

EU Policies linked to forest-based bioeconomy

Forest Academy for EU Decision Makers
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EU Bioeconomy Strategy Lead Markets

LEAD MARKETS FOR MATERIALS:

- **Bio-based construction products**
- **Bio-based fibre-packaging materials**
- **Bio-based plastics and polymers**
- **Textiles from bio-based fibres**
- **Bio-based chemicals**
- **Bio-based fertilizers**
- **Bio-based plant protection products**

LEAD MARKETS FOR TECHNOLOGIES:

- **Biorefineries**
- **Bio CCUS**
- **Advanced Fermentation**

- ✓ **Substitution of fossil feedstock and carbon removal**
- ✓ **Efficiency and circularity**
- ✓ **Resilience and strategic autonomy**
- ✓ **Scale-up and innovation**



CAP Support for Bioeconomy

Bioeconomy Strategy Key Action:

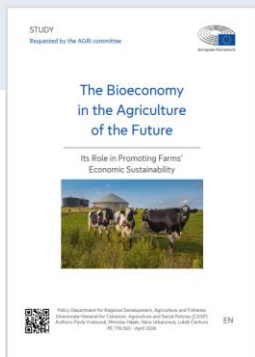
“Support cooperation of primary producers to drive joint investments in innovative bio-based value chains through CAP investment support, sectoral interventions and the European Innovation Partnership (EIP-AGRI)”

CAP 2023-2027:

- **EUR 5.6 billion** total public expenditure planned in 44 bioeconomy-labelled interventions (material use and biogas/biomethane) in 20 Member States
- **EUR 4.2 billion** total public expenditure planned in 180 forestry related interventions in 23 Member States

CAP 2028-2034:

- **mobilize Synergies between CAP, NRP and ECF**



ACTIVITIES & DELIVERABLES

CAP Investment support (on-farm, cooperative/joint investments) under Art 73 CAP-SP Regulation (future Article 13 CAP Regulation)

Support for investments of producer organisations under relevant sectoral interventions: up to 5% of direct payment envelope in any sector

EIP-AGRI support for cooperation projects for innovation through operational groups: planned EUR 1.6 billion (2023-2027), EUR 360.000 median budget support per operational group



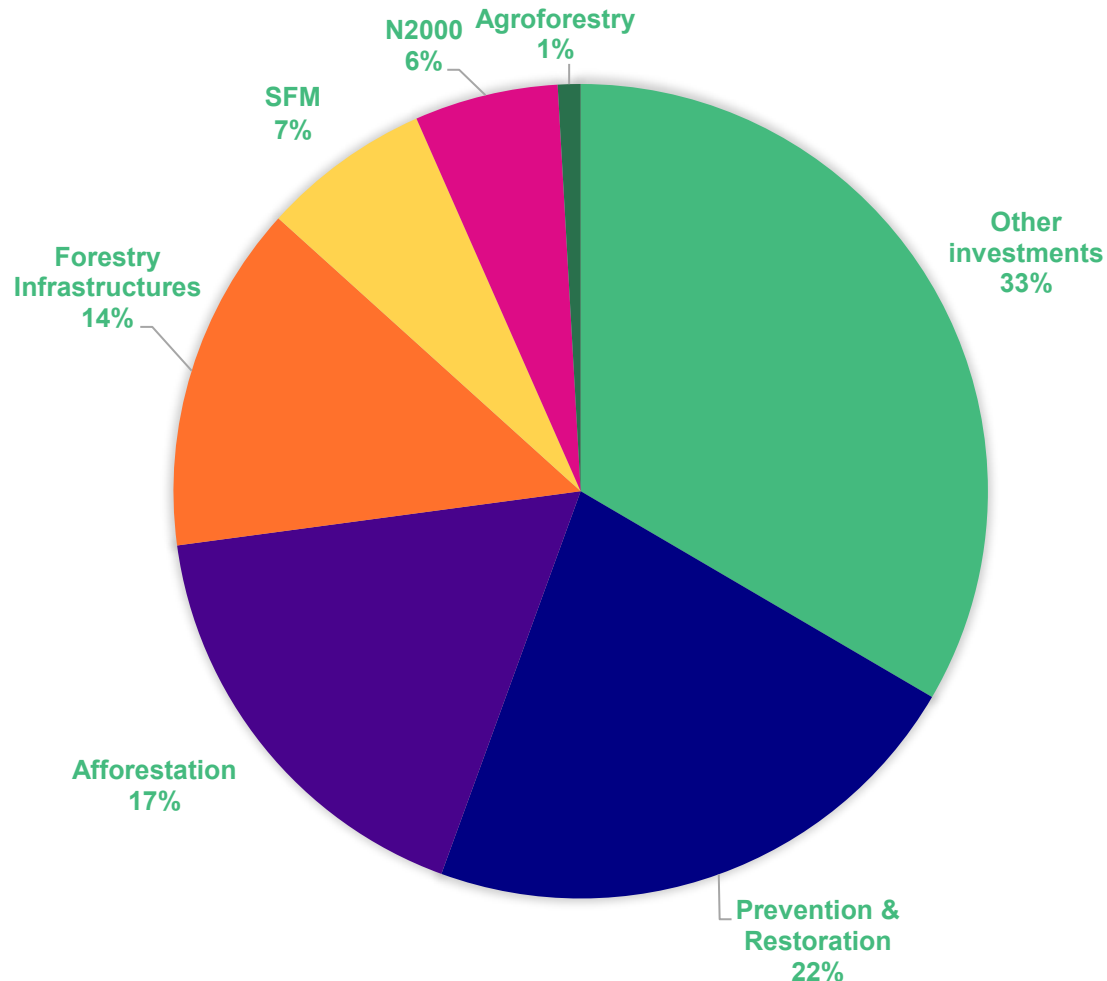
Upcoming activities:

