

## Overview of opportunities?

- Needs & challenges of SMEs  
the bioeconomy in NW Europe



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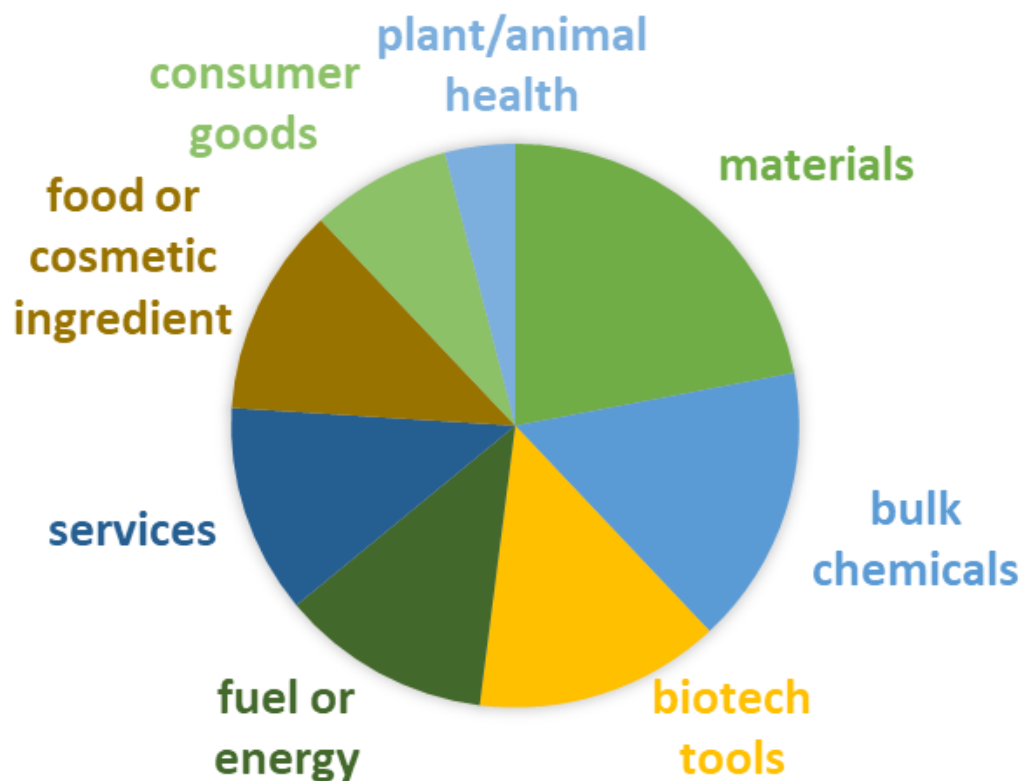
	not a barrier		high barrier		
	1	2	3	4	5
Demand					
Intellectual property					
Investment					
Regulation					
Public perception					
Human resources					
Collaboration					
Policy					
Feedstocks					

## 9 categories of barrier

With a total of 43  
suggested  
barriers.

Scored from  
1 to 5.

# 50 SME responses



Country	Number of SMEs
IE	8
NL	8
FR	7
DE	9
UK	10
BE	8

# Common mistakes – not an opportunity

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## Common mistakes – not an opportunity

✿ At risk global supply of natural rubber



- While natural rubber is still available, there is no motivation to swap

✿ Shortage of natural rubber

- If you can make more rubber at an appropriate price and volume before global production recovers, this could be a business opportunity



## Here are 2 non- opportunities

- 🌱 300 million kg of coffee waste is generated in the Netherlands every year, which goes to composting, landfill or incineration
- 🌱 All natural rubber is currently produced in Asia

## Suggested opportunities

- ☛ Cafes chains are looking for a way to stand out from the crowd. 300 million kg of coffee waste is generated in the Netherlands every year, which could be used to make...
- ☛ Tyre manufacturers are interested in know-how for growing rubber to have a competitive edge in case of plantation collapse



## Top 3 barriers

**Demand-side policy**

**Poor stakeholder perception**

**Investment risk**

## Comparison with 4 years ago

2013	2018
Capital requirement	Demand-side policies
Investment risk	Investment risk
Patent filing, cost and regulation	Public perception

	All	IE	NL	FR	DE	UK	BE
<b>Average score across barriers, 2018</b>	2.9	3.1	2.9	3.0	2.8	2.5	2.9
<b>Average score across barriers, 2014</b>	3.1	3.5	3.3	-	3.0	2.7	3.2

