funding and supporting research on energy efficiency, circular materials, and environmentally responsible technologies.

AIHPR – A five-year, $2.5 million collaboration funded by AgriFutures Australia through its Emerging Industries Program and led by Southern Cross University. The program is delivered in partnership with a national consortium of universities, state government agencies and industry collaborators, including Northern Territory Government, New South Wales Department of Primary Industries, Agriculture Victoria, Charles Sturt University, The University of Sydney, Murdoch University, Curtin University, The University of Melbourne, Integrated Veterinary Rehabilitation, Vasse Valley Hemp Farm, Sage Consulting and other research and industry partners.

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This dedicated space for biotechnology to grow and thrive is fit with PC2 labs, shared resources and a knowledge ecosystem for early-stage biotechnology and agrotechnology businesses.

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THE LAUMETRIS

KP-4 HEMP CUTTER

RETTING
KP-4 leaves cut hemp evenly distributed on the field for a proper start to the retting process

TEDDING
Short cut length allows use of tedder, evenly turning hemp for consistency and quality

RAKING
Shortened length allows use of a rotary rake to handle the hemp, improving harvest efficiency

BALING
These improvements in the field operation in turn allow hemp to be baled in a more conventional fashion

INFERIOR METHODS

SELF-PROPELLED
Expensive, prone to break-down

SICKLE BAR
Slow and inefficient, hemp is cut to long, unmanageable lengths

DISCBINE
Cuts hemp to long, unmanageable lengths, hemp gets caught inside discbine

SPECIFICATIONS

Type:	**trailed, pull type harvester**	Transportational width:	**2.5 meters(8.5 feet)**
Operational width:	**2.8 meters(9 feet)**	Weight:	**4400 kg**
Working speed:	**14 -16 km/h (8-11 mp/h)**	Hitch Type:	**CAT3**
Cutting units:	**4**	Suggested HP:	**tractor with adequate 3pt lifting capacity of 6000lbs+ generally 145hp+**
Distance btwn cutters:	**600mm(2 feet)**		
Wheels:	**520/50-17**		

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Natural fiber insulation
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Plant bedding

Perfect for

Hemp building teachers
Research organizations
Small farmers
Do-it-yourselfers

Key features

Compact, simple design
Easy to operate, Gear driven,
Stainless steel rollers
Minimal maintenance

HurdMaster

hurdmaster.com

Power supply: 220V/1500W; **Capacity**: ~50kg/hr; **Dimensions**: 80cm X 200cm X 125cm (32" X 79" X 49") **Weight**: 260kg/575 lbs

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we want you

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HEMP BUILDING CARBON CREDITS

