

Analysis of Lithuanian Bioeconomy Policy Landscape

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Executive Summary

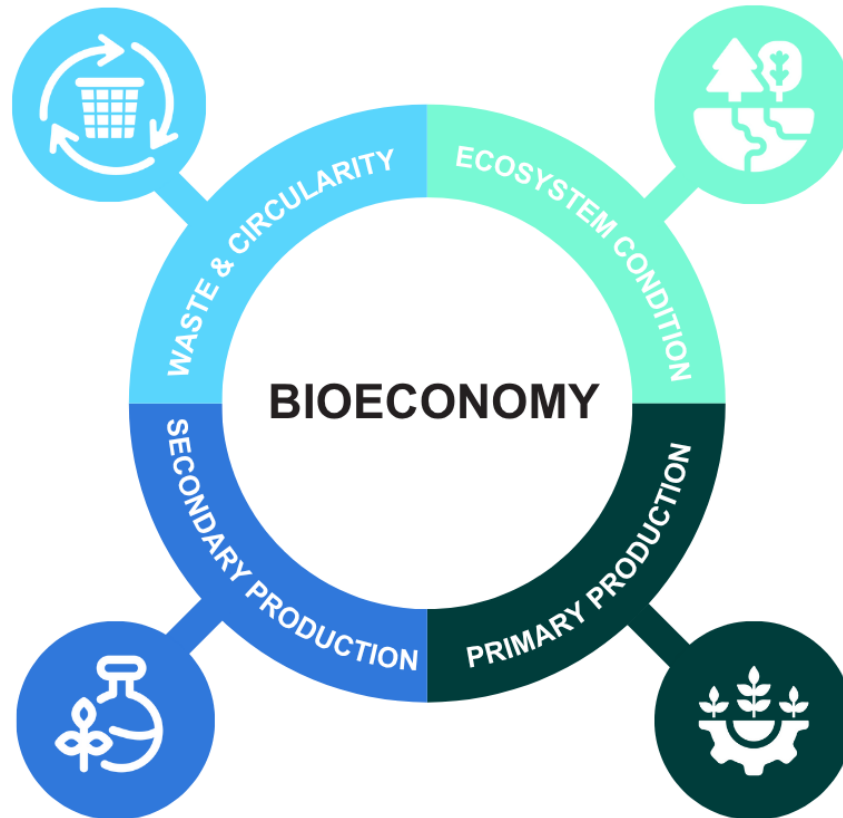
The document provides an **overview of interministerial policy data** in an effort to summarise the **current Lithuanian policy actions directed at strengthening the bioeconomy**. An analysis of 283 policy measures was conducted. Of the 283 policies, 179 were found to be in scope with 136 directly related to the bioeconomy and 43 were flagged as indirectly related.

Key findings of the analysis:

- Policy attention is primarily focused on **ecosystem condition** (68 policies) and **primary production** (63 policies), while waste and circularity receive the least attention (24 policies).
- **Land-based ecology, agriculture, and forestry** are the most strongly supported sectors, whereas marine ecology and aquaculture receive limited policy attention.
- Bioeconomy policy implementation is led primarily by **Aplinkos Ministerija and Žemės Ūkio Ministerija**, together accounting for approximately **82% of relevant policies**.
- Funding is concentrated in primary and secondary production, with **agriculture receiving the largest share of sector-specific funding**.
- Sectors such as **bioenergy** and **biomaterials** receive comparatively **high levels of funding** despite a smaller number of targeted policies.

Conceptual Framework

Figure 1. Four Pillars of the Bioeconomy



Source: adapted from [EU Bioeconomy Monitoring System](#), 2025



Waste and circularity are the processes of recovering and managing biowaste and food waste. It includes waste management services that recover or recycle these materials so that they can be transformed into new products or energy.



Ecosystem condition describes the quality of freshwater, marine, agricultural, forest and urban ecosystems. It includes ecosystem management services, which help maintain ecosystems in a healthy and well-functioning state.



