

# Transition to bioeconomy in BIOEAST countries: different endowments, common challenges

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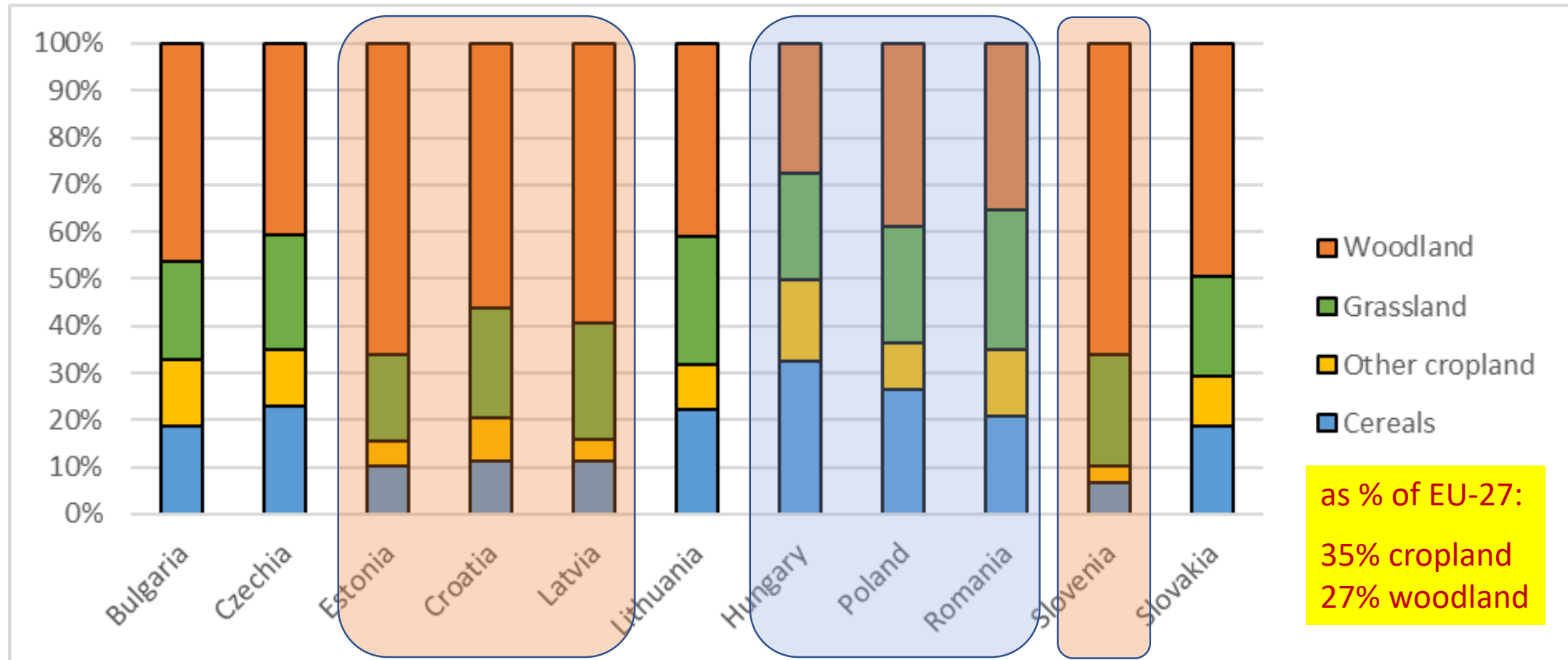
University of Ljubljana

