

Participatory workshop:

“Engaging with primary producers in bio-based value chains: setting the scene for the CBE JU Deployment Group on Primary Producers”

28 February 2024, Brussels



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1. Background

A task force involving CBE JU Programme office, the European Commission and the Bio-based Industries Consortium was set out in May 2023 to define the Deployment Group on Primary Producers scope, objectives, areas of action, etc.

The first draft of the concept note of the Deployment Group on Primary Producers prepared by the EC-BIC-CBE task force was presented to the Governing Board in December 2023.

Considering that some of the elements needed a further definition, for example, the right size of the group or how to prioritize the different types of actions, it was agreed to organize a workshop before finalizing the concept note for the endorsement of the Governing Board. **The participative workshop took place at CBE JU premises (Brussels) on 28.02.2024.**

2. Objectives of the workshop

The workshop aimed at engaging with primary producers and relevant stakeholders working closely with primary producers to discuss challenges and opportunities offered by circular bio-based innovations and to gather feedback on how the future CBE JU Deployment Group on Primary Producers could best contribute to them.

More concretely, the workshop has served to collect feedback on the different sections of the concept note:

- Main challenges and problems to be tackled by the DEG PP
- The areas of action envisaged for the DEG PP to address the problems and challenges
- Areas of action to ensure synergies with other initiatives
- Areas of action to ensure successful cooperation between other primary sectors
- Areas of action to ensure cooperation with the rest of the actors of the value chains, in particular with the industry
- The profile, type, number, etc. of stakeholders of the future members of the DEG PP
- Ideas to establish the DEG in an efficient and manageable way

3. Participants

The workshop targeted organizations that are primary producers and/or work in close cooperation with the primary sector (e.g., cooperatives, advisors, etc.) for the primary sectors: agriculture, forestry; and fisheries & aquaculture.

A long list of potentially interested organisations was created. The list included about 130 organisations identified together between EC-BIC and CBE JU (in consultation with relevant stakeholders, including COPA-GOGECA, SRG, relevant HE/CBE projects, BIC members, etc.). Due to the initial low level of registration, all of them were invited to the workshop.

41 organizations registered and 38 attended the workshop including:

- Primary sectors: agriculture (61%), forestry (23 %) and fisheries & aquaculture (16%)
- Type of organisations: EU –based and national (20% EU-based vs 80% National)
- Profile: primary sector or close to the primary sector (50% each)
- Geographical origin: some countries more interested: Spain, Italy, Finland, Ireland and Croatia.

A preparatory questionnaire was also launched, and it was very important to engage with stakeholders and prepare them to participate in the workshop.

Annex 1- contains the list of registered participants.

4. Content and programme of the workshop

The workshop kicked off with an **Opening session** addressed by Nicoló GIACOMUZZI-MOORE, CBE JU Executive Director, Diego CANGA FANO, Director at the European Commission, DG AGRI and Marco RUPP, Head of Public Affairs and Sustainability, BIC.

Two subsequent **info sessions** followed where the main information about the CBE JU programme and the concept and objectives of the CBE JU Deployment Group on Primary Producers were presented by Virginia PUZZOLO, Head of Programme, CBE JU, Ana Ruiz, Programme Officer, CBE JU and Michael WOLF, Policy Officer, EC DG AGRI.



An **ice-breaker session** took place to introduce the hosting team and the participants of the workshop, allowing them to identify via participatory techniques who were the representatives from each primary sector, etc. As well, the participants were requested to express their expectations for this workshop. The workshop continued with **2 breakout sessions**, followed by debriefs of the main outcomes of the discussions.



The workshop closed with a **Wrapping-up, conclusions and next steps** session address by Virginia PUZZOLO, CBE JU and Orsolya FRIZON-SOMOGYI, Deputy Head of Unit, DG AGRI. The participants could also submit their main take away from the workshop via Slido.

The agenda is provided in Annex 2.

5. Main outcomes and harvested material

5.1. Breakout session 1

Focus: Helping to define the areas of action and type of members of the future Deployment Group, considering the specificities and particularities of the primary sector (i.e., agriculture; forestry; or fisheries & aquaculture)

Groups: To answer the questions of Breakout session 1, the participants were grouped per primary sector resulting in 5 tables as follows: Agri (table 1, 2 and 3), Forestry (table 4) and Aqua (table 5).

The main outcomes per question are reported below.

1.1. What are the main problems and challenges faced by the primary sector you are representing in order to fully benefit from the opportunities offered by circular bio-based innovations that should be tackled by the CBE JU Deployment Group?

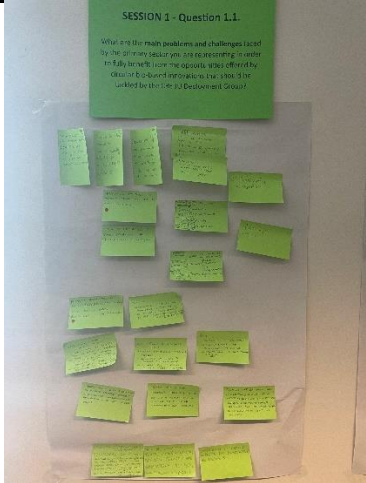
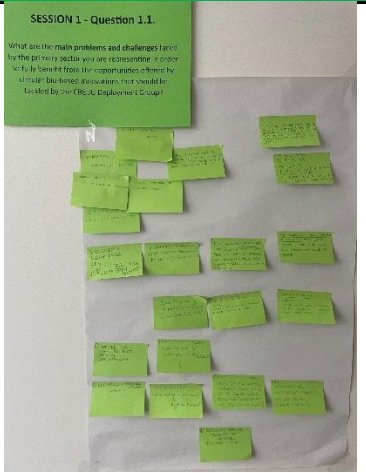
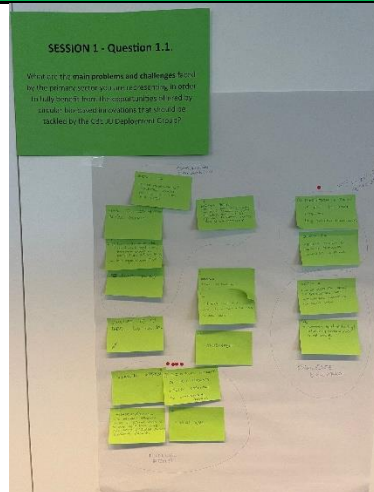
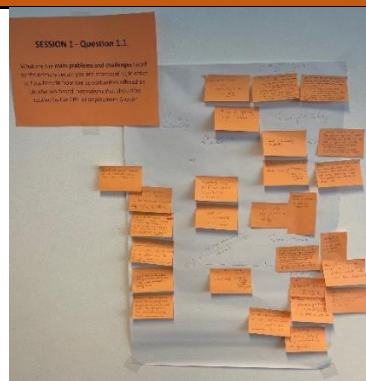
| Table 1: Agricultural sector - Rapporteur Oana Neagu | |
|---|--|
|  <p>SESSION 1 - Question 1.1. What are the main problems and challenges faced by the primary sector you are representing in order to fully benefit from the opportunities offered by circular bio-based innovations that should be tackled by the CBE JU Deployment Group?</p> | <ul style="list-style-type: none"> • Lack of awareness and communication on the benefits of bioeconomy • Lack of understanding from the industry on how the sector works: • Not knowing from the farming sector the potential of bioeconomy and the opportunities provided by CBE work. • Not enough dialogue with industry: how to build synergies with industry is still a problem for farmers. • Lack of skills and advisory services to build new business models. The situation differs a lot between member states but in general, the skills and advisory services are not strong. • Problems related to the scaling up. • Unfair competition on land use and food use. How bio-based vs. fossil-based is treated is also unfair: a lot of pressure on the way farmers use biomass but not such a level of pressure on the use of fossil-based products. • Lack of incentives (financially speaking) and lack of coherence on the importance of the bioeconomy at the policy level (i.e., the importance of the economy should be emphasized and be back on the political agenda) |
| Table 2: Agriculture sector - Rapporteur: Tajana Radić | |
|  <p>SESSION 1 - Question 1.1. What are the main problems and challenges faced by the primary sector you are representing in order to fully benefit from the opportunities offered by circular bio-based innovations that should be tackled by the CBE JU Deployment Group?</p> | <ul style="list-style-type: none"> • Lack of awareness of funding opportunities • Farmers sometimes do not have enough knowledge what they can do /information flows and dialogue is needed. • Value chains not organized. • Fragmentation of small farmersto take part in supply chains if they are not organized in PO or Cooperative • Lack of cooperation in CEE countries • Lack of economic interest and problems of finance • Seasonality: each crop has specific cycle and famers need to follow this. • Lack of scale • Economic feasibility and putting new products on the market which had to be regulated / to provide not complex registration procedure. • Certification process is complex and need to be simplified. |