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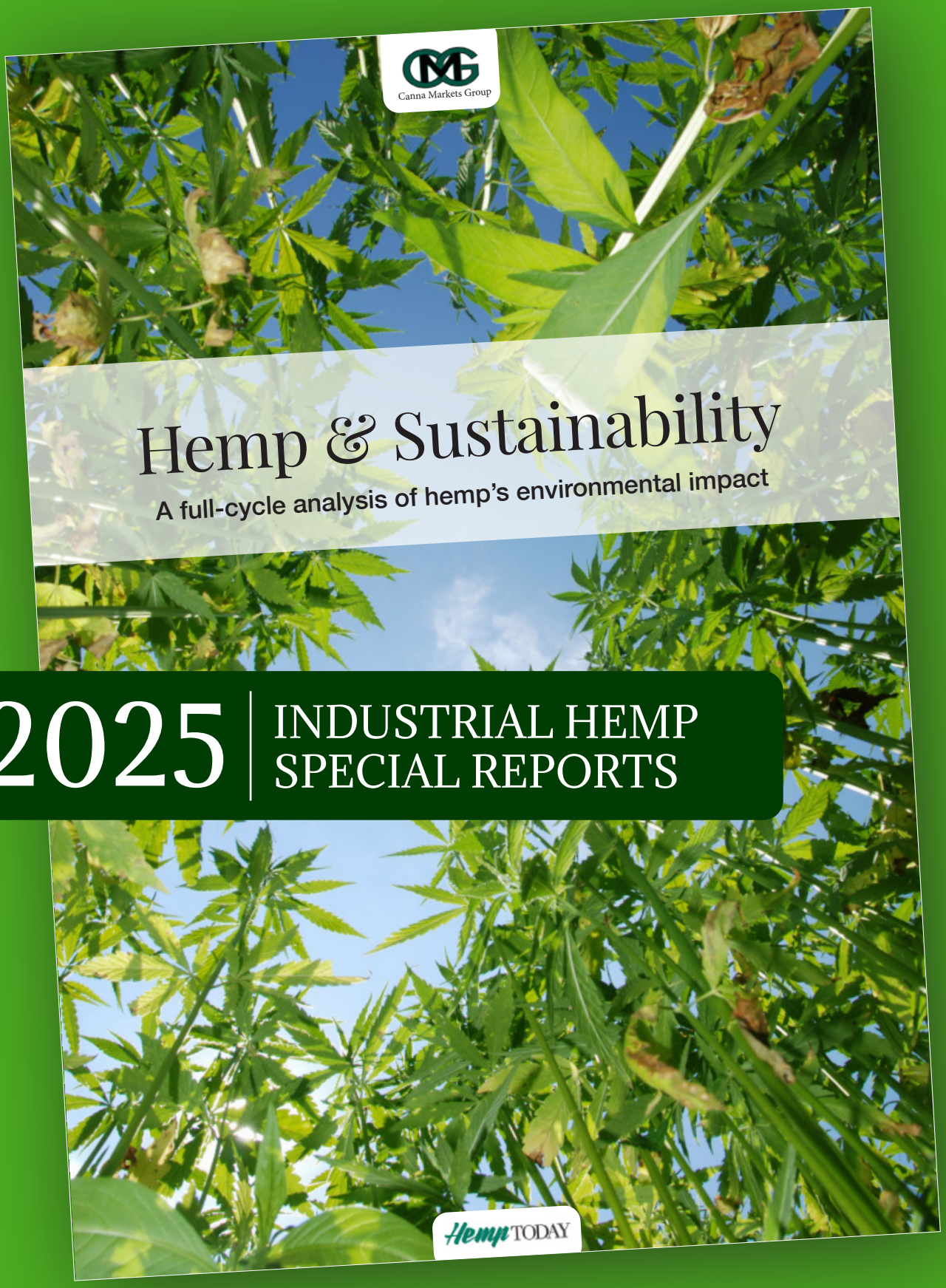
- minimum annual production of **30,000 tons** of a standardized hempcrete unit (for example, a block);
- are willing to share information to conduct a Life-Cycle-Assessment;
- **want to build an additional long-term income stream...**

then please reach out to us!

CarbonConnect and its partners are looking into developing a hemp building carbon credit project based on the ICROA endorsed Bio-Based Construction Material Methodology by Rainbow.

CONTACT

nando@carbonconnect.earth | www.carbonconnect.earth



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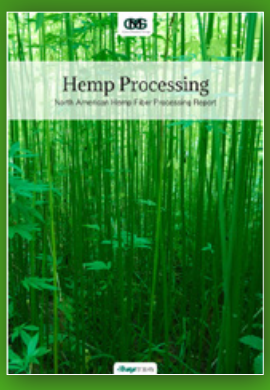

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The New Zealand Hemp Industries Association advocates for a high-value, science-driven hemp economy, linking growers, researchers and end-users while supporting policy reform, market development and best-practice standards across grain, fiber and emerging applications.

RESEARCH & EDITORIAL

HempTODAY

HempToday is an international B2B media platform providing news, market intelligence and analysis for the global hemp industry, with a focus on fiber, hurd, grain and sustainability. It serves decision-makers through reporting, directories, events and sector-specific publications.