URBAN FOREST INNOVATION LAB
UFIL CUENCA

NWFP businesses in Spain and portrait of the future Spanish entrepreneurs in forest bioeconomy

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EUROPEAN UNION
UIA URBAN INNOVATIVE ACTIONS

Bioeconomy opportunites

Misions Europe

Climate change adaptation

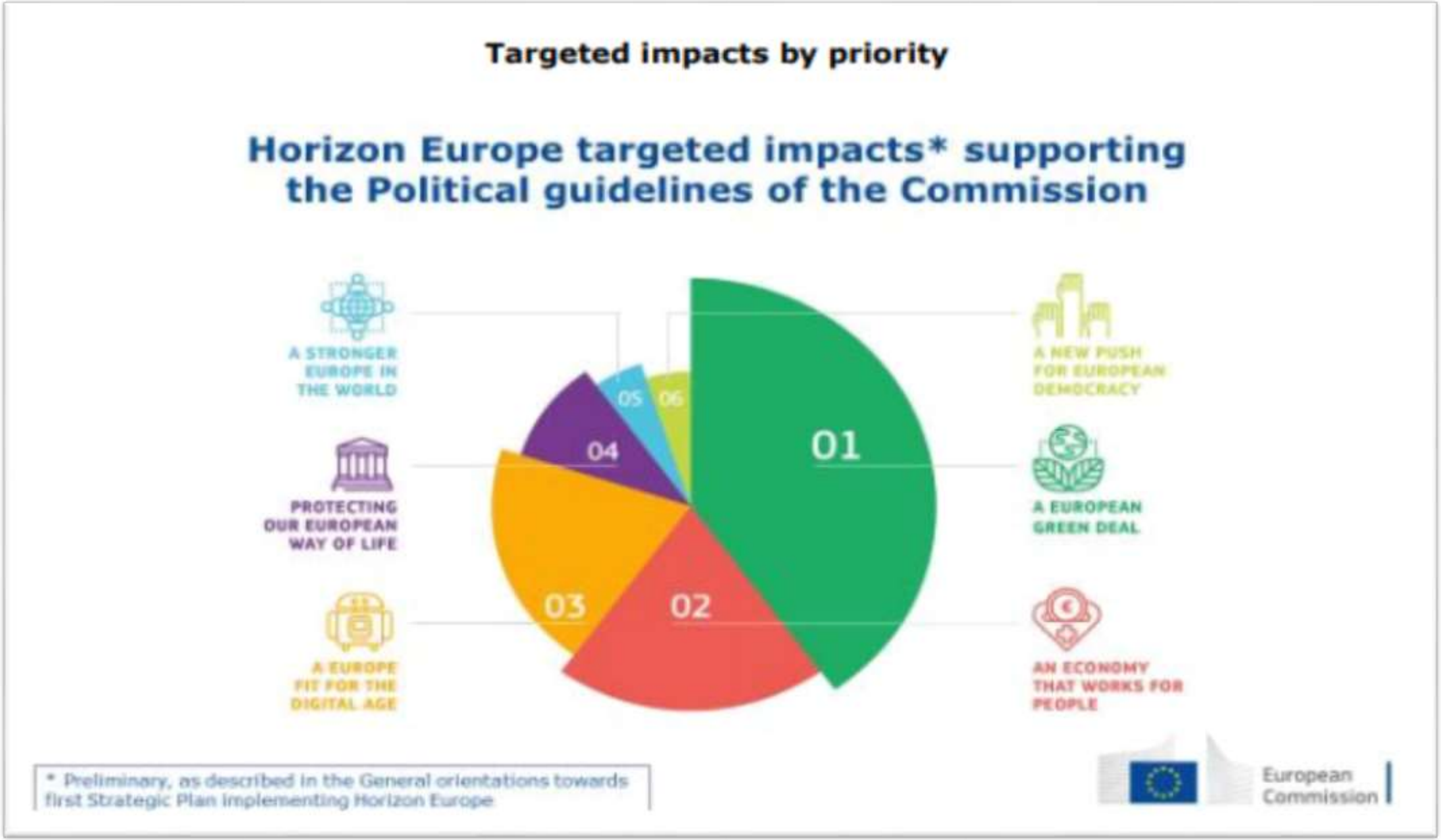
Smart and neutral cities

Soil and agrofood

Oceans, seas and water

Health (Cancer)