Table 3 Agricultural sector - Rapporteur: Maider Gómez Palermo



- Small producers are not sufficiently integrated in the value chain to reach enough quantity of biomass to valorise.
- Lack of expertise and resources
- Regulations applied differently (by each country) imply biobased products less competitive in the market.
- Access to knowledge of farmers is not good (advisory services). #
- Communicate bioeconomy to farmers is not well targeted: how to make it relevant for them (identify opportunities for them).
- Financing: significant investments are needed, there should be a follow-up plan.
- Many administration procedures and regulations
- Lack of modernisation and reluctance to change (old people).
- Bio-based innovations are not realistic in some cases from a risk/benefit perspective.
- Experiences of successful cases are useful and contribute to build trust.
- Perception of bioeconomy is not good: it imply to address too many issues: pest control, biodiversity, soil quality improvement, decrease climate change impact.
- Benefits associated to an innovation are sometimes only allocated to certain actors of the value chain. There should be benefits for all the stakeholders (primary industry) involved.
- Water usage is an issue to address.
- At farm level the main problem is the small income obtained.
- New regulations (can't use certain pesticides, need to use less or less effective fertilizers, need to set-aside fields, measure to protect fauna/biodiversity, etc.) don't take into account the effect on the production costs.
- Share risk among the actors involved in the value chain.
- Primary producers should be involved from the beginning, to identify and evaluate relevance and urgency of the problems and challenges and not only to implement solutions that have not been developed considering their feedback
- Need of supporting services to raise awareness and communicate regarding the opportunities and solutions that can be brought.

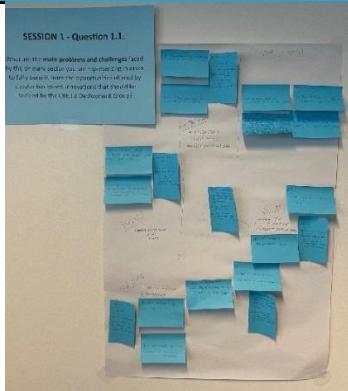
Table 4: Forest - Rapporteur: Martin Behrens



- Although there are successful cases out there is a general lack of time and capacity, which might be related to a perceived low prioritisation to get involved due to a gap of knowledge and awareness among primary sector actors
- There is currently a low involvement of primary sector actors in CBE JU programming. The required participation of primary sector actors in some Calls is seen positive although it sometimes also is seen as a burden which needs to be implemented but not taken seriously
- Characteristics of the sector hamper participation, i.e. fragmentation, dominance of small companies or organisation sizes and a poor self-organisational level which leads to low capacity to influence i.e. policy developments
- Unfavourable framework conditions including policy, regulation and societal expectations and pressures on all levels including the EU, regional, national and local
- A high competition for biomass, including increasing demands on Sustainable Forest Management, lead to a general perception that

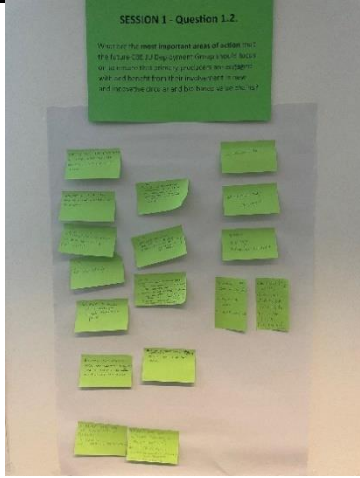
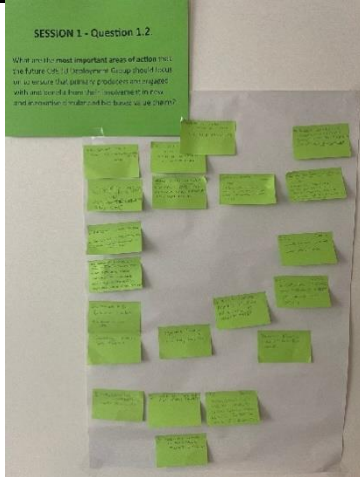
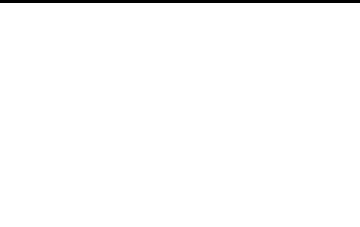
there is not enough biomass to meet all regulatory and policy demands.

Table 5: Fisheries and Aquaculture Rapporteur: Luis Costa



- Lack of awareness:
 - Of Producers about opportunities of Bioeconomy Business Models and/or Aquatic Ecosystem Services Business Models
 - Of Consumers and Users about the benefits of consuming biobased, to drive Producers interest
- Communication
 - Communication barriers with producers – almost need to go door-to-door; needs to be simple and streamlined; inefficient interlocutors at the producer level to receive and process the information;
 - Insufficient communication between R&D – Public – Private sectors leads to wasted efforts with unfeasible solutions;
- Scale: Fragmented value chains / Small players / local producers – not enough resources (financial and others) to commit;
- Legal:
 - Algae Vs. Fish aquaculture has vastly different impacts on the environment but the legal framework exists for fish aquaculture and makes it more difficult for algae producers
 - No framework for RAS (Recirculating aquaculture systems) in EU
 - No regulatory framework to incentivize bioeconomy products
 - Incomplete spatial planning for aquaculture sectors on land and at sea
 - Implementation of fisheries landing obligation and separately store by species (type of biomass)
- Technological
 - More technology development required (e.g. mechanization of algae production, algae production quality control standards, increase efficiency and reduce costs of biobased solutions, novel biobased pathways towards new sources of biomass and new products and value chains, utilization of environmentally problematic coastal algae blooms biomass, improve business cases of small scale biorefineries)
 - Lack of Impact Assessment Tools
 - - Lack of storage capacity on fishing vessels

1.2. What are the most important areas of action that the future CBE JU Deployment Group should focus on to ensure that primary producers are engaged with and benefit from their involvement in new and innovative circular and bio-based value chains?

