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investment gap to achieve sustainable targets in the bioeconomy -- 4.1 Forestry: An investment gap of more than €4.2 billion in the European Union and 270 billion globally -- 4.2 Agriculture and agrifood sectors: An investment gap of €67.8 billion in the European Union and 300 billion in developing countries -- 4.3 Irrigation: An investment gap of €11.5 billion per year in the European Union and 77.8 billion in the rest of the world -- 4.4 Research, development and innovation in bio-based industries: An investment gap of around €1 billion in the European Union and 10.5 billion in developing countries -- 4.5 Innovative bio-based industries: An investment gap of around €2.07 billion to €3.35 billion in the European Union -- 4.6 Bioenergy: An investment gap of €8.7 billion to €9.4 billion per year in the European Union -- 4.7 Fisheries and aquaculture: An investment gap of €3.3 billion to €10.4 billion per year in the European Union and 25 billion to 50 billion in the rest of the world -- 4.8 Protection of resources: An investment gap of €18 billion in the European Union and 95 billion in the rest of the world -- 5 Filling the investment gaps in practice: The role of the EIB in overcoming barriers to investment in the bioeconomy -- 5.1 Barriers related to regulation require better coordination and harmonisation. 5.2 Fostering cooperatives and regional cooperation among small and medium-sized bioeconomy companies to reduce investment barriers related to market size and structure -- 5.3 Investment barriers from public sector constraints can be reduced by aligning budgets with climate and sustainability goals and increasing funding for research and innovation that benefits society -- 5.4 Investment barriers related to access to financing can be tackled with targeted financial products -- 6 Conclusion -- Annex 1: Contribution of bioeconomy sectors to Sustainable Development Goals -- Annex 2: Green Deal and bioeconomy -- Annex 3: Detailed calculations for the European Union's investment gap in forestry -- Annex 4: Methodology for estimating the European Union's irrigation investment gap -- Annex 5: Methodology for estimating the investment gap for irrigation in the rest of the world -- Annex 6: Methodology for estimating the European Union's investment gap for research, development and innovation -- Annex 7: Methodology for estimating the European Union's investment gap for bioenergy.

Sommario/riassunto

The bioeconomy contributes €967 billion annually to the European Union, representing 8.6% of GDP and supporting 16.9% of EU jobs. It constitutes a cornerstone of the Union's economic resilience and its innovation, competitiveness and sustainability agenda. Moreover, the bioeconomy is integral to the European Green Deal and the United Nations Sustainable Development Goals (SDGs), underpinning efforts to ensure food security, advance climate adaptation, safeguard biodiversity, and enable the transition to a low-carbon economy. Yet despite this, investment in the bioeconomy falls short by an estimated €121.8 billion a year in Europe and as much as 777 billion a year globally. This report examines the state of the bioeconomy, the structural drivers of the investment gap, and innovative financing mechanisms to mobilize the capital required to realise its full potential.