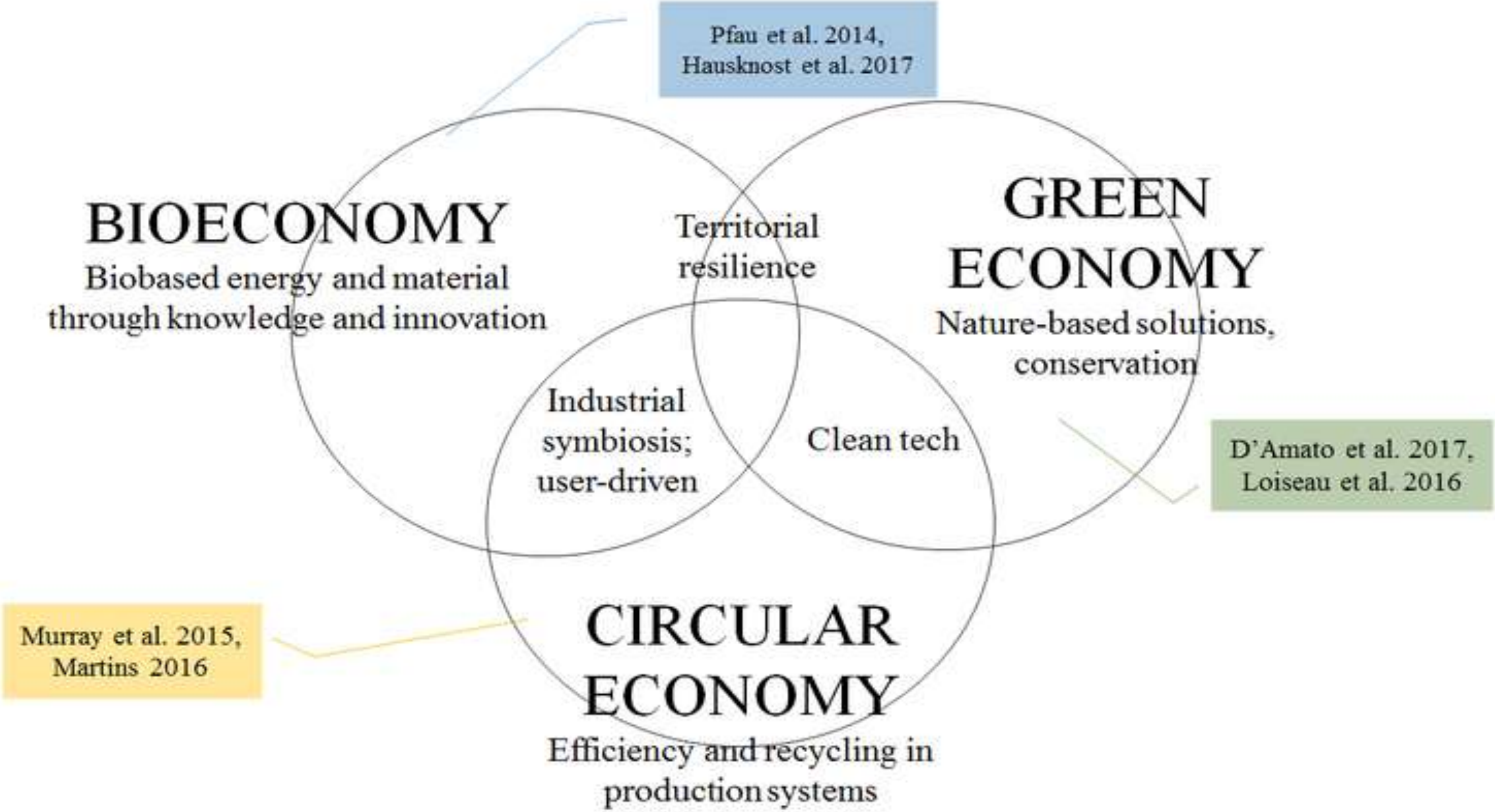
Bioeconomy opportunities



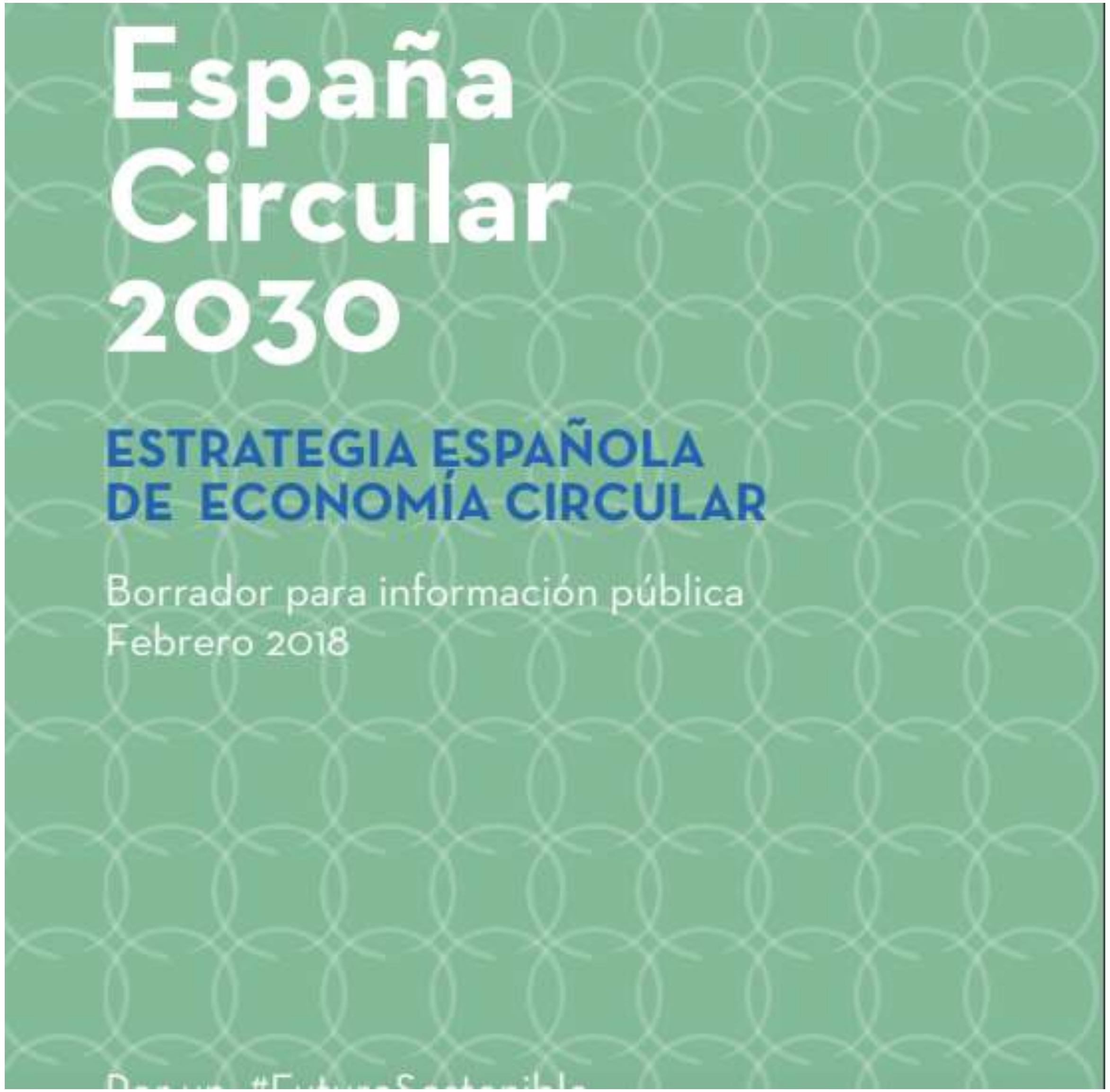
A new Circular Economy Action Plan
Biodiversity Strategy for 2030
Strategy on the sustainable use of chemicals
Clean Air and Water Action Plans
Transition to a Circular Economy
Preserving Europe's natural capital
A zero pollution Europe
TBD with the commissioner-designate
Sustainable Transport
European Green Deal
Farm to Fork
Farm to Fork Strategy
Revising 2030 Climate targets
Extending ETS
Climate Pact
Climate Law
Carbon Border Tax
Achieving Climate Neutrality
The transformation of agriculture and rural areas
Vision for Inclusive Rural Areas
Africa Europe agenda
Clean, Reliable and Affordable energy
Towards a modernised and simplified CAP
CAP reform proposal
Review Energy Legislation
European Framework for gas
Review Energy Taxation directive
Financing the transition
Leave no one behind (Just Transition)
European Investment Bank as European Climate Bank
Sustainable Europe Investment Plan
Green Financing Strategy
Mainstreaming climate transition and sustainability in the MFF
Just Transition Instrument, including the Just Transition Fund
Mainstreaming the Just Transition in the MFF


significant progress
3 Good health and well-being
4 Quality education
11 Sustainable cities and communities
5 Gender equality
7 Affordable and clean energy
1 No poverty
12 Responsible consumption and production
2 Zero hunger
8 Decent work and economic growth
17 Partnerships for the goals
15 Life on land
9 Industry, innovation and infrastructure
10 Reduced inequalities
moderate movement away
moderate progress
Goals for which trends cannot be calculated (*)
6 Clean water and sanitation
13 Climate action
14 Life below water
16 Peace, justice and strong institutions