| Table 1: Agricultural sector - Rapporteur Oana Neagu | |
|---|--|
|  | <ul style="list-style-type: none"> • Awareness raising, better explanation, and communication on the opportunities offered by the bioeconomy. • Improve the messages and the language used at the national level: simpler messages. • Translation of documents in specific languages might help but also using the language that farmers understand (use their words): what is their role and what are the benefits, should be better explained to them. • Farmers should also understand better why they need to be part of future research and innovation projects and how research and innovation can help them find new business models. • Sharing best practices and recognition of the ones that they succeed in bringing research to practice. • More direct contact with industry and build more synergies between the farming sector and the industry. For example, co-ownership and multi-feedstock biorefinery model, solutions that are possible commercially. • To address local, national, and regional specificities (geographical balance should be also addressed in the composition of the group) • To apply eligibility criteria for projects: farmers and cooperatives should be by default members of the consortium/projects. This should be mandatory when new value chains are created. • Financial part: The farmer sector needs concrete models for financing (business models is fine but also how the new business can receive financial support) |
| Table 2: Agriculture sector - Rapporteur: Tajana Radić | |
|  | <ul style="list-style-type: none"> • Provide business models and ways of cooperation and to be sustainable economically. • Investment is needed for value chains development. • New business models we have to take care that regulation is updated and facilitate this new product. • Framework updates, access to market, knowledge exchange • Awareness of a new products • Concrete examples • Value chain optimization- Specifically identifying gaps • Cross sectoral governance approach • Improve education of farmer - Clarity of the process and knowledge exchange |
| Table 3: Agricultural sector - Rapporteur: Mainer Gómez Palermo | |
|  | <ul style="list-style-type: none"> • Identify actions to facilitate the valorisation of side-streams/residues (regulation of residues). • Improve cooperation among producers, technology centres, etc. and involve primary producers from the beginning. • Find a trusted entity to transfer the results. • Identify suitable business models and how to transfer them to farmers. |

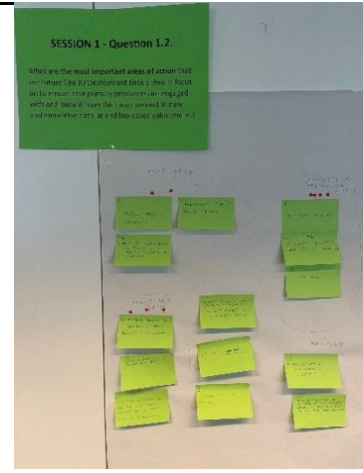
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|  | <ul style="list-style-type: none"> • Develop networks. • Improve or create repository. • Simplify the application procedures and regulations. • Transfer knowledge. • Demonstration of solutions. • Educational sector can help to improve the recognition of the general public (efforts of primary producers to contribute to biobased economy depletion). • Find synergies among different actors and sectors. • Address Water, energy and pest disease management (taxation). |
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Table 4: Forest - Rapporteur: Martin Behrens

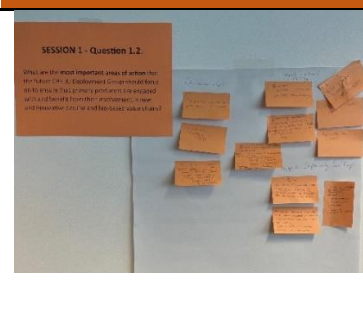
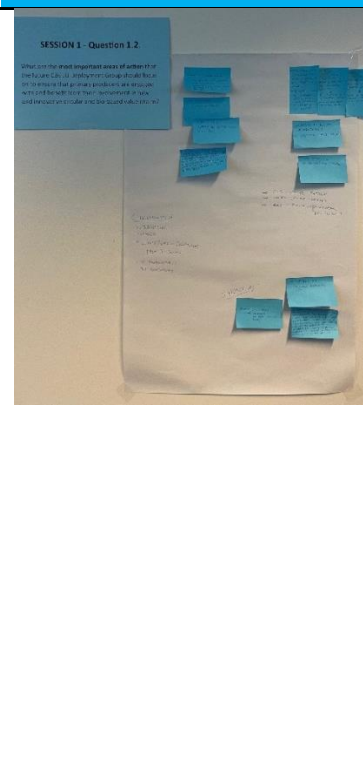
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|  | <ul style="list-style-type: none"> • Actions should be realistic and manageable by a group of primary sector actors which will be involved pro bono • Improve and simplify communication. Try to established direct channels to the primary sector stakeholders. • Support the involvement in CBE programming and projects • measures of capacity building, learning and sharing from best practices i.e. by promoting decentralised knowledge hubs; support collaboration within and across sectors, use front runners i.e. successful start-ups as best practice examples |
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Table 5: Fisheries and Aquaculture - Rapporteur: Luis Costa

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|  | <ul style="list-style-type: none"> • Communication: <ul style="list-style-type: none"> - Streamline and simplify - Increase visibility of Producers and of new biobased products - To Producers and to Consumers: from Organizations already in contact in Producers (Cooperatives, associations, authorities which issue the permits...); About Claims / Value / Premium from utilizing products from bioeconomy and industrial symbiosis instead of fossil based - Promote cross-sectorial communication - Promote intra-sectorial communication • Stimulate development of new products: <ul style="list-style-type: none"> - Of medium/high value - European species (algae and others), native, adapted and differentiated from other geographies - Support renewable energy in aquaculture, e.g. from waste • Incentives: <ul style="list-style-type: none"> - For circular economy products - To de-risk supply chain - Create incentives through consumers, users (industry) and policy (environmental benefits), for example: to use european-made biofertilizers, to replace chemical fertilizers (with huge impacts on sustainability and geopolitical factors); to incorporate algae biomass into aquaculture fish feed. |
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1.3. In your opinion, what are the most important organisations (type, profile, geographical coverage, etc.) that should be members of the deployment group?

