BBI JU: The seed is planted and it is growing

BIC membership in figures

> **240 industry members** (including 40 large industries)

> **200 SMEs** (140 represented in SME clusters)

> **200 associate members** i.e. universities, RTOs, associations, etc

Sectors

Agriculture, food & feed

Aquaculture and marine

Chemicals and materials

Forestry and pulp & paper

Market actors incl. brand owners

Technology providers

Waste management

Mission

Build new *bio-based value chains* (develop new technologies, products and applications, optimise feedstock)

Create favourable business and policy climate to *accelerate market uptake*

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Impact of BBI JU (2014-today)

- ✓ **Mobilisation of private investment in Europe:** keeping knowledge and innovation, and investments in innovative production processes in Europe. Attract companies from outside EU to invest in innovation in Europe!
- ✓ **Growing interest for BBI grants,** including growing number of demo and flagship proposals
- ✓ **Development of new innovative value chains**: e.g. food industry collaborating with the chemical industry, the forestry and pulp & paper sector collaborating with chemical and textile industry, etc.
- ✓ **New industrial sectors are joining** e.g. by creating value from waste and side streams (food processing sector, aquatic/marine sectors, bio-waste, …). As a result we also observe a **wider geographical spread** throughout Europe.
- ✓ **Linking the industry to policies and initiatives** such as the Circular Economy Package and COP21.
- ✓ **Increased market focus**: participation of brand owners is key as they help to develop new applications and create new markets. Their involvement also shortens time to market for innovative bio-based products

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Impact of BBI JU (2014-today)

>140
expected new cross sector interactions
against a target of **36** by 2020

>100
expected new bio-based value chains
against a target of 10 by 2020

OUTPUT

933 beneficiaries
41% SMEs
32 countries
7 FLAGs

82 projects (well spread)
€ 500 million grant
€ 1.1 bn BIC contrib.

OUTCOME

> 140 new cross sector interactions

> 100 new bio-based value chains

Organise the value chains

Structuring effect

Mobilising effect

Reach critical mass

>60
expected new bio-based building blocks
against a target of 5 by 2020

>140
expected new bio-based materials
against a target of 50 by 2020

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BBI JU activities in Spain

Spain published its national Bioeconomy Strategy in 2016 and since then, three annual action plans on a yearly basis with the aim to transform the Spanish economy into a more sustainable one. Spanish bioeconomy has an annual turnover of approx. EUR 198 500 million and employs nearly 1 339 000 people.*