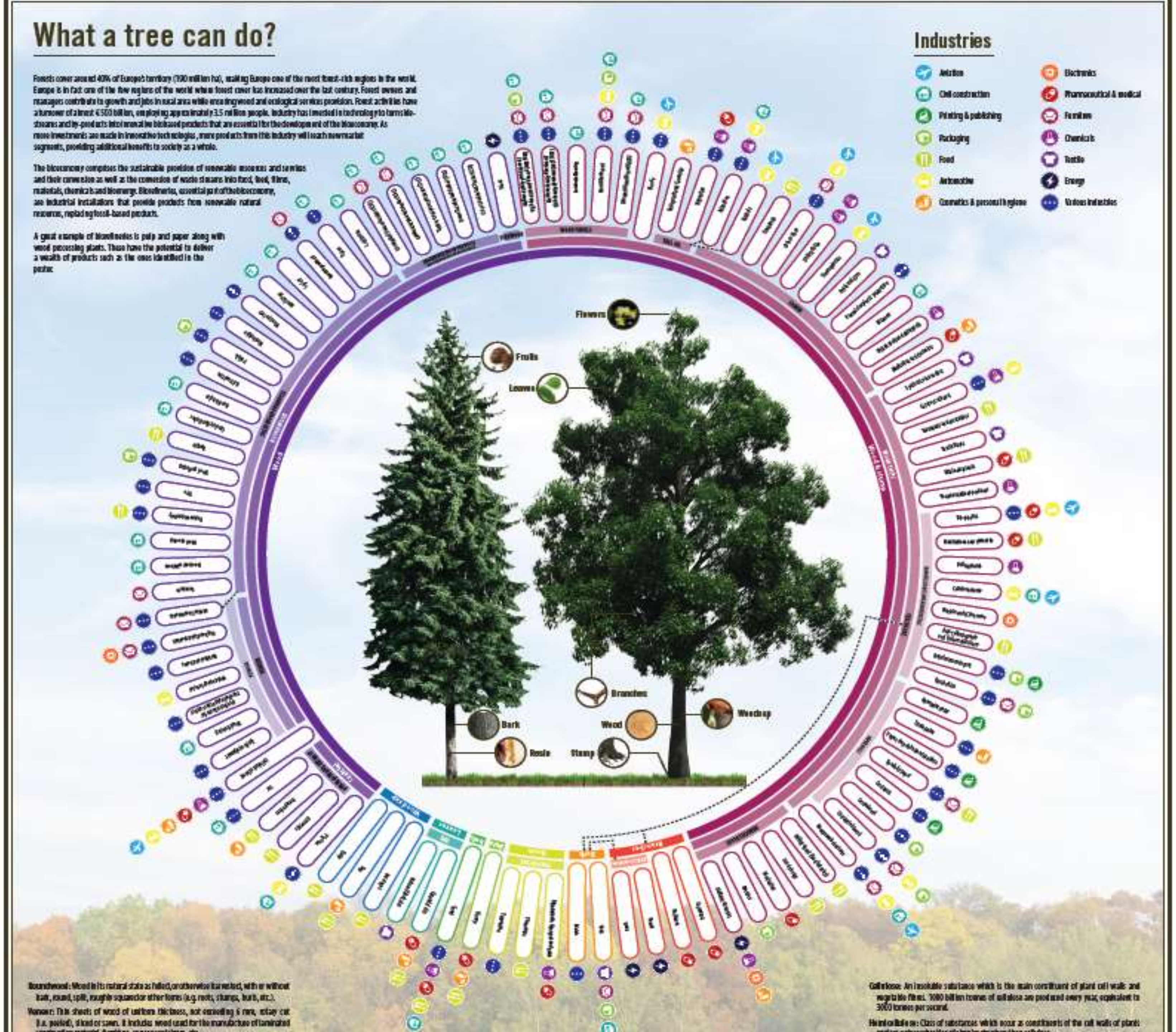
Bioeconomy opportunites



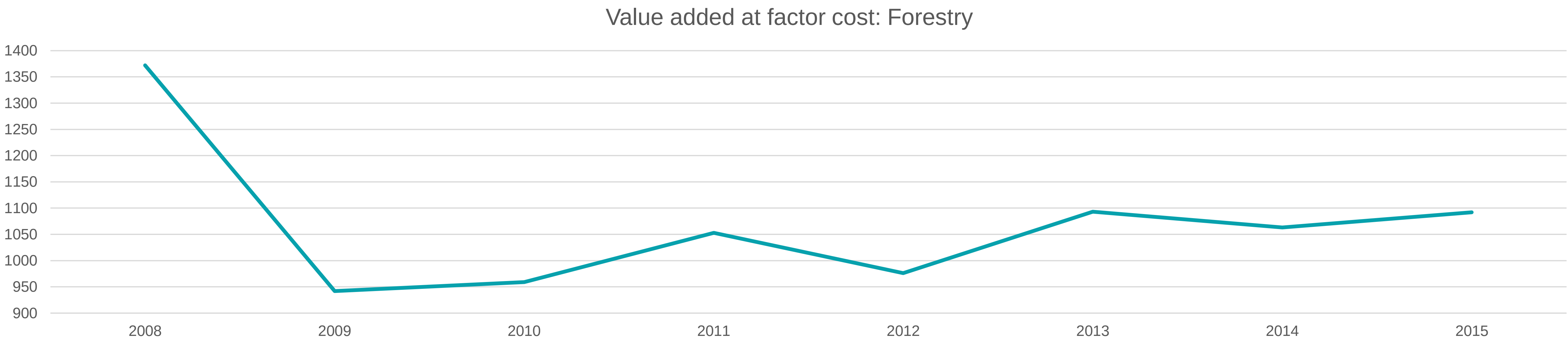
Forest bioeconomy Opportunities



Forest bioeconomy



Forest bioeconomy



Millions €

https://ec.europa.eu/knowledge4policy/visualisation/bioeconomy-different-coun

Forest bioeconomy

Year	Concept	Unit	Value	Productivity
2008	Turnover	Million euros	1173	4%
2008	Value added at factor cost	Million euros	1372	4%
2008	Employment	Number of people employed	32000	
2009	Turnover	Million euros	1173	4%
2009	Value added at factor cost	Million euros	942	3%
2009	Employment	Number of people employed	31600	
2010	Turnover	Million euros	1173	4%
2010	Value added at factor cost	Million euros	959	3%
2010	Employment	Number of people employed	32500	
2011	Turnover	Million euros	1173	4%
2011	Value added at factor cost	Million euros	1053	3%
2011	Employment	Number of people employed	31800	
2012	Turnover	Million euros	1173	5%
2012	Value added at factor cost	Million euros	976	4%
2012	Employment	Number of people employed	24900	
2013	Turnover	Million euros	1317	6%
2013	Value added at factor cost	Million euros	1093	5%
2013	Employment	Number of people employed	23300	
2014	Turnover	Million euros	1299	5%
2014	Value added at factor cost	Million euros	1063	4%
2014	Employment	Number of people employed	24600	
2015	Turnover	Million euros	1344	5%
2015	Value added at factor cost	Million euros	1092	4%
2015	Employment	Number of people employed	26100	

