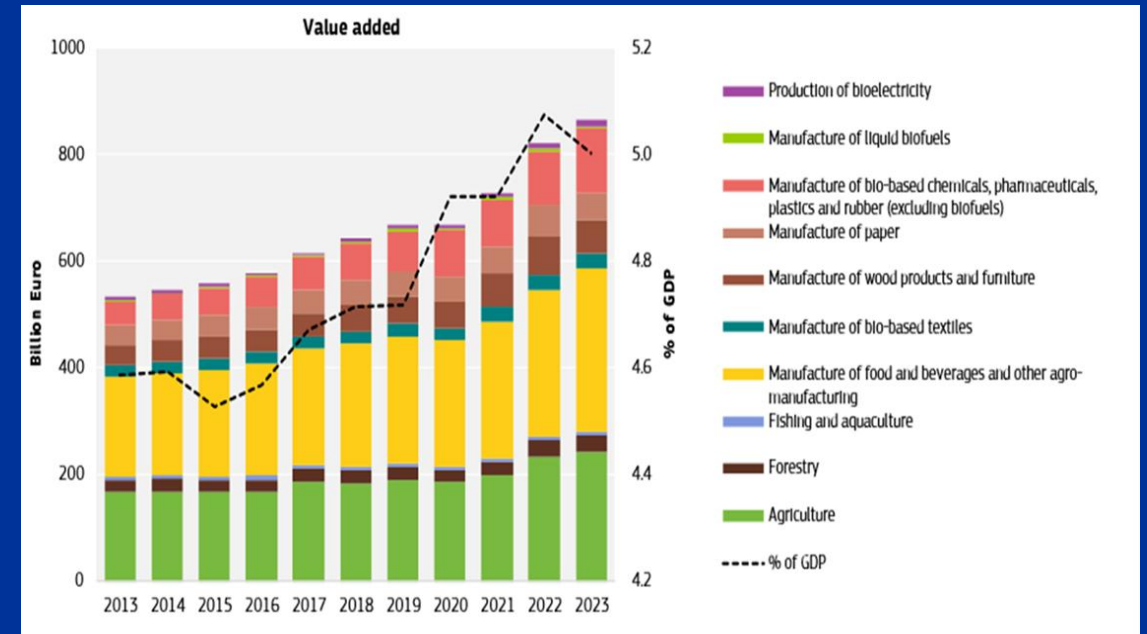
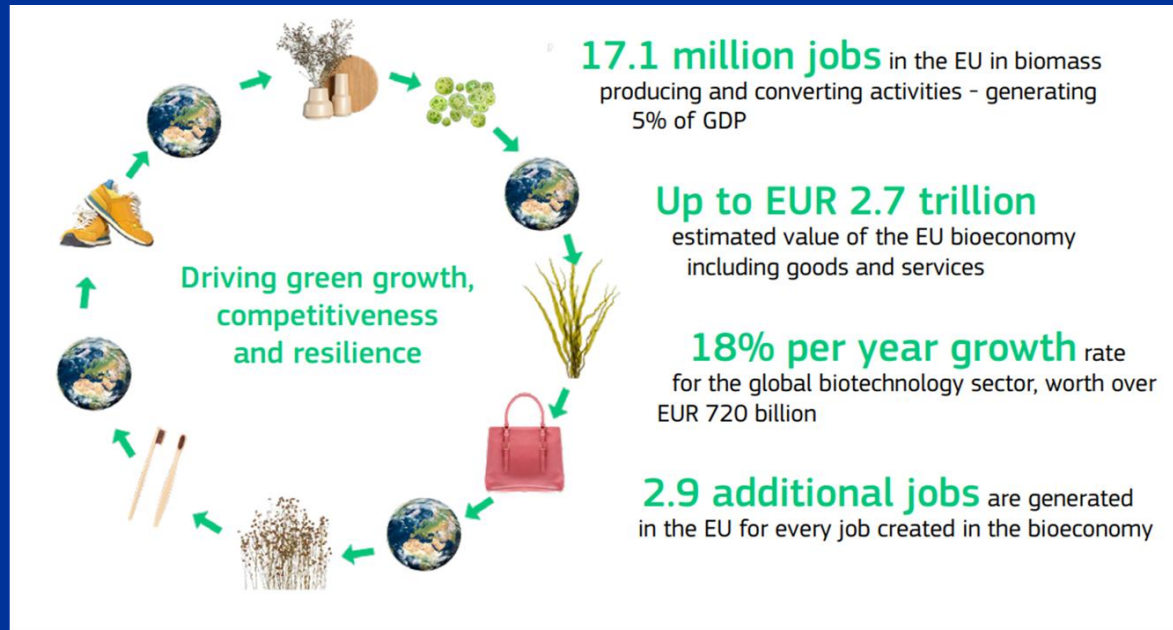