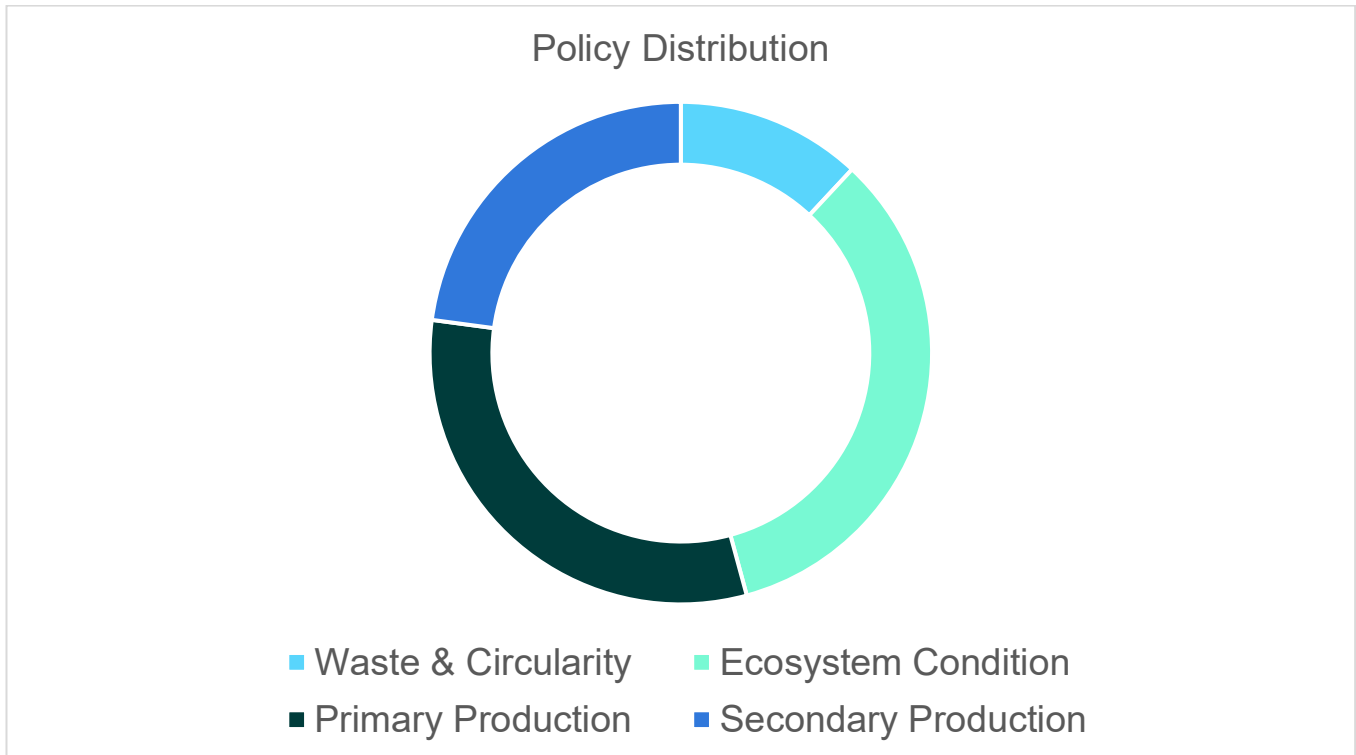
Primary production is the part of the economy that produces biomass. Included within this sector are the agricultural, forestry, fishing and aquaculture industries.



Secondary production transforms raw biomass into value-added products. This sector includes the food, bioenergy, biochemical and biomaterial industries.