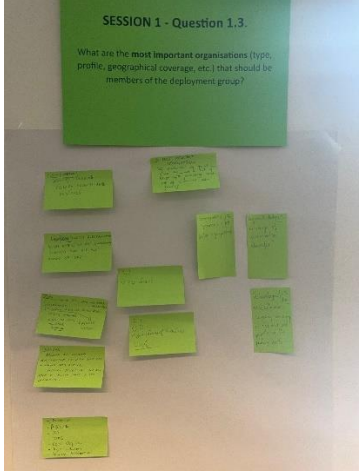
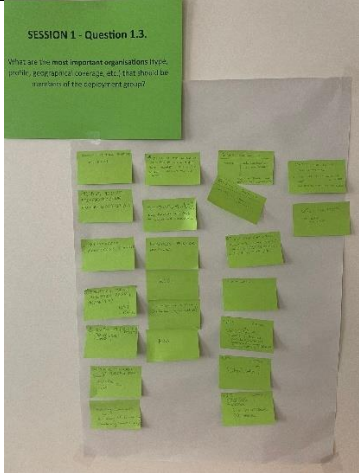
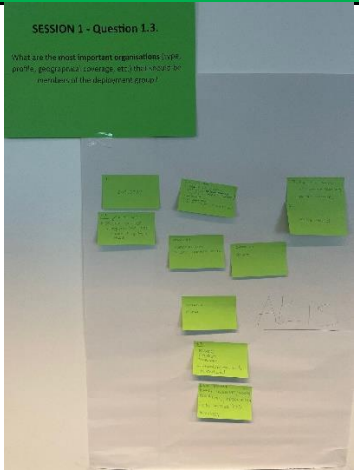
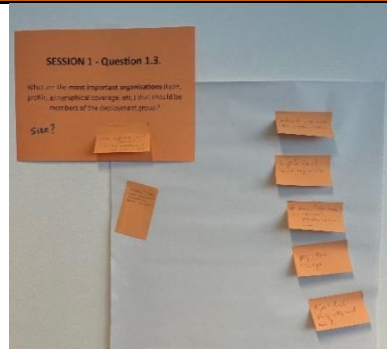
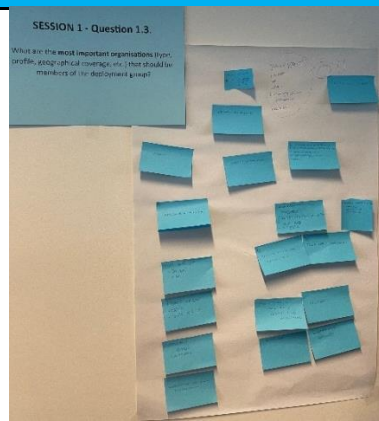
| Table 1 Agricultural sector - Rapporteur Oana Neagu | |
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|  | <ul style="list-style-type: none"> • Young farmers or/and their representatives • Farmers cooperatives are very important as it is done in CBE. • To consider involving: banks (e.g., agricultural banks, soil capital, etc.) even not being direct members of the DEG but collaborating in the activities of the DEG • Advisory services working with farmers. • Industry and private companies: e.g., dairy companies are investing a lot and also linked to farmers' cooperatives. • Members that can ensure collaborations and better use of the DEG activities: from the financial point of view but also to communicate better the climate and environmental aspects linked to the primary sector. |
| Table 2 Agriculture sector- Rapporteur: Tajana Radić | |
|  | <ul style="list-style-type: none"> • National primary producers' associations, local authorities, ministries Ministry of agriculture, forestry and fishery/Ministry of regional development • Other key actors are cooperatives, academic institutions, farmers and primary producers, the private sector-industry, technology providers, policy makers, and advisory bodies (TAEGS) should also be involved. • The deployment group size was recommended to be around 10 people per organization, with cluster groups taking a micro and macro view. |
| Table 3 Agricultural sector – Rapporteur: Maider Gómez Palermo | |
|  | <ul style="list-style-type: none"> • Fundacid • Technological centers • Companies • Public offices • Representatives of primary producers that are not part of the cooperatives • Policy makers need to be part of it • Actors involved in the value chain to valorise waste from food and feed industry. • Useless to look at national level, involve local representatives • Industry network |

Table 4: Forest - Rapporteur: Martin Behrens



- a rather bigger group of stakeholders with working group structures which support horizontal (cross-sectorial) but also sector specific activities
- stakeholder categories to be considered:
 - networks, associations, sector representations (on all levels)
 - small and large organisations
 - knowledge brokers i.e. educators, advisory services, knowledge hubs
 - good geographic coverage, including different levels (EU, regional, national, local)

Table 5_ Fisheries and Aquaculture - Rapporteur: Luis Costa



- There was little time to discuss this topic and the group felt that it was difficult to propose something from scratch, without some additional small guidance. For example: entities excluded ab initio or the envisaged size of the group (20? 100? 200 members?). So, the result is perhaps lacking objectivity.
- A long cascade of information should flow from the top, all the way down to the primary producers, informing them of opportunities to be engaged, such as:
 - DG AGRI, ENVI, GROW, MARE (please remember to include this for Marine and Aquatic biomass!)
 - National authorities (Agri, Forests, Environment, Economy, Sea)
 - Regional authorities
 - Local authorities / municipalities (especially with strong activity in primary production)
 - Licensing/permitting authorities
 - Federations, associations and cooperatives of primary producers
 - Federations, associations and cooperatives of biorefinery/biomass transformation businesses (BIC/CBE...)
 - Primary producers: fisheries by-catch, all aquaculture producers (fish, shellfish, macroalgae, microalgae) at sea and onland, all algae natural blooms harvesters
- A lot of different players were identified as relevant, probably too many to have a functional DEG. So, one idea was to consider an organization such as:
 - A smaller, operational, executive and agile group (5-20 members?)
 - A larger, consultation and dissemination/representation body (50-200 members?)
 A parallel list of stakeholders to be engaged and utilized, e.g.: i.
 - Funding partners (banks, foundations...); Media partners; Research organisations; Blue Regions (Gotland, Kiel...); Private investors (Hatch, Blue Invest...); Mission Ocean Lighthouses; Chambers of Commerce, Economy and Trades&Crafts; Expert Advisory Services; FLAGs (Local Action Groups); EU4Algae; Submariner Network.


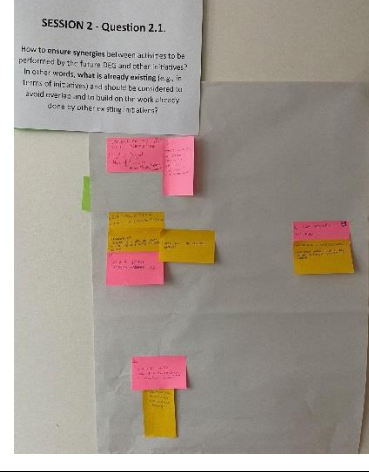

5.2. Breakout session 2

Focus: How to ensure successful cooperation between different primary sectors, and with the rest of the actors of the value chains (in particular with industry), and how to ensure synergies with existing initiatives.

To answer the questions of Breakout session 2, the participants were mixed in 5 tables.

The main outcomes per table are reported below per question.

2.1. How to ensure synergies between activities to be performed by the future DEG and other initiatives? In other words, what is already existing (e.g., in terms of initiatives) and should be considered in order to avoid overlap and to build on the work already done by other existing initiatives?

| Table 1 - Rapporteur: Francisco Castro Alves, EuropaBio | |
|---|--|
|  <p>SESSION 2 - Question 2.1. How to ensure synergies between activities to be performed by the future DEG and other initiatives? In other words, what is already existing (e.g., in terms of initiatives) and should be considered in order to avoid overlap and to build on the work already done by other existing initiatives?</p> | <ul style="list-style-type: none"> • Most of the participants were not aware of other ongoing initiatives due to lack of communication or organisation and they left the suggestion to create a “one-stop-shop” to inform them on projects, networks, initiatives. • Other initiatives identified were EU CAP Network, EIP AGRI and National Operational Groups from the Rural Development pillar of the CAP. |
| Table 2 - Rapporteur: Emanuele Paolo Sicuro | |
|  <p>SESSION 2 - Question 2.1. How to ensure synergies between activities to be performed by the future DEG and other initiatives? In other words, what is already existing (e.g., in terms of initiatives) and should be considered in order to avoid overlap and to build on the work already done by other existing initiatives?</p> | <ul style="list-style-type: none"> • Mapping (what is going on and what has already happened (biorefineries, existing projects, catalogue of projects already funded, etc. at all levels, local, regional and EU) • Appropriated and target sharing of knowledge, for example creating a repository. But, the repository should be accessible for farmers and actionable, including information not only on EU projects but eventually it should provide an opportunity to be a repository of local and national activities of interest for farmers. |
| Table 3 - Rapporteur : Mainer Gómez Palermo, Project Manager CIRCE | |
|  <p>SESSION 2 - Question 2.1. How to ensure synergies between activities to be performed by the future DEG and other initiatives? In other words, what is already existing (e.g., in terms of initiatives) and should be considered in order to avoid overlap and to build on the work already done by other existing initiatives?</p> | <ul style="list-style-type: none"> • On the one hand, involve the right actors to ensure those synergies take place. The relevant actors/entities/organisations to involve are: <ul style="list-style-type: none"> - European associations, CAP monitoring committees, organisations of producers - EU partnerships and more specifically ERANET (European forestry partnership, agriculture partnership, blue bioeconomy.) |

