

Brussels, 17 March 2026
(OR. en)

7397/26

ENV 249
CLIMA 146
COMPET 341
IND 191
AGRI 191
FOOD 23
PECHE 102
ENER 139
MI 258
ENT 50
MAP 79
RECH 125
FORETS 40

OUTCOME OF PROCEEDINGS

From: General Secretariat of the Council
On: 17 March 2026
To: Delegations

No. prev. doc.: 7156/26 + COR 1

Subject: A Strategic Framework for a Competitive and Sustainable EU Bioeconomy
- Council conclusions

Delegations will find in the Annex the Council conclusions on the abovementioned subject, as approved by the Council at its 4165th meeting held on 17 March 2026.

A Strategic Framework for a Competitive and Sustainable EU Bioeconomy

- Council conclusions -

THE COUNCIL OF THE EUROPEAN UNION,

RECALLING:

- The Decision on the 8th Environment Action Programme (EAP)¹ and the Communication from the Commission on the European Green Deal²,
- Its conclusions on:
 - the opportunities of the bioeconomy in the light of current challenges with special emphasis on rural areas³;
 - the updated Bioeconomy Strategy “A sustainable Bioeconomy for Europe: strengthening the connection between economy, society and the environment”⁴;
 - a call for action on life sciences for the Union's competitiveness⁵;
 - the importance of research and innovation for the EU Startup and Scaleup Strategy⁶;
 - a competitive European industry driving our green, digital and resilient future⁷;
 - the European Water Resilience Strategy⁸;

¹ Decision (EU) 2022/591 of the European Parliament and of the Council of 6 April 2022 on a General Union Environment Action Programme to 2030 (OJ L 114, 12.4.2022, p. 22).

² ST 15051/19 + ADD 1.

³ ST 8406/23.

⁴ ST 14594/19.

⁵ ST 13323/25.

⁶ ST 13357/25.

⁷ ST 10127/24.

⁸ ST 14303/25.

- the New EU Forest Strategy for 2030⁹;
- on a Long-Term Vision for the EU's Rural Areas (LTVRA)¹⁰;
- the Biodiversity Strategy: the need for urgent action¹¹;
- a sustainable blue economy: health, knowledge, prosperity, social equity¹²;
- the European Ocean Pact¹³;
- delivering on the EU Action Plan for the Circular Economy¹⁴.

WELCOMING:

- The Communications from the Commission on:
 - the Competitiveness Compass for the EU¹⁵;
 - the Clean Industrial Deal¹⁶;
 - the Vision for Agriculture and Food¹⁷;
 - the European Chemicals Industry Action Plan¹⁸;
 - Building the future with Nature: Boosting Biotechnology and Biomanufacturing in the EU¹⁹.

⁹ ST 13984/21.
¹⁰ ST 15631/23.
¹¹ ST 12210/20.
¹² ST 9153/21.
¹³ ST 15807/25.
¹⁴ ST 10447/18.
¹⁵ ST 5785/25.
¹⁶ ST 6515/25.
¹⁷ ST 6385/25.
¹⁸ ST 11459/25.
¹⁹ ST 9163/1/24 REV 1.

UNDERLINING the UN 2030 Agenda for Sustainable Development, its sustainable development goals²⁰ and the National Strategies for Sustainable Development.

WELCOMING the Commission Communication on “A Strategic Framework for a Competitive and Sustainable EU Bioeconomy”²¹ as a timely and essential step to strengthen Europe’s competitiveness, resilience, prosperity and sustainability and RECOGNISING that the bioeconomy is a key cross-sectoral driver of sustainability, green growth, research, innovation and job creation, and that the primary sector plays a key role in ensuring sustainable biomass supply alongside food and nutrition security, food safety and rural livelihoods, supporting sustainable development and circular production models while integrating climate, biodiversity and human and animal health considerations, and safeguarding the environment, including the quality of water and soil health.

EMPHASISING sustainable bioeconomy’s contribution to the EU’s competitiveness and strategic autonomy while preserving an open economy and RECALLING the strategic importance of a competitive and sustainable bioeconomy for achieving climate neutrality and resilience, the protection and restoration of biodiversity, ecosystems and related ecosystems services, zero pollution, resource efficiency, circularity, water resilience, food and nutrition security, and reducing dependence on fossil-based materials and products and imports thereof; HIGHLIGHTING the importance of an efficient implementation of the sustainability criteria for biomass set out in current Union legislation, and supporting fair competition for biobased products.