Thematic Overview

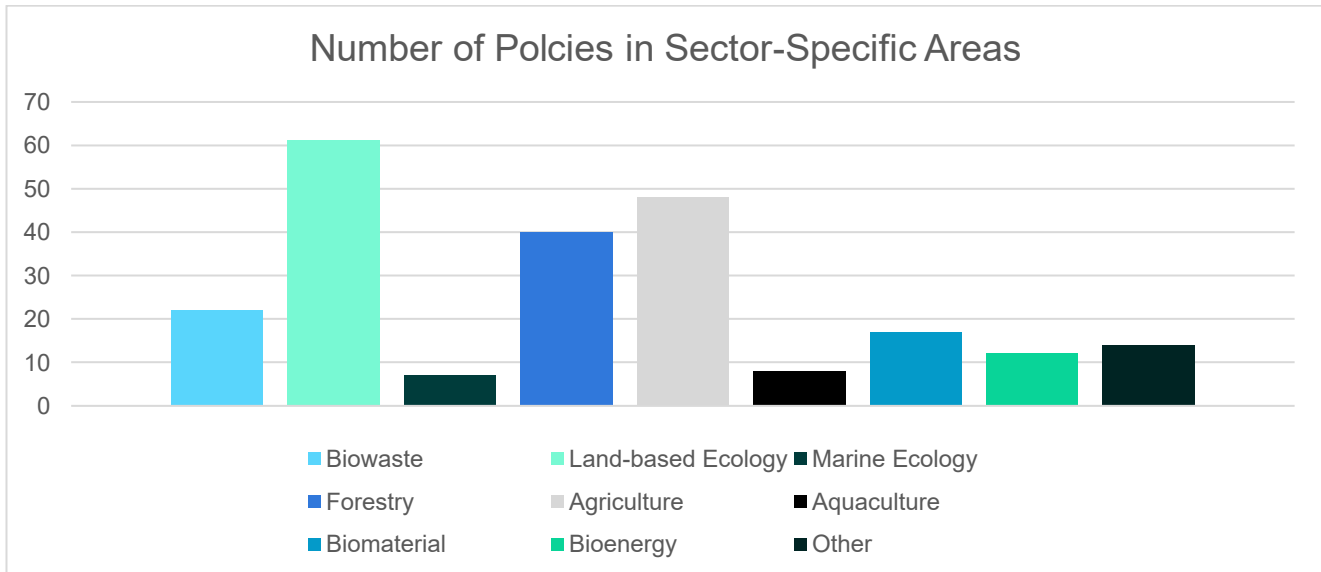
Figure 2. Distribution of Policies Across Bioeconomy Areas



Source: Authors' own elaboration based on interministerial data

Figure 2 above presents an overview of which strategic areas the policies were directed at. The analysis of strategic policy areas reveals that **ecosystem condition receives the most policy attention** with 68 policies targeting this key area, closely followed by primary production, which is supported by 63 policies. The area which receives **the least policy attention is waste and circularity**, only 24 policies operated within this area of the bioeconomy. An analysis of sector-specific strategic policy areas was also conducted, and the results of this analysis are presented in Figure 3 below.

Figure 3. Sector-Specific Overview of Policy Areas



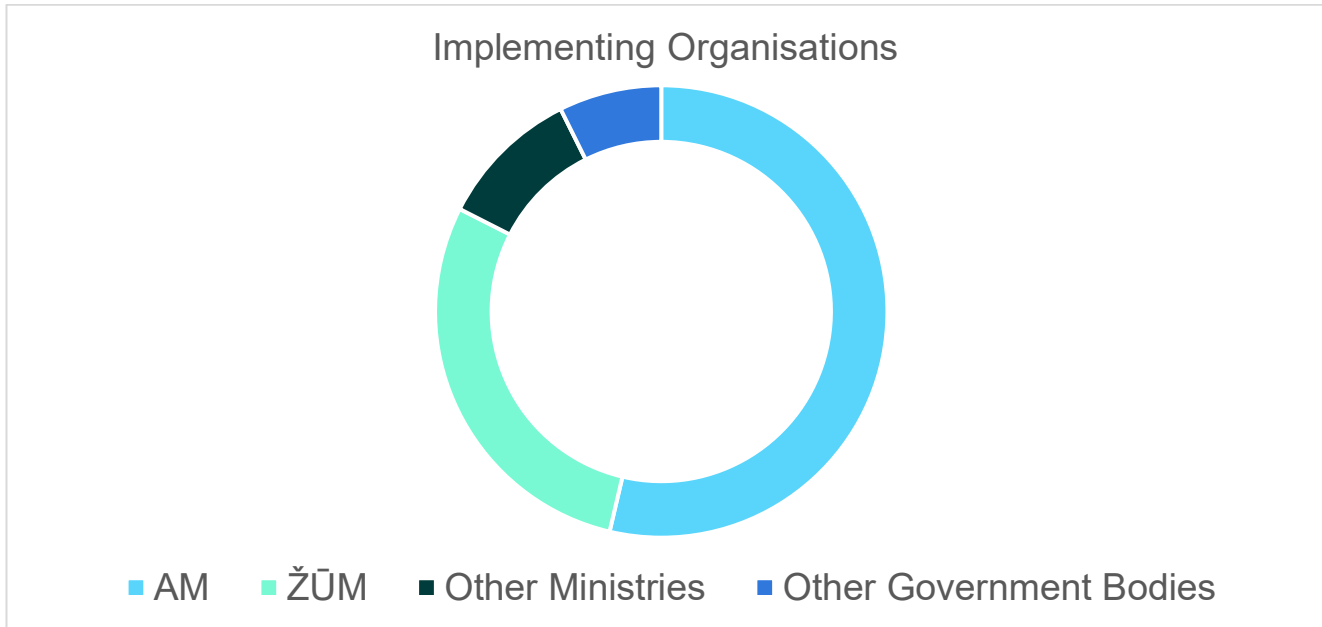
Source: Authors' own elaboration based on interministerial data