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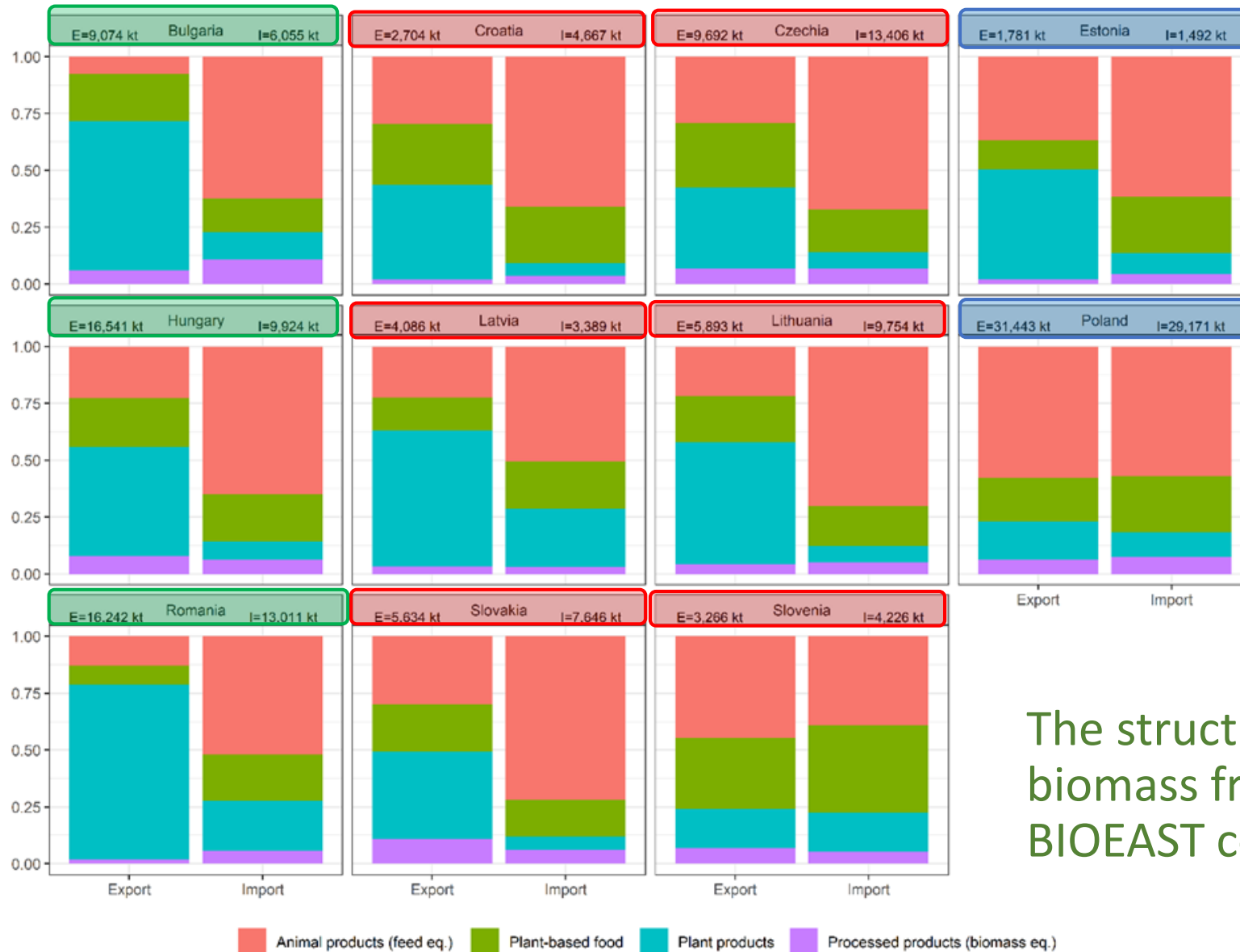


# Resource base: land use → biomass availability

Share of key categories of land use in total land use available for biomass production in the BIOEAST countries (data: Eurostat, 2019)



# Biomass flows (agriculture)



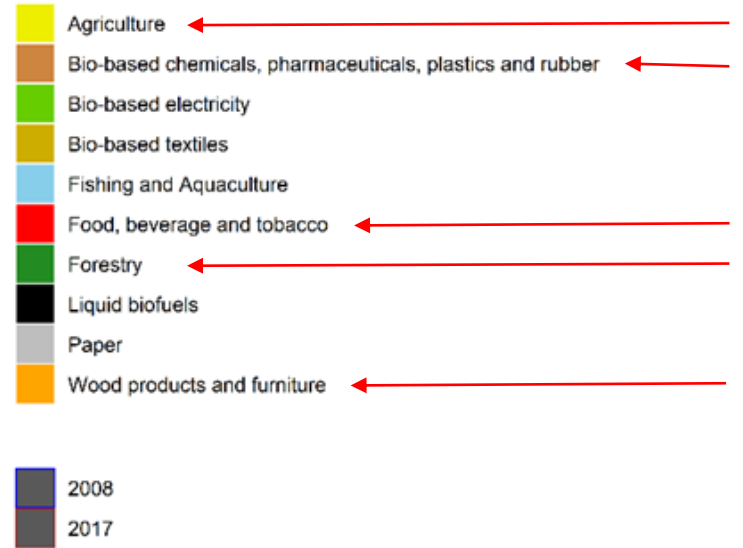
The structure of imports and exports of biomass from agriculture in the BIOEAST countries (Data: JRC, 2021)

