11th Bioeconomy in Europe Report

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The Bioeconomy in Europe:
11th Intesa Sanpaolo-Cluster Spring Report

2012 European Strategy for a Sustainable Bioeconomy

2014

1st Bioeconomy in Europe Report

2015

2nd Bioeconomy in Europe Report. *Same methodology, new data for 2013*

2017

3rd Bioeconomy in Europe Report *New methodology for bio-based chemistry. Bio-based waste component included.*

Italian Bioeconomy Strategy (BIT I)

2018

4th Bioeconomy in Europe Report. *Including the water cycle, focus on innovation and the marine bioeconomy*

Review of the European Strategy for a Sustainable Bioeconomy

2019

5th Report on the Bioeconomy in Europe *New estimation methodology (use of JRC database). Focus on the wood and paper supply chain.*

Italian Bioeconomy Strategy (BIT II)

2020

6th Bioeconomy in Europe Report. *Focus on innovation and agribusiness*

2021

7th Bioeconomy in Europe Report. *New estimation methodology. Focus on land and bio-based chemistry*

2022

8th Bioeconomy in Europe Report *Updated estimates to 2021 and impact of Russian-Ukrainian war. Focus on start-ups*

2023

9th Bioeconomy in Europe Report. *Updated estimates to 2022. Focus on textiles and clothing*

2024

10th Bioeconomy in Europe Report. *Estimates updated to 2023. Focus on innovation, agribusiness, water and cosmetics*

2025

11th Bioeconomy in Europe Report. *Estimates up to 2024. Estimates for EU27. Focus on packaging and inland areas*

Review of the European Bioeconomy Strategy

INTESA SANPAOLO

The contents of the 11th Report

- The Bioeconomy in Italy to 2024
- The Bioeconomy in Europe: an estimate for the EU27
- Plastic packaging: the results of an ad hoc survey with a focus on bio-based companies
- From marginality to sustainable centrality: the potential of inland areas in the perspective of the Bioeconomy (by SRM)
- The Bioeconomy in the global geopolitical scenario


INTESA SANPAOLO SPRING
Italian Circular Bioeconomy Cluster

The Bioeconomy in Europe

11° Report

Research Department

June 2025

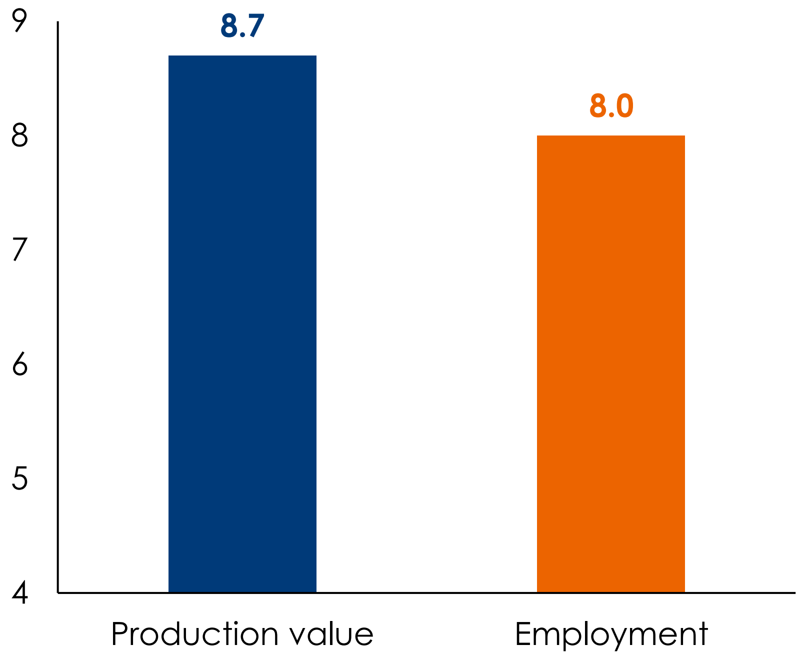
Key results

1. Bioeconomy is relevant in every EU country
2. Bioeconomy as a key element for local development
3. Bioeconomy as a driver of innovation and sustainability
4. Bioeconomy: Market or regulation driven?

