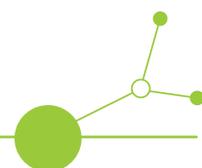


Reflections on the EU Agri-food vision 2040, CAP 2028-2034 and circular bioeconomy

Input prepared for BIOECO-UP activity A.3.2
Development of strategy and action plan
for implementing bioeconomy measures



BAB

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Abstract	The EU Agri-food vision 2040 takes a long-term perspective beyond a single CAP period, it provides strategic considerations for CAP 2028-2034 and it references policies other than the CAP. Since the agri-food sector produces and processes biomass, the EU Agri-food vision 2040 priority goals are bioeconomy-relevant. This report provides a summary of the EU Agri-food vision 2040 and reflects on its relations to the circular bioeconomy concept and the CAP 2028-2034 from a bioeconomy perspective. Report version 27.10.2025 was intended, in addition to the national level analyses carried out by the partner organisations, as an input for the BIOECO-UP activity A.3.2 strategy and action plan. Report version 21.01.2026 is a slightly updated and publishable document.
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MAIN PART

1. About this report

The **BIOECO-UP project** aims to support the circular bioeconomy in Central and Eastern Europe with respect to the development of circular and biobased value chains, consumer awareness and choices as well as the policy framework. Work package WP3 (“Mainstreaming of circular bioeconomy policies”) focuses on bioeconomy policy in Central and Eastern Europe particularly within the framework of the Common Agricultural Policy (CAP). Activity A.3.2 is dedicated to the “Development of strategy and action plan for implementing bioeconomy measures”. [BIOECO-UP D.3.1.1]

This report aims to provide a qualitative input for BIOECO-UP activity A.3.2. It focuses on the EC’s “A vision for agriculture and food – Shaping together an attractive farming and agri-food sector for future generations” (hereinafter “EU Agri-food vision 2040”) [EC, 2025a]. It is one of several sources consulted in the process of transnationally discussing and formulating a bioeconomy strategy and action plan for Central and Eastern Europe. This report’s main interest is: **How do the EU Agri-food vision 2040, the Common Agricultural Policy (CAP) and the (circular) bioeconomy relate to one another?**

To answer this question, the **main part** comprises: an introduction to the EU bioeconomy concept, policy and sectors [chapter 2], an introduction to the CAP [chapter 3], an overview of the purpose and scope of the EU Agri-food vision 2040 [chapter 4.1], an overview of the priority goals and exemplary measures of the EU Agri-food vision 2040 [chapters 4.2 to 4.5] as well as explicit references to the bioeconomy [chapter 4.6]. The report further identifies key aspects and commonalities of the EU Agri-food vision 2040 with the concept of a circular bioeconomy and indicates directions for the future development of the CAP from a bioeconomy perspective [chapter 5]. It also provides a compilation of bioeconomy measures and topics in different policy frameworks [chapter 6].

The **annex** includes complementary information: references to BIOECO-UP activities particularly relevant for A.3.2 [annex A.1], key findings from the BIOECO-UP A.3.1 policy workshop [annex A.2], a list of references with data on agricultural biomass [annex A.3]. In addition, there is an overview of the EU Bioeconomy Monitoring System [annex A.4], of the action plan in the EU Bioeconomy strategy 2018 [annex A.5], of the key actions listed in the EU Bioeconomy strategy 2025 [annex A.6], as well as of types of actions defined by EU member states with a dedicated national bioeconomy strategy [annex A.7].

2. EU bioeconomy

2.1 Bioeconomy concept

There is no uniform definition for the bioeconomy concept [EC-JRC, 2025d: 46], and its scope and focus have evolved over time. Various definitions illustrate the complexity of the concept. For instance:

“Sustainable & Circular: Bioeconomy the European way. The bioeconomy covers all sectors and systems that rely on biological resources (animals, plants, micro-organisms and derived biomass, including organic waste), their functions and principles. It includes and interlinks: land and marine ecosystems and the services they provide; all primary production sectors that use and produce biological resources (agriculture, forestry, fisheries and aquaculture); and all economic and industrial sectors that use biological resources and processes to produce food, feed, bio-based products, energy and services. To be successful, the European bioeconomy needs to have sustainability and circularity at its heart. This will drive the renewal of our industries, the modernisation of our primary production systems, the protection of the environment and will enhance biodiversity.” [EC-DGRI, 2018: 1]



“The bioeconomy is defined as the activities that deliver sustainable solutions based on biological resources to create added value. These include products, services, science and technologies benefiting sectors ranging from agriculture, forestry, fisheries and aquaculture to value chains based on biomass processing, biomanufacturing and biotechnologies such as in food, health, energy, industry, ecosystem and other services. Biological resources include genetic resources, as well as primary and secondary biomass, such as by-products and residues, and biogenic carbon captured through innovative technologies.” [EC, 2025c: 1]

“The bioeconomy is an enabler for implementing green transitions in a sustainable, competitive and just way. Sustainability calls for a holistic view, taking into account biomass scarcity, biodiversity, climate mitigation and de-fossilisation, ecosystem services and the needs of future generations. Competitiveness requires less dependency on third countries, thereby enhancing the strategic autonomy of the EU. The circular economy has a key role in increasing resource efficiency, improving biomass recovery, valorising secondary feedstock, fostering innovation, and creating circular business models and green jobs. The main aim of the sustainable, circular, and competitive bioeconomy is to create more added value using fewer natural resources. The just way needs the involvement of all citizens, urban and rural populations, leaving no-one behind, and providing the required education, re-skilling and up-skilling of the workforce.” [Korosuo et al., 2024: 3]

There are numerous commonalities between the general bioeconomy concept and the EU Agri-food vision 2040 [see chapter 4].

2.2 Bioeconomy policy

The EU proactively deals with the development of the EU bioeconomy by means of numerous bioeconomy-relevant policies and initiatives, dedicated bioeconomy objectives, actions and monitoring.

The **objectives** as defined in the EU bioeconomy strategies 2012 and 2018 [EC-DGRI, 2018: 5-6] are:

- Objective 1: Ensuring food and nutrition security
- Objective 2: Managing natural resources sustainably
- Objective 3: Reducing dependence on non-renewable unsustainable resources
- Objective 4: Mitigating and adapting to climate change
- Objective 5: Strengthening European competitiveness and creating jobs

The EU Bioeconomy strategy 2018 foresees an action plan comprising 14 actions in 3 action clusters [see annex A.5; EC-DGRI, 2018]:

- “Strengthen and scale-up the bio-based sectors, unlock investments and markets
- Deploy local bioeconomies rapidly across Europe
- Understand the ecological boundaries of the bioeconomy”

Following a public consultation [EC, 2025d; EC, 2025e], a new EU bioeconomy strategy was presented in 2025 which seeks “to build a sustainable and a nature-positive bioeconomy by:

1. scaling innovation and investments;
2. building new lead markets for bio-based materials and technologies;
3. ensuring sustainable biomass supply across value chains and
4. harnessing global opportunities.” [EC, 2025c: 3]

The EU Bioeconomy strategy 2025 lists a set of 31 key actions [see annex A.6; EC, 2025c].