https://ec.europa.eu/knowledge4policy/visualisation/bioeconomy-different-coun

Forest Bioeconomy NWFP

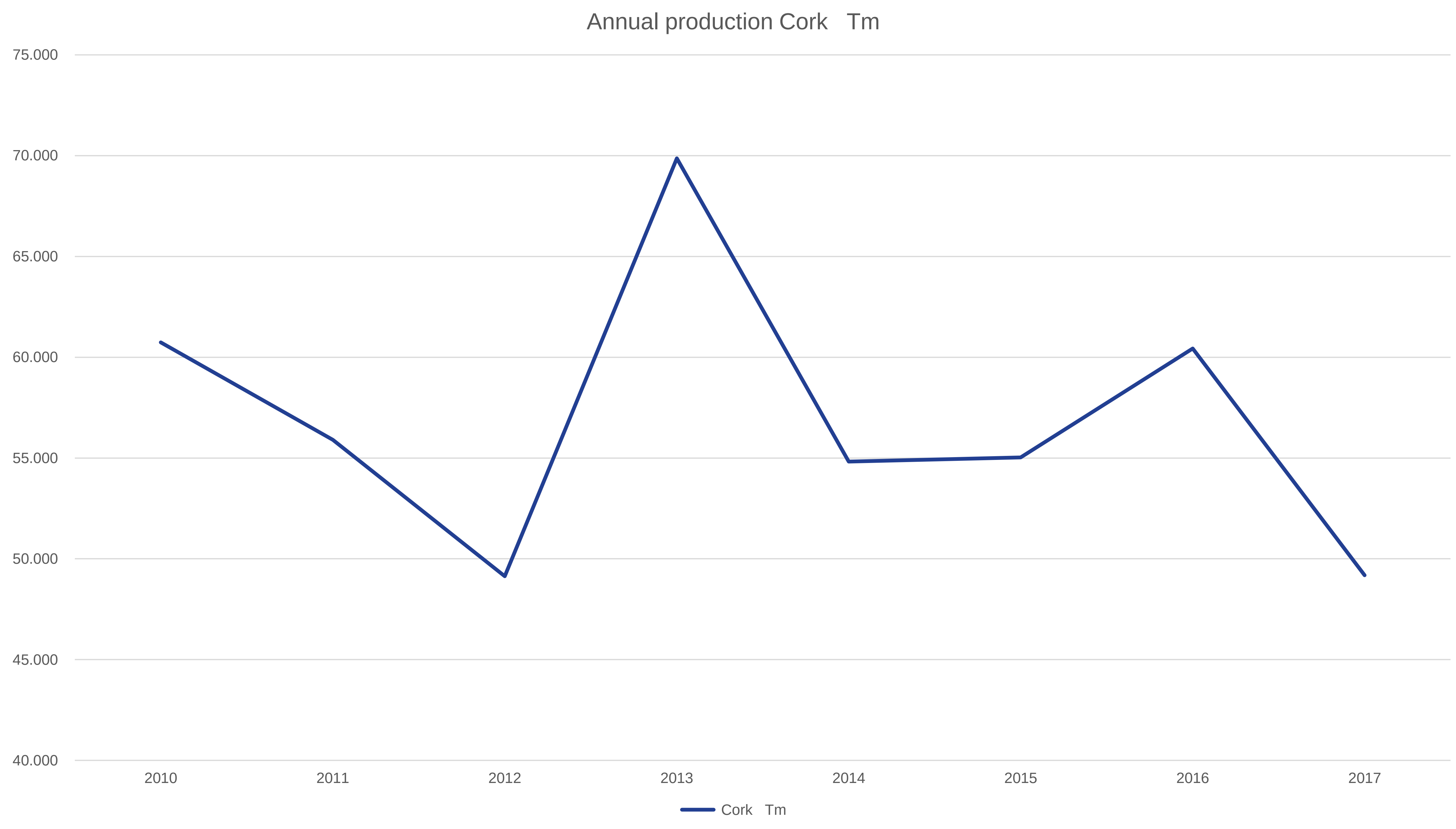
Resins

Pine seeds

Chestnuts

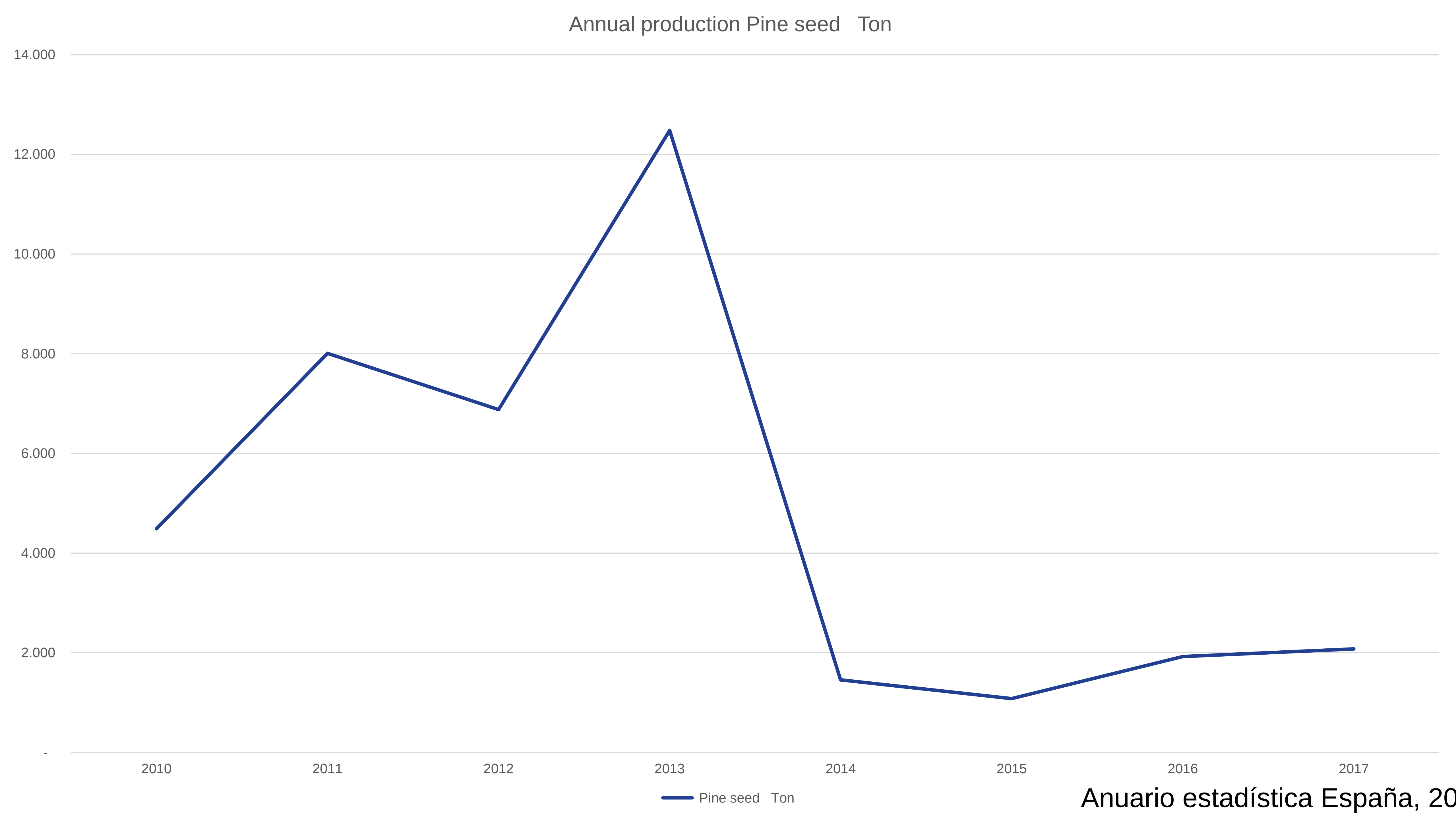
Fungui and Truffles

Cork


Annual production Cork Tm
75.000
70.000
65.000
60.000
55.000
50.000
45.000
40.000
2010
2011
2012
2013
2014
2015
2016
2017
Cork Tm