The Bioeconomy in the EU27: more than EUR 3,000 billion in 2024

- **For the first time** the **value of the Bioeconomy for the EU27** has been estimated
- In 2024 the value of the European Bioeconomy's output is estimated at **EUR 3,042 billion, employing over 17 million people**

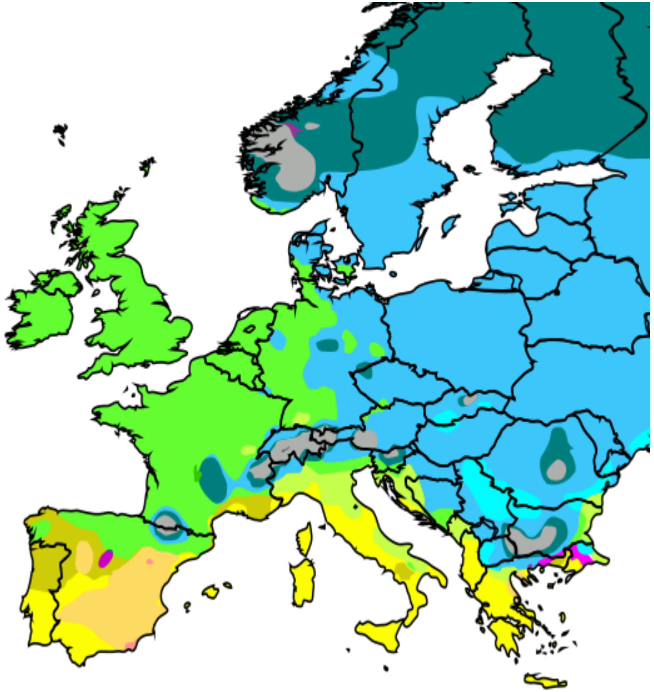
Weight of the EU27 Bioeconomy on the total EU27 economy (%, 2024)



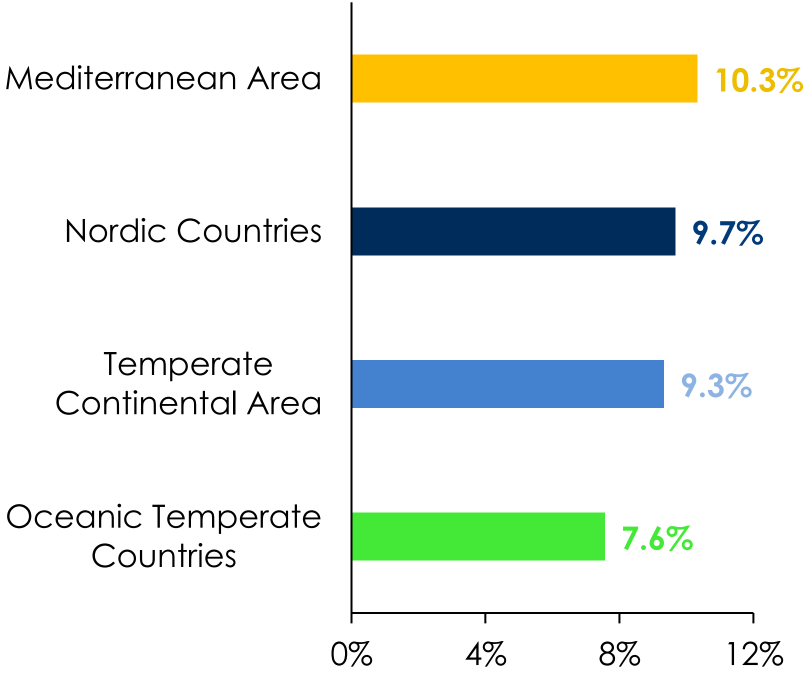
Source: Intesa Sanpaolo elaborations from various sources