- **Focus Group on Forest wildfire prevention**
- **Workshop on Agroforestry**
- **Workshop on Soil carbon sequestration**



Forestry in the CAP 2023-2027

EUR 4.2 BILLION TOTAL CAP FORESTRY BUDGET PLANNED



MS PLANNING PER CATEGORY:

- ❑ **Afforestation:** BG, CY, CZ, DE, DK, EL, HU, IT, LV, LT, MT, PL, PT, RO, SK, ES (16 MS)
- ❑ **Agroforestry:** BE-FL, CZ, HU, IT, PL, PT, SK, ES (8 MS)
- ❑ **Prevention & Restoration:** BG, CY, CZ, DE, EL, HU, IT, LV, LT, PT, SK, SI, ES (13 MS)
- ❑ **Infrastructure:** AT, BE-W, CY, CZ, HR, FR, DE, IT, LV, PT, SK, SI (12 MS)
- ❑ **Other investments (machinery, stand conversion, etc)** : All 22 MS
- ❑ **SFM:** BG, CZ, DK, DE, EL, HU, IT, LV, PT, RO, SK (11 MS)
- ❑ **Natura 2000:** BE-W, BG, HR, EE, DE, EL, HU, IT, LV, LT, PT, SK, ES (13 MS)



Horizon Europe Co-funded European Partnership (2026–2036)

European Partnership for FOrests, forestry, and the forest-based sector: REsearch and innovation for a Sustainable Transition

- **100 organisations across 28 countries, 7 joint calls, 200–250 projects,**
- Expected overall budget of ca. **EUR 235 million** (incl. EUR 70 million from the EU)
- **First Joint Call** open since **15 September 2026** bringing together 36 Research Funding Organisations from 27 countries,
- with an indicative total public funding commitment of up to **€40 million**
- **TOPIC 1 – Climate-Resilient Forest Systems**
- **TOPIC 2 – Adaptive and Multifunctional Forest Management Systems**
- **TOPIC 3 – Timber and Innovative Wood-Based Products**
- **TOPIC 4 – Forest Value Chains, Markets and Governance**
- Partnering workshop, Brussels: 30 September
- Online networking webinar: 6 October
- **Call closes: 02 December 2026 (13:00 CET)**
- <https://forest-partnership.eu/jointcall2026/>



ACTION: BIO-BASED EUROPE ALLIANCE

INVESTMENT COMMITMENT TARGET

EUR 10 Billion
by 2030

Bringing together EU companies committed to collectively purchasing bio-based materials, products and applications.