WELCOMING the vision for a sustainable bioeconomy by 2040 and the focus on scaling innovation and investments; building lead markets for bio-based materials, products and technologies; ensuring sustainable biomass supply and use across value chains and harnessing global opportunities; and recognizing the role of regions and autonomous communities in planning and implementation, without prejudice to the division of competences between the EU and its Member States.

²⁰ Sustainable Development Goals: 17 Goals to Transform our World | United Nations.

²¹ ST 16071/25.

IMPLEMENTATION

1. STRESSES the need for coherent, predictable and supportive implementation of existing Union legislation relevant to the bioeconomy, including the Common Agricultural Policy, the Common Fisheries Policy, the Renewable Energy Directive, the Corporate Sustainability Due Diligence Directive, the Fertilizing Products Regulation, the Packaging and Packaging Waste Regulation, the Waste Framework Directive, the Ecodesign for Sustainable Products Regulation, the EU Deforestation Regulation (EUDR), the Land Use, Land Use Change and Forestry Regulation (LULUCF), the Nature Restoration Regulation, the Soil Monitoring Law, the Taxonomy Regulation and the Carbon Removal Certification Framework (CRCF) and also of the aims set, inter alia, in the Biodiversity Strategy, the Forest Strategy, the new Circular Economy Action Plan For a cleaner more competitive Europe, the Competitiveness Compass for the EU, the Vision for Agriculture and Food, the Nature Credits Roadmap, the Water Resilience Strategy, the European Green Deal and the Clean Industrial Deal; while ENCOURAGING the removal of regulatory barriers and ensuring regulatory coherence and SUPPORTING the ongoing simplification agenda without lowering relevant standards, in order to avoid additional administrative burdens and duplications.
2. ENCOURAGES Member States to continue developing and updating coherently their national strategies and action plans with the new EU Bioeconomy Strategy and integrate its objectives into regional and national plans such as National Energy and Climate Plans, National Long-term Low Emissions Development Strategies, National Adaptation Strategies, National Restoration Plans, CAP Strategic Plans, National Strategies or Action Plans for the Circular Economy and regional development strategies; Green Public Procurement National Action Plans; ensuring effective participation of regions and autonomous communities in project selection and investment planning as well as ensuring that increasing biomass demand does not undermine biodiversity conservation and nature restoration objectives, food and nutrition security or the long-term productive capacity of primary sectors.

3. ENCOURAGES the mainstreaming of bio-based and circular solutions across all relevant sectors, by promoting the substitution of fossil-based resources and taking into account the efficient and sustainable use of bio-based resources and bioeconomy actions that support market uptake, SMEs, scale-ups and start-ups, while staying within planetary boundaries and biodiversity objectives set in in the Kunming-Montreal Global Biodiversity Framework, protecting the EU carbon sink, safeguarding the environment and human health, and respecting regional diversity, in line with EU legislation and strategies on this matter.
4. UNDERLINES the importance of comprehensive education in general, training and knowledge transfer capacities programs; EMPHASISES the need for awareness- raising among primary producers, economic operators, cooperatives, national, regional and local authorities, policymakers, consumers and the public in general, and for transparent monitoring of biomass flows and environmental impacts through the EU Bioeconomy Monitoring System; and CALLS for strengthened outreach and consumer engagement, capacity building and increase the demand of the public sector through, inter alia, green public procurement, to promote sustainable lifestyles and consumption.
5. CALLS for a competitive single market for sustainably sourced biomass, biobased products and circular bio-based solutions in Europe to ensure a level playing field between biobased materials and products and fossil-based ones, and HIGHLIGHTS the importance of an efficient implementation of the sustainability criteria for biomass set out in current Union legislation, and market surveillance mechanisms to mitigate negative impacts, while RECOGNISING the specific structural constraints faced by certain regions, including island Member States, notably limited biomass availability, high dependence on the marine environment, and a heightened vulnerability of ecosystems, and UNDERTAKES to ensure that such considerations are duly integrated into the development and implementation of relevant measures.

6. STRESSES the importance for the bioeconomy strategy to take into account the specificities of outermost regions, extreme cold weather condition regions and the eastern border region in their use of biomass and RECOGNIZES its important role for the decarbonization and circularity in these territories, in line with sustainability requirements.
7. CALLS upon the Commission to implement the initiatives of the EU Bioeconomy Strategy and WELCOMES the Commission's intention to report on its delivery by 2028 and to set up the EU-Member States Bioeconomy Dialogues.