Bioeconomy-relevant policies and initiatives are defined and implemented at different **spatial levels**: at the EU, the macro-regional (e.g. BIOEAST), the national or the sub-national level [Korosuo et al., 2024: chapter 2]. In 2025, 12 out of 33 European countries had a dedicated national bioeconomy strategy (AT, GE, ES, EE, FI, FR, IE, IT, LV, NO, NL, PT); 10 countries had a dedicated national bioeconomy strategy under development (CH, CZ, DK, HR, HU, LI, PL, SE, SK, SI); 9 countries had other policy initiatives dedicated to the bioeconomy; 12 countries had other bioeconomy-related strategies at the national level [EC-KCB, 2025: 2].



The 12 countries with a dedicated bioeconomy strategy have defined a variety of policy actions, and **3 policy actions** were addressed by all of them:

- “Encouraging investments in bioeconomy research, innovation, and market development
- Supporting the principles of cascading use, circularity, and resource efficiency for biomass
- Promoting communication campaigns to raise awareness”. [EC-KCB, 2025: 4]

Monitoring information on the EU and national bioeconomies is made available via the EU Bioeconomy Monitoring System (EU-BMS) for value chain steps, sustainability pillars and primary production sectors [see annex A.4 and Korosuo et al., 2024] or through datasets and reports on agricultural biomass (e.g. Eurostat, EC Data and analysis, EC Agri-Food Data Portal, FAOSTAT [see annex A.3 and EC-JRC, 2025a]).

2.3 Bioeconomy sectors

A variety of **economic sectors** as well as economic, civil and policy stakeholders are active in the (circular) bioeconomy in the EU and its member states [see e.g. BIOECO-UP A.1.1 national reports, BIOECO-UP D.1.1.1 synthesis report]. The **biomass producing and converting sectors** can be clustered into: agriculture; forestry; fishing and aquaculture; food, beverage and tobacco; bio-based textiles; wood products and furniture; paper; bio-based chemicals, pharmaceuticals, plastics and rubber (excl. biofuels); liquid biofuels; bio-based electricity [EC-JRC, 2025b]. **Agriculture and food** are core bioeconomy sectors in the EU, and their primary products and sidestreams are diverse [BIOECO-UP D.3.1.1: Executive summary]. The agri-food sector accounted for 77 % of employment and 63 % of value added in the EU-27’s biomass-producing and converting sectors in 2022 [Figure 1].

Figure 1: Employment and value added in biomass-producing and -converting sectors, EU-27, 2022

Economic activities (NACE Rev.2)	People employed		Value added	
	number	%	million EUR	%
Agriculture	8.526.100	49,5	234.552	28,9
Food, beverage and tobacco	4.759.008	27,6	274.033	33,7
Wood products and furniture	1.402.762	8,1	71.716	8,8
Bio-based textiles	697.788	4,1	28.079	3,5
Paper	626.662	3,6	59.881	7,4
Bio-based chemicals, pharmaceuticals, plastics, rubber (excl. biofuels)	502.487	2,9	94.120	11,6
Forestry	476.260	2,8	29.526	3,6
Fishing and aquaculture	158.240	0,9	6.370	0,8
Bio-based electricity	37.544	0,2	8.375	1,0
Liquid biofuels	37.080	0,2	5.415	0,7
Total	17.223.930	100,0	812.067	100,0

Source: Own figure based on Jobs and Wealth in the European Union Bioeconomy, Data-modelling platform of resource economics [EC-JRC, 2025b, accessed 26.08.2025].



3. EU Common Agricultural Policy

3.1 CAP 2023-2027

The Common Agricultural Policy (CAP) provides a policy framework primarily for agriculture and food as well as the rural, but also has an effect on forestry and fisheries. EU countries implement the CAP 2023-2027 through their national CAP strategic plans, which were developed based on 10 key policy objectives of the CAP period 2023-2027. [BIOECO-UP D.3.1.1: chapter 2 and annex 4.5.4 presentation slides]

The **10 key policy objectives** of the CAP 2023-2027 are:

- “to ensure a fair income for farmers;
- to increase competitiveness;
- to improve the position of farmers in the food chain;
- climate change action;
- environmental care;
- to preserve landscapes and biodiversity;
- to support generational renewal;
- vibrant rural areas;
- to protect food and health quality;
- fostering knowledge and innovation.” [EC, 2025f]

3.2 CAP 2028-2034

According to the EC [2025g], the CAP 2028-2034 will supposedly be designed to be simpler and more flexible, fairer and more targeted, and facilitate synergies. Examples for components and other aspects foreseen for the CAP 2028-2034 period [EC-DGAgri, 2025a]:

- CAP income support for farmers: area-based income support, agro-environmental actions, on-farm investments (e.g. modernisation, diversification, uptake of new practices and technologies)
- CAP crisis support for farmers: Unity Safety Net
- National and Regional Partnership Plans: financing LEADER rural projects
- Competitiveness Fund: financing research and innovation in the agricultural sector
- safe and affordable food for consumers
- balanced mix of incentives, investments and obligations
- more flexibility for EU member states, accounting for diversity of farming sector and rural areas
- addressing sector-specific challenges
- a fairer and more targeted support for farmers, particularly young farmers
- a more flexible, results-driven policy, through simplification and tailored targeted support
- support for environmental action, climate action, farm resilience; through incentives, tailoring to local conditions and production systems, risk management, preventative measures, crisis payments, co-financed measures
- revision of the Common Market Organisation provisions (e.g. consumer education and awareness, new marketing standards for certain products, improving preparedness and availability of agricultural supplies during emergencies)



4. EU Agri-food vision 2040

4.1 Overview

The EU Agri-food vision 2040 is formulated for the period until 2040. It considers agriculture including fisheries and the food sector as **strategic sectors** in the EU and its member states which is underlined by statements such as [EC, 2025a: 2]:

- “European food security, safety and food sovereignty are non-negotiable.”
- “Food is also part of our competitiveness.”
- “Farming and food are essential to sustaining vibrant and economically prosperous communities in rural and coastal areas.”
- “Farmers and fishers [...] are a vital part of the solution to the protection and resilience of our nature, soils, water, air, biodiversity, oceans and climate.”
- “Farmers, fishers and food businesses are innovators and entrepreneurs.”

The EU Agri-food vision 2040 states that the EU agri-food sector must build on its **strengths** - such as health, safety, quality, sustainability and innovation - in order to support strategic autonomy, food sovereignty, nature protection and decarbonisation [EC, 2025a: 26]. It seeks to pursue an **inclusive working mode** across the EU and global entire agri-food system based on trust and dialogue [EC, 2025a: 4]. It aims to develop **territorial and tailored approaches**, relying on **current and succeeding generations** of farmers, agri-food operators, informed consumers and rural communities as well as on **all levels of governance** from EU to local authorities and international partners [EC, 2025a: 26]. It further seeks to create an **enabling environment** by means of research, innovation, knowledge and skills [EC, 2025a: 24].

