



Bio-based Industries Consortium

The Bio-based Industries Consortium (BIC) is a non-profit organisation connecting industry, academia, regions and citizens to transform bio-based feedstocks into novel sustainable products and applications, and create circular bioeconomy ecosystems through investments, innovation and know-how.

240+
industry (full) members

large companies and SMEs

200+
associate members

research organisations, academia and trade associations



1	CBE JU	2	Business
①	BIC represents the private sector in a public-private partnership with the European Commission called the Circular Bio-based Europe Joint Undertaking	①	Facilitating connections and providing market intelligence through activities including networking events and commissioned reports/studies
3	Finance	4	Society
①	Mobilising public and private finance and investors through services such as a regional funding platform and a pitching event	①	Increasing awareness, knowledge, acceptance and education through activities such as a student competition (BISC-E) and positive impact stories on the BIC Investment Portal



BIC also carries out specific activities to achieve a favourable policy, regulatory and financing framework for the bio-based industries, such as representing our members interest vis-à-vis the EU Institutions.



1.

The EU must act to maximize the potential of the bioeconomy for a circular, climate-neutral and green economy

The bioeconomy can play a fundamental role in **defossilising the materials and chemicals sector** and in creating sustainable carbon cycles.

This **opportunity is currently underutilised** and could be increased by using (carbon from) a diverse range of renewable feedstock, including biomass, bio-waste, recycled bio-based materials and CO₂. To reduce the use of new virgin fossil feedstock, the current EU policy focus on recycling of fossil-based carbon is not sufficient.

The bioeconomy enables a truly circular and climate neutral economy by ensuring that the renewable **carbon is kept in the loop** over the entire product life cycle – and can be recycled again or returned to the soil.

The bioeconomy is **continuously innovating** to manufacture and recycle products more efficiently, thereby growing the green economy in the EU.

2.

The EU must ensure the reliable supply of sustainably sourced biomass by providing a coherent, long-term policy framework for the circular bioeconomy

Biorefineries efficiently transform and valorise biomass into food, feed, products, and energy. They are at the core of the bioeconomy, delivering sustainable solutions, jobs and rural development, in line with society's needs.

Investing in and building new modern/innovative biorefineries is a long-term and capital-intensive undertaking. Their profitability is bound to their capacity to serve different markets across food, feed, and industrial sectors simultaneously, and to efficiently create value from all fractions of different renewable feedstocks.

The bioeconomy nurtures and preserves healthy and resilient ecosystems, which are crucial for the EU's transition to a climate-neutral economy and for safeguarding biodiversity. Virgin feedstock, by-products, recycled streams, and waste are all crucial feedstocks for the development of bioeconomy. They are complementary pathways to defossilising the EU economy.

3.

The EU must create and expand market opportunities for bio-based products to spur innovation, sustainable growth and secure strategic autonomy

The bioeconomy supplies bio-based products which are largely sourced, manufactured, used and recycled in Europe. Growing the market for bio-based products enhances Europe's strategic autonomy.

For the bio-based industry to be able to meet European consumers' demands for a sustainable lifestyle and associated products, the EU regulatory framework should promote and accelerate the market entry of sustainable innovations and boost the necessary investments.

The EU must develop its own bold bioeconomy action plan to respond to investments and incentives in the US, China and elsewhere.

● Moving forward

BIC Policy Recommendations



To achieve the maximum potential of the bioeconomy for a circular, climate-neutral and green economy, the EU should:

- Develop a **dedicated and long-term policy framework** for the circular bioeconomy to transition into a strategic industry sector, and contribute to the EU's ambitious policy objectives, in consideration of the EU Leads Market Initiative.
- Appoint a **high-level EU policy coordinator** reflecting the cross-sectoral nature of the bioeconomy, e.g., a dedicated European Commissioner, or a cabinet member of the European Commission President.
- Create a **level playing field** for the contribution of carbon from renewable feedstock, by accounting for their key contribution to the substitution of virgin fossil raw materials.
- Establish and use a science-based **definition for renewable carbon** consistently in EU legislation.
- Promote practical **evidence-based criteria** when meeting End-of-Waste status, and for extended producer responsibility (EPR) and labelling, and relevant to the product groups considered. Foster the collection and valorisation of **bio-waste**.
- Support **policies that focus on the safety and sustainability of the end-product**, not on the processes used to produce them. Policies should be **technology neutral** across production methods (such as biotech, fermentation, extraction) and in recycling options (mechanical, chemical, organic and/or a combination).
- Apply a holistic Life-Cycle Analysis approach, including scientifically sound **sustainability criteria**, that fully take into account the benefits of carbon from renewable feedstock e.g. in current methods used for Life Cycle Assessments and Product Environment Footprints.

● Moving forward

BIC Policy Recommendations

2

The EU should unlock the innovation potential of the circular bioeconomy by:

- Undertaking a **systemic assessment** of legislation impacting the availability and use of biomass, including cumulative impacts, inconsistencies, and gaps.
- Ensuring a high-value use of biomass in line with the **cascading use principle**.
- Consistently applying scientifically sound **sustainability criteria** for using biomass.
- Harnessing reliable, comparable, and science-based data on **land use trends** to inform location-appropriate policymaking: the circular bioeconomy includes many diverse ecosystem services across the EU and beyond. One-size-fits-all solutions should be avoided.
- Establishing a regulatory framework for **reducing the dependence from virgin fossil feedstocks** in chemicals and materials including delivering proposals to achieve the 20% reduction target for plastics and chemicals in the EU Communication on Sustainable Carbon Cycles.



● Moving forward

BIC Policy Recommendations

3

For Europe to fully capitalise on the opportunity to transition from fossil to renewable resources, we must:

- Create **incentives for the use of renewable feedstocks**, materials and products including financial instruments and public procurement; and through sustainability labelling and reporting.
- Ensure that the lifecycle effects of fossil-based production are fully accounted for and create a **level playing field** for renewable feedstock.
- Ensure targeted and coherent support for **scaling-up bio-based innovation**, including creating synergies between funding schemes (private, public, national, regional, EU) and faster permitting for first-of-a-kind biorefineries.
- Better enable deployment of bio-based innovation through specific forms of experimentation e.g. **regulatory sandboxes, living labs, test beds**, etc.



- Ensure **faster market-entry** of bio-based innovation through efficient product approval and evaluation mechanisms.
- Set-up **public-private partnerships** for the bio-based industry, for example under the 10th EU R&I Framework programme and/or via Important Projects of Common European Interest.

● Conclusions

The bioeconomy is part of the solution to master the green transition

The bioeconomy has a much greater economic potential than the current share of the EU economy. New materials and products with unique properties can create new markets and growth opportunities. The bioeconomy can also contribute to other societal objectives, in particular to climate and environmental objectives by 2050. The circular bioeconomy is part of the solution, it can power a climate-neutral, sustainable, resilient and competitive Europe.

But this cannot happen by itself.

EU policymakers must take action to realise the full potential of the circular bioeconomy to reach the EU's environmental, economic and social goals.



Europe must build on the strength of its bioeconomy. With a turnover EUR 2.5 billion (of which ca. 30% is in the bio-based industries), the sector provides employment to nearly 18 million people. The bioeconomy, with biorefineries at its core, supplies bio-based products which are largely sourced, manufactured, used and recycled in Europe. The science is excellent across academia and universities. Thousands of European companies are active and at the forefront of bio-based innovation.

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