The findings of the sector-specific analysis provide deeper insights into which areas receive the most policy support. **Land-based ecology (n = 61), agriculture (n = 48) and forestry (n = 40) are the sectors which have the highest number of policies directed towards them.** Notably, **policies in these areas often overlap**, with those targeting land-based ecology frequently also supporting agriculture (e.g., Parama „Natura 2000“ žemės ūkio paskirties žemėje) or forestry (e.g., PR14-P. Darnios miškų ūkio veiklos klimato kaitos kontekste skatinimas privačiuose miškuose). By contrast, **targeted policy support for the blue bioeconomy is more limited**, with the marine ecology (n = 7) and aquaculture (n = 8) sectors showing the lowest number of policies. The data reflects a policy landscape focused on the land-based bioeconomy sector, with integrated approaches for ecosystem condition and primary production.

The organisations leading policy implementation are presented in Figure 4 below. The ministry leading the implementation of most bioeconomy-related policies is Aplinkos Ministerija (AM). AM is responsible for 95 policies directly or indirectly related to the bioeconomy. Leading the implementation of 51 bioeconomy-related policies is Žemės Ūkio Ministerija (ŽŪM) and taken together **AM and ŽŪM are responsible for approximately 82% of all bioeconomy-related policies.**

Organisational Overview

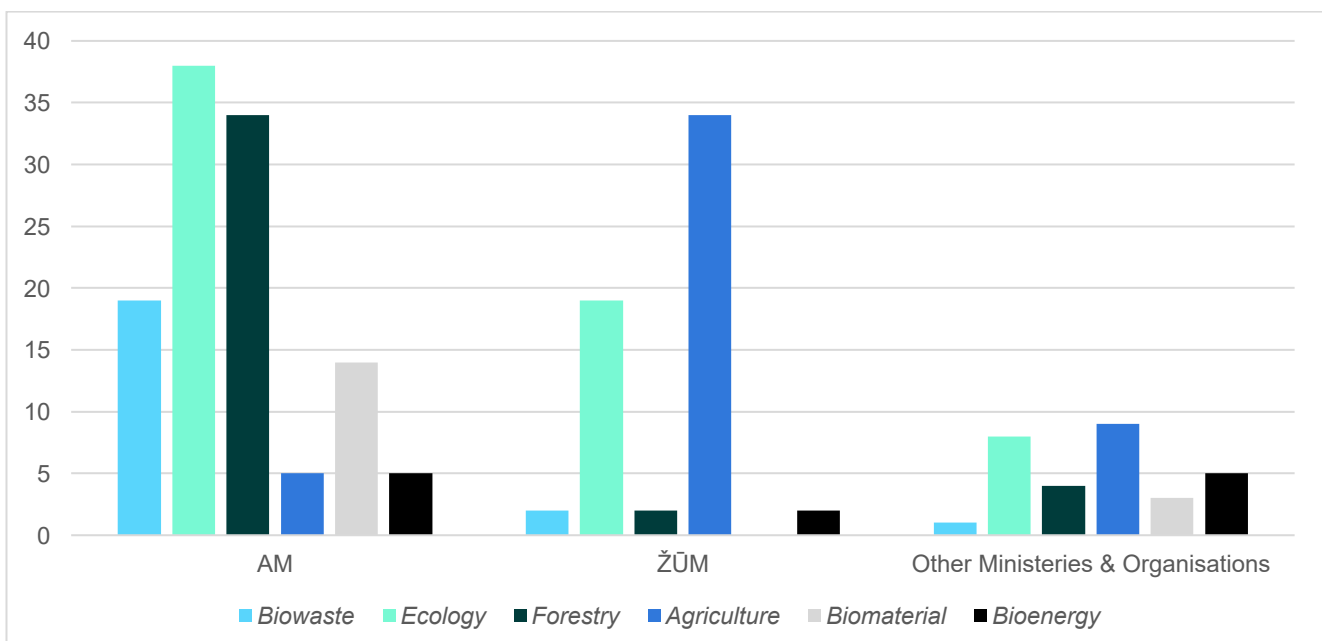
Figure 4. Overview of Organisations Responsible for Policy Implementation