INNOVATION AND INVESTMENTS

8. UNDERSCORES the aim to scale up innovation and industrial deployment of sustainable bio-based solutions, including through biogenic carbon capture, biorefineries, advanced fermentation, and bio-based materials manufacturing and processing as well as water-smart solutions; SUPPORTS pilot- to- plant scale- up accessible demonstration facilities and STRESSES that existing, established business continue to be an important platform for innovation and that equal access to development opportunities should be secured.
9. STRONGLY SUPPORTS the removal of existing barriers for sustainable biobased products and solutions and the simplification of regulatory requirements while preserving environmental objectives, and TAKES NOTE of the proposed Biotech Act I and the announced EU Biotech Act II and the establishment of a European Bioeconomy Regulators and Innovators' Forum as important first steps in accelerating authorisations and access to market and reducing the administrative burden for businesses and public authorities.
10. ENCOURAGES the roll-out of digital tools and data-driven approaches to improve productivity and resource efficiency across bioeconomy value chains, and the development of professional skills and training in all sectors of the value chain.

11. UNDERLINES the need for research and innovation and to streamline market entry for sustainable bio-based products, strengthen competitiveness and support for SMEs, scaleups and startups.
12. RECOGNISES the significant investment needs for scaling up bioeconomy innovation and sustainable industrial deployment, in line with the objectives outlined in the Letta and Draghi reports to boost Europe's competitiveness, strengthen its strategic autonomy while preserving an open economy, and accelerate the deployment of strategic technologies to foster the shift to renewable and fossil free circular and sustainable production and consumption patterns.
13. WELCOMES the Commission's intention to continue financing necessary innovation of sustainable bio-based production throughout the value chain and to contribute to attracting investors and lowering investment risks by mobilising blended finance instruments and strengthening cooperation with the European Investment Bank Group, including through the Bioeconomy Investment Deployment Group; and CALLS for robust EU financial instruments to derisk innovative sustainable biobased investments, while taking into account the long-term stability of the EU budget, and ACKNOWLEDGES the role of the Circular Bio-based Europe Joint Undertaking in supporting innovation and scaling up.
14. URGES Member States to improve access to both early- and late-stage private venture capital at national and regional levels, to cooperate with national promotional banks to increase investments, and to make full use of available EU funds and existing State aid flexibilities for example, the general block exemption rules, the climate, energy and environmental State aid rules and the block exemption for agriculture) for sustainable bioeconomy projects and reforms; and to ensure financing reaches all regions and communities directly, including islands, the outermost regions and the Eastern border region.

DEVELOPING LEAD MARKETS FOR MATERIALS AND TECHNOLOGIES

15. ENCOURAGES the development of lead markets and demand-side measures, including voluntary green public procurement and voluntary industry alliances, to strengthen business predictability, accelerate the bio-based transition and support the design of the “*Important Projects of Common European Interest (IPCEI) on biotechnologies for food and feed, bio-based chemicals and bio-based materials*” and to prioritise, where possible, innovative biobased products in voluntary public procurement, taking into account cost-efficiency.
16. UNDERLINES that creating predictable demand for sustainable bio-based materials and technologies is essential to unlocking private investment and accelerating market scale-up; in this context, WELCOMES the Commission’s intention to identify and strengthen lead markets in the sectors listed in the Strategy; STRESSES, however, the need to also address additional sectors, such as footwear and textile, cork, natural resins, pulp and paper, natural fibers, mycelium-based materials, bio-based fiber packaging, biopharmaceuticals, biogenic carbon solutions and marine and blue bioeconomy applications, notably in island, coastal and inland water regions of the Member States, while RECALLING that bio-based products, specifically in the case of bio-based plastics which have the potential to reduce environmental impacts compared to conventional plastics, need to be properly assessed, sustainably sourced, used, deposited, managed and designed for circularity.
17. INVITES the Commission and Member States to promote demand-side measures, including introduction of technologies and sustainable bio-based content requirements supported by evidence-based assessments, where technically and economically feasible, voluntary incentives in green public procurement, voluntary industry alliances, certification schemes, to support early market uptake and scale up of sustainable bio-based materials and products; while ensuring coherence with existing legislation, cost-efficiency and avoiding unnecessary administrative burdens, without causing negative human and animal or environmental effects.

