



A new Bioeconomy Strategy

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New Bioeconomy Strategy – a driver for green growth



- Position the EU in the **rapidly expanding bioeconomy market**
- **significant growth potential** in bio-based materials, biomanufacturing, biochemicals, and agri-biotech sectors
- **reduce our reliance on fossil fuels** and **improve the economic perspectives of our rural areas**

Competitiveness Compass, January 2025



- **improve resource efficiency** and to tap the **significant growth potential of bio-based materials** substituting fossil-based materials, and related industries.
- **reduce dependencies** on imported raw materials.
- lay down **priorities for manufacturing and using biomaterials**, and for retaining them as long as possible in the economy

Clean Industrial Deal, February 2025



- diversification of value streams
- valorisation of farm residues
- strengthening the role of primary producers in the value chain and generating new jobs in the rural areas

Vision for Agriculture and Food, February 2025

Interplay with other policy areas



Biotech Act

**Circular
Economy Act**

**Start up and
Scale up
Strategy**

**Bioeconomy
Strategy**

Ocean Pact

**Industrial
Decarbonisation
Accelerator Act**

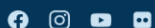


**Life
Science
Strategy**

Global bioeconomy

FAO's work for a sustainable bioeconomy, 2025

G20
BRASIL 2024



Delegates' Area

English

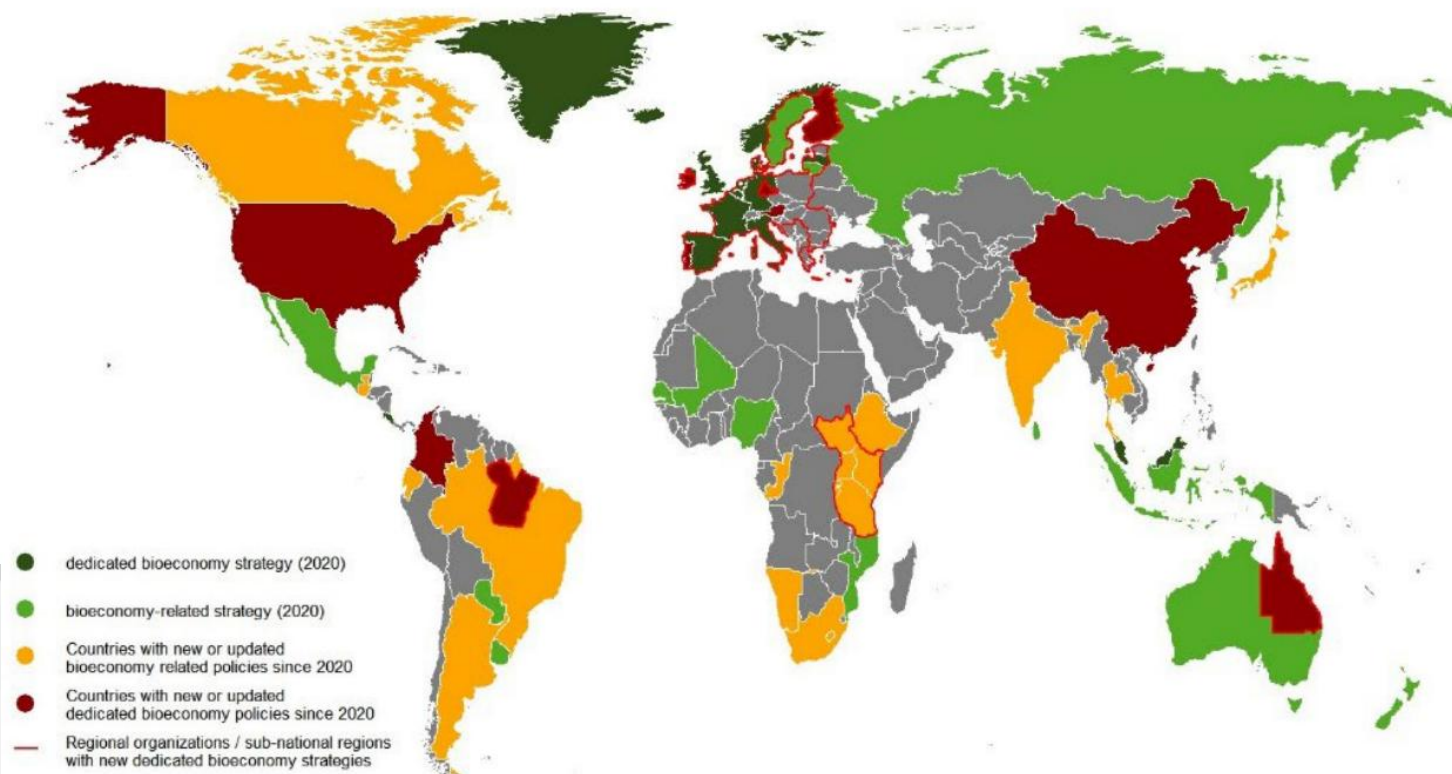
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BIOECONOMY