The EU Agri-food vision 2040 aspires **future-oriented and coherent policies** for a central question: “how to build an agri-food system that is economically, socially and environmentally sustainable, and thus attractive, competitive, future-proof and fair for current and future generations?” [EC, 2025a: 6]. **4 objectives or priority areas** are defined for the agri-food sector [EC, 2025a: 5; EC, 2025b: 1]:

- **Attractiveness:** “An attractive and predictable agri-food sector where incomes enable farmers to thrive”; “Making farming a viable and appealing career”
- **Competitiveness:** “An agri-food sector that is competitive and resilient in the face of rising global competition and shocks”
- **Future-proofing:** “A future proof agri-food sector that is functioning within planetary boundaries”; “Embracing innovation and sustainability for long-term resilience”
- **Connection:** “An agri-food sector that values food, fosters fair working and living conditions and vibrant and well-connected rural and coastal areas”.

The EU Agri-food vision 2040 elaborates its 4 priorities with background information, relevant policies and actors, aspired goals, exemplary measures, etc. Given the nature of a vision document, the indicated measures refer to a superordinate level, allowing for a wide variety of concrete measures to be **specified and operationalised in an action plan**. A brief summary by priority is given below.

4.2 Attractiveness priority

The attractiveness priority aims at: fair and equitable food chains; fairer and better targeted CAP support; leveraging the opportunities of innovation; building an ambitious investment agenda; fostering entrepreneurship and generational renewal [see figure 2].



Figure 2: “Attractiveness” priority goals and exemplary measures

Attractiveness goals	Exemplary measures
Fair and equitable food chains	<ul style="list-style-type: none"> ▪ increasing market revenues ▪ improving transparency
Fairer and better targeted CAP support	<ul style="list-style-type: none"> ▪ balancing regulatory and incentives-based policies ▪ prioritising farmers actively producing food or agricultural products which are essential for the EU’s strategic autonomy and resilience ▪ simplifying income support tools ▪ better targeting specific beneficiaries (e.g. farms with natural constraints, young and new farmers, mixed farms)
Leveraging the opportunities of innovation	<ul style="list-style-type: none"> ▪ additional farm income sources from a climate-neutral, nature-positive economy ▪ economically, environmentally and socially sustainable practices (e.g. organic farming; agroecological farming bioeconomy and circular economy carbon farming renewable energy production and delivery digitalisation)
Building an ambitious investment agenda	<ul style="list-style-type: none"> ▪ CAP support for investments promoting a modern, competitive, sustainable and resilient agricultural sector ▪ risk insurance schemes for primary producers ▪ public-private partnerships for promoting agri-food SMEs and value chains
Fostering entrepreneurship and generational renewal	<ul style="list-style-type: none"> ▪ addressing key barriers (e.g. access to land, investments, skills) ▪ developing a generational renewal strategy or national toolboxes (including e.g. retirement schemes, tax incentives)

Source: Own figure based on EC [2025a: 6-10].

4.3 Competitiveness priority

The competitiveness priority aims at: diversifying supply chains and promoting transformative resilience; a fairer global competition; preparedness and risk-proofing agri-food sector; supporting the resilience of agricultural markets; reducing bureaucratic and regulatory burdens to foster a competitive agri-food sector [see figure 3].

Figure 3: “Competitiveness” priority goals and exemplary measures

Competitiveness goals	Exemplary measures
Diversifying supply chains and promoting transformative resilience	<ul style="list-style-type: none"> ▪ diversifying supply chains ▪ reducing strategic dependencies (e.g. protein supply, imports of raw materials and fertilisers)
Fairer global competition	<p>Global and bilateral cooperation:</p> <ul style="list-style-type: none"> ▪ export of EU products ▪ agri-food economic diplomacy ▪ policy partnership dialogues <p>EU framework for a competitive agri-food sector:</p> <ul style="list-style-type: none"> ▪ SME and competitiveness check in policies ▪ production standards for imported products – particularly regarding hazardous pesticides and animal welfare ▪ protective tools for unfair and unlawful actions ▪ export credits ▪ policy simplification ▪ country of origin labelling
Preparedness and risk-proofing agri-food sector	<ul style="list-style-type: none"> ▪ reviewing and strengthening toolbox for EU risk and crisis management ▪ climate-relevant agricultural policies accounting for local, regional and national needs
Supporting the resilience of agricultural markets	<ul style="list-style-type: none"> ▪ long-term vision for a diverse and sustainable EU livestock sector (e.g. excellence livestock production chain).
Reducing bureaucratic and regulatory burdens to foster a competitive agri-food sector	<ul style="list-style-type: none"> ▪ simplification of agricultural frameworks ▪ simplification of cross-cutting legislative frameworks

Source: Own figure based on EC [2025a: 11-17].



4.4 Future-proofing priority

The future-proofing priority aims at decarbonisation combined with competitiveness, incentivising sustainability, farming and nature [see figure 4].

Figure 4: “Future-proofing” priority goals and exemplary measures

Future-proofing goals	Exemplary measures
Decarbonisation combined with competitiveness	<ul style="list-style-type: none"> ▪ agricultural activities which remove carbon from the atmosphere into soils and biomass while focusing on competitiveness, food security, bioeconomy ▪ effective policies and incentives which reward good practices and tailored approaches (e.g. promoting innovation and bioeconomy as well as healthy, affordable and sustainable food)
Incentivising sustainability	<ul style="list-style-type: none"> ▪ simplifying and streamlining EU requirements (e.g. recording sustainability data only once) ▪ developing a voluntary benchmarking system for on-farm sustainability assessments (e.g. bottom-up, participatory, consumer-driven)
Farming and nature	<ul style="list-style-type: none"> ▪ incentives and new market-based tools to promote a better implementation, streamlining and enforcement of existing legislation (e.g. by reducing the use of harmful pesticides, accelerating access to biopesticides, speeding up risk assessment for plant protection products). ▪ supporting agricultural practices which recover, maintain or improve soil health (e.g. support for organic farming and integrated approaches installing independent advisory services) ▪ addressing water scarcity, use, pollution, other challenges and resilience ▪ increasing nutrients circularity, managing nutrients from livestock farming, reducing the use of synthetic fertilisers

Source: Own figure based on EC [2025a: 17-20].

4.5 Connection priority

The connection priority aims at: fair living and working conditions across rural and coastal areas; reestablishing the link between farming, food, territory, seasonality, cultures, traditions [see figure 5].