2/3 of beneficiaries are **research centers**

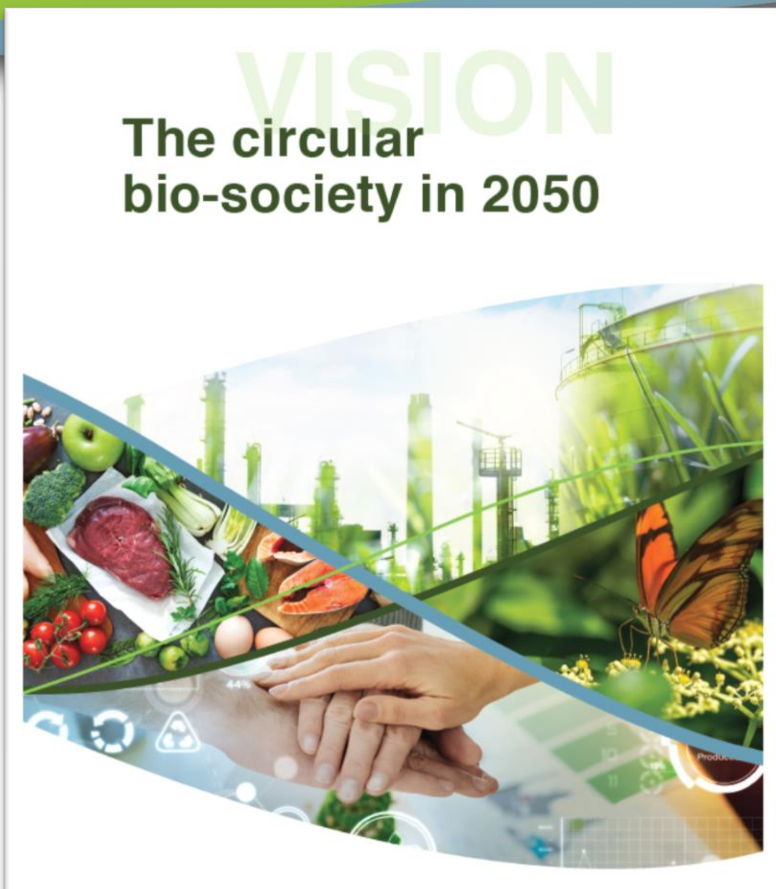
47% of BBI JU funding goes to **SMEs**

Nearly **1.3 million** people employed in the **bioeconomy sector**

Source: https://www.bbi-europe.eu/sites/default/files/Spain.pdf

Vision "The circular bio-society in 2050"

Additional sectors & widening value chains



By 2050, Europe will have a **sustainable** and **competitive** bio-based industry providing jobs and growth that contribute to a **circular bio-society**. In this circular bio-society, **informed citizens** choose a sustainable way of life, supporting an economy that couples economic growth with **societal well-being** and respect for the **environment**.

March 2013

May 2017

→ **2020**

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Mobilising stakeholders

BIC is driver to widen scope of BBI in line with EC vision

*This Vision is the result of **the collective work** by the Bio-based Industries Consortium (BIC) and its members, the BBI JU's advisory bodies: the States Representatives Group and Scientific Committee, and the following organisations:*

- ✓ **European Bioeconomy Alliance (EUBA) and its members:**
  - ✓ **Confederation of European Forest Owners (CEPF);**
  - ✓ **Confederation of European Paper Industries (CEPI);**
  - ✓ **European Association for Bioindustries (EuropaBio);**
  - ✓ **European Association of Sugar Producers (CEFS);**
  - ✓ **European Bioplastics (EUBP);**
  - ✓ **European Farmers and European Agri-Cooperatives (Copa-Cogeca);**
  - ✓ **European Renewable Ethanol Producers Association (ePURE);**
  - ✓ **European Starch Industry Association (Starch Europe);**
  - ✓ **European Vegetable Oil and Protein Meal Industry (FEDIOL);**
  - ✓ **Forest-based Sector Technology Platform (FTP)**
  - ✓ **Primary Food Processors (PFP))**

- **European Agricultural Machinery Industry (CEMA)**
- **European Chemical Industry Council (Cefic)**
- **European Technology Platform 'Food for Life'**
- **European Technology Platform for Sustainable Chemistry (SusChem)**

The Institute for European Environmental Policy (IEEP) has been consulted in this process.

A new BBI JU under Horizon Europe

A strategic Research and Innovation Agenda as the basis for a new PPP

SIRA: important tool to realise and implement **four** pillars of Vision with involved stakeholders (primary producers, industry, academia, EU, society)

1

Foster food security for a growing world population and meet demand for sustainable products

Through integrated, efficient production of food, feed, bio-based products, services and energy with minimal environmental impact.

2

Contribute to a sustainable planet

With carbon-neutral value chains, using natural resources optimally, protecting the environment, adding value to society and the economy.

3

Create jobs and growth in the circular bioeconomy

With value chains that mobilise available and potential local feedstock, making products that meet demand and benefit all actors.

4

Achieve a circular bioeconomic society

Through effective networks of innovation and knowledge centres, connecting industrial actors, investors and municipalities across boundaries of geography and competence, with informed and participating citizens.

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A new BBI JU under Horizon Europe

We are not yet there…

- **Huge and still risky investments**
  - ✓ Issues accessing private capital
  - ✓ Remaining funding gaps in Demo and Flag
- **Structuration still ongoing: market and demand risks**
- **Some areas not yet covered enough**
  - ✓ Farmers participation
  - ✓ Full feedstock potential
  - ✓ Geographic coverage
  - ✓ …
- **Brand owners and retailers participation**
- **Sector request coherent, supportive and stable regulatory framework**
- **Better tell the story of BioEconomy & Bio-Based products: Consumer awareness, education**
- **Go beyond "fossil to biobased" story: climate mitigation, water quality, human and animal health, biodiversity…**

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Thank you!!

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