The Bioeconomy in Europe by climate zones

The Köpper classification

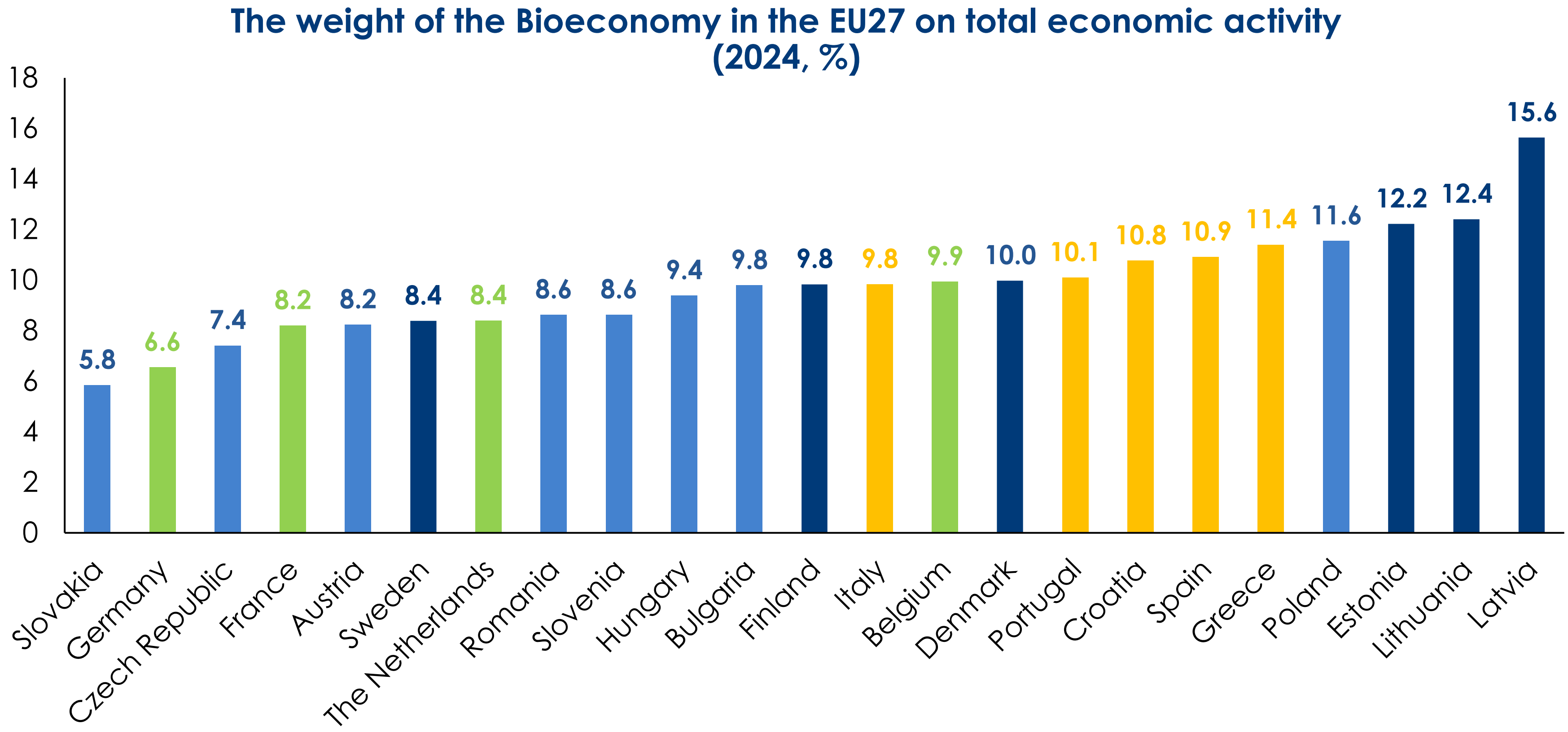


The weight of the Bioeconomy in 2024 in climate clusters on the total economy, in terms of production value (%)



