## The Bioeconomy in 2019

Bernard de Galembert

Sugar Sector Social dialogue 29 January 2019

The Confederation of European Paper Industries

- 1. About the European Bioeconomy Alliance
- 2. The context
- 3. What do we mean in the EU
- 4. Key elements of the revised EU strategy
- 5. Addressing the SDGs and the circularity ambitions
- 6. A few policy messages



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## Creation of the European Bioeconomy Alliance (EUBA)

### Launch

February 2015 in the European Parliament

### Vision

A competitive, innovative, energy secure and sustainable Europe : leading the transition towards a **post-petroleum** society while **decoupling** economic growth from resource depletion and environmental impact.



European Bioeconomy Alliance



## Members of the Alliance

The European Bioeconomy Alliance is an informal alliance of leading European organisations representating the agricultural and forestry innovative value chains of the bioeconomy:

- BIC Bio-based Industries Consortium
- CEFS European Association of Sugar Producers
- CEPF Confederation of European Forest Owners
- CEPI Confederation of European Paper Industries
- COPA-COGECA European Famers and European Agri-Cooperatives
- ePURE European Renewable Ethanol Producers Association
- EuropaBio The European Association for Bioindustries
- European Bioplastics European Bioplastics Association
- FTP Forestry Technology Platform
- PFP Primary Food Processors
- Starch Europe European Starch Industry Association





## Objectives of the European Bioeconomy Alliance

- To bring the stakeholders of the value chain together.
- To continue the work started of promoting the bioeconomy as members of the Public Private Partnership on Bio-based industries.
- To make bioeconomy a priority at EU level.
- To transmit common messages on the importance of the bioeconomy for EU economy.
- To come with proposals of policy asks and tools to boost bioeconomy in EU.





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# The reality

NATIONAL GEOGRAPHIC

PLANET OR PLASTIC?

18 billion pount of plantic ends to in the ocean eac year. And that just the tip of the icebarg.

## The reality

### 

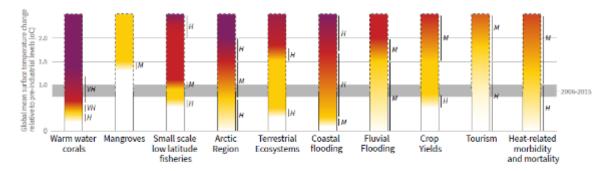
### Global Warming of 1.5°C

Av IPCC queriel report on the expects of global essence of 1.1.5/C elease pre-extential leasts and related global generations per entering otherapy, in the connect of conceptioners the global engineers to the thread clobal information instantiation investments and efforts to standinate providy.



2.0 Observed monthly global mean surface temperature Estimated anthropogenic warming to date and 1.0 likely range. Likely range of modeled responses to stylized pathways Global CO2 emissions reach net zero in 2055 while net non-CO2 radiative forcing is reduced after 2030 (grey in b, c & d) 0.5 2017 → III Faster CO₂ reductions (blue in b & c) result in a higher probability of limiting warming to 1.5°C → I No reduction of net non-CO₂ radiative forcing (purple in d) results in a lower probability of limiting warming to 1.5°C 2000 2020 2040 2060 2060 1960 1980 2100

#### Impacts and risks for selected natural, managed and human systems



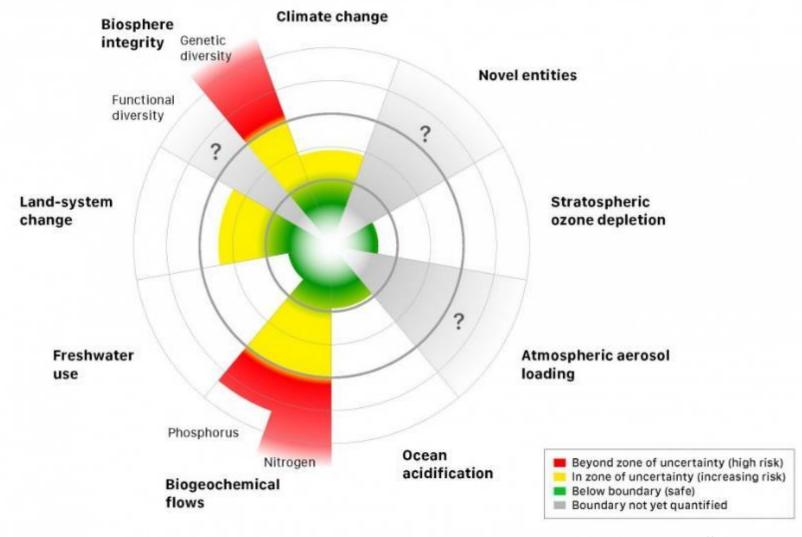
Confidence level for transition: L=Low, M=Medium, H=High and WI=Very high