G20 reaches consensus and establishes High-Level principles on Bioeconomy

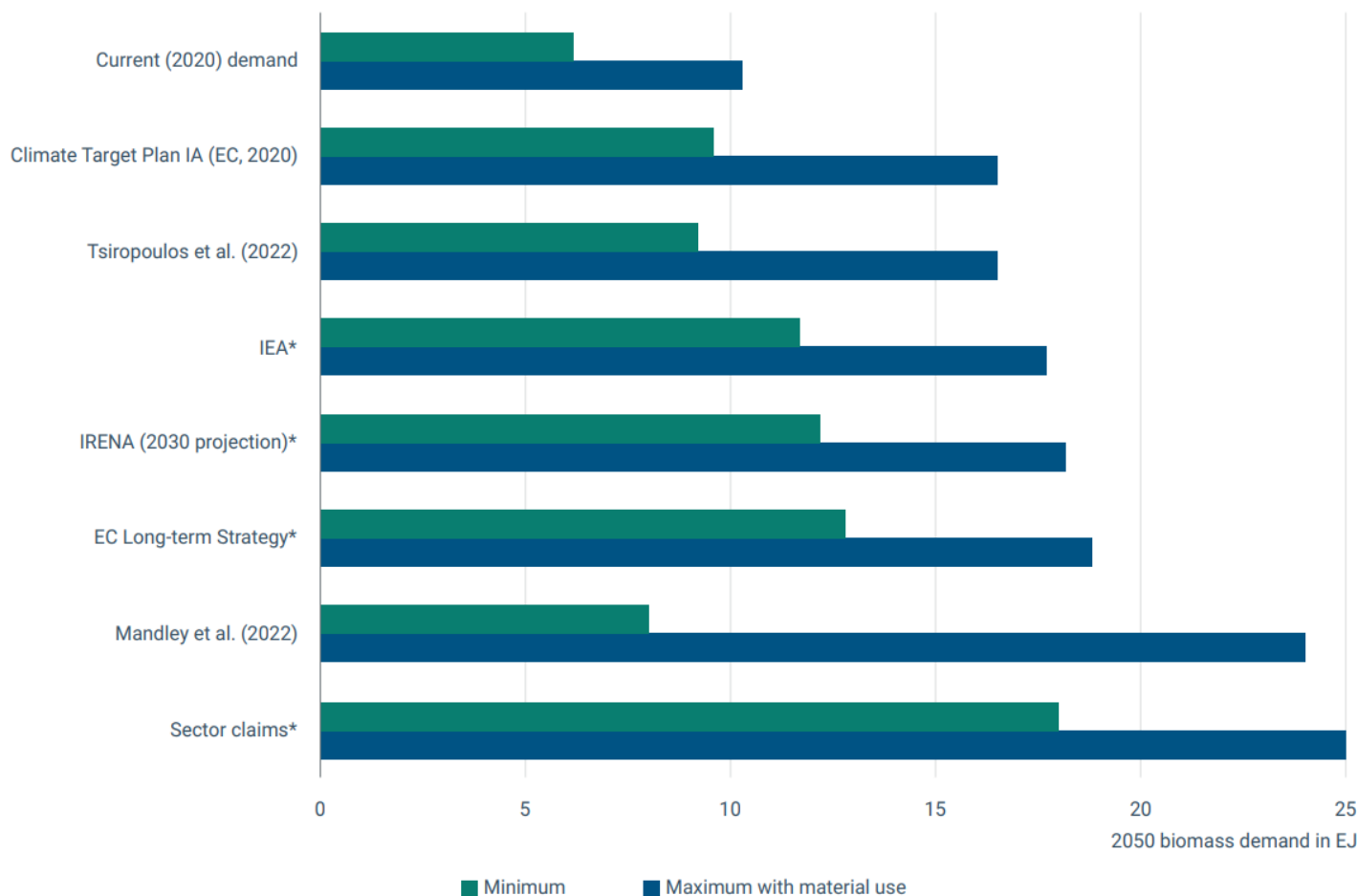
8. Utilize transparent, comparable, measurable, inclusive, science-based and context-specific **criteria and methodologies** to assess their sustainability throughout the value chains.
9. Be fostered by **international collaboration and cooperation** that addresses global challenges, leverages complementary strengths, innovation and entrepreneurship and promotes financing, capacity building and sharing of best practices.
10. Be based on **country-specific** approaches and implemented in line with national priorities and regional and local circumstances.