ASSOCIATED DGS:

ENV

AGRI

ACTIVITIES & DELIVERABLES

Q2 2026

Scoping dialogues with companies and Member States

10/06/2026

Call for interest launched

21 OCT. 2026

Public launch at the Global Bioeconomy Summit during the Irish Presidency

2027-2028

Scaling up of offtake agreements

STATE OF PLAY

discussions with corporates and business partners

CBE JU, Horizon Europe, EIB, ECF

Circular Bio-based Joint Undertaking (CBE JU)

- EUR 185 million invested on primary production (2022-2025)
- CBE JU Working Group on Primary Producers (2025-2028)

Horizon Europe Cluster 6 & Mission Soil

- EUR 3.5 billion (2014-2024) invested in healthy soils, agriculture, forestry, rural areas
- New Strategic Approach on R&I for agriculture, forestry, rural areas and food systems, Q3/2026
- Agriculture Research & Innovation Conference, 24/25 September 2026

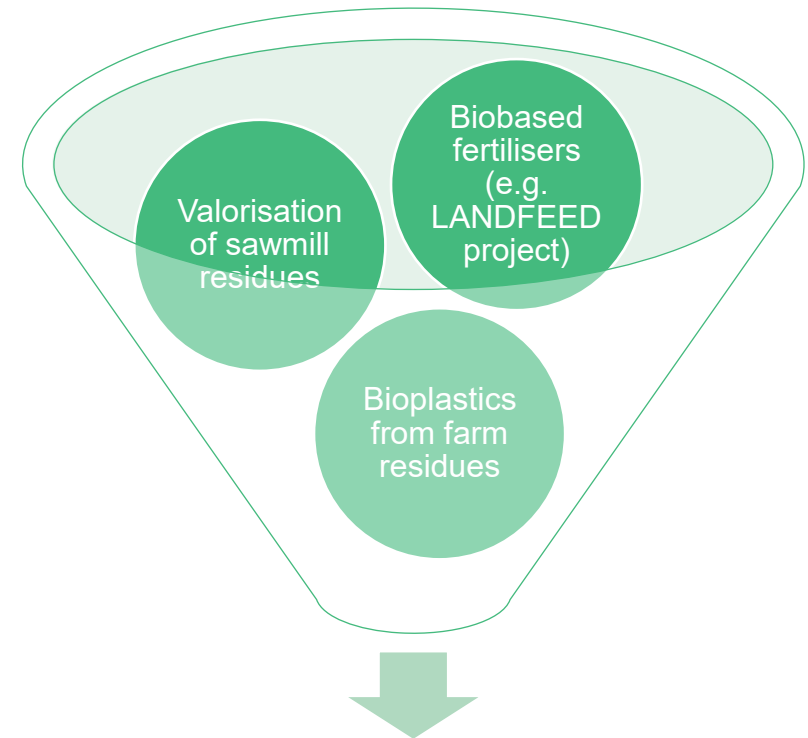
EIB

- Financing gap in agriculture: EUR 62 billion
- EIB fi-compass reports: agro-food tech, insurance & agricultural catastrophe risk, blending of resources (2026-2027)