EU Bioeconomy Strategy

Bioeconomy and competitiveness days – 17 June 2026

Guillermo GEA
Policy officer
ENV.B.1 – Bioeconomy & Sustainable Materials
DG Environment, European Commission

EU Bioeconomy potential – a strategic opportunity of the 21st century



Evolution of value added in the biomass producing and converting sectors (EU27)

Source: Lasarte-López, J., M'barek, R. (2025). The EU bioeconomy at a glance: Focus on economic value added, employment and innovation. European Commission, Seville, 2025. JRC143759

Vision for 2040



© AungMyo / Adobe Stock

The EU Bioeconomy Strategy aims to:



Scale up innovation and investments
by removing barriers and hurdles.



Build lead markets for bio-based materials and technologies
such as plastics, fibres, textiles, chemicals, fertilisers, plant protection products, construction materials, biorefineries, advanced fermentation and permanent storage of biogenic carbon.



Ensure sustainable biomass supply for the value chains
by managing biomass better, increasing circularity and protecting nature.

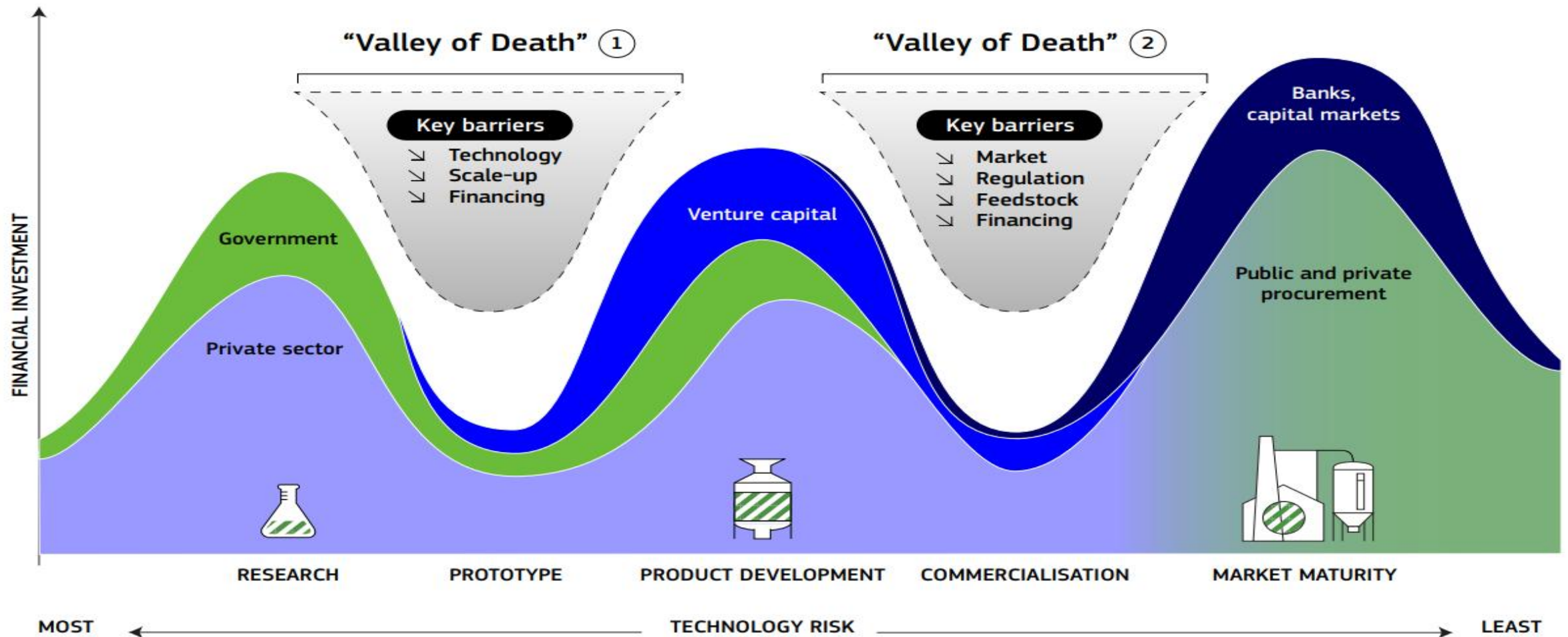


Harness global opportunities
by facilitating access to global markets and shaping the global sustainable bioeconomy agenda.