Source: Bioeconomy globalization: Recent trends and drivers of national programs and policies, IAC on Global Bioeconomy, April 2024

Biomass demand increasing

Figure 3.1 Projections of biomass demand for bioenergy and bio-based material use in 2050



- **Increasing demand** especially for bio-energy but also for bio-based materials and products
- **Potential biomass gap** between increasing demand and sustainable supply by 2050
- **Need for solutions** that reduce pressure
 - Environmental protection and regenerative practices (ecosystem resilience)
 - Sustainable and circular value chains (cascading principle)
 - Valorising bio-waste and by-products (secondary feedstock)

Joining forces for delivery

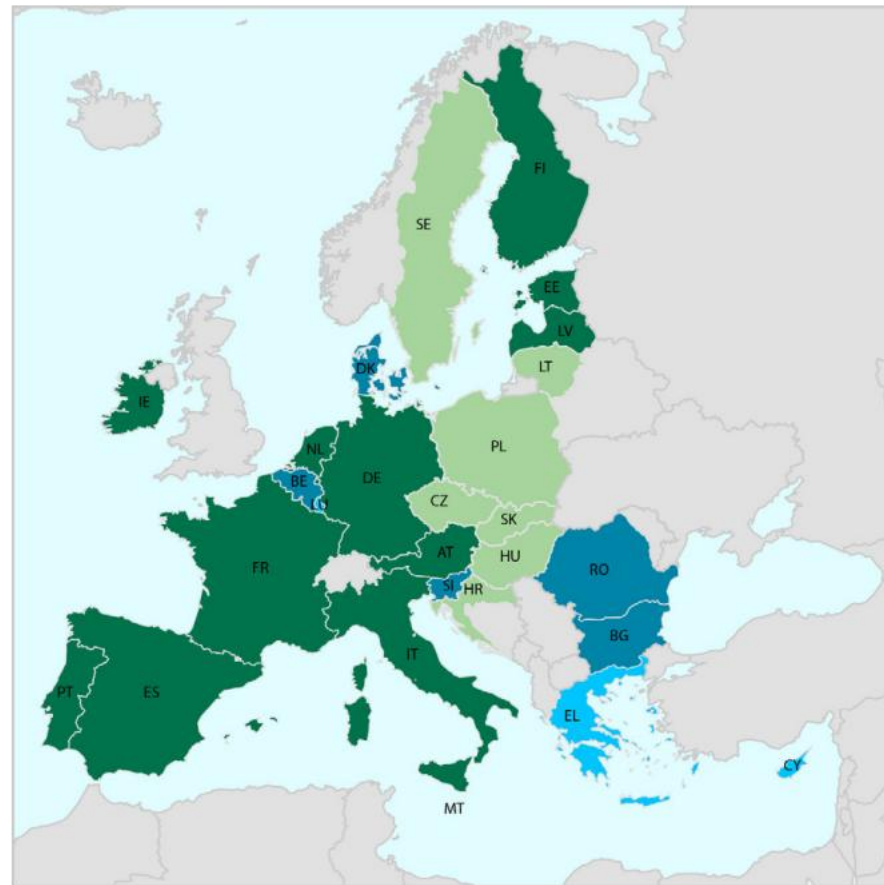


Figure 5. Timeline of national bioeconomy strategies' adoption in the EU-27

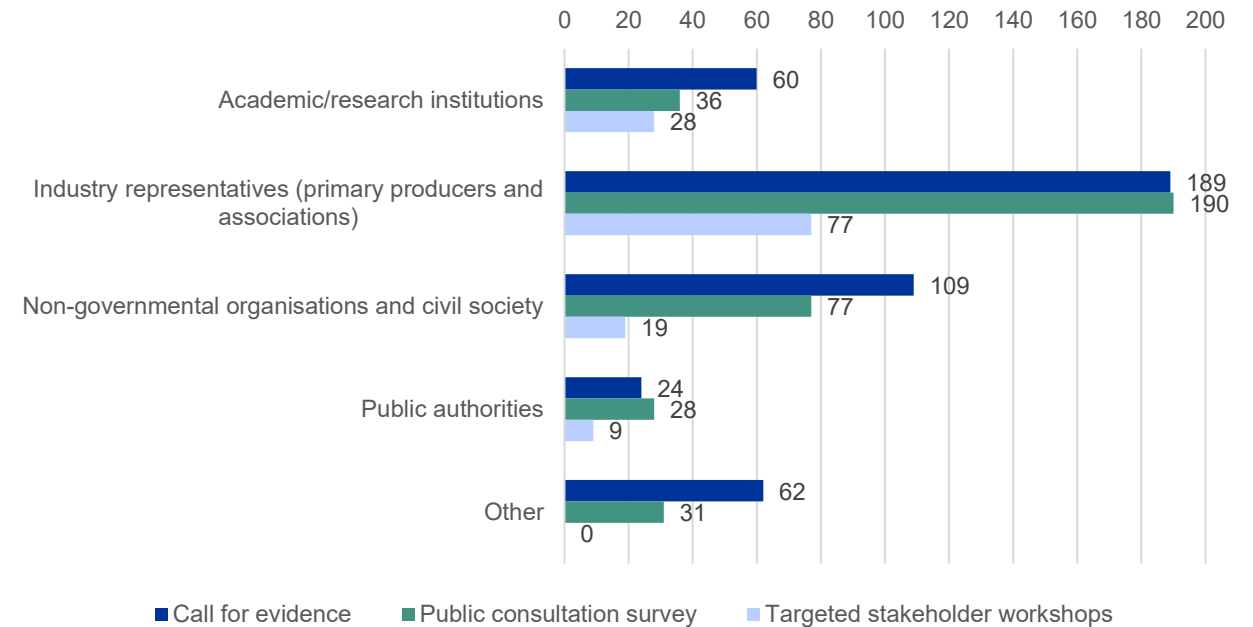


Source: European Commission's Knowledge Centre for Bioeconomy, 2024

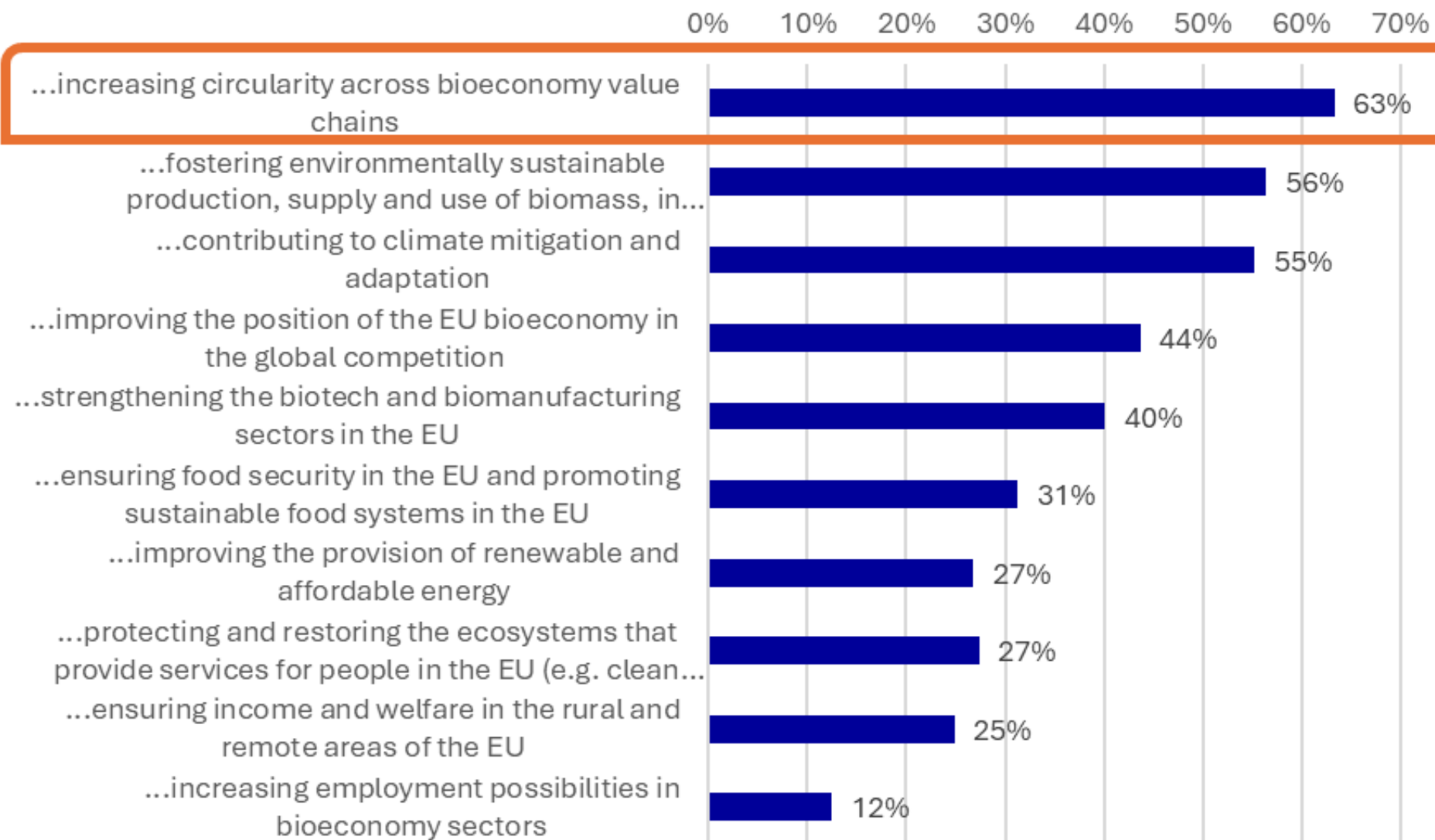
Source: Trends in the EU Bioeconomy – update 2024

