



# OUTPUT PAPER

## BOOSTING AND MAINSTREAMING THE BIOECONOMY



Ministry of Green Transition

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# Output paper - Boosting and mainstreaming the bioeconomy

In this document the Ministry of Green Transition highlights the main outcomes of the conference *Boosting and Mainstreaming the Bioeconomy*, held in Copenhagen 2 December 2025 as part of the Danish EU Presidency.

The conference gathered more than 350 participants including EU Commissioners, ministers, researchers, industry leaders and civil society, including youth representatives. The purpose of the conference was to support the launch of the new EU Bioeconomy Strategy and to create a shared foundation for its implementation across Member States and sectors.

## Executive Summary

The bioeconomy offers Europe a chance to strengthen its competitiveness, resilience and strategic autonomy, by replacing fossil-based materials, creating jobs, making a success of the green transition and leading the global shift to clean industries. The Commission clarified that the strategy uses a coherent, whole-of-government approach; one with innovation at its centre but going beyond research and innovation.

The bioeconomy's future will be determined not by the ambition of its strategies, but by the credibility of their delivery. A successful European bioeconomy requires governance systems that are coherent across policy domains, predictable for investors, fair to primary producers, and responsive to regional realities. The Copenhagen conference underscored that the time for conceptual alignment has largely passed; the decisive phase is now implementation, coordination, and execution. The next phase to mainstream the bioeconomy and bring it from niche to norm.

This point was also underlined by the youth representatives who gave useful comments and input regarding the need is to co-design the future of bioeconomy, not wait.

There are five main points from the conference that Denmark would like to emphasise to the other member states:

- A clear and ambitious strategy is necessary, and it needs to be implemented at various levels: European, regional, national, local
- Communication and a strong narrative are the basis to ensure a large buy-in of the society for the bioeconomy
- Partnerships across sectors are needed to fully exploit the potential of the bioeconomy
- Policy coherence and market signals are crucial to ensure efficiency of bioeconomy related activities
- Sustainable and circular biomass supply and use is at the core of the bioeconomy principles



## Context

The new Bioeconomy Strategy published in November 2025 sets a vision for Europe to become a global leader in sustainable production and innovation by 2040.

The aim of the strategy is to strengthen the EU bioeconomy in a number of key technological and strategic areas. This will be done by strengthening the scaling up of innovation and investment in the bioeconomy, developing lead markets for bio-based materials and technologies, securing long-term potential for the bioeconomy through sustainable supply of biomass and exploiting global opportunities. It will require mobilizing and coordinating resources across countries, industry, investors and civil society. The strategy builds, among others, on the 2012 Bioeconomy Strategy and its 2018 update.

With this new Strategy, the EU will support activities that provide sustainable practical solutions based on biological resources in sectors such as agriculture, food, forestry, fisheries, aquaculture, and in industries and value chains that process biomass and/or deploy biomanufacturing and biotechnologies.

The conference discussed each of the four pillars as presented in the strategy. There was a broad agreement that the bioeconomy will be a central element of Europe's green transition, the geopolitical resilience and future competitiveness.

The conference used Slido for the participants to be a part of the discussion and ask questions to be answered by the panels as well as questions from the EU bioeconomy youth ambassadors at each session.

## Key messages and recommendations

It was stressed that the bioeconomy is *not a sector*, but a transformation of the entire economy, touching agriculture, forestry, food systems, chemicals, construction and energy to achieve climate targets and geopolitical resilience. Adopting this vision implies a fundamental change in all sectors of society. The Strategy provides a common language and gives a toolbox for investment. Bioeconomy is the new economy, but to become mainstream in the EU it requires public understanding and a strong focus on policy coherence and future governance.

## Implementation

The discussions at the conference made it clear that the challenge facing the European bioeconomy is not a lack of vision. Many of the core principles shaping today's



strategies—circularity, cascading use of biomass, ecosystem integrity, and regional value creation—were already articulated more than a decade ago. Progress now depends less on new strategies and more on effective governance and implementation across sectors, Member States and regions.

This is aligned with the description from the Commission of the strategy as the first step in the work with mainstreaming the bioeconomy and the policy suggestions in the strategy. The real implementation and governance start now.

The critical task ahead is to align and operationalize existing policy frameworks to boost and mainstream bioeconomy. Instruments such as the Renewable Energy Directive (RED III) and its cascading use principle, the Common Agricultural Policy (CAP), circular economy legislation, industrial policy, and biotech regulation must work coherently. Inconsistent incentives, regulatory bottlenecks, and uneven implementation across Member States slow down investment in the bioeconomy.