Bio-based products **deployed at scale**: beyond market niche, at a competitive cost

Scale up Bio-innovations & Investments: *from Lab to Fab*

From green premiums to economies of scale



Strategic Pillars of the EU Bioeconomy Strategy

Scaling up
Innovation and
Investments:
from Lab to
Deployment



Developing
Lead Markets
for
Materials and
Technologies



Securing Long-Term
Prospects for the
Bioeconomy:
Sustainably
Sourced Biomass



Harnessing Global
Partnerships and
Opportunities



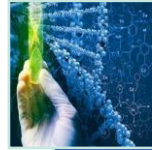
Joining forces for delivery: with Member States, industry, investors and civil society

75 actions to be implemented in 2026-28: some highlights



Innovations and investments

- R&I: Circular Bio-based Joint Undert.
- Upscaling: Competitiveness Fund
- Investing: Taxonomy
- MS support: IPCEIs
- **Regulators & Innovators Forum**
- **Investment Deployment Group**



Lead markets & technologies

- Polymers, textiles, chemicals, construction, fertilisers, plant protection
- Biorefineries, fermentation, carbon capture
- PPWR Article 8
- Biotech Act II
- Ecodesign
- **Bio-based Alliance**



Sustainably sourced biomass

- Circular Economy Act: collection & use of bio-waste
- **Knowledge Centre for Bioeconomy:**
 1. Monitoring biomass availability
 2. Monitoring biomass foresight
 3. Best practices for cascading use



Global Partnerships

- Trade agreements
- Global Gateway
- Discussions within FAO
- **Global Bioeconomy Summit in Dublin - October 26**

Joining forces for delivery: Dialogue with MS; e European Circular Economy Stakeholder Platform

Bio-innovation: CBE-JU, Horizon Europe, EIB, ECF

Circular Bio-based Joint Undertaking (CBE JU)

- EUR 185 million invested on primary production (2022-2025)
- CBE JU Working Group on Primary Producers (2025-2028)

Horizon Europe Cluster 6 & Mission Soil

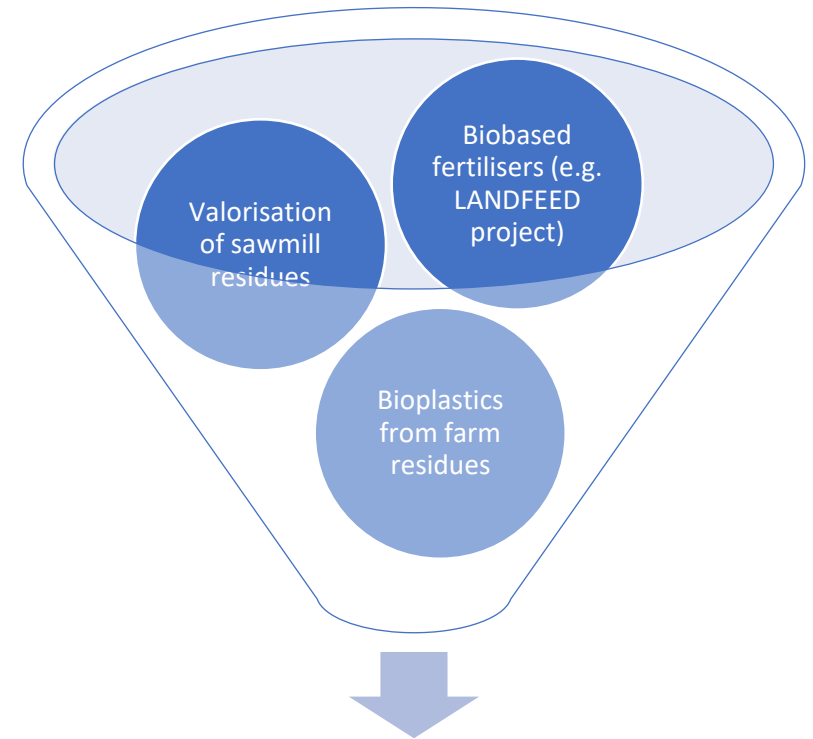
- EUR 3.5 billion (2014-2024) invested in healthy soils, agriculture, forestry, rural areas
- New Strategic Approach on R&I for agriculture, forestry, rural areas and food systems, Q3/2026