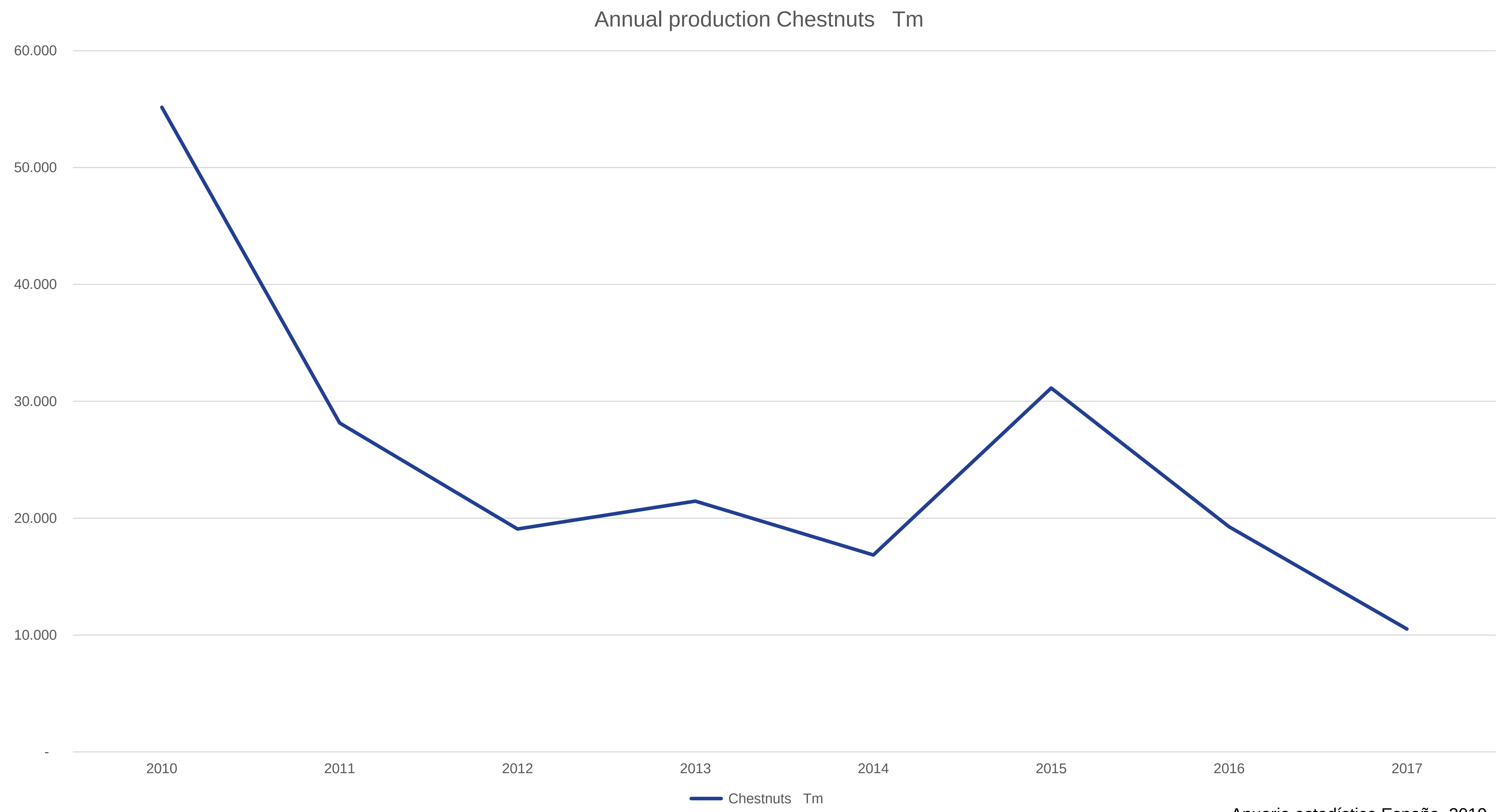
Cork: production has strong oscillations but the tendency is to decline in recent decades. It is also important to highlight the loss of quality and the decrease in prices in the period 2000-2015; As a result we have the disappearance of companies in the sector and the concentration of the market in two large groups: Amorim (Portugal) and Diam (France). In the near future, production in Spain should increase as a result of the repopulations carried out with the support of the CAP; also in a market that does not present problems to absorb the increase in supply.

La Estructura Económica del sector Forestal en España en el periodo 2000-2015 (Ortuño y González, 2019)


Annual production Pine seed Ton
14.000
12.000
10.000
8.000
6.000
4.000
2.000
-
2010
2011
2012
2013
2014
2015
2016
2017
Pine seed Ton
Anuario estadística España, 20

Forest Fruits: o Pine seed: production has declined significantly in recent years, as a result of diseases ("leptoglossus") that, currently, are the most important limitation for this sector and what has caused the disappearance of the most important company, moving to Italy control of international product markets. The business sector is concentrated in the province of Valladolid and to a lesser extent in the provinces of Huelva and Córdoba.

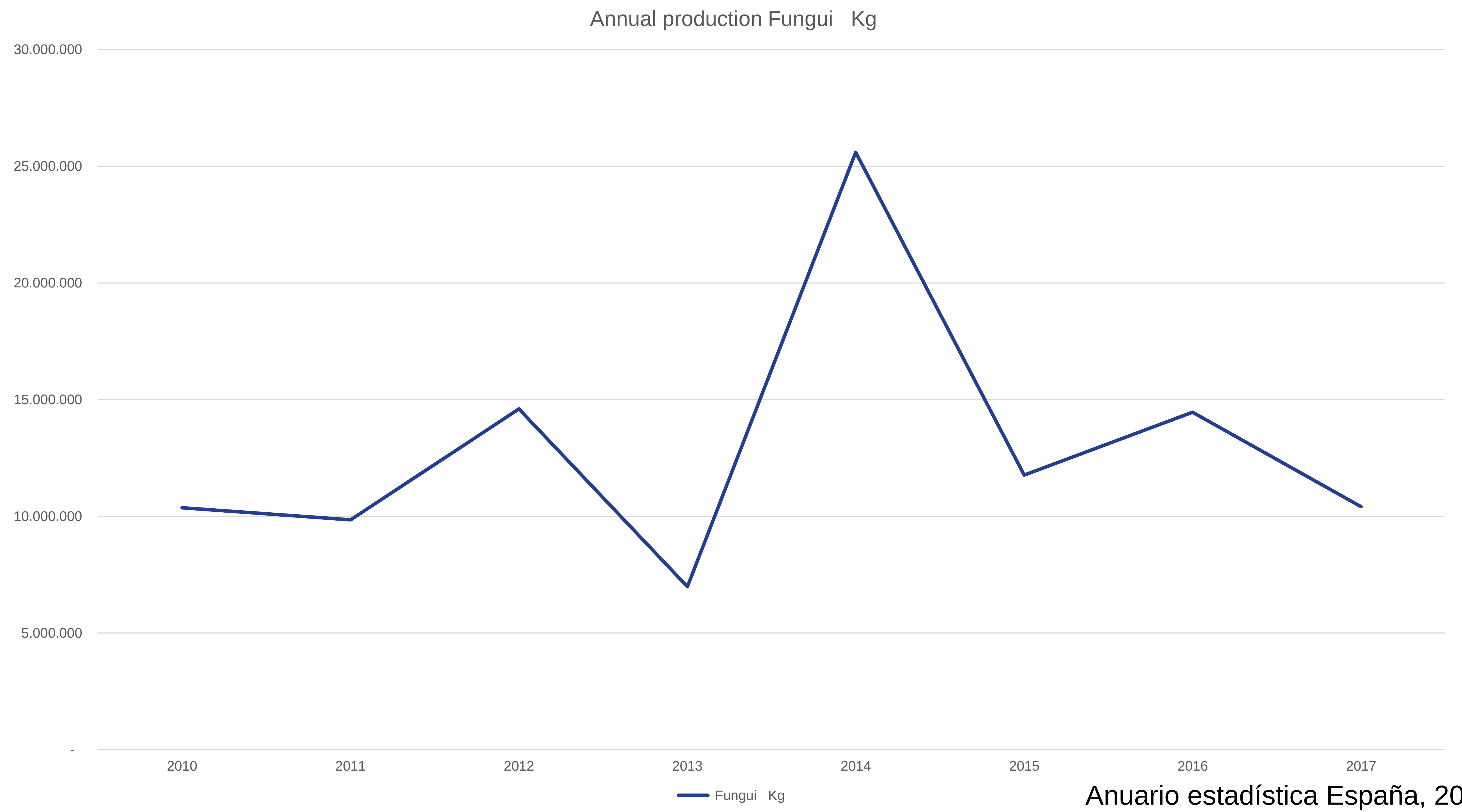
La Estructura Económica del sector Forestal en España en el periodo 2000-2015 (Ortuño y González, 2019)