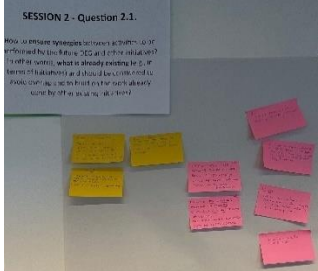
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|  | <ul style="list-style-type: none"> - Advisory networks (national and subnational level) such as the forestry advisory network - EU projects targeting primary producers' engagement - 5) AKIS very much active in the agriculture and increasingly in forestry sector - 6) EU associations can be amplifiers • On the other hand, actions to promote synergies are: <ul style="list-style-type: none"> - create platforms that interconnect sectors' representatives - develop working agenda in which farmers, companies and government have a role to discuss who to promote bioeconomy - Identify policy areas (nature restoration, fertilisers) that should be addressed to contribute to promote biobased initiatives - Exchange of information regarding the solutions that have been already developed and tested - investigate national initiatives with the same objectives - finance communication and exchange between different entities - CO2 certificates can be a powerful tool to improve recognition of biobased initiatives - Horizon booster service and CAP monitoring committees can play a key role to support stakeholders. - Connect platforms. - Support the development of working agendas. |
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Table 4 – Rapporteur: Jérôme Roche, Secretary General of CEETAR

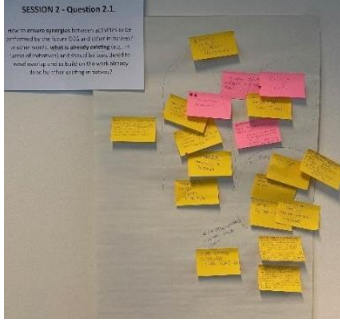
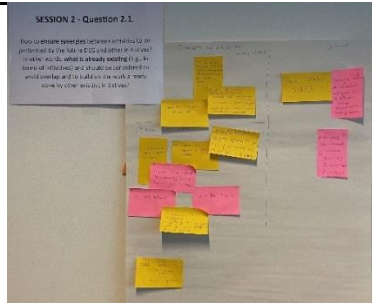
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|  | <ul style="list-style-type: none"> • First of all: map all the existing projects and classify them according to the scope (technical support, training...) and the geographical breakdown; • Once map, meet all the projects coordinators and the stakeholders implementing the projects; • Propose the projects coordinator to exchange experiences; identify the strengths and the gaps; • Do not only focus on financial support, but also on regulatory developments; • Reach also the Member States level, both in terms of policy and projects; • Look for additional financial supports, beyond subsidies, for example by developing bank loans, private equity and • The CBJ-EU proposals are multi-actors and cross-countries: this asset should be used to raise awareness towards other sources of funding, including bankable business cases. This will be of a particular interest for CBJ-EU non-selected projects (the ones benefitting from the “seal of excellence”), which nonetheless bring with them a great potential for development. • In addition to this, these first rejected projects could learn from their mistake, benefit from specific mentoring to make sure that the next time they can reach their goal. |
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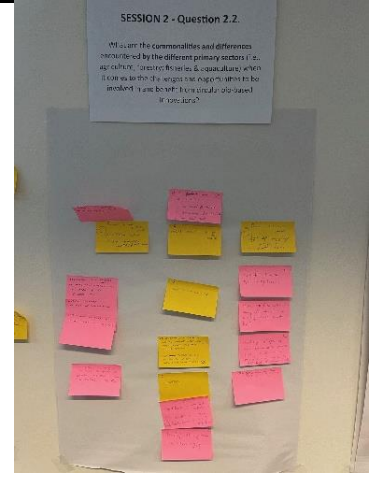
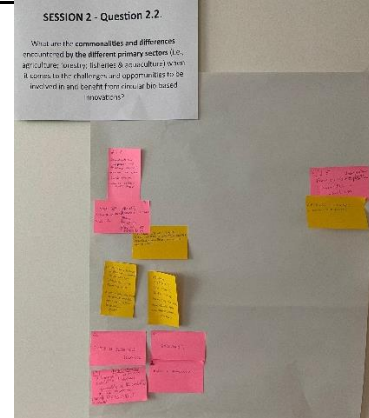
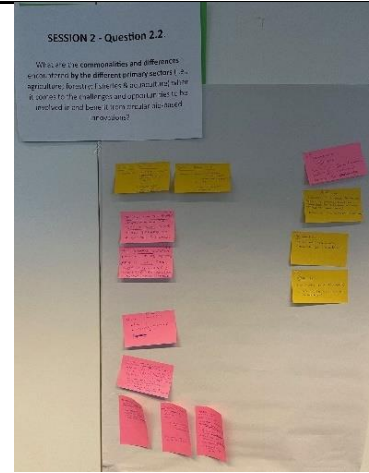
Table 5 : Rapporteur Eftalia Arvaniti SUBMARINER Network// BlueMission Banos// EU4Algae



- Analyse funded initiatives e.g. SUBMARINER Network flagship initiative of EUSBSR, and projects and studies, e.g. CBE, INTERREG (platform) projects, Horizon CSA actions and perform a gap analysis of initiatives and actions to identify where DEG can have more impact.
 - Certain (CSA) projects promote improving governance of innovation like ShapingBio, BlueBioClusters
 - Some Horizon projects promote primary producers market access: BalticMUPPETS, COOLBLUE, ULTFARMS, Seamark, AquaVitae
 - Some Interreg Platform projects consolidate state of play and promote bioeconomy sectors, such as Blue Platform project (Interreg BSR)
 - Mission Ocean, EU4Algae and SUBMARINER Network promotes entire EU sectors and/or blue bioeconomy at macro-regional level, with Roadmapping, Action plans, operational thematic Working Groups with agendas meetings, and minutes
 - Studies on agriculture, aquaculture, fisheries and forestry that operate with primary producers in biobased value chains to.

- Perform an innovation ecosystem approach analysis and good practice exchange:
 - Perform a desk analysis of different value chain platforms, on material, energy, feed, food, packaging, bioactives, to analyse state of play and needs for innovation and market access
 - Economic and environmental metrics & KPIs
 - Geographic region particularities (incl. environmental, financial, infrastructure, also S3):
 - Social ecosystem potentials and needs, e.g. clusters, communities, land uses, S3 strategies, available infrastructure/investments, to identify priorities and cross-cutting activities.
 - Investigate circular practices at local/regional level, nutrients, carbon, energy, water, material
 - Regional Business models that enhance circularity, internalise ecosystem services, resilience at regional level
 - `Relevant species
 - Smart Specialisation Strategies (S3) of regions on regional innovation priorities
 - Activate big cooperatives in control of the entire supply/value chain, and also primary producer mediators/brokers
 - Demonstration of solutions to develop good practices to de-risk industries and create investment cases.
 - Facilitate knowledge transfer and recognition by organising study visits to the demos
 - Think tanks to setup match-making facilities for developing/advancing/de-risking value chains, based on needs/challenges, for companies and also regions (regional challenges)

2.2. What are the commonalities and differences encountered by the different primary sectors (i.e., agriculture; forestry; fisheries & aquaculture) when it comes to the challenges and opportunities to be involved in and benefit from circular bio-based innovations?

