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#### NOTE

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From:	Presidency
To:	Delegations

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Subject:	EU Bioeconomy Strategy: Agriculture, Forestry and Fisheries issues
	- Presentation by the Commission
	- Exchange of views

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With a view to the meeting of the Council (“Agriculture and Fisheries”) on 26 January 2026, delegations will find in the Annex a background document on the above-mentioned subject.

**EU Bioeconomy Strategy – Agriculture, Forestry and Fisheries issues**

The Cyprus Presidency intends to facilitate the approval of Council conclusions on the updated Bioeconomy Strategy titled “A Strategic Framework for a Competitive and Sustainable EU Bioeconomy” as communicated by the Commission on the 27<sup>th</sup> of November, 2025<sup>1</sup>. Having in mind that the Environment Council holds the lead on discussions, a draft text was communicated through the Environment Working Party<sup>2</sup>.

Acknowledging the central role of agriculture, forestry and fisheries sectors on bioeconomy, the Cyprus Presidency attaches significant importance to receiving input from the Agriculture and Fisheries Council for the preparation of the Council conclusions. The objective of this exchange of views is to provide input for the Presidency to formulate a robust contribution ensuring that the approved Council conclusions adequately reflect the realities, potential and needs of these sectors while striking a balance between competitiveness, sustainability and territorial prosperity.

The updated Strategy is underpinned by extensive evidence from various consultations and builds on:

- a) the 2012 strategy “Innovating for Sustainable Growth: A Bioeconomy for Europe”<sup>3</sup>,
- b) relevant reviews carried out in 2018, titled “A sustainable bioeconomy for Europe: strengthening the connection between economy, society and the environment, Updated EU Bioeconomy Strategy”<sup>4</sup>, and 2022 titled “European bioeconomy policy – Stocktaking and future developments”<sup>5</sup>,

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<sup>1</sup> ST16071/25

<sup>2</sup> ST 16980/25

<sup>3</sup> ST 6487/12

<sup>4</sup> COM (2018) 673 final

<sup>5</sup> ST10095/22 ADD 1

- c) the 2023 Council conclusions under the Swedish Presidency titled “on the opportunities of the bioeconomy in the light of current challenges with special emphasis on rural areas”<sup>6</sup>,
- d) the 2024 Council conclusions under the Hungarian Presidency titled “on a potential Europe-wide R&I initiative on advancing sustainable natural resource management, food systems security and the deployment of the bioeconomy, harnessing the potential of Central and Eastern Europe”<sup>7</sup>, and
- e) the strategic agenda for 2024-2029<sup>8</sup>.

It also takes into account the European Parliament Resolution of July 2025 on the future of biotechnology and EU bio-production<sup>9</sup>.

The EU’s bioeconomy is a dynamic driver for competitiveness and is of strategic importance across multiple economic sectors. At the same time, it is constrained by planetary boundaries, the impacts of climate change and the availability and sustainability of biomass. Ensuring responsible and efficient use of biomass is therefore essential for long-term competitiveness, supply stability and eco-system health.

The new strategy aims to build a sustainable and a nature-positive bioeconomy by:

1. Scaling innovation and investments for the bioeconomy;
2. Building new lead markets for bio-based materials and technologies;
3. Ensuring sustainable biomass supply across value chains and
4. Harnessing global opportunities.

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<sup>6</sup> ST 8406/23

<sup>7</sup> ST 15304/24

<sup>8</sup> Official Journal as OJ C 2024 400 I, p. 1

<sup>9</sup> European Parliament, Resolution on the future of the EU biotechnology and biomanufacturing sector: leveraging research, boosting innovation and enhancing competitiveness, 2025. The Committee of the Regions and the European Economic and Social Committee also issued opinions on the bioeconomy.

Primary production (farmers, foresters, fishers and aquaculture producers) manages Europe's living resources. It is where bioeconomy begins and is one of the most important sources of biomass that can be upgraded to sustainable bio-based materials and products such as construction materials, biochemicals, textiles, packaging materials, plastics, fertilisers and plant protection products that provide fossil-free alternatives and create new, stable income streams.

Primary producers are also users of biobased solutions (biofertilisers, bioplastics, biopesticides, etc.) and innovators co-creating innovative products and materials as for instance in the Circular Bio-based Europe Joint Undertaking (CBE-JU).

The Commission's proposal for the next Multiannual Financial Framework increases the funding for bioeconomy through the European Competitiveness Fund and the Horizon Europe Framework Programme policy window on health, biotech, agriculture and the bioeconomy. Also the CAP offers various models for cooperative investments in bottom-up processing and marketing of new value chains, creating value from untapped biomass, and in bridging primary production with industrial investments, thereby contributing to rural growth and employment.

Having in mind that over the past decade bioeconomy sectors have grown faster than the overall economy, Ministers are invited to reflect on the following guiding questions as a contribution to the process of preparing Council conclusions on the bioeconomy to be approved by the Environment Council:

1. *What should be the role of agriculture, fisheries and forestry sectors in the future EU policy on bioeconomy? Does the EU Bioeconomy Strategy support primary producers sufficiently? Which lead markets offer the highest potential for agriculture and forestry and what are the most important barriers?*
2. *In what ways can we strengthen the role of agriculture, fisheries and forestry in the EU bioeconomy policies while at the same time safeguarding and improving:*
  - (a) *opportunities for income diversification for food producers and foresters to enhance competitiveness;*

- (b) *Europe's ability to meet most of its biomass needs through sustainable domestic production on the one hand and the EU's food security on the other hand;*
  - (c) *the sustainability and efficient use of biomass underpinning the long term competitiveness and ecosystem health;*
  - (d) *the prosperity and resilience of rural and coastal areas as well as local communities;*
  - (e) *strong bioeconomy research and innovation and participation of the primary producers?*
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