IPCC, Global Warming of 1.5°C

Global warming relative to 1850-1900 (°C)

## The reality



cep

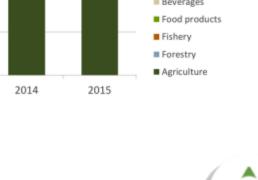
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## What is "bioeconomy" in the EU?

- All sectors and systems that produce, process and use biological resources
  - > Ecosystems on land (fields, forests) and sea
  - > Primary production systems (agriculture, forestry, fisheries)
  - > Waste/side-streams collection and recycling
  - > Food, feed, fibre, chemicals, energy ...
- More than biotech
- ≠ "organic"

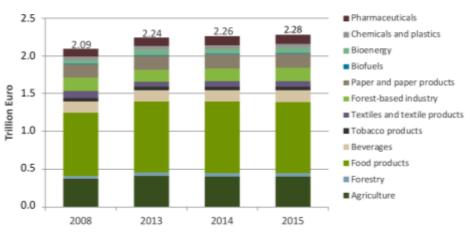


#### Source: Nova Institut – BIC 2018

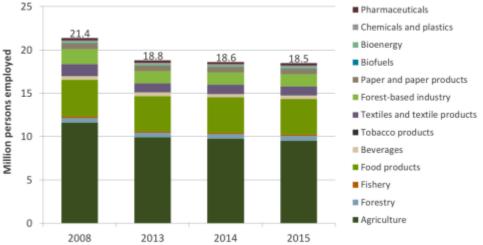


### Turnover in the bioeconomy in the EU-28, 2008-2015

The bioeconomy in figures



#### Employment in the bioeconomy in the EU-28, 2008-2015





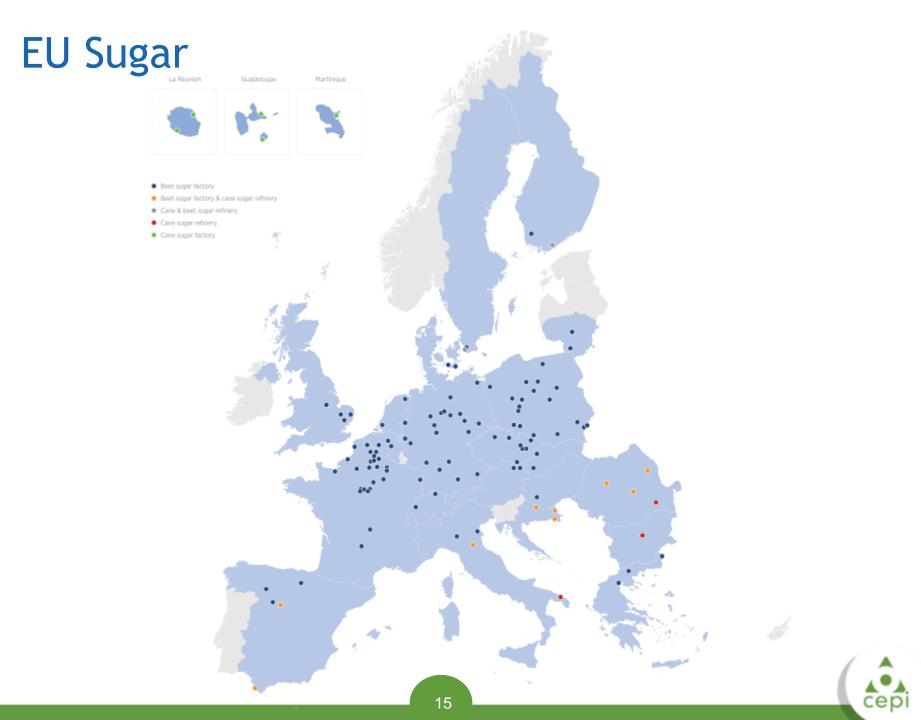
## Biorefineries at the core of the bioeconomy