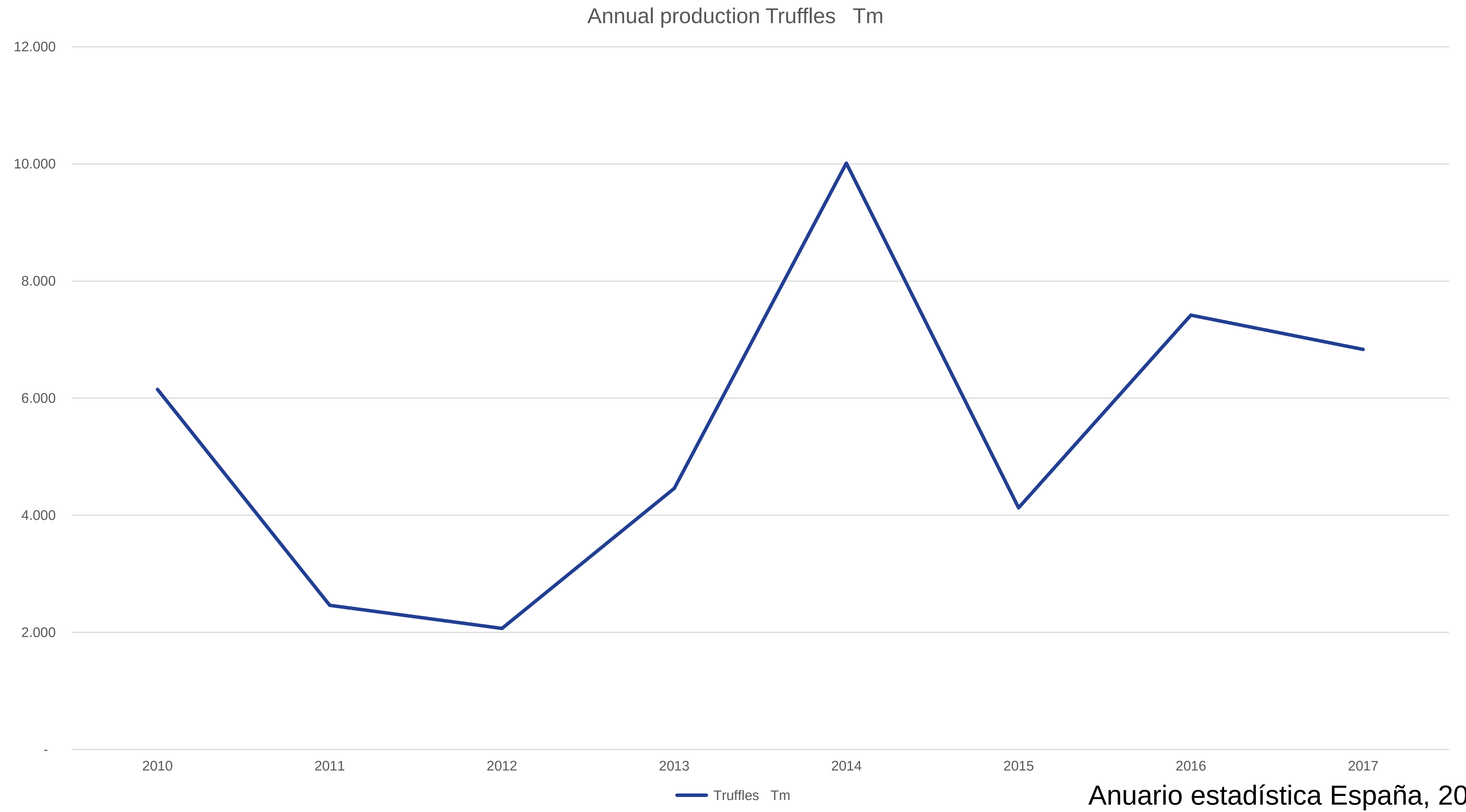
Anuario estadística España, 2019

Chestnut: production is affected by diseases (chancre, ink and more recently the "wasp"). Production and the main processing companies are concentrated in Galicia (Lugo and Orense) and León, although there are also significant nuclei in Extremadura and Andalusia. Farm minifundismo is the biggest problem in the sector. The demand for the product is growing and the market price is stable.

La Estructura Económica del sector Forestal en España en el periodo 2000-2015 (Ortuño y González, 2019)