<https://publications.jrc.ec.europa.eu/repository/handle/JRC140285>

Consultation activities



What should be the main objectives of the new EU Bioeconomy Strategy (multiple answers possible)?



Main challenges raised

Innovation & investment

- Innovation gaps and scaling challenges, for ex. from R&D to industrial applications
- Regulatory barriers, for ex. complexity & fragmentation of regulations across EU
- Market barriers, for ex. unfair competition from fossil-based products



Level-playing field for lead markets

- Creating market demand & enhancing biomass use efficiency
- Cascading principle – prioritisation of high-value applications
- Improving waste management
- Importance of regional collaboration



Sustainable Supply

- Sustainability criteria and certification
- Competition for biomass and land use
- Complex sustainability frameworks & traceability requirements
- Lack of sustainable supply

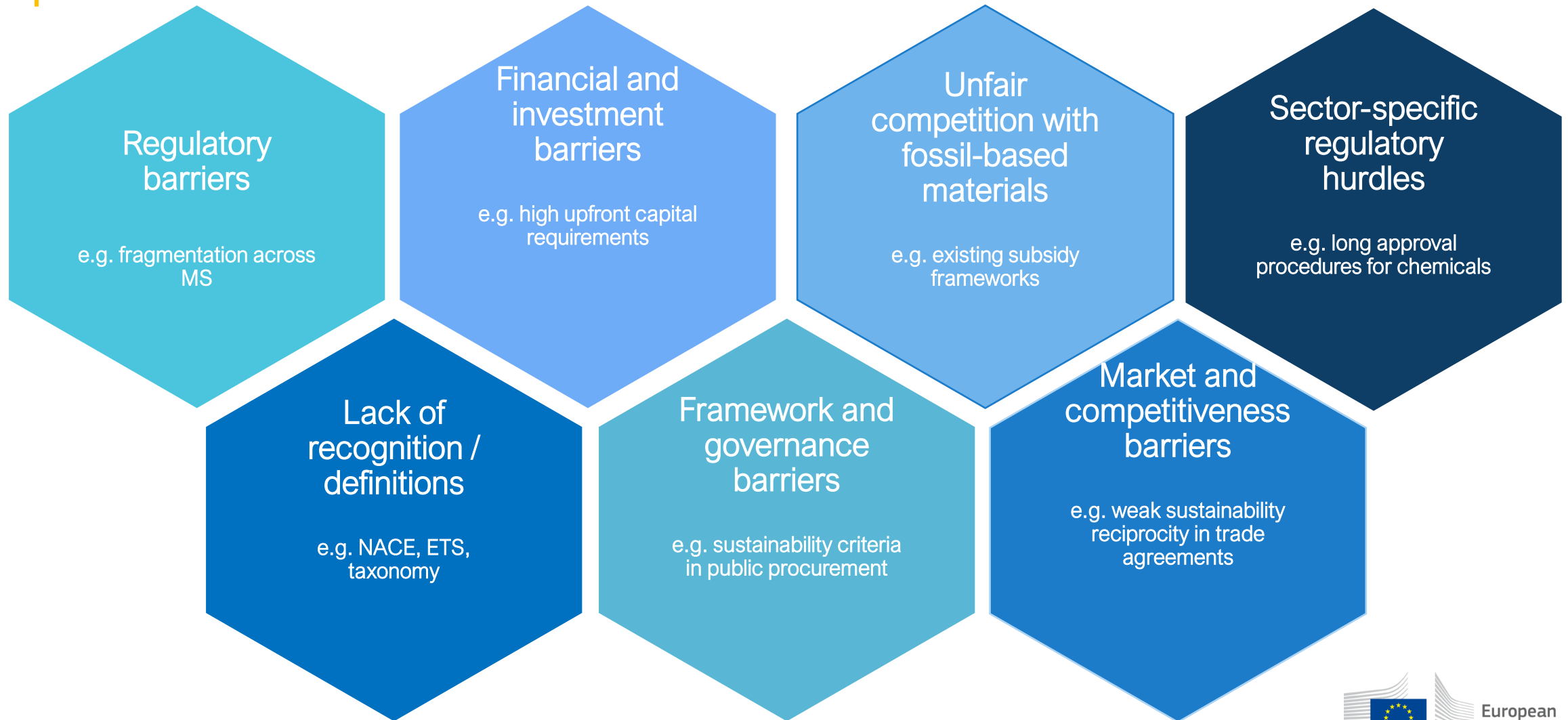


EU's Global Leadership

- Importance of international partnerships and trade
- EU should position itself as a global leader in green diplomacy and bioeconomy, with more active role in international forums



Key barriers identified



Main gaps

Innovation & investment

- EU-wide incentives to lower bio-based premium
- NACE codes for bio-based activities
 - Bio-based public procurement
- Skills and education
- Regulatory sandboxes



Level-playing field for lead markets

- Phase-out of harmful subsidies for fossil-based products
- Lengthy approval procedures on Plant Protection Regulation
- Strengthening the implementation of the cascading principle



Sustainable Supply

- Sustainability criteria
- EU-wide alert system and Task Force to manage energy-material conflicts
- Dietary changes
- Recognizing fibres as strategic feedstock/critical raw material



EU's Global Leadership

- Internalisation of negative externalities in third countries
- Difficult traceability of imported bio-based products
 - LULUCF to incorporate time factor for biogenic emissions



Main recommendations

Innovation & investment

- Targeted funding, for ex. for start-ups and SMEs
- Streamlining regulatory frameworks (simplified, harmonized, more predictable, etc)