Source: Authors' own elaboration based on interministerial data

Other ministries involved in the implementation of bioeconomy-related policies include Ekonomikos ir Inovacijų Ministerija, Energetikos Ministerija, Švietimo, Mokslo ir Sporto Ministerija, Socialinės Apsaugos ir Darbo Ministerija and Susisiekimo Ministerija. Outside of ministries, other organisations implementing relevant policy projects include associations and enterprises (e.g. Valstybinių Miškų Urėdija), universities (e.g. Kauno Technologijos Universitetas) and other governmental bodies (e.g. savivaldybės).

Figure 5. Sector-Specific Overview of Policy Areas by Ministry

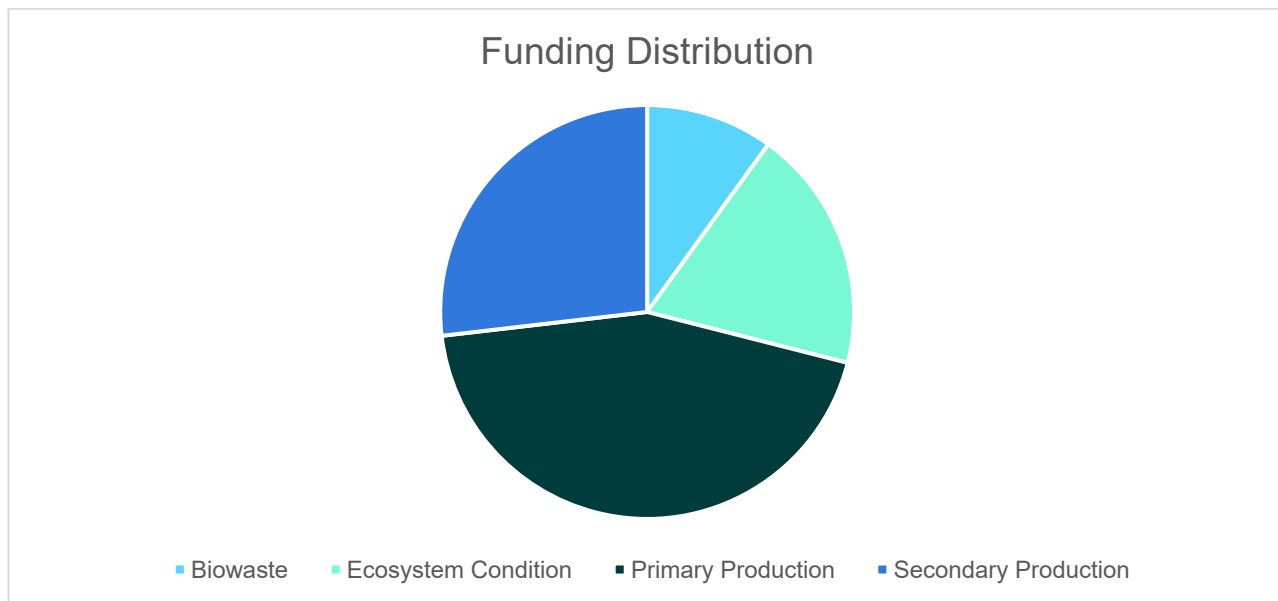


Source: Authors' own elaboration based on interministerial data

Figure 5 above presents the number of policy measures targeting key sectors. The data highlights which sectors are prioritised by each ministry. Most policies implemented by AM are directed towards ecology (n = 38), forestry (n = 34), and biowaste (n = 19) whereas those implemented by ŽŪM mainly target agriculture (n = 34) and ecology (n = 19). **Compared to AM, the policies implemented by ŽŪM cover a narrower range of topics.** Amongst the other organisations the volume of support was smaller, many programmes directly targeted the bioeconomy.