| Table 1 - Rapporteur: Francisco Castro Alves, EuropaBio | |
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|  | <p><u>Commonalities:</u></p> <ul style="list-style-type: none"> • need for better communication internally (within the sector) and externally (final consumer), heterogeneity and uncertain availability of outputs, fragmentation or lack of scale. <p><u>Differences:</u></p> <ul style="list-style-type: none"> • levels of maturity and organisation depending on the country/sub-sector, type of outputs due to different sources, food vs non-food, food vs fuel purposes, harvesting period/timeline (days, months, year(s)). |
| Table 2 - Rapporteur: Emanuele Paolo Sicuro | |
|  | <p><u>Commonalities:</u></p> <ul style="list-style-type: none"> • they are looking for a sustainable business model. They want to know how these sustainable models could be built by bringing value to primary producers (e.g., a good example is dairy farms that are climate-neutral, by integrating sewage into the refarming to reduce methane emission). <p><u>Differences:</u></p> <ul style="list-style-type: none"> • different size, and different innovation capabilities (i.e., volumes). They also deliver different commodities (e.g., in the agricultural sector there are more aspects related to seasonality that you don't necessarily have in the forest sector or for example the diversity of commodities is also different). • Synergies are needed but we have also to acknowledge and take into account the differences of each primary sector. |
| Table 3 - Rapporteur : Maida Gómez Palermo, Project Manager CIRCE | |
|  | <p><u>Commonalities:</u></p> <ul style="list-style-type: none"> • Ensure successful market uptake of biobased products. • Seasonality of the feedstock. • Valorisation technologies available . • Actions are needed to improve the visibility of the efforts carried out by the primary producers to promote bioeconomy. • Lack of independent Advisory services: well equipped advisory. <p><u>Differences:</u></p> <ul style="list-style-type: none"> • Level of organisation and advocacy. • Same level of frustration towards European regulation. Logistic can be key to trade the biomass beyond the local area although it is not so relevant on agriculture biomass. • Integration to be able to reach a sufficient amount to make profitable the implementation of valorisation schemes. |

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| | <ul style="list-style-type: none"> • There are differences regarding the biomass regulation depending on the origin. |
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Table 4 - Rapporteur: Jérôme Roche, Secretary General of CEETAR

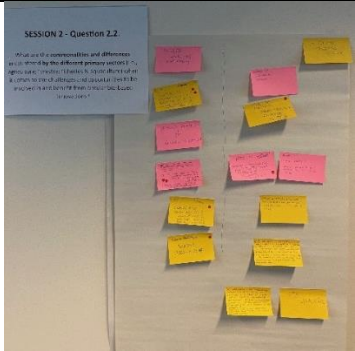
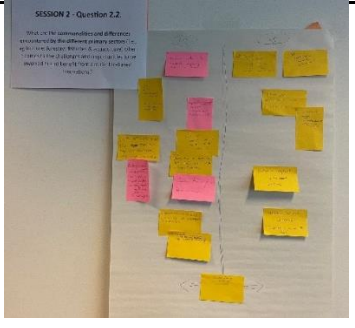
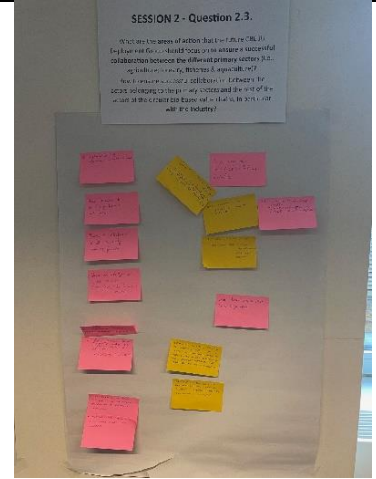
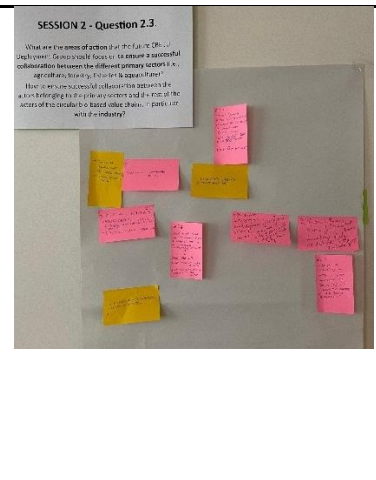
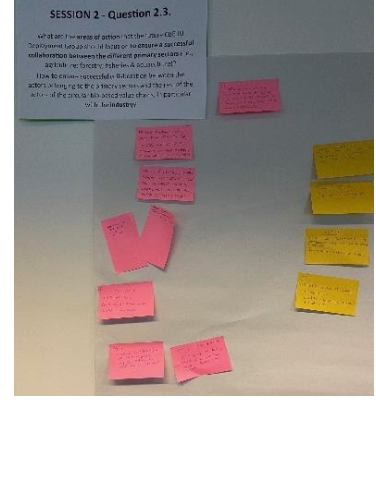
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|  | <p><u>Commonalities:</u></p> <ul style="list-style-type: none"> • Primary producers have the weakest part in the value-chain; • They use similar technologies for the same sector and they face the same technological challenges. However, a mapping of technological is needed; • The primary sector needs to be more competitive and more sustainable at the same time; • The primary sector is suffering from over-regulations, especially the bio-based sector; <p><u>Differences:</u></p> <ul style="list-style-type: none"> • Though over-regulated, the sectors must comply with very different requirements (for example in terms of land use); • Even common issues, such as soil health, are tackled in a different way according to the sectors; • At the end, the way each sector evaluates their efforts to be more sustainable differently/ They also communicated on this differently; • The waste valorisation is also different, between energy and material use. The agri primary producers are not paid for the waste, and face very various challenges, whereas the forestry sector is more homogenous on this. • There is a difference in terms of ownership: whereas agriculture is mostly privately owned, forestry ownership is more divided. The time-horizon is different. More broadly speaking, the management timeline is different, as trees will only be used years after their planting. |
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Table 5 : Rapporteur Efthalia Arvaniti SUBMARINER Network// BlueMission Banos// EU4Algae

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|  | <p><u>Commonalities:</u></p> <ul style="list-style-type: none"> • National authorities govern the administration rules in producers level, and not EU, so national guidelines and interpretation of EU directives is essential. • Ecosystem services are provided by most systems, • Power-to-X model, can be transferred to Biomass-to-X to enable industrial symbiosis and also land/sea multi-use models, promoting circular systems linking the blue and the green, e.g. algae. • This is important e.g. when e.g. building biorefineries that can operate all year round by processing diverse biomass, tackling the issue of seasonality of biomass availability. • Primary and secondary raw materials are equally important, however not there are geographic particularities that determine availability and potential of biomass streams. • Map biomass resources, incl. secondary material streams, e.g. using AI platforms. • Develop a brokerage and market place for primary and secondary resources. • Identify tested business models, that generates fair impact for farmers, in comparison to industry. |
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| | <p>Increase resilience of established value chains by integrating cross cutting supply chains, e.g. algae for feed, food, crop biostimulants.</p> <p><u>Differences:</u></p> <ul style="list-style-type: none"> • Green bioeconomy is more scaled up and scaled out, than blue bioeconomy, incl. supply chains and producers volume and abundance; Not many entrepreneurs, cooperatives of aquaculture farmers etc. • Some sectors are more resilient/predictable than others, e.g. fisheries vs. aquaculture, so they can be scaled up and scaled out better. Integrate upcoming species/biomass platforms into existing value chains, to increase resilience. • There are not many targeting regulations and licensing on upcoming biomasses, such as algae, usually they are included in fisheries, finfish aquaculture or agriculture. • Land-farmers own the land they use, instead aquaculture farms get a 5/10/20 years license to use a maritime space. Finland is an exception where farmers can “own” water. • Not level playing regulations (standards, labels, licensing) between blue and green biomass production. • Specific problems need specific solutions, and solutions can come from out-of-the-box ideas, so a brokerage/match-making facilities for promoting challenges of companies or even regions, can stimulate innovation across sectors. • Some sectors communicate better than others, e.g. forestry sector in Finland operates better than agriculture sector in Spain, so we need good practice exchange of transferable solutions. |
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2.3. What are the areas of action that the future CBE JU Deployment Group should focus on to ensure a successful collaboration between the different primary sectors (i.e., agriculture; forestry; fisheries & aquaculture)? How to ensure successful collaboration between the actors belonging to the primary sectors and the rest of the actors of the circular bio-based value chains, in particular with the industry?