- Improving public-private partnerships for scaling innovations



Level-playing field for lead markets

- Demand-side measures, in particular public procurement
- Financial and regulatory support
- Encouraging co-production models, where biomass could be used for multiple high-value purposes



Sustainable Supply

- EU-wide sustainability criteria and certification systems. Support for clearer & more transparent criteria and consistent traceability standards
- Public procurement policies key to drive demand for sustainably sourced biomass



EU's Global Leadership

- Trade partnerships for bio-based products & mutual recognition of sustainability safeguards
- International regulatory alignment for a level playing field & enhancing competitiveness



EU Bioeconomy strategy 2025: challenges to address

- Lack of investments
- Market penetration
- No incentives



- Biomass, unlimited resource
- Ensure sustainability of biomass extraction
- Lack of incentives for primary resources

- No clear role and impact of biobased
- No valorisation of waste
- Lost resources



- Unlevelled playing field
- Race to lead the bioeconomy

Objectives and scope of the new Bioeconomy Strategy

Enhance **long-term competitiveness** of the EU economy and strategic resilience

Ensure **industrial leadership** in addressing climate change, biodiversity loss and pollution

Lead in the emerging **bio-based economy** and drive biotechnology innovation

Secure **sustainably sourced biomass** for food, materials, energy and services

Create **green jobs**

- ▶ **Innovation and investment: from Lab to Fab**
- ▶ **Lead markets**
- ▶ **Securing sustainably sourced biomass supply**
- ▶ **Positioning the EU in the rapidly expanding global bioeconomy**

EU Bioeconomy potential - Lead Markets

Key sectors for sustainable supply markets

- Agriculture and food sectors
- Forestry
- Chemical industry

Creating demand for more value from less resources

- Packaging sector
- Automotive sector
- Bio textiles and fibres industry
- Construction and buildings materials sector
- Chemicals industry (biopolymers, biofertilizers) and its downstream users
- Personal care and cosmetics

Thank you

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