Map of biorefineries producing bio-based chemicals, liquid biofuels and composites and fibres in the EU



Source: JRC 2018

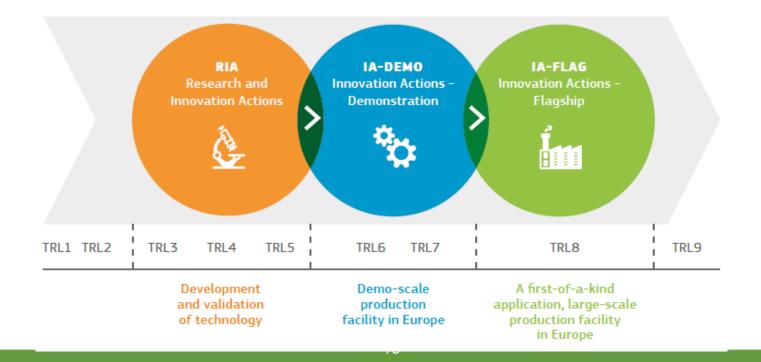




# **Bio-based Industries JU**



- Institutional public-private partnership
- € 3.7 billion (EU: 975 mio Private: 2.7 bio)
- 800 participants



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## Key elements

### **Working assumptions**

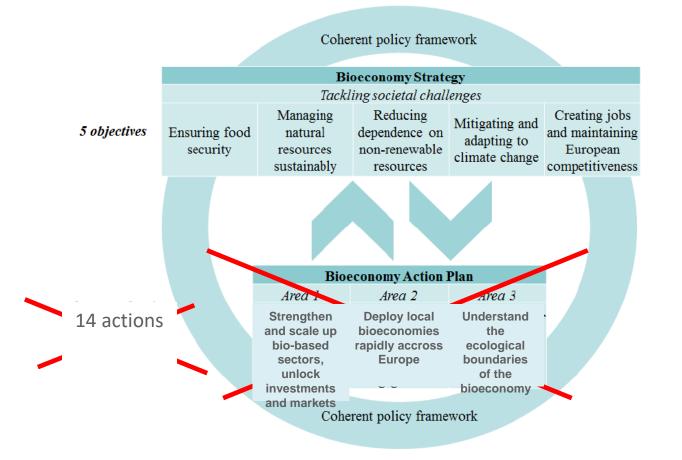
- Natural resources are limited
- The bioeconomy must be sustainable and circular

### Potential benefits by 2030

- 1 million new jobs
- 300 new biorefineries
- 50% less food waste
- zero-plastic oceans
- Land degradation neutrality



## **Objectives and priority areas**





## 3 pillars and 14 actions

Boost bio-based sectors,	Boost local bioeconomies	Care for nature and the
investments and markets		environment
Mobilise stakeholders, in development and deployment of bio-based solutions	Strategic deployment agenda for sustainable food and farming systems, forestry and bio-based production	Knowledge on the bioeconomy, including on biodiversity and ecosystems.
EUR 100 mio Circular Bioeconomy Thematic Investment Platform	Pilot actions to support local bioeconomy development	Increase observation, measurement, monitoring and reporting capabilities
Unlock and guide the deployment of bio-based innovations	EU Bioeconomy policy support facility and a European Bioeconomy Forum	Good practices to operate the bioeconomy within safe ecological limits
Promote standards, labels and market uptake of bio- based products	Promote education, training and skills	Enhance the benefits of biodiversity-rich ecosystems in primary production
New sustainable biorefineries		
Substitutes to fossil-based materials/plastics		