18. ENCOURAGES the development and the use of Life Cycle Assessment (LCA) analysis, harmonised standards, NACE codes and performance and durability, repairability, reusability and recyclability requirements for bio-based materials and products under the Construction Products Regulation, the Ecodesign for Sustainable Products Regulation and other relevant policy frameworks.
19. STRESSES the importance of the efficient use of biomass to ensure food and nutrition security as a priority while preserving ecosystems and related ecosystems services; ENCOURAGES, where feasible, the production of higher-value products and materials that store carbon for longer and substitute fossil-based materials while ensuring circularity, resource efficiency and conservation of natural resources, competitiveness and the reduction of pressures on ecosystem and food-supply markets; while applying cascading as a guiding principle, where appropriate and technically and economically feasible.
20. SUPPORTS the creation of industrial symbiosis, through platforms, districts, valleys or cross-border and cross-sectors initiatives, and the development of bioeconomy hubs and demonstration infrastructure to enable SMEs and innovators to test and scale new sustainable bio-based materials and products, better conditions for cross- border clusters and joint investments, and comprehensive support for academia, start-ups, and the industrial sector in researching and developing new sustainable bio-based products, materials, and technologies.

SUSTAINABLE BIOMASS SUPPLY AND CIRCULARITY

21. WELCOMES the Commission's intention to improve data and modelling for monitoring biomass availability relying on the Knowledge Centre for Bioeconomy in close cooperation with Member States; and CALLS upon the Commission to assess the availability of sustainable biomass compared to the projected demand for biomass in the EU in 2040.

22. STRESSES that sustainable biomass supply is essential for the long-term viability of the bioeconomy and that the use of biomass must respect planetary boundaries and biodiversity objectives, safeguarding the environment including the quality of air, water and soil health and that long-term measures to maintain productive capacity, ecosystem health, and resources resilience should be coherently implemented; CALLS upon the Commission to ensure the efficient implementation of the sustainability criteria set out in current Union legislation.
23. CALLS upon Member States to use primary biomass in a resource efficient way by making circularity one of the core principles of the European bioeconomy, by promoting the implementation of the precautionary principle, and prevention, reuse and recycling, as well as the use of secondary biomass streams, including by-products, bio-waste and residues and by awareness-raising on sustainable consumption, while recognising national specificities and security- of- supply needs, food security and food safety requirements and preserving biodiversity and ecosystems and related ecosystems services.
24. UNDERLINES the importance of sustainable and integrated land, forest, soil, coastal and water management in maintaining ecosystem health and productive capacity; and EMPHASISES the importance of policies related to the bioeconomy and biomass use to fully integrate climate, environment, and human health considerations.
25. UNDERLINES that sustainably produced bioenergy, in particular from waste, residual and low-value biomass, remains an important component of the Union's energy mix, contributing to security of supply, affordability, energy independence and climate objectives notably where no decarbonization alternatives exist or are not technically or economically feasible, while respecting specific energy needs, and RECOGNISES that material uses of biomass deliver higher long-term value and that energy uses should focus on residues and waste, in accordance with the waste hierarchy, and be adapted to local and regional conditions.

26. ACKNOWLEDGES the central role of the primary sector in supplying and further processing sustainable biomass and CALLS for the creation of added value within the primary sector through the mobilisation of available public and private funding instruments and the minimisation of administrative and regulatory barriers and burdens, while respecting the need for sustainable biomass input to improve soil health and the decontamination of polluted sites; SUPPORTS the development of economic incentives for voluntary carbon farming and nature positive actions, for example through, the EU Buyers Club to foster demand for permanent carbon removals and carbon farming under the CRCF Regulation and the Commission's Roadmap for nature credits; INVITES the Commission and the Member States to make use of existing funding opportunities to support the primary sector in supplying sustainable biomass to the bioeconomy.
27. STRESSES the importance of waste prevention, including the reduction of food waste, circularity and increased valorisation of by-products along the value chain, and CALLS for strengthened separate collection and legal clarity for biodegradable waste, as well as the promotion of its conversion into bio-based material and chemicals, quality compost, biogas and biomethane and other biofuels in accordance with applicable RED III criteria, as well as the valorization of digestate as an alternative to synthetic fertilizers if properly treated and managed; and UNDERLINES that closing the nutrient cycle and recovery from sewage sludge and the safe and sustainable use of the nutrients contained therein, contributes to environmental and economic resilience and NOTES that, subject to strict environmental safeguards and without incentivising their spread, the controlled use of already established invasive alien plant species biomass listed in Regulation 1143/2014 on Invasive Alien Species, for the production of pulp and paper, fibres, energy or the extraction of high-value compounds, in compliance with the regime of permits and authorization set in Article 8 and 9 of that Regulation, may be considered part of their management and eradication, while respecting the restrictions of that Regulation.