| Table 1 - Rapporteur: Francisco Castro Alves, EuropaBio | |
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|  <p>SESSION 2 - Question 2.3. What are the areas of action that the future CBE JU Deployment Group should focus on to ensure a successful collaboration between the different primary sectors (i.e., agriculture; forestry; fisheries & aquaculture)? How to ensure successful collaboration between the actors belonging to the primary sectors and the rest of the actors of the circular bio-based value chains, in particular with the industry?</p> | <ul style="list-style-type: none"> Adapt existing tools or policies from a sub-sector to other, share information about what did not work, two-way communication channel between primary producers and industry to share, for instance, availability and demand for biomass. |
| Table 2 - Rapporteur: Emanuele Paolo Sicuro | |
|  <p>SESSION 2 - Question 2.3. What are the areas of action that the future CBE JU Deployment Group should focus on to ensure a successful collaboration between the different primary sectors (i.e., agriculture; forestry; fisheries & aquaculture)? How to ensure successful collaboration between the actors belonging to the primary sectors and the rest of the actors of the circular bio-based value chains, in particular with the industry?</p> | <ul style="list-style-type: none"> Better integration in the supply chain: farmers they should not only seen as biomass suppliers, but they should be also part of the innovation journey and they should also benefit from the different market applications. So, primary producers should benefit from that. To use and apply the slogan “From competition to collaboration”: cooperative approach within the primary sector but across them should be achieved.. Conversation between the three sectors is needed. Primary producers not only need to join projects but also enjoy long-term opportunities offered by the solutions developed by them. Important to find the right way to deliver messages to primary producers _use a language that is clearly understood by them. |
| Table 3 - Rapporteur : Mainer Gómez Palermo, Project Manager CIRCE | |
|  <p>SESSION 2 - Question 2.3. What are the areas of action that the future CBE JU Deployment Group should focus on to ensure a successful collaboration between the different primary sectors (i.e., agriculture; forestry; fisheries & aquaculture)? How to ensure successful collaboration between the actors belonging to the primary sectors and the rest of the actors of the circular bio-based value chains, in particular with the industry?</p> | <ul style="list-style-type: none"> Find means to find joint actions. Find ways to transfer best practices. Find suitable formats to exchange keys and relevant information among initiatives/projects/entities. Summaries and practice abstract to share knowledge. Cross-sector knowledge transfer. Improve the collaboration. Knowledge transfer. Address regulation issues hindering the deployment of biobased initiatives. National advisory bodies: identify synergies. Direct connection between primary producers and industry (transforming industry, chemical industry, etc.). Create a platform/central point with updated information where valuable information can be consulted. |

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| | <ul style="list-style-type: none"> • Facilitate the dialogue among stakeholders at regional level. • Tinder platform connecting the actors of the supply chain. |
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Table 4 - Rapporteur: Jérôme Roche, Secretary General of CEETAR

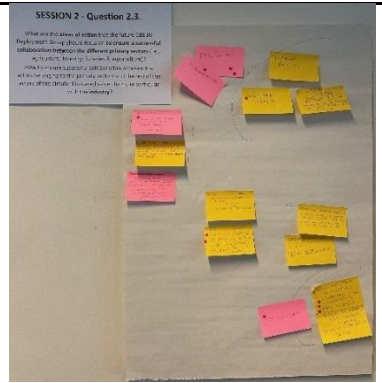
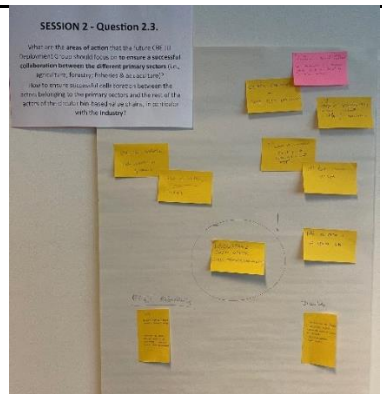
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|  | <ul style="list-style-type: none"> • The DEG should promote at the EU level the innovation principle, together with the precautionary principle. This should be reflected in the EU research projects work programmes (this would enhance the role of CBE JU!); • There is some space for more biomass mapping, for example waste mapping, the DEG should ask for it; • The DEG should establish long-lasting business models between primary producers and the end of the value chain; • The DEG could bridge the gap between the sectors' differences, such as fight against climate change and soil regulation; • The DEG could lobby the Member States to make sure that projects benefitting from the seal of excellence, but which are multi-country projects, could however benefit from financing; • Mainstreaming: in all CBJ-EU projects, add the primary producer angle, including in the project evaluation. In other words, is the multi-actor approach enough or do we need to dig deeper into selected flagship projects to check whether they are primary-producers compatibles); • Outreach an additional range of potential experts who know the primary sector and the industry, to add their profile to the pool of potential project evaluators (as too many experts come from the research world); • At the end of the day, the challenge is about networking, sharing information to understand each other |
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Table 5 : Rapporteur Eftalia Arvaniti SUBMARINER Network// BlueMission Banos// EU4Algae

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|  | <p>There is a lot already being done in supporting primary producers, and the aim is to cross-link with existing efforts, and develop actions on a targeting effort on:</p> <ul style="list-style-type: none"> • Develop a governing body platform for organising activities per biomass sector • DEG should have a closer collaboration with those institutions that manage the respective sector • Go for the low hanging fruits: <ul style="list-style-type: none"> - Most important urgent challenges - Areas of common benefit - Define actions and follow up steps • Share information about species, production practices, and examples of strong cross-cutting value chains • Use existing networks and events, e.g. AlgaEurope (EU4Algae), ESNI conference (nutrient recycling), Mission Arenas (regional events that exchange good practice exchange and support development of regional agendas) • Transfer good practices from green to blue bioeconomy to the right stakeholders, especially those NOT involved in DEG and CBE yet, incl. farm cooperatives, green parks, ecosystem services and subsidies. • Support biorefineries that process mixed biomasses year round • Focus on Green Deal, upcoming Blue, but also Circular Economy Action plan, linking market, technology and environment |
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| | <ul style="list-style-type: none"> • Promote Standardisation of products from primary and secondary producers. • Promote strategies for regional nutrient budgets linked to S3 strategies • Promote industrial symbiosis parks, connecting agriculture and aquaculture, and waste (side-streams), incl. large and small farms • Improve access to land and water for new farms • Make a action plan with realistic timeline and priorities • Make sure there is enough engagement and representation from all levels (EU, regional, local, trans- national/regional, research, implementation, etc.). Not to much at any level, or knowledge will not be transferred |
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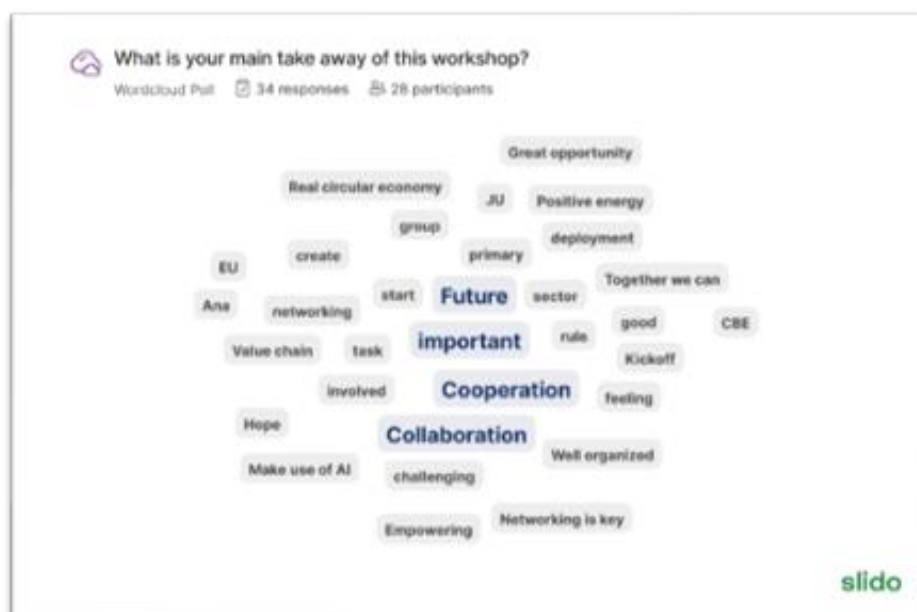
6. Participants' expectations vs main take away of the workshop.