EIB

- Financing gap in agriculture: EUR 62 billion
- EIB fi-compass reports: agro-food tech, insurance & agricultural catastrophe risk, blending of resources (2026-2027)

MFF proposal European Competitiveness Fund and Horizon Europe

- Policy Window II 'Health, Biotech, Agriculture and Bioeconomy', EUR 40 billion
- Bioeconomy and agriculture are closely linked: agriculture and forestry are the main feedstock providers for the bioeconomy and also a market for biobased products



ACTION: REGULATORS & INNOVATORS' FORUM



POLICY OBJECTIVE & SCOPE

Accelerate product authorisations and reduce market barriers to foster bio-based industrial scaling.

Coordinate EU Agencies and national efforts without interfering in competent authorities' decisions.

Improve innovators' preparedness on their path to commercialisation.

Complement regulatory efforts (Biotech Acts).

ASSOCIATED DGS:

ENV

RTD

GROW

AGRI

SANTE

ACTIVITIES & DELIVERABLES

Q3 2026

Establishment of service contract for Secretariat and content support

Q3-4 2026

First activities: Launch event, Call for Interest, Pilot Cases

2027-2029

Workshops on specific product groups

STATE OF PLAY

Preparing service contract

ACTION: BIOECONOMY INVESTMENT DEPLOYMENT GROUP



POLICY OBJECTIVE & SCOPE

Mobilise investments in bioeconomy by connecting essential economic actors and institutional bodies.

Bring together CBE-JU, EIB Group, private investors and National Promotional Banks.

Boost bioeconomy knowledge in finance and develop a database of investment-ready projects.

ASSOCIATED DGS:

ENV

RTD

AGRI

GROW

ACTIVITIES & DELIVERABLES

22/04/2026

Scoping event with potential participants

10/06/2026

Kick-off event in the Bio Innovations Europe Conference (Den Haag)

Q3 2026

Establishment of service contract for Secretariat and content support

Q3 2026 – 2028

WGs operation. Key deliverables: bankability assessment & database, inputs on policy and financial instruments, database of investment-ready projects

STATE OF PLAY

Officially launched (10.06), seeking more engagement from Commercial & National Promotional Banks

ACTION: BIO-BASED EUROPE ALLIANCE

INVESTMENT COMMITMENT TARGET

EUR 10 Billion
by 2030

Bringing together EU companies committed to collectively purchasing bio-based materials, products and applications.

ASSOCIATED DGS:

ENV

AGRI

ACTIVITIES & DELIVERABLES

Q2 2026

Scoping dialogues with companies and Member States

10/06/2026

Call for interest launched

21 OCT. 2026

Public launch at the Global Bioeconomy Summit during the Irish Presidency

2027-2028

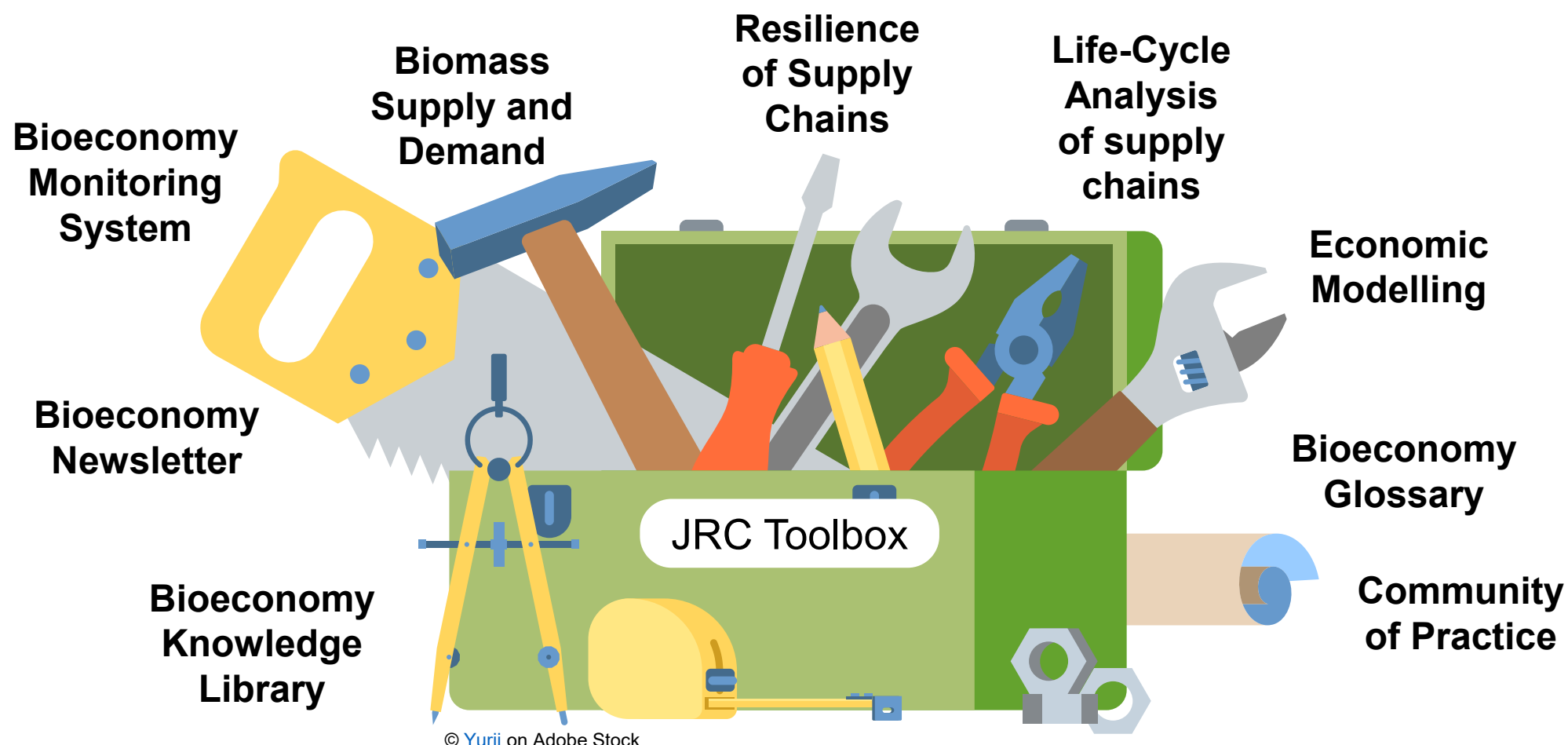
Scaling up of offtake agreements

STATE OF PLAY

Contacts with corporates and business partners

Knowledge Centre for Bioeconomy

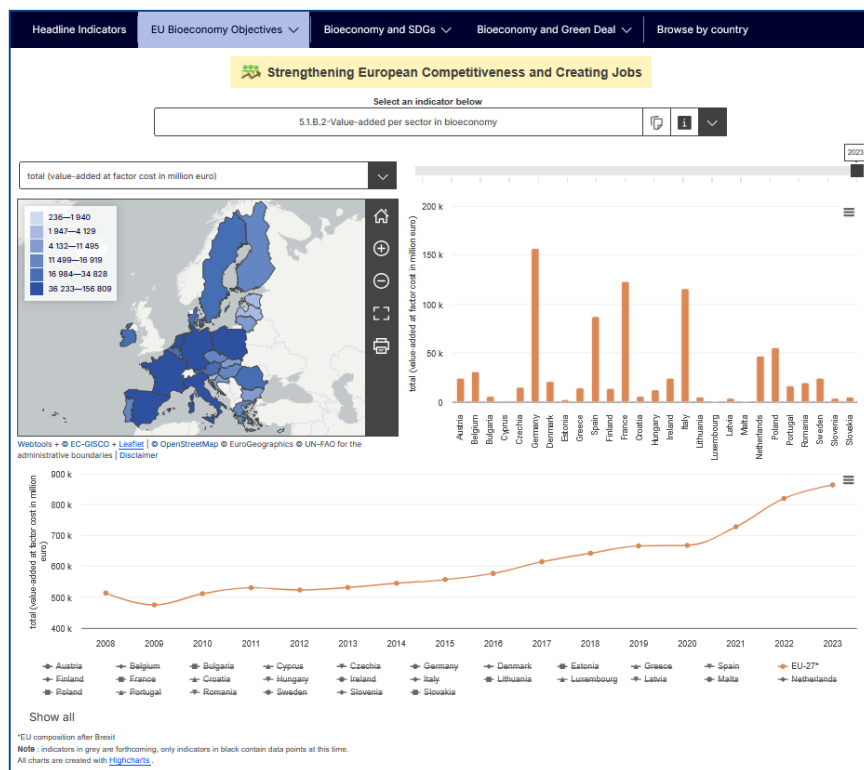
Toolbox of knowledge, indicators, models and approaches for a sustainable and competitive bioeconomy