Figure 5: “Connection” priority goals and exemplary measures

Connection goals	Exemplary measures
Fair living and working conditions across rural and coastal areas	<ul style="list-style-type: none"> ▪ policies addressing preconditions for vital rural areas and attractive employment in the food sector (e.g. making available adequate or better education, quality jobs, career opportunities, mobility, basic health services, connectivity) ▪ supporting mental health of farmers ▪ contributing to social, economic and territorial cohesion ▪ enhancing synergies and complementarities (e.g. coordination of funding) ▪ involving civil society and rural communities in policy discussions and implementation ▪ addressing disinformation ▪ advancing the circular bioeconomy in rural areas ▪ advancing the concept of functional rural areas (e.g. availability and affordability of services for rural citizens) ▪ providing specific support for outermost regions ▪ promoting women’s engagement and equal opportunities in farming ▪ discussing good practices
Reestablishing the link between farming, food, territory, seasonality, cultures and traditions	<ul style="list-style-type: none"> ▪ providing consumers access to trustworthy information ▪ respecting national/regional competences in health policy, freedom to choose ▪ strengthening community-led initiatives to foster dialogue and exchange good practices related to affordability and availability of healthy, high-quality food ▪ implementing an annual food dialogue with the food system’s actors (e.g. entire value chain, authorities, civil society) ▪ studying the impact of “ultra-processed foods” ▪ promoting short food supply chains, local and seasonal consumption, a “best value” approach in public procurement)



	<ul style="list-style-type: none"> ■ enhancing consumer awareness ■ promoting uptake of geographical indicators ■ developing business models strengthening every part of the value chain - regarding competitiveness, innovation, resilience and sustainability ■ facilitating SME networking and virtual innovation hubs ■ studying the impact of certain advertising and marketing practices on consumer health and well-being (e.g. on children) ■ inclusively discussing and promoting food innovation, factoring in social, ethical, economic, environmental and cultural aspects ■ accounting for new societal expectations (e.g. by revising animal welfare legislation and labelling) reducing food loss and food waste
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Source: Own figure based on EC [2025a: 20-24].

4.6 References to the bioeconomy

Since the agri-food sector produces, processes and consumes biomass, all 4 priorities are directly related to the bioeconomy. The EU Agri-food vision 2040 explicitly mentions the term “bioeconomy” 8 times, i.e. in the context of the priorities “attractiveness”, “future-proofing” and “connection”. Overall, the EU Agri-food vision 2040 takes the position that the (circular) bioeconomy offers notable potentials for agriculture, forestry, the entire food system as well as innovation and rural areas. [see figure 6]

Figure 6: Explicit references to the bioeconomy

Priority	Explicit reference to the bioeconomy
Attractiveness: innovation opportunities [EC, 2025a: 8]	<p>“bioeconomy and circularity offer a great potential for agriculture, forestry and the entire food system, as well as for reducing our critical dependencies. The new Bioeconomy Strategy, to be presented by the end of 2025, will aim at positioning the European Union as a global leader in the rapidly expanding bioeconomy market. We must accelerate the commercialization of bio-based and circular solutions, scale up breakthrough biotechnologies, capture emerging market opportunities and bridge investment gaps. This will be particularly beneficial for the farming community by enabling 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. The Commission will work with international partners, in particular through the Food and Agriculture Organisation (FAO), to together identify sustainable ways of mobilising the potential of the bioeconomy for farmers not only in Europe but also worldwide.”</p>
Future-proofing: decarbonisation and competitiveness [EC, 2025a: 18]	<p>“The Commission expects agriculture to achieve the emissions cuts in alignment with the EU climate target for 2030. Building on this, the Commission will consider pathways for the contribution of the agricultural sector to the EU’s 2040 climate target, taking into account the specificities of the sector and focusing on its competitiveness, the need to ensure food security and to strengthen the bioeconomy, and in dialogue with the sector and the Member States. This approach will be reflected in the review of the relevant legislation regulating GHG emissions and removals from the agriculture and the Land Use, Land Use Change and Forestry sectors. [...] Clear policies and incentives should be put in place to realise the innovation potential in the food system and the bioeconomy at large and to deliver healthy, affordable and sustainable food to EU citizens.”</p>
Connection: fair living and working conditions [EC, 2025a: 21]	<p>Furthermore, circular economy contains significant potential for the economy of rural areas, in particular through the bioeconomy. In the long-term Vision for rural areas, the Commission estimated that the further development of the bioeconomy will lead to the creation of 400,000 new highly skilled jobs by 2035 and up to 700,000 by 2050, mostly in rural areas.</p>

Source: Own figure based on EC [2025a].



5. Reflections on EU Agri-food vision 2040 and circular bioeconomy

Based on selected documents - i.a. the EU bioeconomy strategies [EC-DGRI, 2018; EC, 2025c], the EU Agri-food vision 2040 [EC, 2025a] and the policy analysis of circular bioeconomy measures [BIOECO-UP D.3.1.1] - the authors of this report exemplify through a brainstorming exercise some key aspects and commonalities between the EU Agri-food vision 2040 and the circular bioeconomy in general:

- The agri-food sector is a core sector in the (circular) bioeconomy.
- A notable part of the EU Agri-food vision 2040 and the circular bioeconomy identifies with or aspires elements or ambitions such as:
 - transition to sustainable systems (e.g. ecological, social, economic sustainability)
 - future orientation (e.g. succession)
 - use of research and innovation (e.g. technology, society, finance)
 - diversification of activities and sources of income (e.g. food, energy, services)
 - inclusion of smaller-scale entities (e.g. small-scale farms, SMEs, start-ups, lateral entrants)
 - participatory approaches including multiple actors (e.g. production, processing, trade, consumption, policy, science, civil society)
 - cooperation (e.g. along the value chain, across sectors, across borders)
 - activities in rural areas
 - targeted and tailored approaches
- At the same time, the agri-food sector as a part of the (circular) bioeconomy is confronted with certain challenges and limitations:
 - limited availability of land and resources in the required quantity and quality (e.g. materials, knowledge, skills, finance, infrastructure)
 - substantial resources required for the transition to a new system (e.g. finance, actions, time, skills, innovation, cooperation, materials)
 - changes to legal and institutional infrastructure required for the aspired transition
 - complex systems with a diversity of actors and often conflicting interests and priorities
 - long-term orientation, difficult to communicate concepts (e.g. the bioeconomy concept, CAP logic) and a lack of immediate visibility of interrelationships and effects (e.g. present actions and their effects in the future, own actions and their effects on overall society)
 - uncertainty (e.g. crises, shocks) and the need to make decisions based on incomplete information, resulting in risk and learning processes

At the BIOECO-UP A.3.1 policy workshop [BIOECO-UP D.3.1.3], experts discussed the bioeconomy in the context of the future CAP and identified some key findings: In the EU countries, the bioeconomy is developed to different stages, and CAP funding is already used for advancing the bioeconomy and implementing bioeconomy measures. Since EU countries have integrated markets, it is reasonable to coordinate activities and policies. More actors should be involved in the value chain (beyond primary production) for adding value. Cooperation is important (e.g. along the value chain, across sectors, across countries; e.g. for sharing best practices, exchanging knowledge). Ideally, policies and the institutional framework are coordinated and based on national needs and potentials (e.g. what producers can contribute). Developing bioeconomy policy is more sustainable if key positions in the managing authority remain the same over a longer period of time. There is a need for coordinating and integrating experience and knowledge at the policy-making level (e.g. through involvement of practitioners, businesses, researchers, education). There is also a need for developing coordination mechanisms and capacities for the bioeconomy (e.g. value chains, sectors, transnational action). [see annex A.2]