28. HIGHLIGHTS the strategic role of sustainable forest based bioeconomy as well as the wood value chain and non-wood forest products in the bioeconomy in providing sustainable growth and employment, economic development, nature conservation and restoration, climate change adaptation and mitigation, in contributing to the Union’s climate neutrality objective, as well as circular business models while EMPHASISING the importance of forests as ecosystems services providers and as carbon sinks; CALLS for the promotion of innovation in sustainable forest management using the most efficient pathway for high value added products. NOTES the role of European forest owners and managers in ensuring the security of supply, fully respecting Member states competencies and national specificities.
29. STRESSES the strategic role of the agri-food sector and its entire value chain as a cornerstone in ensuring food and nutrition security; HIGHLIGHTS the need to enable farmers to participate effectively in higher value-added bioeconomy value chains, including through cooperation, local processing, short supply chains and innovative business models; ENCOURAGES innovation and biomanufacturing to create high-value products from agricultural biomass without compromising food and nutrition security; STRESSES the importance of a sustainable bioeconomy in creating complementary income for farmers and in contributing to resilient rural areas, competitiveness of rural SMEs and the agricultural sector as well as the Union’s environmental targets; UNDERLINES the importance of small-scale farmers and to ensure fair access to innovation and participation in high value-chains.
30. ACKNOWLEDGES the strategic role of fisheries and aquaculture as one of the key pillars of the bioeconomy and sustainable blue economy; RECOGNISES the benefits of the sector in providing renewable, low-carbon biological resources that contribute to food and nutrition security and competitiveness; and HIGHLIGHTS the need for environmentally sound and sustainable sector adequately ensuring sustainable growth, climate neutrality, water resilience and biodiversity protection and restoration.

31. UNDERLINES the importance of security of domestic supply and fair competition in biomass markets and CALLS for measures to safeguard biomass supply chains against external and internal disturbances and protect SMEs and local processors through proportionate compliance requirements and improved market access.

GLOBAL ACTION

32. UNDERLINES the need to strengthen the EU's role as a leading partner in shaping a global sustainable bioeconomy agenda and promoting fair and rules-based trade; including taking into account free and fair competition to avoid unfair and unsustainable imports and HIGHLIGHTS the importance of ensuring a global level playing field.
33. EXPRESSES DEEP CONCERN over the extensive environmental degradation, pollution, and resource depletion resulting from Russia's ongoing war of aggression against Ukraine, which has led to severe and long-lasting damage to ecosystems, infrastructure, and communities and STRESSES the importance of developing an EU bioeconomy that enhances security, sustainability, resilience and strategic autonomy.
34. CALLS for strategic and mutual beneficial partnerships under the Global Gateway to support investments in sustainable biomass supply chains, knowledge exchange and innovation cooperation with partner countries, and also for global market access for EU sustainable bio-based technologies and products under trade agreements and regulatory dialogues; and to prioritise blue bioeconomy cooperation for coastal, island and inland water regions of the Member States, including through strengthened coordination with existing regional governance frameworks, regional seas conventions and inland water conventions.

35. HIGHLIGHTS the importance of engaging in the international environment and climate conventions, UNEP, FAO, WTO, UNFF, COFFI, the International Bioeconomy Forum, and the International Resource Panel and in pan-European fora, such as Forest Europe, to advance convergence on sustainability frameworks and exchange best practices and RECALLS the advances provided by the G20 Principles on Bioeconomy (2024), which encourages fostering international collaboration and cooperation, through capacity building and sharing of best practices and also RECALLS the Final Communiqué of the 2025 Global Forum for Food and Agriculture, especially for the primary sector.
36. INVITES the Commission to foster cooperation with candidate countries, neighbouring regions and strategic partners to build resilient bioeconomy hubs; and to support initiatives of cooperation between Member States, including at macro-regional level, such as BIOEAST, through a potential EU-wide range of comprehensive, ongoing, and dedicated future measures to develop and deploy sustainable bioeconomy solutions in regions with high biomass potential; address obstacles like persistent barriers within the single market, to safeguarding Europe's competitiveness, ensuring that innovation is nurtured and commercialized within the Union, and strengthening the resilience of its markets, while maintaining the Union's ambition on environment and climate action.
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