## **Demand-side policy barriers**

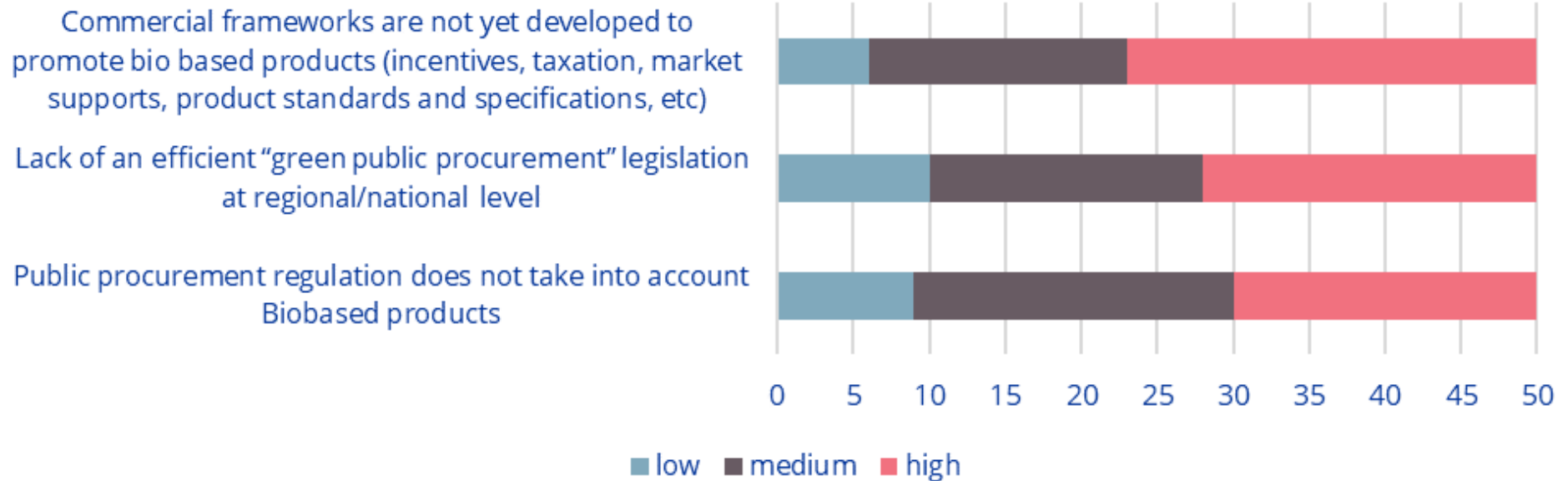
These include incentives, taxation, product standards and specifications, public procurement, etc

**Demand**

**Perception**

**Investment**

## Demand-side policy barriers



“frameworks support fossil resources”  
“to much focus on biofuels”  
“[take example from] USDA bio-preferred  
programme”