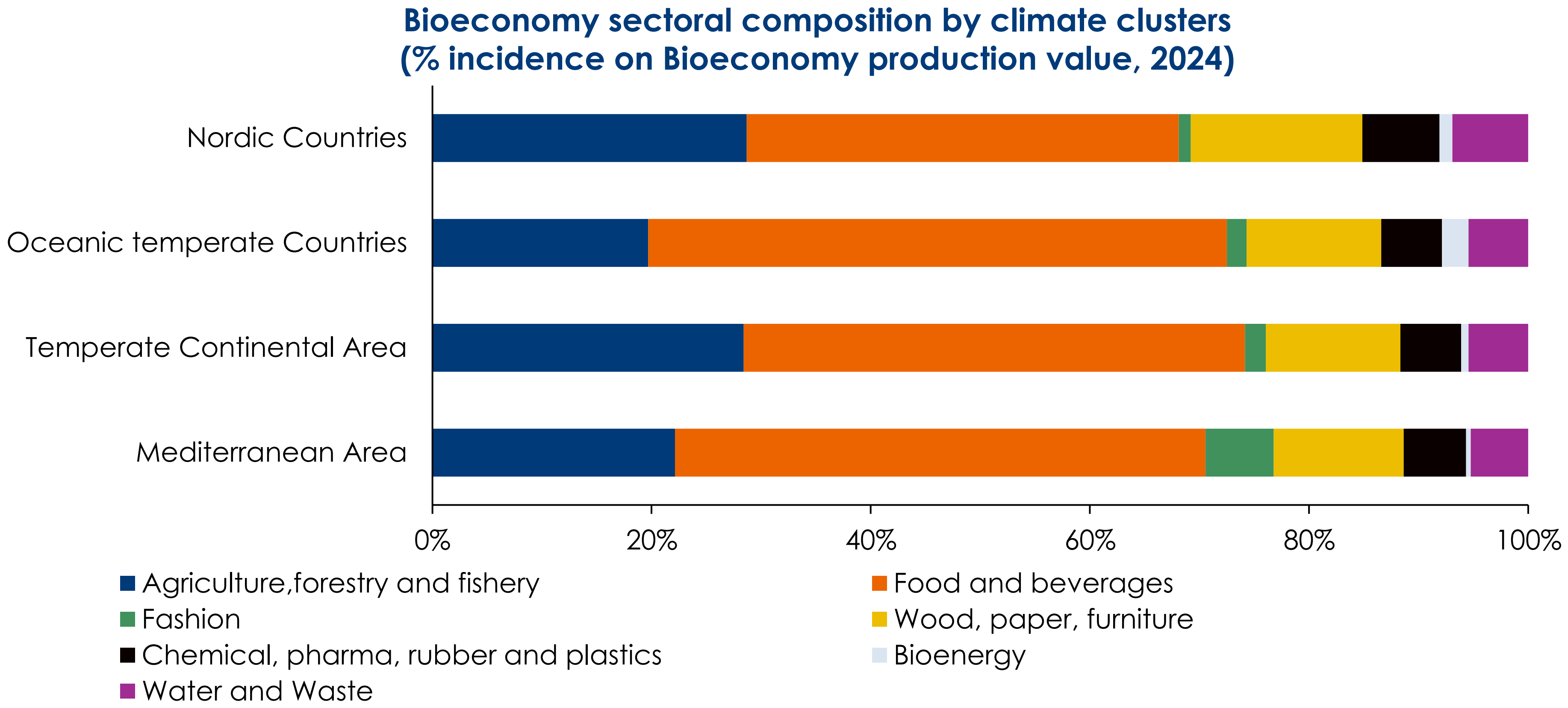
Source: Intesa Sanpaolo elaborations from various sources

The weight of the Bioeconomy in Europe: over 8% for the majority of the 23 countries analysed



Source: Intesa Sanpaolo elaborations from various sources

Agri-food dominates in every country



Source: Intesa Sanpaolo elaborations from various sources

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The Bioeconomy as an opportunity for the valorisation and inclusion of Inland Areas

Inland Areas

Distance from large urban agglomerations

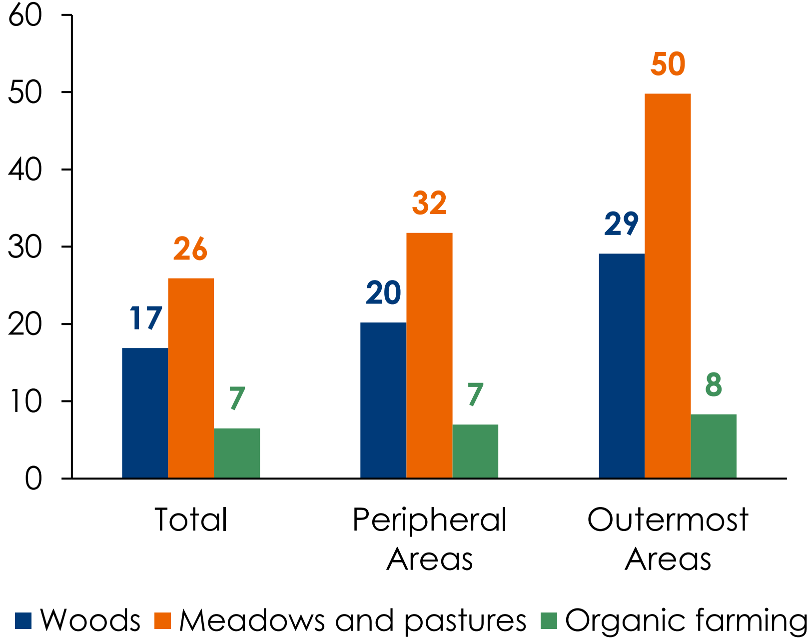
Lack of infrastructure and services (education, health, mobility)