KCB dashboards with MS data

Bioeconomy Monitoring System

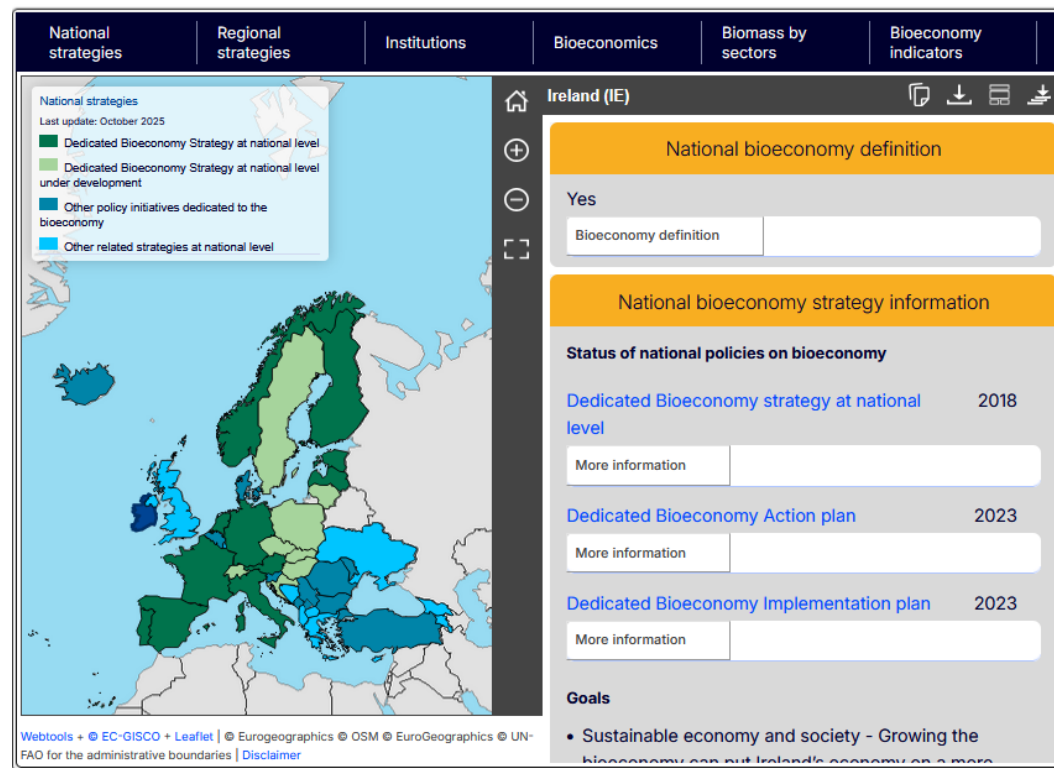
49 indicators, time-series, dynamic display
Sources: FAO, UNICEF, Eurostat, UNEP, EEA, JRC/DataM



https://knowledge4policy.ec.europa.eu/bioeconomy/monitoring_en

Bioeconomy Country Dashboard

42 countries, national, sub-regional strategies, macro regional initiatives, institutions
Sources: JRC desk research and periodic surveys