# Biomass flows (wood)



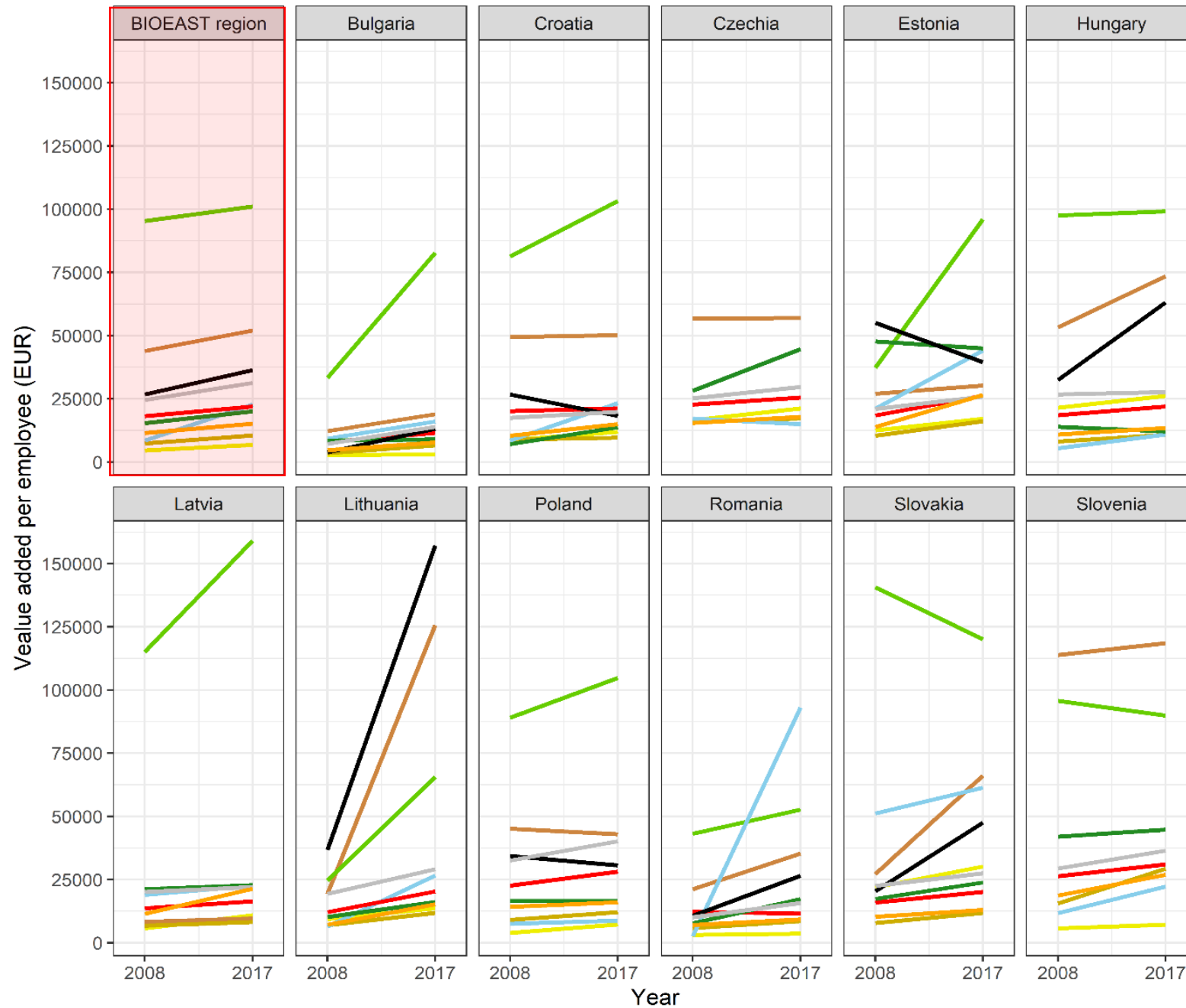
The structure of imports and exports of forest-based biomass in the BIOEAST countries (Data: JRC, 2021)