Presence of a large natural endowment and biodiversity

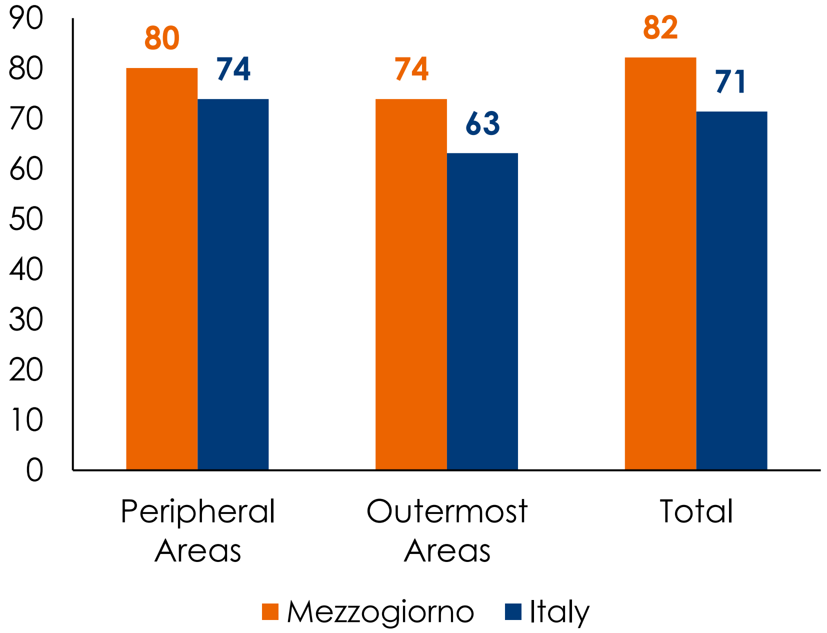
- The relevance **of the agro-forestry sector**, the richness in terms of **biodiversity**, the importance of **local supply chains** are distinctive elements of the Inland Areas and can become drivers for the development of a sustainable bioeconomy.
- **Bioeconomy** offers a growth model consistent with the **vocations of the Inland Areas**.

Biomass and biodiversity: the potential of the Inland Areas of Southern Italy

Share (%) of farms in the Mezzogiorno by type of territory

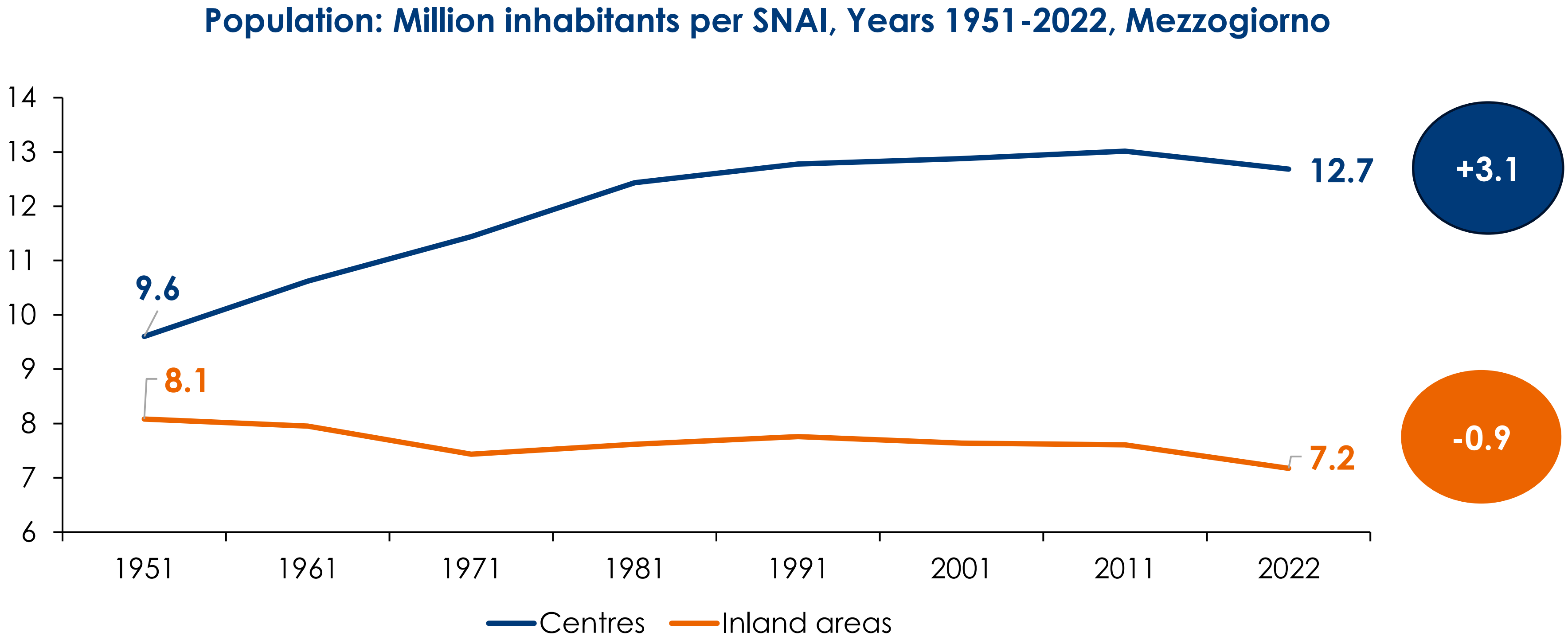


Share (%) of farms by type of territory with permanent crops (comparison between Mezzogiorno and Italy)