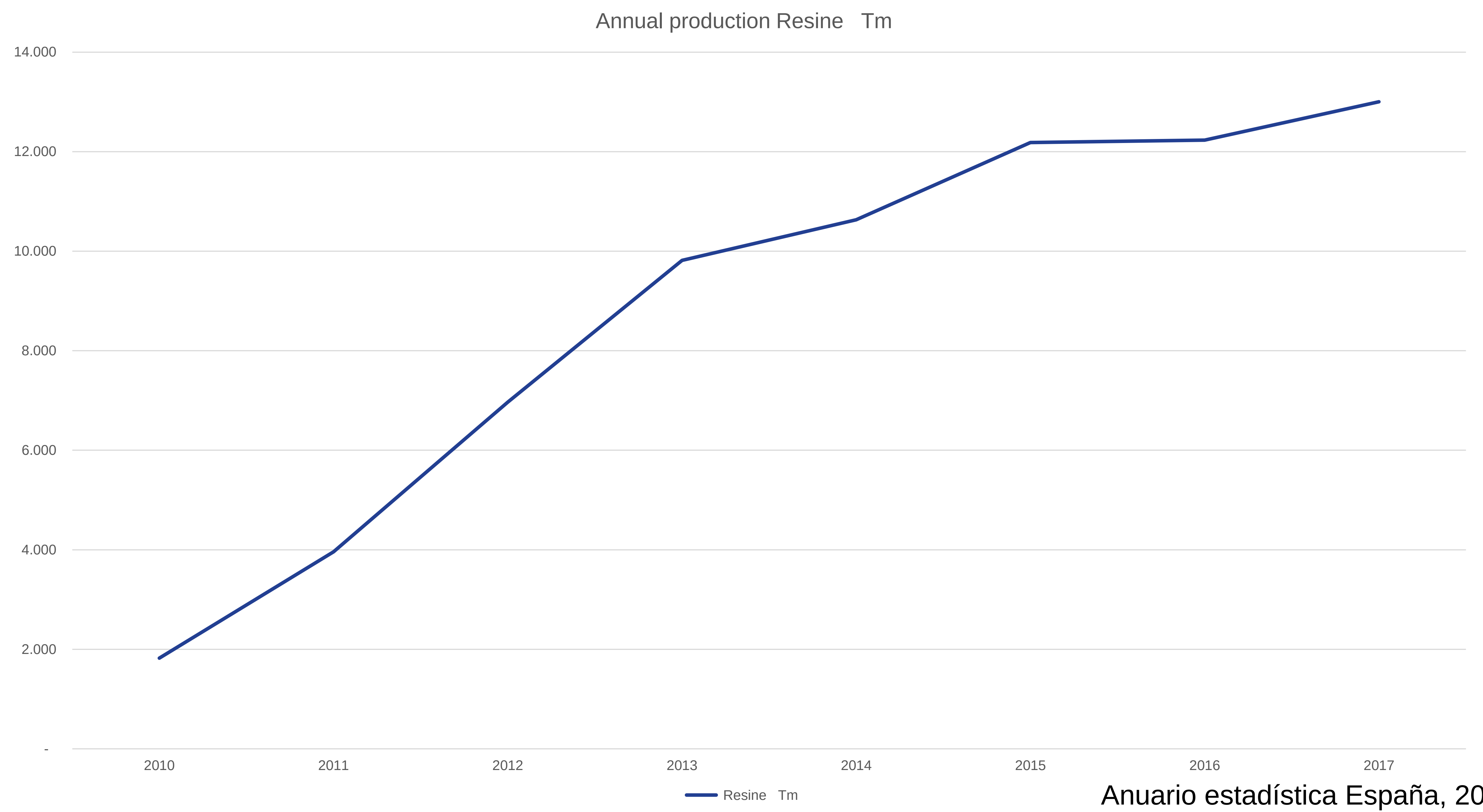
Anuario estadística España, 20



Anuario estadística España, 20

Fungi and truffles: the mycology sector has grown significantly and has great potential to continue doing so if its use is regulated. The estimated turnover of the mushroom sector amounts to € 200 million per year, although the real amount will be higher, since there are no transparent marketing channels and there is also a high percentage of self-consumption and local consumption. As for truffles, wild production is currently very small and what has developed exponentially is the cultivation of truffles, the surface has doubled and is concentrated in some regions of the Iberian System.

La Estructura Económica del sector Forestal en España en el periodo 2000-2015 (Ortuño y González, 2019)



Anuario estadística España, 20

Resin: more than 80% of the production in Spain was concentrated in Castilla y León, it has also grown exponentially in recent years, from just 2,000 tons in 2010 to more than 12,000 tons in 2016. The decrease in exports China and the rise in prices for the producer are the main causes of this trend change. On the other hand, the deficit of raw material and derivatives is very important in the EU, so there is ample scope to expand its development to new areas of resin. Large Portuguese and Brazilian companies have entered the Spanish market in recent years.

La Estructura Económica del sector Forestal en España en el periodo 2000-2015 (Ortuño y González, 2019)

Spanish forest/green entrepreneurs: who are they?

Male

- 78%

Not young

- 38 year old

Experienced

- More than one entrepreneurial experience

High Education

- 80%

With no entrepreneurial training

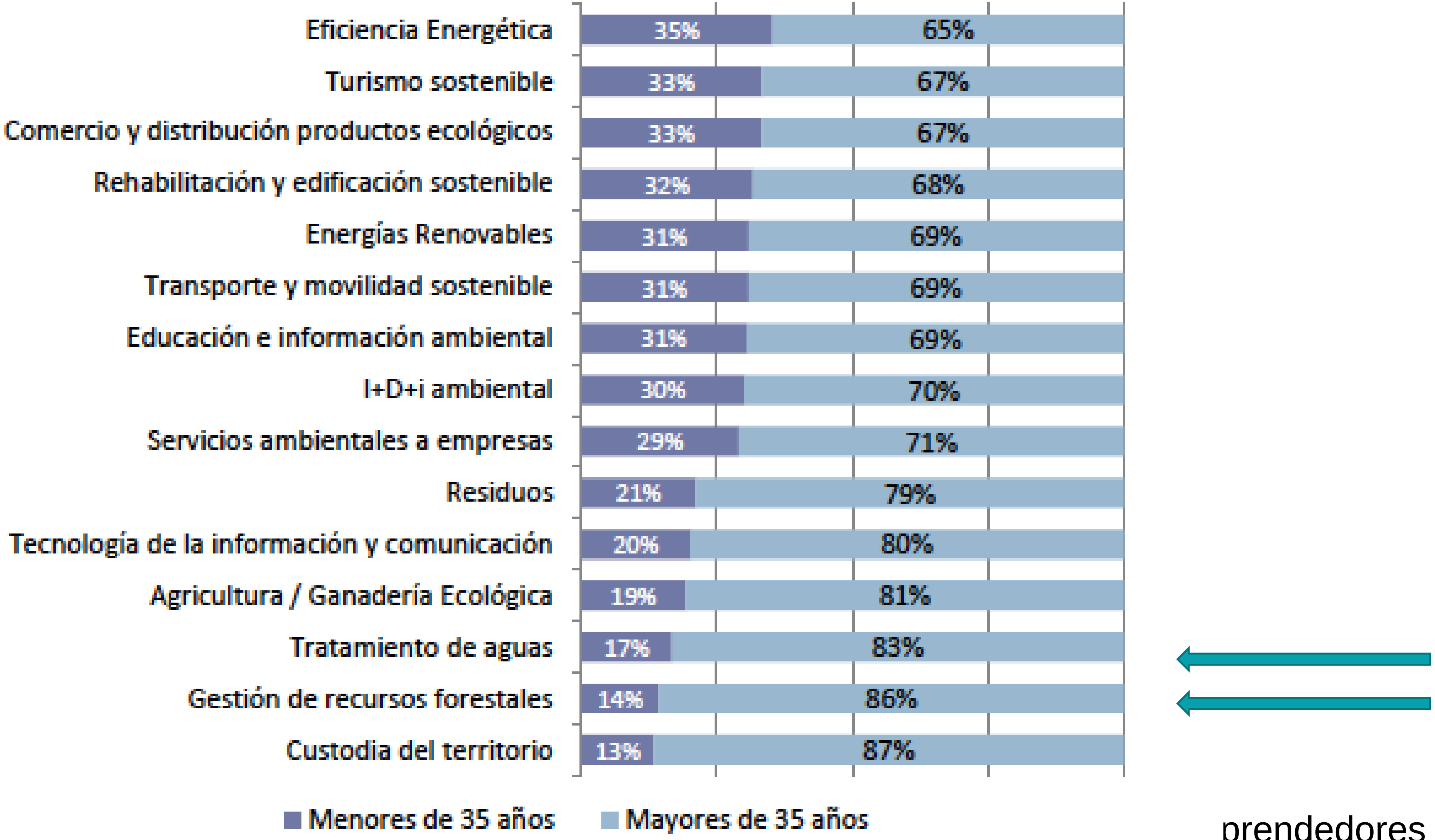
- 65%

Urban

- 70&

Estudio emprendimiento forestal – COIM, Estudio Emprendedor verde, 2017, Avile

Spanish forest/green entrepreneurs: Green sector and age



prendedores verdes rurales, 20

Spanish forest/green entrepreneurs: motivation

(*) En los resultados del Informe GEM 2012 esta serie se refiere a otro tipo de motivaciones no clasificables en ninguna de las demás opciones planteadas, mientras que para las otras dos categorías se refiere a "No sabe / No contesta"

Fuente: elaboración propia a partir de Informe GEM 2012 y Estudio sobre Opinión Pública y Política Fiscal (Módulo PYMES y emprendedores) CIS, Julio 2012