6. Compilation of bioeconomy measures and topics in different policy frameworks

The policy frameworks presented in this report have numerous thematic intersections and propose a wealth of measures [see figure 7]. Bioeconomy measures and topics may be analysed based on different foci, such as: topics addressed in all policy frameworks, measures to be implemented in the short run, cost-efficient measures, measures with sustainability gains, measures for a specific sector or value chain segment. According to different sources in the (circular) bioeconomy discussion, there is a preference or need for flexibility in the bioeconomy strategy and action plan as different countries have different endowments, strengths and agendas [e.g. EC-DGAgri, 2025a; BIOECO-UP A.3.4 round table AT].

Figure 7: Compilation of bioeconomy measures and topics in different policy frameworks

	EU Agri-food vision 2040 [EC, 2025a]
Priorities: <ul style="list-style-type: none"> ■ Priority goals 	Attractiveness: <ul style="list-style-type: none"> ■ Fair and equitable food chains ■ Fairer and better targeted CAP support ■ Leveraging the opportunities of innovation ■ Building an ambitious investment agenda ■ Fostering entrepreneurship and generational renewal
	Competitiveness: <ul style="list-style-type: none"> ■ Diversifying supply chains and promoting transformative resilience ■ Fairer global competition ■ Preparedness and risk-proofing agri-food sector ■ Supporting the resilience of agricultural markets ■ Reducing bureaucratic and regulatory burdens to foster a competitive agri-food sector
	Future-proofing: <ul style="list-style-type: none"> ■ Decarbonisation combined with competitiveness ■ Incentivising sustainability ■ Farming and nature
	Connection: <ul style="list-style-type: none"> ■ Fair living and working conditions across rural and coastal areas ■ Reestablishing the link between farming, food, territory, seasonality, cultures and traditions
	EU Bioeconomy strategy 2018 [EC-DGRI, 2018]
Objectives	<ul style="list-style-type: none"> ■ Objective 1: Ensuring food and nutrition security ■ Objective 2: Managing natural resources sustainably ■ Objective 3: Reducing dependence on non-renewable unsustainable resources ■ Objective 4: Mitigating and adapting to climate change ■ Objective 5: Strengthening European competitiveness and creating jobs
Action clusters: <ul style="list-style-type: none"> ■ Actions 	1 Strengthen and scale-up the bio-based sectors, unlock investments and markets: <ul style="list-style-type: none"> ■ 1.1 Mobilise public and private stakeholders, in research, demonstration and deployment of sustainable, inclusive and circular bio-based solutions ■ 1.2 Launch of the EUR 100 million Circular Bioeconomy Thematic Investment Platform ■ 1.3 Study and analysis of enablers and bottlenecks and provide voluntary guidance to the deployment of bio-based innovations ■ 1.4 Promote and/or develop standards and emerging market-based incentives, and improve labels applicable to bio-based products on the basis of reliable and comparable data on environmental and climate performance ■ 1.5 Facilitate the development of new sustainable biorefineries and confirm the type and estimated potential



	<ul style="list-style-type: none"> ▪ 1.6 Research and innovation investments for the development of substitutes to fossil based materials that are bio-based, recyclable and marine-biodegradable, and of bio-remediation methods by mobilising the key actors in the relevant value chains including the plastics value chain and to contribute to plastic-free, healthy and productive European seas and oceans
	<p>2 Deploy local bioeconomies rapidly across Europe:</p> <ul style="list-style-type: none"> ▪ 2.1 A Strategic Deployment Agenda for sustainable food and farming systems, forestry and bio-based production in a circular bioeconomy ▪ 2.2 Pilot actions to support local bioeconomy development (rural, coastal, urban) via Commission instruments and programmes ▪ 2.3 Set up an EU Bioeconomy policy support facility and a European Bioeconomy Forum for Member States ▪ 2.4 Promote education, training and skills across the bioeconomy States
	<p>3 Understand the ecological boundaries of the bioeconomy:</p> <ul style="list-style-type: none"> ▪ 3.1 Enhance the knowledge on the bioeconomy, including on biodiversity and ecosystems, to deploy it within safe ecological limits and make it accessible through the Knowledge Centre for Bioeconomy ▪ 3.2 Increase observation, measurement, monitoring and reporting capabilities and build an EU-wide, internationally coherent monitoring system to track economic, environmental and social progress towards a sustainable bioeconomy ▪ 3.3 Provide voluntary guidance to operate the bioeconomy within safe ecological limits ▪ 3.4 Better integrate the benefits of biodiversity-rich ecosystems in primary production through a specific support to agro-ecology, the development of microbiome-based solutions, and new tools to integrate pollinators in supply value chains
	<p>EU Bioeconomy strategy 2025 [EC, 2025c]</p>
Key action groups	<ul style="list-style-type: none"> ▪ Scaling up innovation and investments: From lab to deployment (8) ▪ Developing lead markets for materials and technologies (10) ▪ Securing long-term prospects for the bioeconomy: Sustainably sourced biomass (8) ▪ Harnessing global partnerships and opportunities (3) ▪ Joining forces for delivery: Member states, industry, investors and civil society (2) <p>For a full list of key actions, see this report annex A.6. (Total: 31)</p>
	<p>EU member states national bioeconomy strategies [EC-KCB, 2025: 4]</p>
Policy actions	<ul style="list-style-type: none"> ▪ Embed the bioeconomy into new legislative frameworks ▪ Revisit existing regulatory frameworks to include bioeconomy concepts/priorities ▪ Promote the establishment of intra-governmental groups to support policy coherence or collaboration amongst different bioeconomy stakeholders ▪ Promote labels and standards for bio-based products ▪ Promote public procurement of bio-based products ▪ Enhance land management for new production systems and ecosystem functions ▪ Promote specific bioeconomy sectors ▪ Promote the principles of “cascading use”, “circularity” and “resource efficiency” for biomass ▪ Enhance the knowledge on bioeconomy by setting-up knowledge hubs, observatories, information systems, web portals, conferences, etc. ▪ Implement specific studies (feasibility, impact assessments, land use, territorial development analyses, market analyses, foresight studies etc). ▪ Develop monitoring systems for the bioeconomy ▪ Promote communication campaigns for awareness raising (e.g. bioeconomy awards, information systems, events, etc.) ▪ Promote educational/training programmes ▪ Promote investments in bioeconomy research, innovation, market development ▪ Market incentives for bio-based production/consumption (e.g. subsidies, taxes)