Source: SRM elaborations on Istat data

The development of an alternative model also to counter depopulation



Note: SNAI National Strategy for Inner Areas . *Source: SRM elaborations on Istat data*

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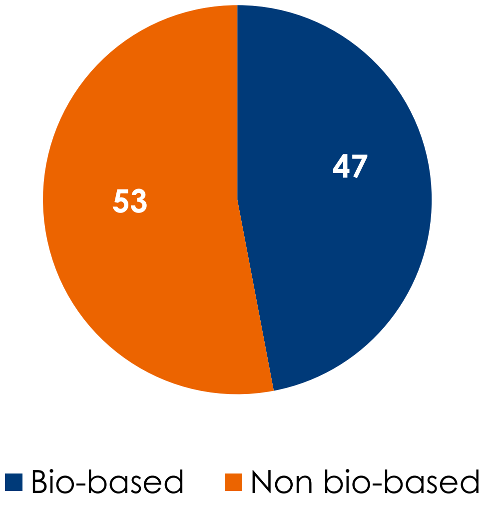
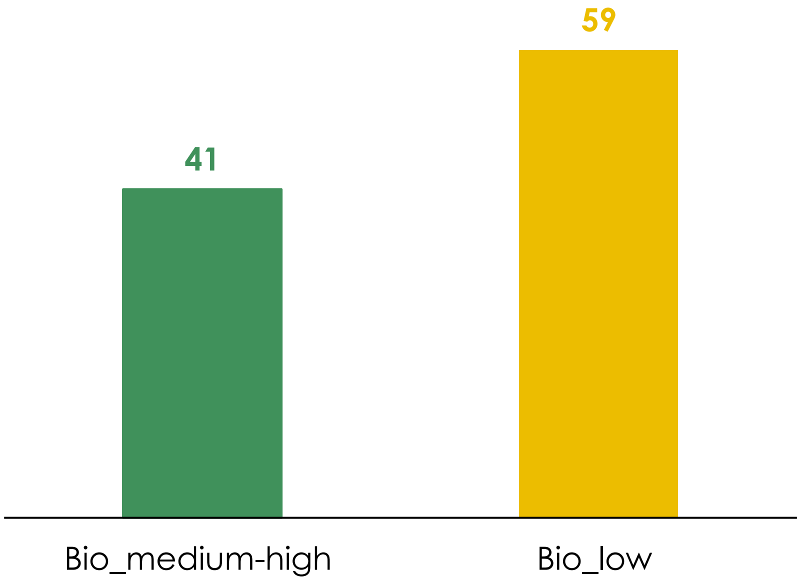
Bio-based productions have already a significant weight in the Italian plastic packaging sector

Distribution of firms by use of bio-based and non-bio-based raw materials (%)



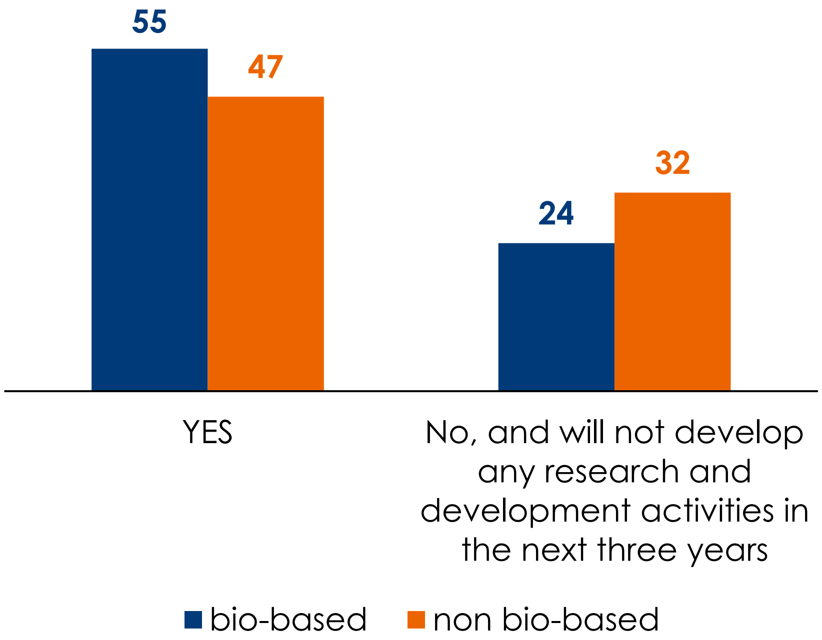
Distribution of bio-based companies by classes of intensity of use of bio-based raw materials (%)