## Sectoral mix

The structure of value added by the bioeconomy sectors 2008-2017 (data: JRC, 2021)



Sector

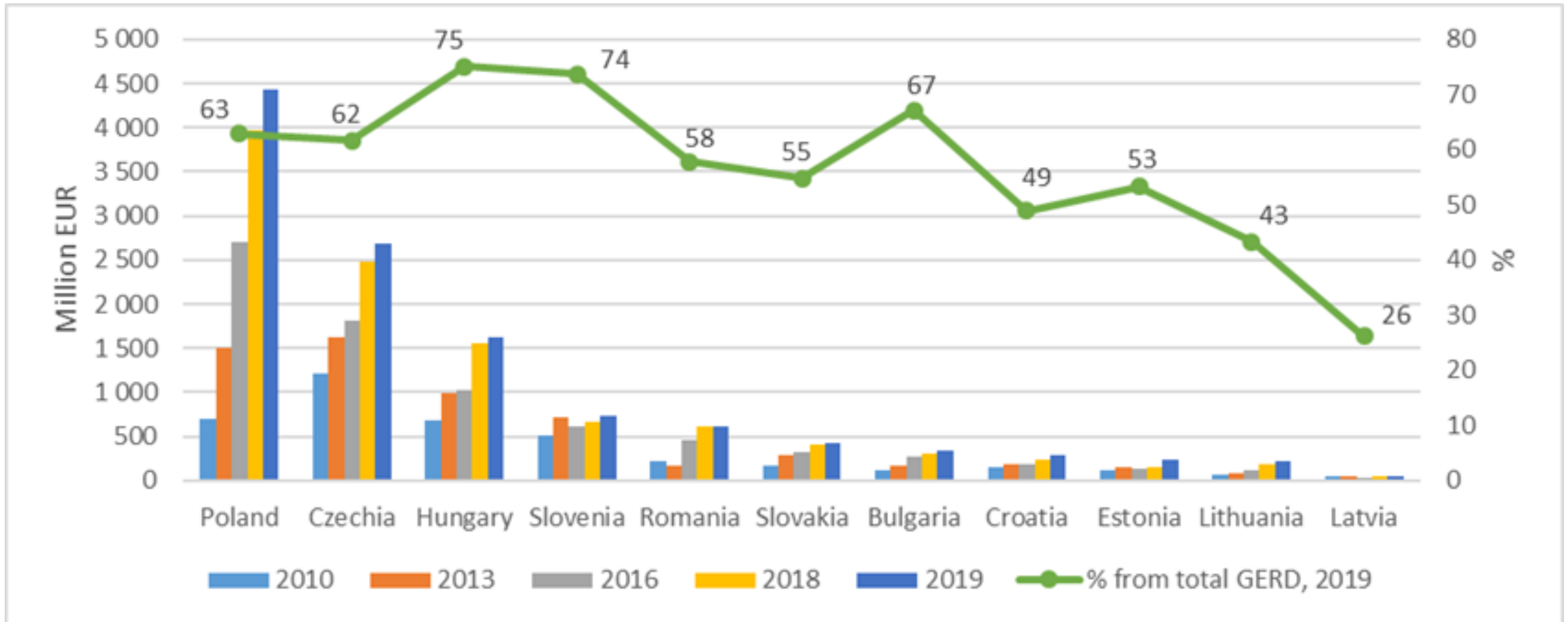
- Agriculture
- Bio-based chemicals, pharmaceuticals, plastics and rubber
- Bio-based electricity
- Bio-based textiles
- Fishing and Aquaculture
- Food, beverage and tobacco
- Forestry
- Liquid biofuels
- Paper
- Wood products and furniture

# Productivity

VA per employee by bioeconomy sectors (data: JRC, 2021)

# RDI intensity

R&D intensity in BIOEAST countries in the business enterprise sector (data: Eurostat, 2021)