	CAP 2023-2027	[EC, 2025f]
Key policy objectives	<ul style="list-style-type: none"> ▪ to ensure a fair income for farmers ▪ to increase competitiveness ▪ to improve the position of farmers in the food chain ▪ climate change action ▪ environmental care ▪ to preserve landscapes and biodiversity ▪ to support generational renewal ▪ vibrant rural areas ▪ to protect food and health quality ▪ fostering knowledge and innovation 	
	CAP 2028-2034	[EC-DGAgri, 2025a]
Components and other aspects foreseen	<ul style="list-style-type: none"> ▪ CAP income support: area-based income support, agro-environmental actions, on-farm investments (e.g. farm modernisation, diversification, uptake of new practices and technologies) ▪ CAP crisis support for farmers: Unity Safety Net ▪ National and Regional Partnership Plans: financing LEADER rural projects ▪ Competitiveness Fund: financing research and innovation in the agricultural sector ▪ safe and affordable food for consumers ▪ balanced mix of incentives, investments and obligations ▪ more flexibility for EU member states, accounting for diversity of farming sector and rural areas ▪ addressing sector-specific challenges ▪ a fairer and more targeted support for farmers, particularly young farmers ▪ a more flexible, results-driven policy, through simplification and tailored targeted support ▪ support for environmental action, climate action, farm resilience; through incentives, tailoring to local conditions and production systems, risk management, preventative measures, crisis payments, co-financed measures ▪ revision of the Common Market Organisation provisions (e.g. consumer education and awareness, new marketing standards for certain products, improving preparedness and availability of agricultural supplies during emergencies) 	

Source: Own figure based on EC [2025a; 2025f], EC-DGRI [2018], EC-KCB [2025], EC-DGAgri [2025a].



ANNEX

A.1 BIOECO-UP activities particularly relevant for A.3.2

All BIOECO-UP activities - particularly activities A.1.1 Mapping bioeconomy potential, A.3.1 Analysing circular bioeconomy measures and A.3.4 Shaping bioeconomy future - contribute discussions or results which are directly or indirectly relevant for activity A.3.2 Development of strategy and action plan for implementing bioeconomy measures.

BIOECO-UP activity A.1.1: Mapping bioeconomy potential

The national reports for the 8 BIOECO-UP countries (AT, CZ, HR, HU, IT, SI, SK, PL) addressed the national agriculture and food, forestry and wood as well as aquatic sectors with respect to: biomass availability; infrastructure and logistics; industrial initiatives; knowledge institutions and industry-relevant applied research; strategies and policies; biobased markets, competitive products, demand trends [see BIOECO-UP A.1.1: National reports]. A synthesis report transnationally analysed bioeconomy potentials and limitations [see BIOECO-UP D.1.1.1: Executive summary].

BIOECO-UP activity A.3.1: Analysing circular bioeconomy measures

Outputs of this activity were a bioeconomy policy workshop and lists of selected bioeconomy measures.

The transnational bioeconomy policy workshop was held online on 01.02.2024 and hosted by BAB. Experts discussed (circular) bioeconomy policy at the global, EU and BIOECO-UP national levels in the specific context of the EU's Common Agricultural Policy (CAP). They found that there is potential for: creating additional value-added in the sectors agriculture and food, forestry and wood, fisheries and aquaculture by using a higher proportion of sidestream biomass as resources in the bioeconomy; and for supporting the transition to a circular bioeconomy through the CAP framework. [see annex A.2; BIOECO-UP D.3.1.3]

The European Commission makes available a full list of CAP 2023-2027 interventions [EC-DGAgri, 2025b]. Out of the 809 interventions defined in total in the CAP strategic plans 2023-2027 of the 8 BIOECO-UP countries, the policy experts selected 69 interventions which are or can be used for advancing the (circular) bioeconomy. The list of selected CAP 2023-2027 interventions as well as a complete measures lists from national bioeconomy action plans of AT (113 measures) and IT (60 measures) were provided. [see BIOECO-UP D.3.1.3].

BIOECO-UP activity A.3.4: Shaping bioeconomy future

Selected national policy documents and important statements relevant for the future bioeconomy were reported for each BIOECO-UP country (AT, CZ, HR, HU, IT, SI, SK, PL). These reports served as an input for developing a bioeconomy vision for Central and Eastern Europe in the BIOECO-UP project. [see e.g. BIOECO-UP A.3.4 background documents AT report].

Moderated round table discussions in all BIOECO-UP countries brought together experts from research, policy, business and society (quadruple helix) to discuss key challenges and potential opportunities for the future circular bioeconomy and to contribute shared perspectives as a basis for developing a transnational Central European bioeconomy vision. [see e.g. BIOECO-UP A.3.4 round table AT report].



A.2 BIOECO-UP A.3.1 policy workshop key findings

The text below originates from BIOECO-UP deliverable D.3.1.1, Annex 4. Policy workshop:

The workshop dealt with bioeconomy-related activities, information and experiences at the policy level with a focus on how to support the bioeconomy through the national CAP strategies of the BIOECO-UP countries (AT, HR, HU, IT, PL, SI, SK). [...] The key findings listed below were formulated by the project partners (BAB) based on statements made by presenters and panellists during the workshop. It should be noted that this list is incomplete and it does not necessarily reflect a consensus of all represented experts. It does however indicate observations, experiences and information which the policy experts deemed important to share with other experts in this transnational workshop.

Bioeconomy concept:

- There is no common understanding of the concept of bioeconomy.
- Bioeconomy has its limitations (e.g. resource availability).
- Bioeconomy may contribute to solving societal problems.

Bioeconomy and the CAP:

- CAP funding may be used for implementing bioeconomy policy measures.

Bioeconomy, markets:

- EU countries have integrated markets, so it would make sense to coordinate activities and policies.
- For adding value, involve more actors in value chains (beyond primary production).
- Bioeconomy may be seen as an opportunity (e.g. for individual businesses, the economy as a whole).
- Cooperation is important (e.g. along the value chain, across sectors, across countries; e.g. for sharing best practices, exchanging knowledge).

Policy, institutional framework and coordination:

- Ideally, policy is based on national needs and potentials (e.g. what producers can contribute).
- Developing bioeconomy policy is more sustainable if key positions in the managing authority remain the same over a longer period of time.
- There is a need for coordinating and integrating experience and knowledge at the policy-making level (e.g. through involvement of practitioners, businesses, researchers, education).
- There is a need for developing coordination mechanisms and capacities for the bioeconomy (e.g. value chains, sectors, transnational action).

BIOECO-UP countries:

- In the BIOECO-UP countries, the bioeconomy is developed to different stages.
- Policy makers are interested in sharing knowledge and experiences transnationally.
- BIOECO-UP countries are looking for financing options for bioeconomy measures.
- All BIOECO-UP countries have an approved CAP strategic plan.
- BIOECO-UP countries intend to or are already making use of CAP funding for bioeconomy measures.

