

Policy Brief

BBioNets

The Circular Bioeconomy in Spain: What is Needed to Foster the Growth of Bio-Based Technologies

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A Strategic Agenda for Policy Recommendations

Point of Attention	Target Audiences	Funding Instruments	Timeline
Low integration of the forestry sector in the bioeconomy	Forestry actors, cooperatives	Environmental policies, regional programmes, PRTR	2025–2030
Limited access to diversified funding	SMEs, cooperatives, innovators	EU funds, rural development, private finance	Short–medium term
Insufficient biomass availability & planning	Biomass producers, industry	Regional / national programmes	2025–2030
Logistics & aggregation bottlenecks	Logistics operators, hubs	Regional policies, EU programmes	Medium term
Limited local processing capacity	Local industry, rural areas	Regional, EU innovation funds	Medium term
Weak market uptake of bio-based products	Farmers, consumers, public buyers	CAP, market instruments	Short–medium term
Innovation-to-market gap	R&D centres, startups, SMEs	Horizon Europe, regional R&I	Medium term
Low digitalisation & traceability	Value chain actors	Digitalisation programmes	Short–medium term
Barriers to scaling pilot technologies	Producers, cooperatives	EU / national funding	Short term

CAP: Common Agricultural Policy; EU: European Union; PRTR: Recovery, Transformation and Resilience Plan; R&D: Research and Development; R&I: Research and Innovation; SMEs: Small and Medium Enterprises;

1. Policy Context

In Spain, the circular bioeconomy offers significant opportunities to valorise agricultural and forestry biomass through Bio-Based Technologies (BBTs). However, limited forestry integration, funding constraints, biomass supply and logistics challenges, weak market demand and difficulties in scaling up innovation continue to hinder the development of sustainable bio-based value chains.

2. Stakeholder Priorities

Stakeholders identified nine key Points of Attention: limited integration of the forestry sector; difficulties accessing diversified funding; insufficient biomass availability and planning; logistics and aggregation bottlenecks; limited local processing capacity; weak market uptake of bio-based products; gaps between innovation and commercialisation, low digitalisation and traceability; and barriers to scaling pilot technologies.

3. Methodology

The recommendations build on a preparatory analysis of national priorities and their validation during the Spanish Policy Workshop, organised by CTA and TEPRO on 22 January 2026 in Seville. The workshop brought together representatives from public administrations, businesses and the Andalusian Agricultural and Forestry Network (FAN) to review the identified Points of Attention, assess their regional relevance and develop concrete policy recommendations to support the wider BBT adoption.

4. Priority Areas for Policy Action

The development of BBTs in Spain depends on creating

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favourable conditions for their wider adoption. Improving biomass management, facilitating access to financing, strengthening local value chains and promoting cooperation among stakeholders are key to supporting a competitive and sustainable circular bioeconomy.

1. Sustainable forest management. Promote active forest management, sustainable biomass mobilisation and cascading use of resources, strengthening the integration of the forestry sector into circular bioeconomy value chains.

2. Market development and traceability. Encourage the uptake of bio-based products through certification schemes, green public procurement and awareness-raising activities, while improving digital monitoring and traceability.

3. Biomass supply and logistics. Strengthen biomass supply planning, develop collection and storage hubs, optimise transport routes and support local processing facilities, including territorial biorefineries.

4. Access to financing. Facilitate access to public and private funding for SMEs, cooperatives and innovators through proposal preparation support, investor connections and blended financing mechanisms.

5. Innovation and capacity building. Support pilot projects, demonstrations and technology scaling, while promoting technical assistance, feasibility studies, digitalisation and cooperation between research centres and industry.

In summary....

advancing Spain's circular bioeconomy requires coordinated policies, stronger local value chains, accessible financing and continued support for innovation to facilitate the wider adoption of BBTs.

Main Recommendations for Spain

Recommendations	Categorisation
Strengthening sustainable forest management (cascading use)	Policy coherence & regulatory simplification
Market development, traceability and demand stimulation	Market development
Biomass supply planning and logistics optimisation	Market development
Diversification of funding and access to public-private instruments	Access to public & private support
Innovation, digitalisation and capacity building	Training and capacity building

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