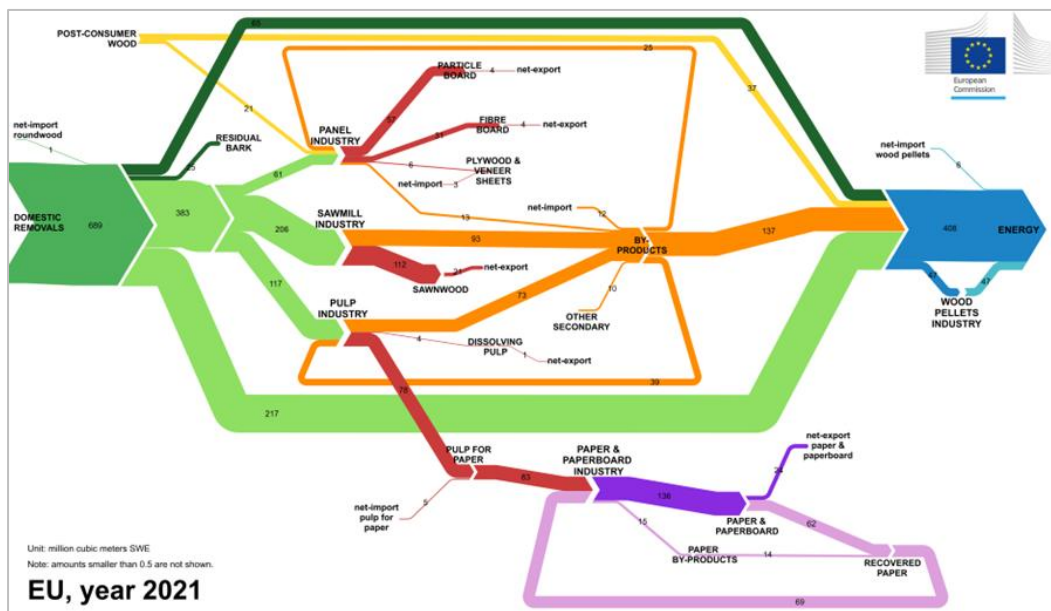


https://knowledge4policy.ec.europa.eu/visualisation/bioeconomy-different-countries_en

Woody and agricultural biomass flows

Available for each Member State, latest year available 2021

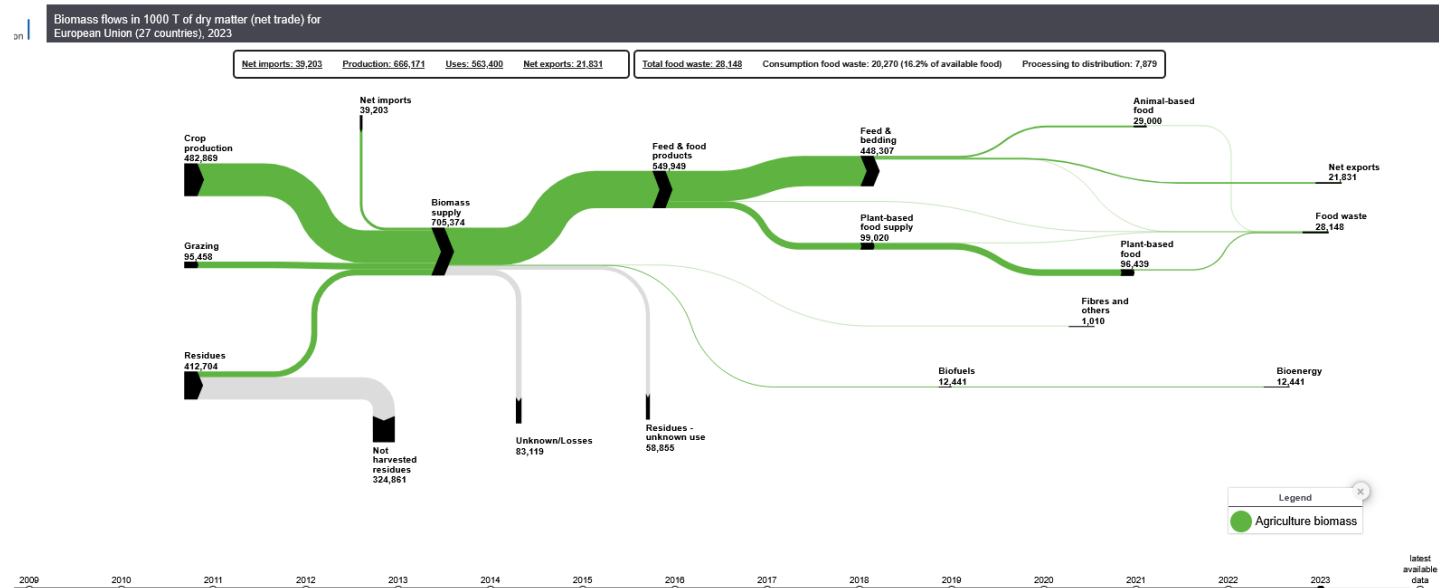
Woody biomass



https://knowledge4policy.ec.europa.eu/visualisation/interactive-sankey-diagrams-woody-biomass-flows-eu-member-states_en