Note: intensity classes of use of bio-based raw materials: low=1%-30%, medium-high=31%-100%.
Source: Intesa Sanpaolo survey of companies in the plastic packaging sector (2024)

Research and Development as the basis for competitiveness

Does your company carry out Research and Development? (% respondents)



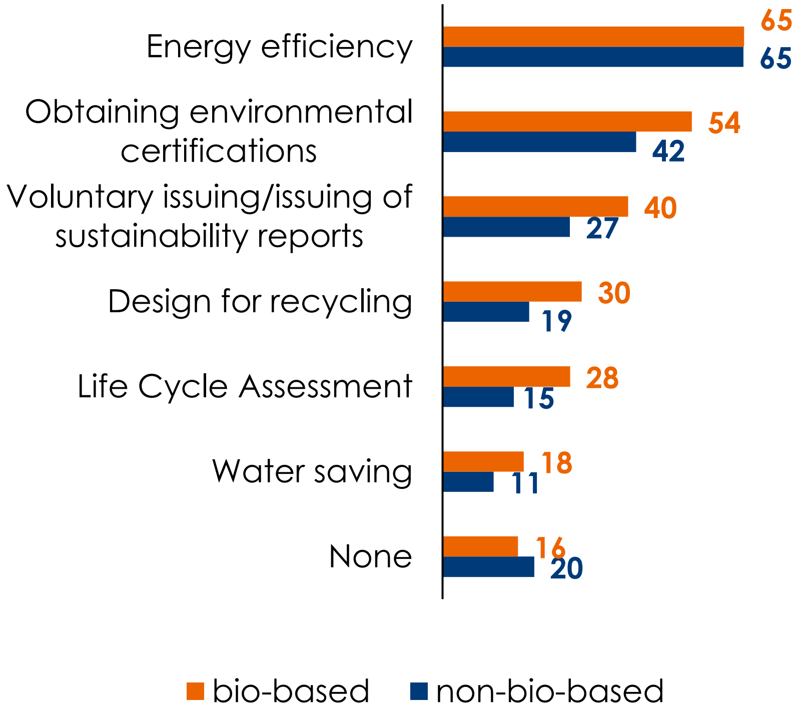
The vitality of packaging companies also emerges in terms of innovation, which is a strategic factor for growth and sustainability.

R&D is more widespread among bio-based companies

Source: Intesa Sanpaolo survey on companies in the plastic packaging sector (2024)

For bio-based companies, sustainability is crucial

Sustainability projects your company is involved in (%)



Attention to environmental sustainability is considered a strength by more than **46% of bio-based** companies, compared to 32% of non-bio-based companies.

Note: ranking based on bio-based companies.
Source: Intesa Sanpaolo survey of companies in the plastic packaging sector (2024)

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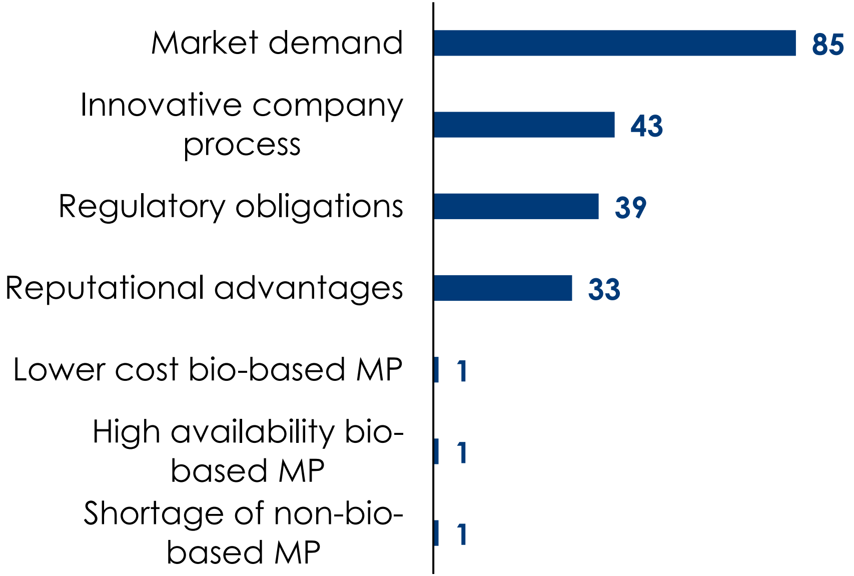
The choice to use bio-based inputs