A.3 Data on agricultural biomass

EC-JRC [2025a] lists various sources providing data on agricultural biomass:

- „[Eurostat agriculture statistics](#) and related [analysis](#) provide reliable information on the EU agricultural sector.
- [EC Data and analysis](#) on agriculture offer up to date information on agricultural markets, the allocation of funding, and the economy of farms and rural areas.
- [EC Agri-Food Data Portal](#) displays data on national and European agriculture and CAP, provided by the EC's Agricultural and Rural Development Department.
- [FAOSTAT](#) provides free access to food and agriculture data for over 245 countries and territories and covers all FAO regional groupings from 1961 to the most recent year available.”



A.4 EU Bioeconomy Monitoring System

With the EU Bioeconomy Monitoring System, the EC-JRC [2025c] provides indicators for value chain steps, sustainability pillars and primary production sectors, arranged by: Headline Indicators, EU Bioeconomy Objectives, Bioeconomy and SDGs, Bioeconomy and Green Deal.” [see figure 8]

Figure 8: EU Bioeconomy Monitoring System dashboards overview

Headline Indicators	<ul style="list-style-type: none"> ■ Primary production systems: Management of primary production, Emissions from primary production, Value-added from primary sectors, Employment in primary sectors, Production of biomass ■ Trade ■ Waste and circularity: Food waste Biowaste Circularity or recovery ■ Secondary production systems: Uses of biomass, Employment in secondary sectors, Value-added from secondary sectors, Emissions from secondary sectors, Products ■ Ecosystem condition: Freshwater, Marine, Agricultural, Forest, Urban
EU Bioeconomy Objectives	<ul style="list-style-type: none"> ■ Ensuring Food and Nutrition Security ■ Managing Natural Resources Sustainably ■ Reducing Dependence on Non-renewable Unsustainable Resources ■ Mitigating and Adapting to Climate Change ■ Strengthening European Competitiveness and Creating Jobs
Bioeconomy and Sustainable Development Goals (SDGs)	<ul style="list-style-type: none"> ■ SDG 1: No Poverty ■ SDG 2: Zero Hunger ■ SDG 3: Good Health and Well-being ■ SDG 5: Gender Equality ■ SDG 6: Clean Water and Sanitation ■ SDG 7: Affordable and Clean Energy ■ SDG 8: Decent Work and Economic Growth ■ SDG 9: Industry, Innovation and Infrastructure ■ SDG 12: Responsible Consumption and Production ■ SDG 13: Climate Action ■ SDG 14: Life Below Water ■ SDG 15: Life on Land ■ SDG 17: Partnerships for the Goals
Bioeconomy and Green Deal	<ul style="list-style-type: none"> ■ Increasing the EU’s Climate Ambition for 2030 and 2050 ■ Supplying Clean, Affordable and Secure Energy ■ Mobilising Industry for a Clean and Circular Economy ■ Building and Renovating in an Energy and Resource Efficient Way ■ Accelerating the Shift to Sustainable and Smart Mobility ■ From ‘Farm to Fork’: Designing a Fair, Healthy and Environmentally-friendly Food System ■ Preserving and Restoring Ecosystems and Biodiversity ■ A Zero Pollution Ambition for a Toxic-free Environment ■ Mobilising Research and Fostering Innovation

Source: Own figure adapted from European Commission Knowledge Centre for Bioeconomy [EC-JRC, 2025c, knowledge4policy.ec.europa.eu/visualisation/eu-bioeconomy-monitoring-system-dashboards_en, 07.07.2025]



A.5 EU Bioeconomy strategy 2018 action plan

The EU Bioeconomy strategy 2018 includes an action plan of 14 actions [see figure 9; EC-DGRI, 2018].

Figure 9: EU Bioeconomy strategy 2018 actions and actors

Action Title	Who
1 Strengthen and scale-up the bio-based sectors, unlock investments and markets	
1.1 Mobilise public and private stakeholders, in research, demonstration and deployment of sustainable, inclusive and circular bio-based solutions	Commission, Member States, Regions and stakeholders
1.2 Launch of the EUR 100 million Circular Bioeconomy Thematic Investment Platform	Commission
1.3 Study and analysis of enablers and bottlenecks and provide voluntary guidance to the deployment of bio-based innovations	Commission
1.4 Promote and/or develop standards and emerging market-based incentives, and improve labels applicable to bio-based products on the basis of reliable and comparable data on environmental and climate performance	Commission and Member States/stakeholders
1.5 Facilitate the development of new sustainable biorefineries and confirm the type and estimated potential	Commission and Member States
1.6 Research and innovation investments for the development of substitutes to fossil based materials that are bio-based, recyclable and marine-biodegradable, and of bio-remediation methods by mobilising the key actors in the relevant value chains including the plastics value chain and to contribute to plastic-free, healthy and productive European seas and oceans	Commission, stakeholders
2 Deploy local bioeconomies rapidly across Europe	
2.1 A Strategic Deployment Agenda for sustainable food and farming systems, forestry and bio-based production in a circular bioeconomy	Commission, Member States, private sector, stakeholders
2.2 Pilot actions to support local bioeconomy development (rural, coastal, urban) via Commission instruments and programmes	Commission, Member States, regions, municipalities and other stakeholders
2.3 Set up an EU Bioeconomy policy support facility and a European Bioeconomy Forum for Member States	Commission and Member States
2.4 Promote education, training and skills across the bioeconomy States	Commission and Member States
3 Understand the ecological boundaries of the bioeconomy	
3.1 Enhance the knowledge on the bioeconomy, including on biodiversity and ecosystems, to deploy it within safe ecological limits and make it accessible through the Knowledge Centre for Bioeconomy	Commission, Member States, International Organisations, IPBES
3.2 Increase observation, measurement, monitoring and reporting capabilities and build an EU-wide, internationally coherent monitoring system to track economic, environmental and social progress towards a sustainable bioeconomy	Commission, Member States, private sector
3.3 Provide voluntary guidance to operate the bioeconomy within safe ecological limits	Commission
3.4 Better integrate the benefits of biodiversity-rich ecosystems in primary production through a specific support to agro-ecology, the development of microbiome-based solutions, and new tools to integrate pollinators in supply value chains	Commission, Member States, private stakeholders

Source: Own figure adapted from EC-DGRI [2018, COM(2018) 673 final, 07.07.2025]



A.6 EU Bioeconomy strategy 2025 key actions

The EU Bioeconomy strategy 2025 includes a set of 31 key actions [see figure 10; EC, 2025c].