At national and regional levels, implementation capacity remains uneven. At this point 11 out of 27 member states have a national bioeconomy strategy and this fragmentation risks undermining the EU's overall ambition and reinforces the need for approaches that reflect regional biomass availability, industrial strengths, and innovation capacities. National strategies should be seen as key tools for overcoming sectoral silos and enabling coherent implementation of the bioeconomy.

The Commission cannot implement the bioeconomy strategy alone. Member states and stakeholders must actively participate in the implementation and mainstreaming of the bioeconomy across the EU.

### ***Communication and a strong narrative***

The phrase “Bioeconomy is the new economy” requires education and public understanding to achieve mainstreaming. It would require a strong public discourse regarding bioeconomy that should highlight resilience, security, and economic opportunity. Bioeconomy policies should be communicated as investments in food security, industrial autonomy, and rural prosperity, not only environmental protection.

There was a joint understanding that the bioeconomy is not mainstream at this point and there will be a lot of work, discussion and need to create awareness and knowledge about the bioeconomy. The debate on bioeconomy is currently maintained within the same circles and one of the major steps is to ensure broad knowledge of the bioeconomy and the possibilities.



## ***Partnerships Across Sectors***

Cross-sectoral and strong regional cooperation is essential for sustainable growth. Innovation often emerges at the interfaces between sectors, including through industrial symbiosis, partnerships across value chains, and the cascading use of biomass and waste streams.

Regional innovation ecosystems were highlighted as important drivers of new value chains and local job creation, while youth representatives and other stakeholders underlined the need to fully utilize the single market to enable the free flow of knowledge, innovation and skills across borders. The youth representatives encouraged the idea to build coalitions (students, farmers, NGOs, start-ups) in order to get the cross-sectoral cooperations moving forward and to use EU-level pressure when national governments lag.

Strengthening regional bioeconomy ecosystems—connecting primary producers, industry, research institutions, startups, and public authorities—emerged as a key factor for impact for the bioeconomy. Regions are where biomass is sourced, value chains are built, and societal acceptance is shaped. Empowering regions with coherent policy frameworks, investment tools, and knowledge-sharing mechanisms will be essential to move from pilots to scale.

## ***Policy coherence and market signals are crucial***

A recurring message from industry and policy stakeholders was that access to capital is not the only important bottleneck for the bioeconomy in Europe. Other important barriers are insufficient market demand, fragmented regulation, absence of a level playing field for fossil and bio-based products, and unclear long-term policy signals. Without predictable frameworks and demand-side incentives, even mature bio-based solutions struggle to scale and maintain a sustainable growth. Several speakers mentioned the possibility of public procurement as a strategic demand driver, using public purchasing power to accelerate market uptake and de-risk private investments.

The discussion underlined that policy coherence across climate, agricultural, food, industrial, trade, and circular economy policies is essential. Clear, aligned, and credible market signals will be decisive in enabling the bioeconomy to scale while delivering competitiveness, resilience, and environmental integrity.

The Commission is aware of these problems and works on complementary initiatives (e.g. Biotech Acts, Circular Economy Act, Innovation Act). It will also depend on member states and the European parliament to make sure that regulations meet the demands.





## ***Sustainable and circular biomass use***

Biomass is a scarce resource and subject to competing demands. Its use must therefore be strategically prioritised to maximise value creation, climate mitigation, and ecosystem integrity.

The cascading use principle should be applied consistently across sectors, ensuring that biomass is directed first to high-value, long-lived material applications before lower-value uses.

There is a need to strengthen policy coherence across EU legislation, notably climate, energy, agricultural, food, industrial, and circular economy policies, to avoid contradictory incentives for biomass use and to ensure that the prioritization of biomass efficiently supports the EU's climate, competitiveness, and resilience goals.

There is also a need to ensure a sustainable production of biomass, e.g. by developing complementary income mechanisms, such as climate and nature credit schemes, to reward farmers and land managers for delivering verified climate mitigation, biodiversity, and ecosystem services, in line with the strategy's focus on fair value distribution and rural development.

Overall, the conference underlined that the EU Bioeconomy Strategy must operationalize a sustainable, circular and resource efficient use of biomass. Clear prioritisation of biomass use, aligned incentives, and robust sustainability frameworks are essential to deliver a competitive, resilient, and nature-positive European bioeconomy.