# Demand-pull factors: integration with international value-chains

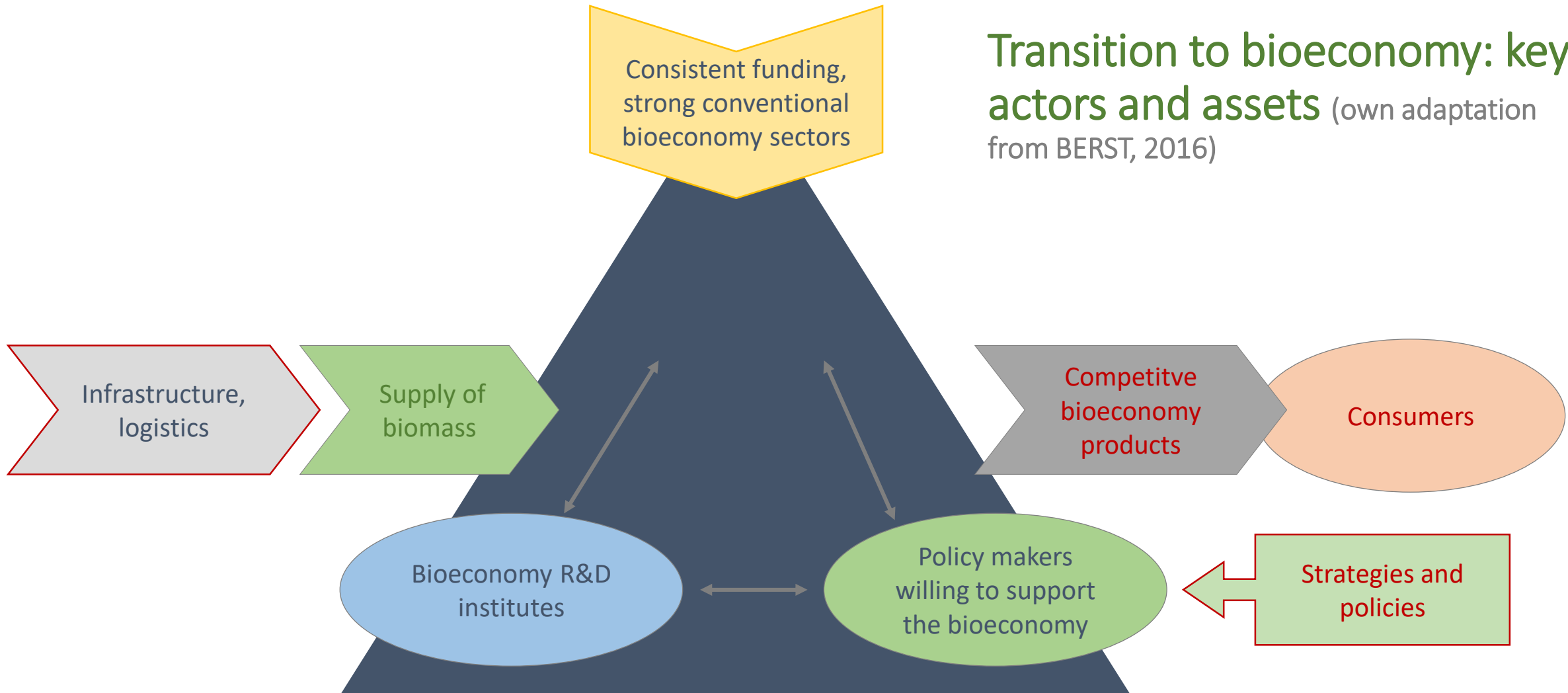
Share of bio-based and potentially bio-based products among PRODCOM products that generate 50 % of total value (data: Eurostat, 2020)

	Bulgaria	Croatia	Czechia	Estonia	Hungary	Latvia	Lithuania	Poland	Romania	Slovakia*	Slovenia
Share of (potentially) bio-based products among PRODCOM products that generate 50 % of total value	34	31	5	25	5	38	28	27	27	0	10
Farm2Fork sectors (%)	77.7	78.1	43.9	36.5	44.1	24.6	43.9	60.8	58.0	48.5	29.2
Wood-based sectors (%)	6.6	18.5	6.7	56.2	7.5	71.2	36.7	11.0	10.2	13.2	11.4
New (potential) bioeconomy sectors (%)	10.4		49.4	7.4	48.3		15.4	25.2	31.8	38.3	59.5
Other bioeconomy sectors (%)	5.3	3.4				4.3	4.1	3.1			



# Transition to bioeconomy is a complex and contested process !

Transition to bioeconomy: key actors and assets (own adaptation from BERST, 2016)



Thank you for your attention!

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