Figure 10: EU Bioeconomy strategy 2025 key actions and timeline

Actions	Timeline	Actions	Timeline
SCALING UP INNOVATION AND INVESTMENTS: FROM LAB TO DEPLOYMENT		Improve green public procurement requirements and create lead markets for bio-based materials and clean strategic technologies through the revision of the EU public procurement legislation	Rolling
Adopt Biotech Acts	2025 3Q2026	SECURING LONG-TERM PROSPECTS FOR THE BIOECONOMY: SUSTAINABLY SOURCED BIOMASS	
Establish a European Bioeconomy Regulators and Innovators' Forum	1Q2026	Exchange good practices for local circular uses of animal by-products supported under CAP network	2027
Adopt standardisation requests for doors & windows, structural timber products/elements and ancillaries, wood-based panels and elements, thermal insulation products under the Construction Products Regulation	2026	Support biogas and biomethane production valorising bio-waste and residues and enabling the use of the co-produced digestate as bio based fertilising products through a tripartite agreement	2026
Support co-operation of primary producers to drive joint investments in innovative bio-based value chains through CAP investment support, sectoral interventions and the European Innovation Partnership	2026	Assess best bioeconomy practices and innovations to increase nitrogen use efficiencies in bioeconomy systems and value networks	As of 2026
Launch of a European Bioeconomy Investment Deployment Group	2026-2028	Issue guidance on circular business models	2027
Review the current CBE JU partnership arrangement, and identify the most effective and impactful future collaboration options under the next Multi-Annual Financial Framework	2026-2028	Improve data and modelling for monitoring biomass availability (relying on the Commission's Knowledge Centre for Bioeconomy)	As of 2026
Ensure that sustainable biomanufacturing and other bio-based economic activities are appropriately recognised in the upcoming revisions of the EU Taxonomy Delegated Acts	2026-2028	Launch of the blue bioeconomy innovation initiative and related Horizon Europe funding	2026-2027
Revise the Recommendation on the use of Environmental Footprint (EF) methods and provision of data	4Q2026	Incentivise data-driven approaches to the development of a sustainable bioeconomy: integration of Earth Observation (EO) data to monitor sustainable biomass availability and related land-use changes and biodiversity concerns.	2027
DEVELOPING LEAD MARKETS FOR MATERIALS AND TECHNOLOGIES		Develop an EU-wide repository of knowledge with practical, locally adapted guidance to support farmers, foresters, and land managers in improving biomass productivity, resilience to extreme weather, and the delivery of ecosystem services, including under the Mission Soil	By 2030
Analysis and exchange of best practices on cascading use with a community of practitioners within the EC Knowledge Centre for Bioeconomy	2026-2027	HARNESSING GLOBAL PARTNERSHIPS AND OPPORTUNITIES	
The Energy Union package for the decade ahead will take into account the experience gained by the implementation of the RED Directive including its sustainability and greenhouse gas emissions saving criteria, and technological developments in energy from renewable sources.	2026	Use the EU free trade agreements and other partnerships and international fora to advance cooperation on expanding market access for sustainable bioeconomy solutions. Identify and address regulatory and technical trade barriers to support investment in bio-based sectors	Rolling
Publish a report, in line with Article 3(3) RED, on the impact of Member States' support schemes for biomass, including on biodiversity, climate and the environment, and on possible market distortions.	2027	Work with selected partner countries to promote European innovation and build strategic partnerships and facilitate investments, incl. through Clean Trade and Investment Partnerships and Global Gateway	2026-27
Adoption of criteria, targets for bio-based plastics under the Packaging and Packaging Waste Regulation	2027	Advance global cooperation and streamline global governance on sustainable and circular bioeconomy,	Rolling
ESPR delegated acts on eco-design requirements for textiles and furniture, as announced in the first ESPR working plan	2027-2028	JOINING FORCES FOR DELIVERY: MEMBER STATES, INDUSTRY, INVESTORS AND CIVIL SOCIETY	
Continue standardisation work for bio-based construction products under the Construction Products Regulation	2026	EU bioeconomy dialogues with Member States on the implementation of the EU bioeconomy strategy, mobilisation of the Circular Economy and Bioeconomy Stakeholder Platforms, the European Board for Agriculture and Food (EBAF) and EU Bioeconomy Youth Ambassadors Programme.	As of Q12026
Support the development of industrial symbiosis valleys and bioeconomy hubs	As of 2026	Monitoring of the EU bioeconomy through the EU Bioeconomy Monitoring System economic and environmental aspects.	As of 2026
Launch the Competitiveness Coordination Tool including voluntary 'Bio-based Europe' Alliance	4Q2026		
Certification methodology for long-lasting carbon storage in buildings under the Carbon Removals and Carbon Farming (CRCF) Regulation	2026		

Source: Own figure adapted from EC [2025c, COM(2025) 960 final, 08.01.2026]



A.7 National bioeconomy strategies and actions overview

The text and figure below originate from a “Factsheet based on data from the Bioeconomy country dashboard of the European Commission Knowledge Centre for Bioeconomy” [EC-KCB, 2025: 4].

4. Policy actions in the strategies

Figure 4 provides an overview of the policy actions foreseen in the national bioeconomy strategies.

Across all countries considered, three common policy actions are consistently addressed:

- Encouraging investments in bioeconomy research, innovation, and market development.
- Supporting the principles of cascading use, circularity and resource efficiency for biomass.
- Promoting communication campaigns to raise awareness.

Figure 4: Overview of policy actions in national bioeconomy strategies per country.

Bioeconomy Strategies of Member States		AT	DE	EE	ES	FR	FI	IE	IT	LV	NL	NO	PT
Focus													
Policy actions	Embed the bioeconomy into new legislative frameworks					●			●				
	Revisit existing regulatory frameworks to include bioeconomy concepts/priorities	●	●	●		●	●	●	●	●	●	●	●
	Promote the establishment of intra-governmental groups to support policy coherence or collaboration amongst different bioeconomy stakeholders	●	●	●	●	●	●	●	●	●		●	●
	Promote labels and standards for bio-based products	●	●		●	●	●	●	●	●	●	●	●
	Promote public procurement of bio-based products	●	●	●	●	●	●	●	●	●	●	●	●
	Enhance land management for new production systems and ecosystem functions	●	●			●		●	●	●		●	●
	Promote specific bioeconomy sectors	●	●	●		●	●		●	●		●	●
	Promote the principles of "cascading use", "circularity" and "resource efficiency" for biomass	●	●	●	●	●	●	●	●	●		●	●
	Enhance the knowledge on bioeconomy by setting-up knowledge hubs, observatories, information systems, web portals, conferences, etc.			●	●	●	●	●	●			●	●
	Implement specific studies (feasibility, impact assessments, land use, territorial development analyses, market analyses, foresight studies etc).	●	●		●	●	●	●	●	●		●	●
	Develop monitoring systems for the bioeconomy		●				●	●	●		●	●	●
	Promote communication campaigns for awareness raising (e.g. bioeconomy awards, information systems, events, etc.)	●	●	●	●	●	●	●	●	●	●	●	●
	Promote educational/training programmes	●	●	●	●	●	●	●	●	●	●	●	●
	Promote investments in bioeconomy research, innovation, market development	●	●	●	●	●	●	●	●	●	●	●	●
Market incentives for bio-based production/consumption (e.g. subsidies, taxes)	●	●	●		●	●		●	●	●	●		

Source: European Commission Knowledge Centre for Bioeconomy [EC-KCB, 2025: 4]



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