Factors that determined the introduction of bio-based inputs (%; more than one answer possible)



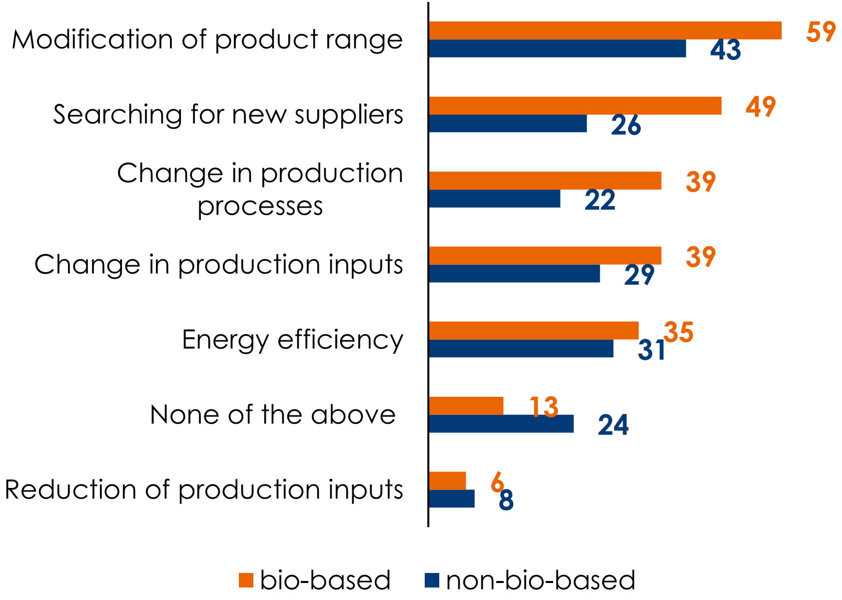
Bio-based inputs are used to achieve market **competitiveness**, **innovation** and compliance with regulatory obligations.

Source: Intesa Sanpaolo survey of companies in the plastic packaging sector (2024)

Companies' production and strategic choices are closely linked to the regulatory framework

- **Bio-based companies appear to be more sensitive and responsive** to the introduction of new regulations.
- The main lever activated by companies concerns the modification of the **product range**, a strategy implemented by 59% of bio-based companies and 43% of non-bio-based companies.

Strategy adopted following regulatory developments to date (%; multiple answers possible)

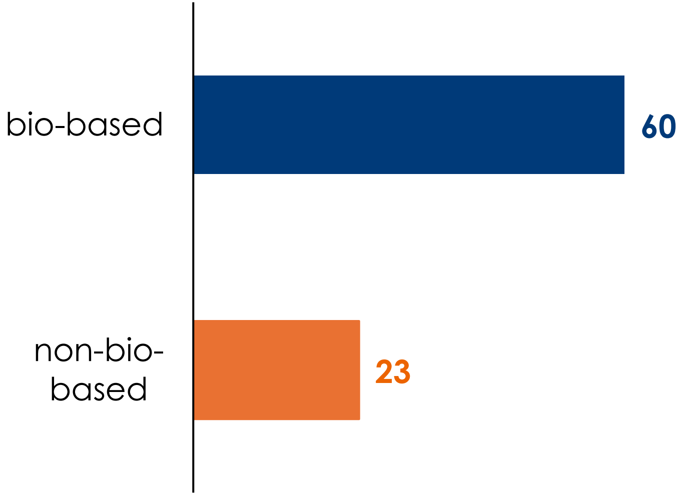


Source: Intesa Sanpaolo survey of companies in the plastic packaging sector (2024)

Use of bio-based inputs will grow in the future

- **23% of companies** that do not use bio-based raw materials **intend to introduce** such inputs into their production processes.
- **60% of bio-based companies will increase** their use of such inputs.
- As many as 68% of the companies that use bio-based inputs marginally state that they will expand the use of such resources.

Companies that will increase/introduce the use of bio-based inputs in the next three years (% respondents)



Note: Percentages calculated on total responses, including "don't know".
Source: Intesa Sanpaolo survey of companies in the plastic packaging sector (2024)

Thank you!

QR code to access the page with the meeting materials

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