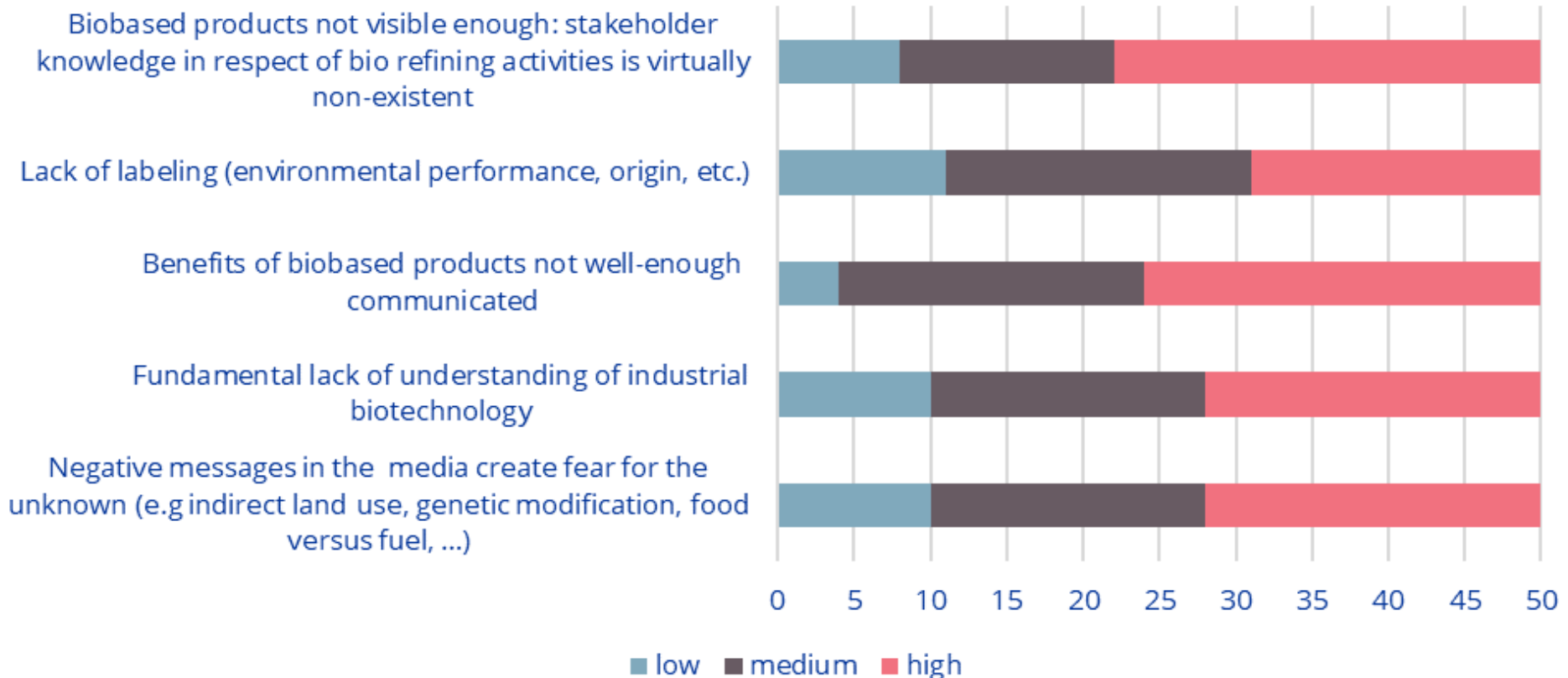
*SME comments*

**Demand**

**Perception**

**Investment**

## Stakeholder perception barriers



“large confusion about biobased and  
biodegradable plastics”

“big problem in building sector”

*SME comments*

**Demand**

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## Investment risk

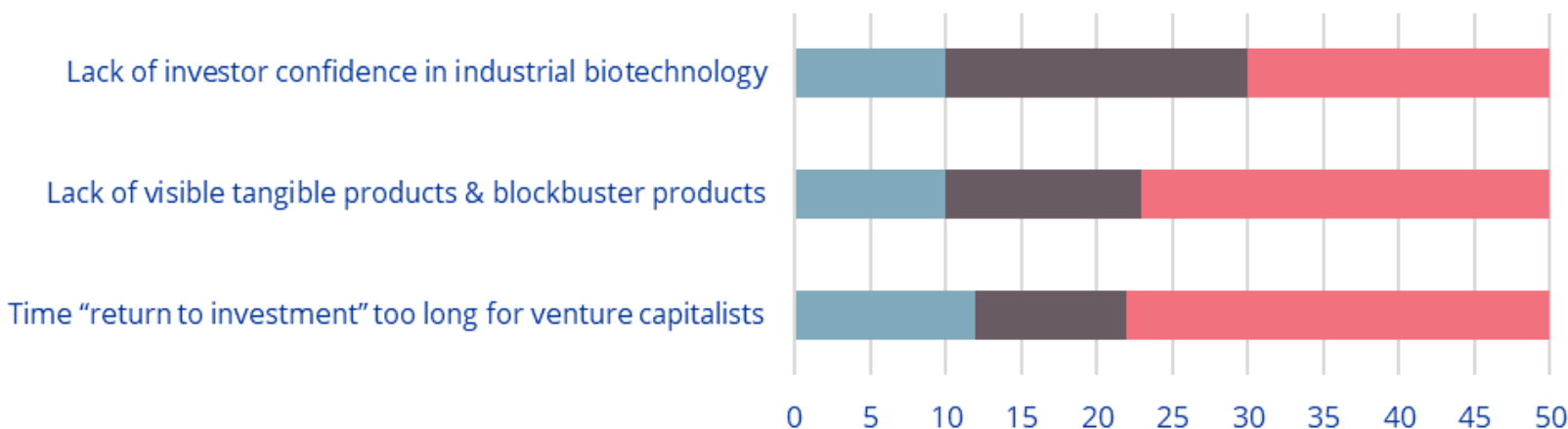
Bioeconomy technologies can take a long time to develop and bring to market, and cut across many different fields. Investors see this as confusing and risky.