Available for each Member State, latest year available 2023

Agricultural biomass



https://knowledge4policy.ec.europa.eu/visualisation/biomass-flows_en

CAP Support for Bioeconomy

Bioeconomy Strategy Key Action:

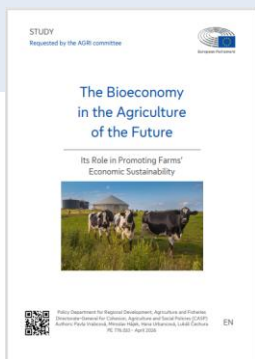
“Support cooperation of primary producers to drive joint investments in innovative bio-based value chains through CAP investment support, sectoral interventions and the European Innovation Partnership (EIP-AGRI)”

CAP 2023-2027:

- **EUR 5.6 billion** total public expenditure planned in 44 bioeconomy-labelled interventions (material use and biogas/biomethane) in 20 Member States
- **EUR 4.2 billion** total public expenditure planned in 180 forestry related interventions in 23 Member States

CAP 2028-2034:

- **mobilize Synergies between CAP, NRP and ECF**



ACTIVITIES & DELIVERABLES

CAP Investment support (on-farm, cooperative/joint investments) under Art 73 CAP-SP Regulation (future Article 13 CAP Regulation)

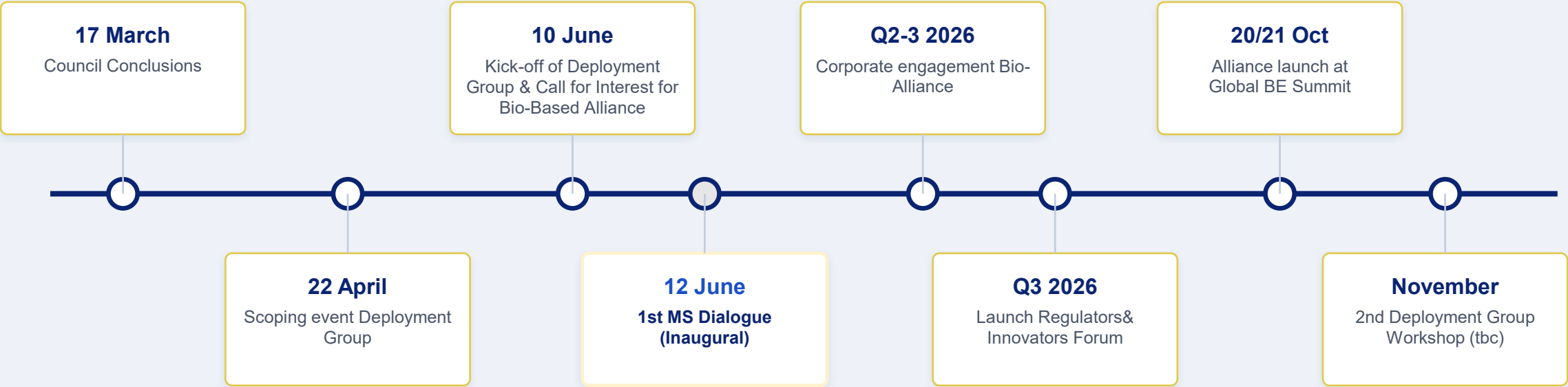
Support for investments of producer organisations under relevant sectoral interventions: up to 5% of direct payment envelope in any sector

EIP-AGRI support for cooperation projects for innovation through operational groups: planned EUR 1.6 billion (2023-2027), EUR 360.000 median budget support per operational group



**Upcoming CAP Network Focus Group:
“Innovative management of
fertilisers at farm level”**

TIMELINE 2026: IMPLEMENTATION PLANNING





Thank you!

Environment - Bioeconomy Strategy

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