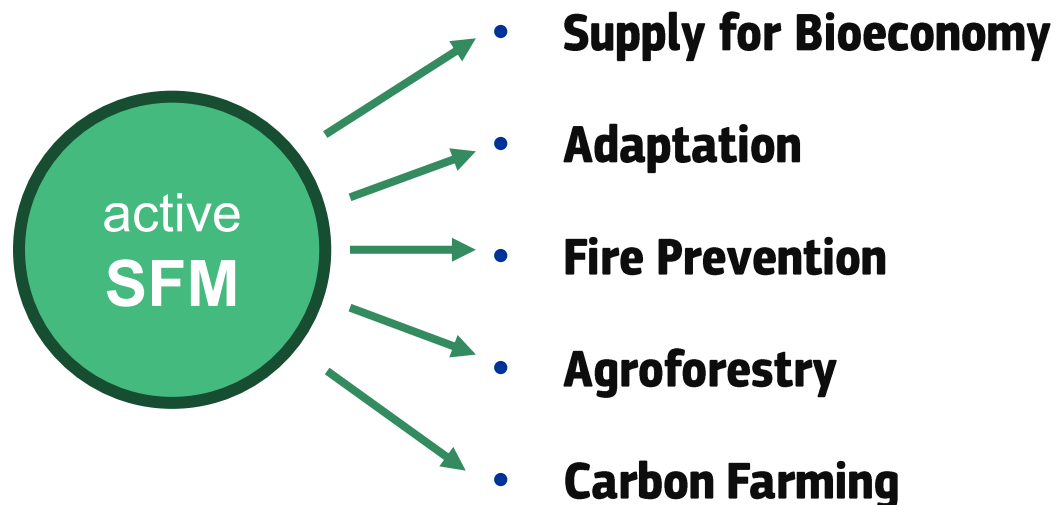
MFF proposal European Competitiveness Fund and Horizon Europe

- Policy Window II 'Health, Biotech, Agriculture and Bioeconomy', EUR 40 billion
- Bioeconomy and agriculture are closely linked: agriculture and forestry are the main feedstock providers for the bioeconomy and also a market for biobased products

Innovation
examples...



Active Sustainable Forest Management



Challenges and Chances:

Expected Outcomes:

- **Competitive Bioeconomy lead markets**
- **Substitution of fossil feedstock**
- **Bioenergy (RED, SAF targets)**
- **Increase resilience**
- **Ecosystem Services**

- Long term Investment
- Research and Innovation
- Level Playing Field

FOREST EUROPE expected to consensually develop a roadmap:

- ensuring the regular and evidence-based review of the criteria and indicators for SFM,
- strengthening their relevance, comparability, and high quality,
- adapting to evolving policy priorities and societal demands



SUSTAINABLE PRODUCTION of PRIMARY BIOMASS

AGRICULTURAL BIOMASS

CAP CONDITIONALITY 2023-2027

- **Statutory Management Requirements (SMRs)**,
e.g. Directives on Water Framework, Nitrates, Animal Welfare, Sustainable Use of Pesticides, Natura (Habitat and Birds)
- **Good Agricultural and Environmental Conditions (GAECs)**

PROPOSAL 2028-2034: FARM STEWARDSHIP

- **Statutory Management Requirements (SMRs)**
- **Protective practices:**
 - a) *Protection of carbon-rich soils, landscape features and permanent grasslands on agricultural area;*
 - b) *Protection of soil against erosion, preservation of the soil potential, maintenance of soil organic matter including soil rotation or diversification, and protection against burning of stubble on arable land;*
 - c) *Protection of water courses and ground water against pollution and runoff*

FOREST BIOMASS

CAP and SFM 2023-2027

- **Environmental and climate related management commitments (Art 70):** subject to relevant SMRs (e.g. Natura 2000)
- **Investments (Art 73):** *conditional on forest management plan in accordance with Sustainable Forest Management (SFM) as defined by Forest Europe*

PROPOSAL 2028-2034: continuity in Art 10 and 13

FUTURE DEVELOPMENT of SFM

EU Bioeconomy Strategy: “...build consensus through voluntary, bottom-up approaches, including a voluntary benchmarking system for on-farm sustainability assessments and cooperation with Member States and partners such as Forest Europe, FAO and IFAD to strengthen sustainable forest management in a way that recognises regional diversity and long-standing practices. Consensus building will be supported through continued cooperation with Member States, researchers, and stakeholders, including through the pan-European Forest Europe process.”

Forest Europe Ministerial Declaration 2026: “develop a roadmap, building on past and ongoing work, to ensure the regular and evidence-based review of the C&I for SFM and present, as appropriate, modification proposals, in order to strengthen their relevance, comparability, and high quality, including improved reporting and adaptation to evolving policy priorities and societal demands.”

State of Europe's
Forests 2025





Thank you!

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