

Overview of opportunities?

- Needs & challenges of SMEs the bioeconomy in NW Europe





06th May 2019 Bovendonk Tanja Meyer Project Coordinator



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

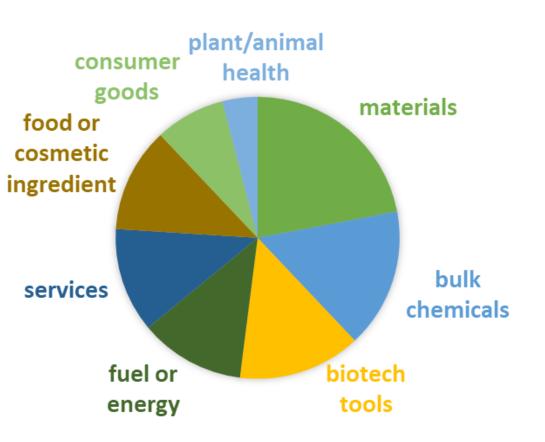
9 categories of barrier

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

At risk global supply of natural rubber







Common mistakes – not an opportunity

- At risk global supply of natural rubber
 - While natural rubber is still available, there is no motivation to swap







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 planation 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
Average score across barriers,							
2018	2.9	3.1	2.9	3.0	2.8	2.5	2.9
Average score across barriers,							
2014	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

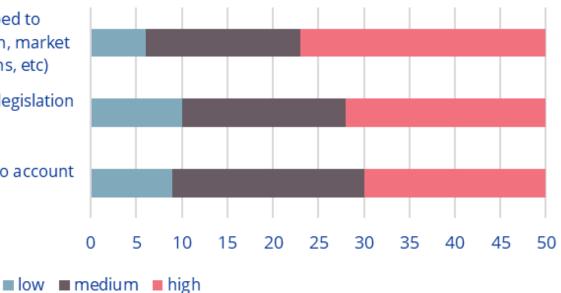


Demand-side policy barriers

Commercial frameworks are not yet developed to promote bio based products (incentives, taxation, market supports, product standards and specifications, etc)

Lack of an efficient "green public procurement" legislation at regional/national level

Public procurement regulation does not take into account Biobased products





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

SME comments



Stakeholder perception barriers

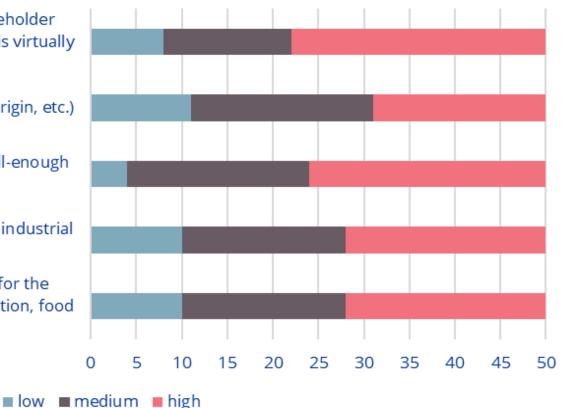
Biobased products not visible enough: stakeholder knowledge in respect of bio refining activities is virtually non-existent

Lack of labeling (environmental performance, origin, etc.)

Benefits of biobased products not well-enough communicated

Fundamental lack of understanding of industrial biotechnology

Negative messages in the media create fear for the unknown (e.g indirect land use, genetic modification, food versus fuel, ...)





"large confusion about biobased and biodegradable plastics"

"big problem in building sector"

SME comments



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.

Investment barriers: investment risk

Lack of investor confidence in industrial biotechnology

Lack of visible tangible products & blockbuster products

Time "return to investment" too long for venture capitalists

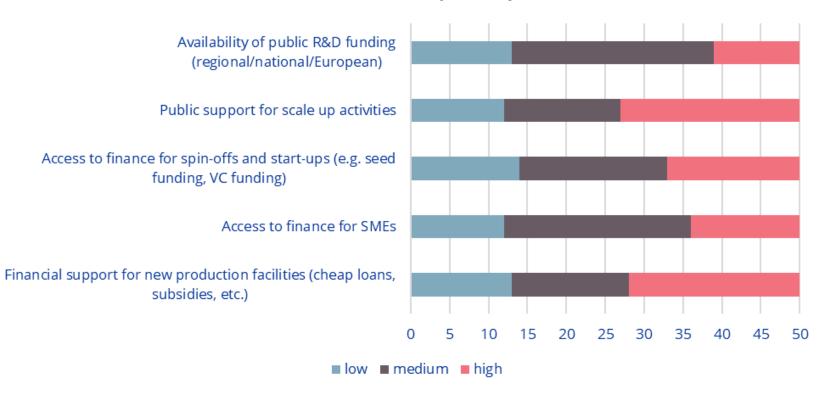
20

30

35

50

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



Recommendations

Demand

Green procurement

Investment & Funding

Circular Economy Thematic Investments

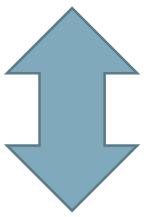
Public perception

Building awareness



BioBase4SME strategy and action plan

policy priorities of BioBase4SME partners



outcomes of the SME survey



Recommendations

Demand

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Public perception

Building awareness

Interreg EUROPEAN UNION North-West Europe BioBase4SME

European Regional Development Fund

Thank you!