Spanish forest/green entrepreneurs: supporters and obstacles

Supporters

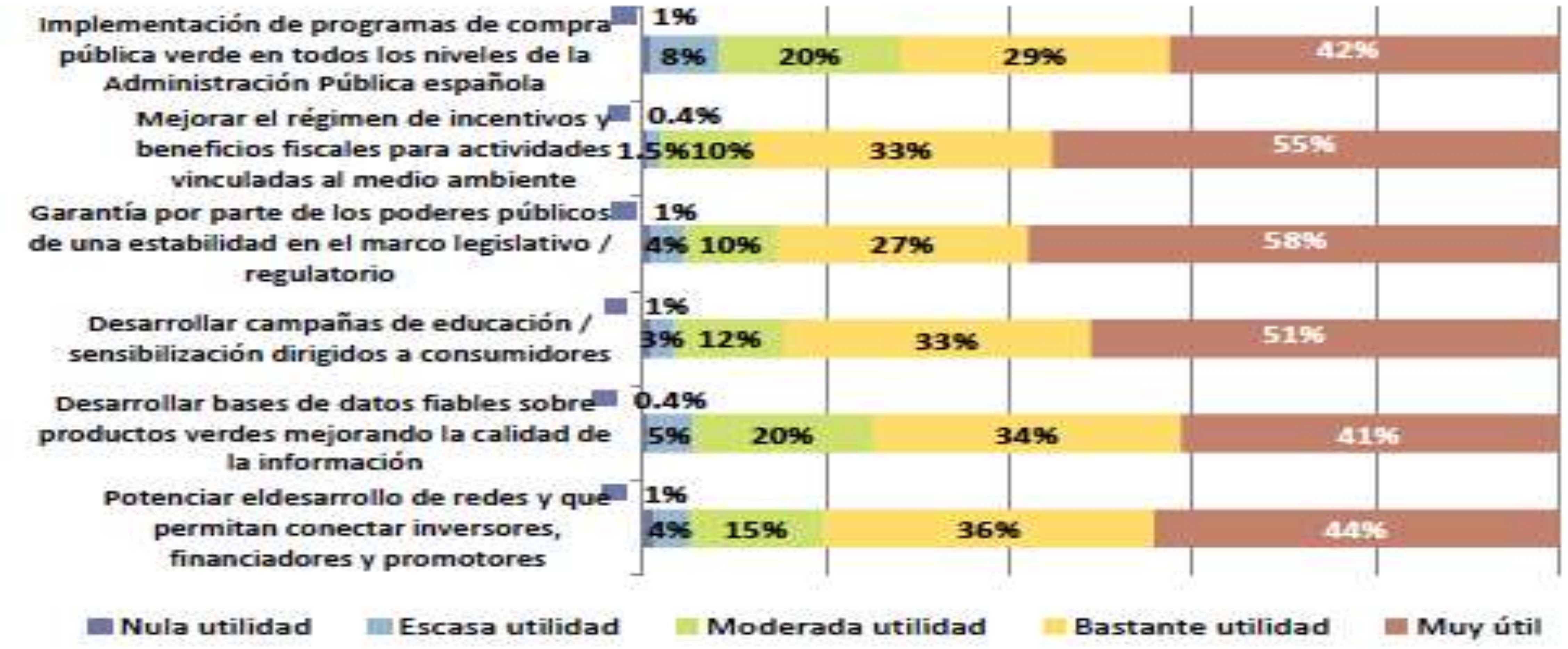
- Family, friends
- Entrepreneur networks
- Cámaras de Comercio

Obstacles

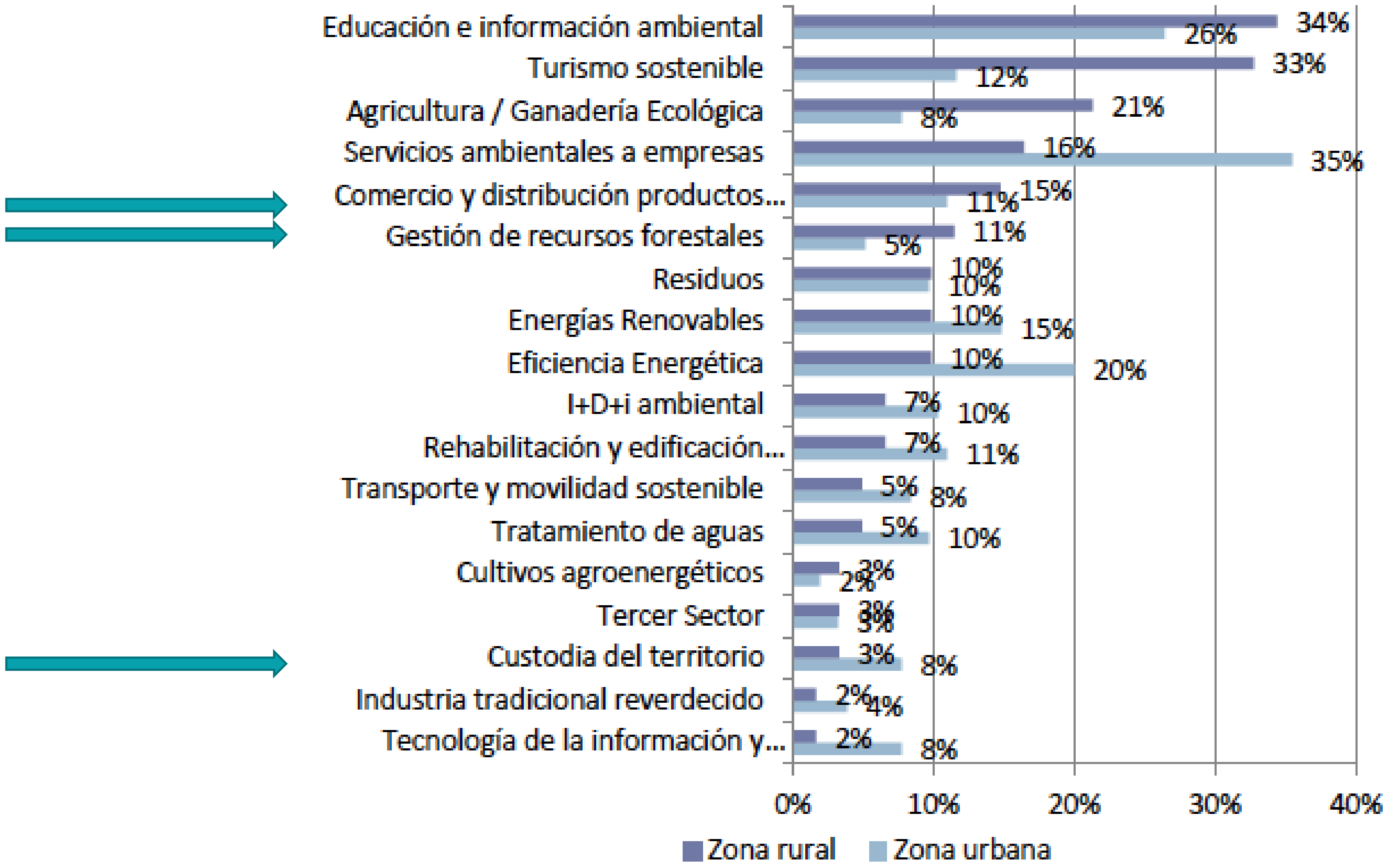
- Context of uncertainty
- Regulatory framework
- Education System
- Subsidies
- “freelance” fee, doesn’t depend on incomes

Emprendedores verdes rurales, 20

Spanish forest/green entrepreneurs: supporters and obstacles



Spanish forest/green entrepreneurs: diferences rural/urban



Emprendedores verdes rurales, 20

You'll go far if your pillars are…

Innovation as value proposal

Networks

Associations

Accelerator, incubator and other iniciatives - UFIL, Treennova, ECOSTAR, INCREDIBLE, SUS Forest

Bioeconomy based Solutions

Synergies

uia.cuenca.es

Thank so much!
We want you!

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