Demand

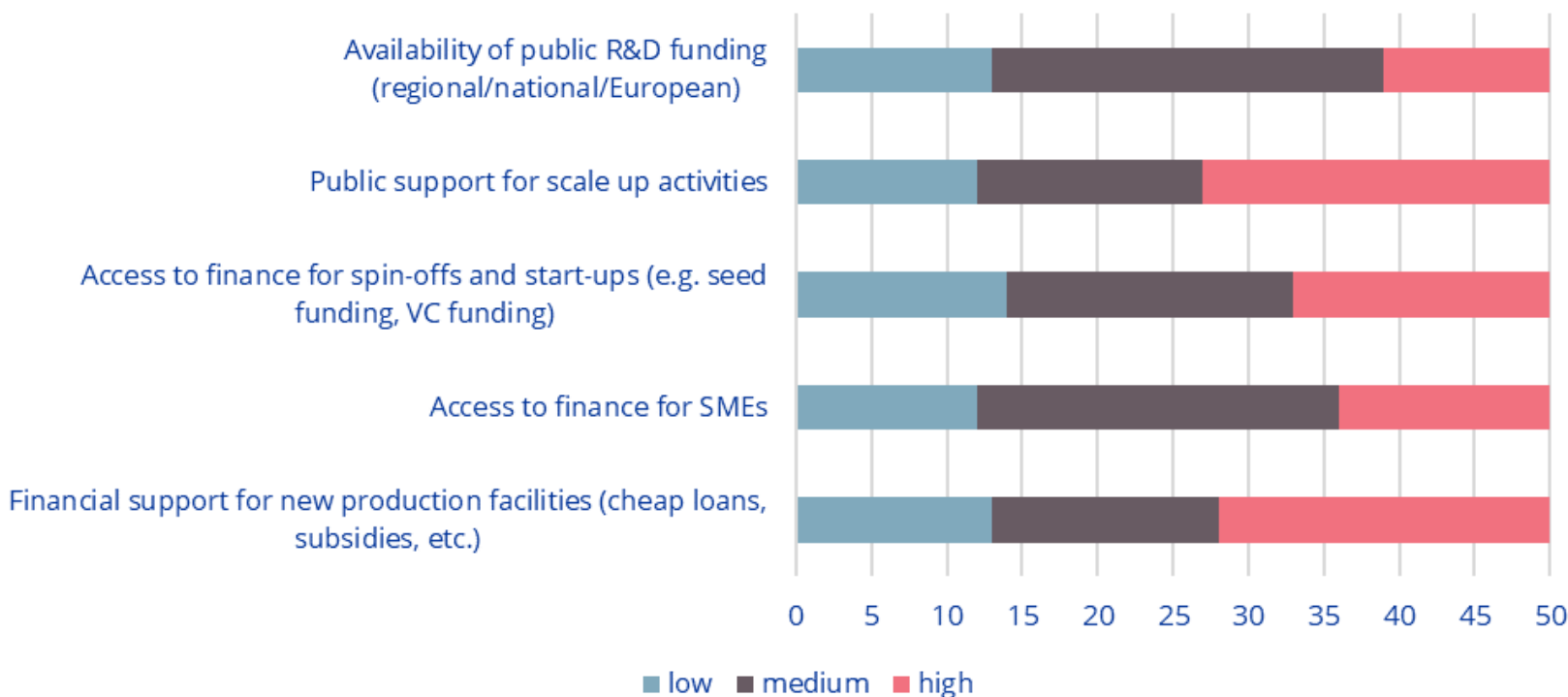
Perception

Investment

## Investment barriers: investment risk



## Investment barriers: capital requirement



“traditional banks consider you as an alien”  
“multinationals want drop-ins immediately”  
“Great potential of our technology, but  
currently no tangible product”

*SME comments*

Demand

Perception

Investment

# Recommendations

## Demand

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- Green procurement

## Investment & Funding

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- Circular Economy Thematic Investments

## Public perception

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- Building awareness

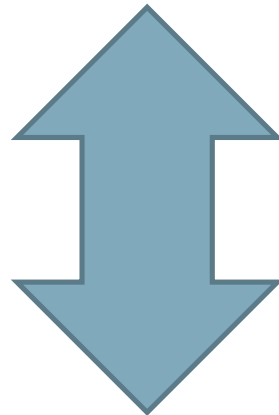
**Demand**

**Perception**

**Investment**

## **BioBase4SME strategy and action plan**

policy priorities of BioBase4SME partners



outcomes of the SME survey

# Recommendations

## Demand

- Green procurement

## Investment & Funding

- Circular Economy Thematic Investments

## Public perception

- Building awareness

**Demand**

**Perception**

**Investment**

# Interreg



EUROPEAN UNION

## North-West Europe

## BioBase4SME

European Regional Development Fund

# Thank you!