LUN

## National strategies



The Spanish Bioeconomy Strategy 2030 Horizon



BIT



Groene Groei Van biomassa naar business



**Bioeconomy in Flande** 





bloeconomy\*

Federal Minist of Education and Research

National Research Strategy BioEconomy 2030 Our Route tours ste a biobase



### UNE STRATÉGIE BIOÉCONOMIE POUR LA FRANCE Enjeux et vision



Swedish Research and Innovation Strategy for a Bio-based Economy









Un'opportunità unica per riconnettere AMBIENTE, « ECONOMIA e SOCIETĂ



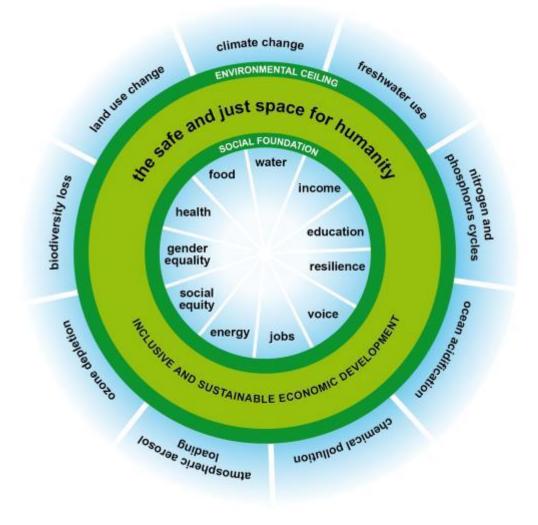


Future Opportunities for Bioeconomy in the West Nordic Countries



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## Operate in a just and safe space ...



Kate Raworth



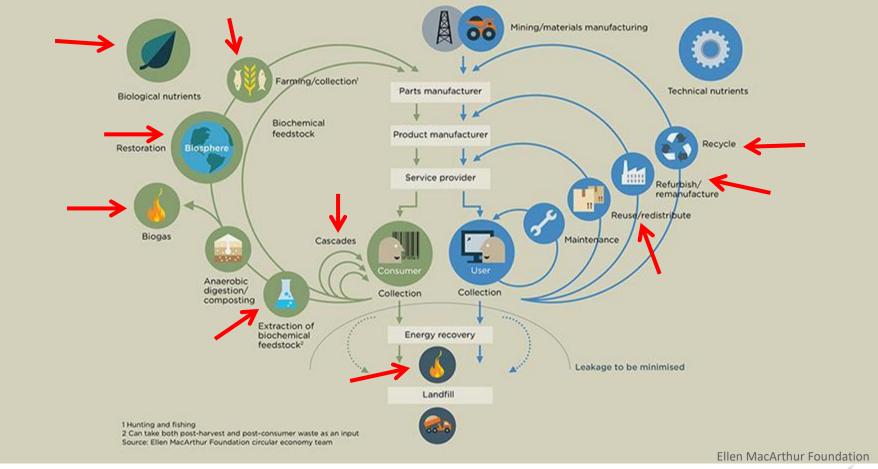
## ... to meet the SDGs (examples)

- Use of Biostimulants; benefits of co-products from biofuel production (SDG 2)
- Woody biomass residues as energy feedstock project 'uP running'; use of enzymes to turn household waste to biogas (SDG 7).
- Modern biorefinery using of locally grown thistle MATRICA project (SDG 8)
- 1,000 new jobs and up to €325 million additional private investments AGRICHEMWHEY project (**SDG 9**)
- Bio-based beverage carton manufactured entirely from renewable materials - Tetra Rex<sup>®</sup> Bio-based (SDG 12)
- Timber frame for a carbon-neutral 10 story complex in London (SDG 13)
- From brownfields to sustainable agricultural production INTENSE project (SDG 15)
  17 FORTHE EQUALS
  15 LIFE ON LAND
- BBI JU and partnerships (SDG 17)



## Bioeconomy is circular by nature

We are here ...





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## Enabling conditions ...

- Mainstreaming the bioeconomy
- Raw materials availability and competition (virgin, recycled and waste)
- Sustainable sourcing
- Reduced/zero land-use impacts
- Low to No Regulatory risk
- Investments support/de-risking
- Carbon neutrality/benefits
- Facts and data vs. risk of deceptive claims
- Awareness raising and communication

# .. to deliver ....







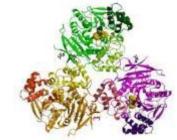


























# .. and much more



## Thank you

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