The participants were requested during the ice breaker session to provide in one word or very short sentence, which was their expectations for the workshop. As well, at the closing session, the participants were requested to provide their main take away of the workshop via Slido. The result of the main contributions are described here.

6.1. Expectations before

NETWORKING, ACTIONS, UNDERSTAND why bioeconomy is far from farmers, discuss about **PROBLEMS** and **PROPOSE SOLUTIONS**, road for farmers and key points for next steps, obstacles and how to enhance bioeconomy, opportunities, open discussion, insights, understand, opportunities for projects, business models, innovations, **LEARN**, more incomes to farmers, diversify incomes, let understand that forest are part of the bioeconomy, find how industry and primary producers can better collaborate, etc.

6.2. Main take away after



Annex 1 – List of registered participants

| Name | Last name | Organisation | Country |
|----------------|-----------------|---|----------|
| Andrés | Álvarez Murillo | University of Extremadura | Spain |
| Efthalia | Arvaniti | SUBMARINER Network for Blue Growth | Germany |
| Carlo | Bagnara | Cà Colonna srl | Italy |
| Francesco | Balsamo | Eurocoop s.c.a.r.l. (cooperative olives) | Italy |
| Martin | Behrens | Agency for Renewable Resources (FNR) | Germany |
| Søren | Bisp | SEGES Innovation | Denmark |
| Laurent | BLEUZE | La Coopération Agricole | France |
| John | Brosnan | ICOS | Ireland |
| Miguel | Cachão | AVIPE | Portugal |
| Jose | Calama | TROIL VEGAS ALTAS S.COOP | Spain |
| Francisco | Castro Alves | EuropaBio (Representing PRIMED Project) | Belgium |
| Luís | Costa | A4F - Algae for future | Portugal |
| Hayri | Deniz | Fish and Food Products Company & Mugla Fish Farmers Association | Türkiye |
| maroun | el moujabber | CIHEAM Bari | Italy |
| Gyorgy | Endrodi | | Hungary |
| James | Gaffey | Munster Technological University | Ireland |
| Maider | Gómez Palmero | CIRCE | Spain |
| Katrin | Jõgi | Fibenol OÜ | Estonia |
| Karol | Kissane | Irish Farmers Association | Ireland |
| Daniel | Komlós | Confederation of European Forest Owners | Belgium |
| Airi | Kulmala | Central Union of Agricultural Producers and Forest Owners (MTK) | Finland |
| Desmytter | Manon | AQUIMER | France |
| Ana | Matin | University of Zagreb Faculty of Agriculture | Croatia |
| Huseyin | Metin | Kastamonu Entegre | Türkiye |
| Ivana | Miletic | Permanent Representation of Croatia to EU | Belgium |
| Constantin | Muraru | European Agroforestry Federation (EURAF) | Belgium |
| Neagu | Oana | Copa Cogeca | Belgium |
| Irene | Paredes Diaz | Innovarum | Spain |
| Tytti | Peltonen | Metsä Group | Belgium |
| Rui | Pereira | Green Aqua | Portugal |
| Rocio | Pérez Chinarro | University of Extremadura | Spain |
| Carlo | Piemonte | National Cluster of Forests & Wood - Italy | Italy |
| Michael | Pil | Avecom | Belgium |
| Lukas | Puffet | Boerenbond | Belgium |
| Tajana | Radić | Croatian Chamber of Agriculture | Croatia |
| Jerome | ROCHE | CEETTAR | Belgium |
| Emanuele Paolo | Sicuro | Cargill | Belgium |
| Martin | Wette | Austrian Chamber of Agriculture | Austria |

Annex 2- Agenda



28 February 2024 | 09:30 – 16:10 CET time



White Atrium, Avenue de la Toison d'Or 56-60, B-1060 Brussels, Belgium (only in person)

| From | To | Item | Presenter |
|--------------|-------|---|--|
| 9:30 | 10:00 | Registration & welcome coffee | |
| 10:00 | 10:20 | Opening of the workshop and welcome address by CBE JU and its partners | Nicoló GIACOMUZZI-MOORE, CBE JU Executive Director Diego CANGA FANO, Director at the European Commission, DG AGRI Marco RUPP, Head of Public Affairs and Sustainability, BIC |
| 10:20 | 10:35 | Setting the scene: the CBE JU and the deployment groups | Virginia PUZZOLO, Head of Programme, CBE JU |
| 10:35 | 10:45 | The CBE JU Deployment Group on Primary Producers: concept and objectives | Ana Ruiz, Programme Officer, CBE JU, and Michael WOLF, Policy Officer, EC DG AGRI |
| 10:45 | 11:15 | Icebreaker session to know each other & check-in | Monica Pérez-Cabero, Project Officer, CBE JU & participants |
| 11:15 | 11:30 | Coffee break | |
| 11:30 | 11:35 | Explanation of the working dynamics in the breakout sessions | Ana Ruiz, CBE JU |
| 11:35 | 12:35 | Breakout session 1: sectorial discussion: Agriculture; Forestry; and Aquaculture and fisheries tables | Participants (all) |
| 12:35 | 13:00 | Debrief of outcomes of discussions in breakout session 1 (5' per table) | Rapporteurs |
| 13:00 | 14:15 | Photo group and Networking lunch | |
| 14:15 | 15:15 | Break out session 2: cross-sectorial discussion - combining participants from different primary sectors | Participants (all) |
| 15:15 | 15:40 | Debriefing of outcomes of discussions in breakout session 2 (5' per table) | Rapporteurs |
| 15:40 | 15:50 | Break | |
| 15:50 | 16:00 | Wrapping-up, conclusions and next steps | Virginia PUZZOLO, CBE JU, and Orsolya FRIZON-SOMOGYI, Deputy Head of Unit, DG AGRI |
| 16:00 | 16:10 | Check out and closing of the workshop (slido) | Monica Pérez-Cabero, CBE JU |