Financial Overview

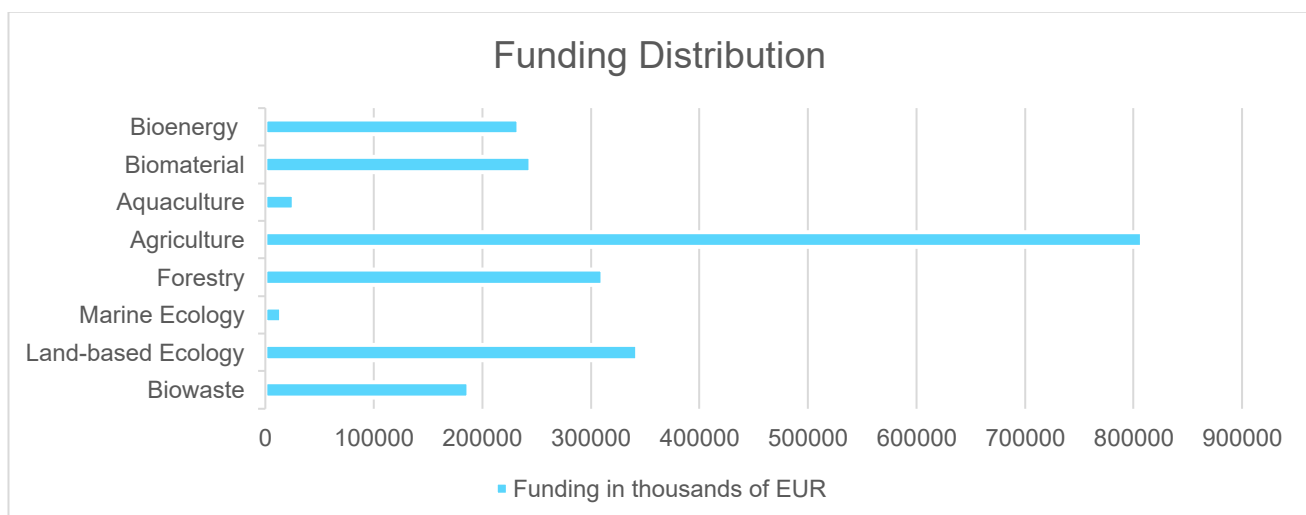
Figure 6. Overview of Allocated Policy Funding Distribution



Source: Authors' own elaboration based on interministerial data

The figure above presents the allocation of funding to key areas of the bioeconomy. The majority of funds are allocated to primary (n = €831,439,000) and secondary production (n = €504,853,000). These findings are mirrored in Figure 7 below, which outlines sector-specific funding allocation for bioeconomy-related policies.

Figure 7. Sector-Specific Overview of Allocated Policy Funding



Source: Authors' own elaboration based on interministerial data

The analysis reveals that compared to other sectors, **significantly more funding** is allocated to policies targeting **the agricultural sector (n = €807,540,000)**. Land-based ecology receives the second largest sum (n = €342,784,000), less than half the amount allocated to agriculture-targeted measures. This is despite land-based ecology having a larger absolute number of policies targeting the sector, suggesting that **thematic attention is not always matched by financial support**. Alternatively, the bioenergy (n = €233,509,000) and biomaterials (n = €244,546,000) sectors receive relatively limited policy focus but comparatively high levels of funding.