

Welcome to the Event Future of BioBuilding



Thank You to Our Partners:



Oliver Kutsch
CEO at Ceresana

Ceresana

Ceresana at a Glance

Ceresana
Market Research Since 2002



Our Experience

Over 20 years of experience, specializing in chemical and industrial topics, and focusing on bioeconomic topics for the past 16 years



Our Mission

"Be a trusted global partner in industrial market research, driving clients' success through precise and impactful analysis"



Our Customers

Over 10,000 customers in more than 70 countries



Why Market Reports

Gaining Essential Knowledge



Basis for strategic decisions



Objective market perspective



Proof of economic viability



Avoidance of risks



Support for well-timed investments



Overview of value chains and competitors



Identification of undiscovered opportunities



Faster achievement of goals

Construction Market Reports

Showcasing the Market Expertise

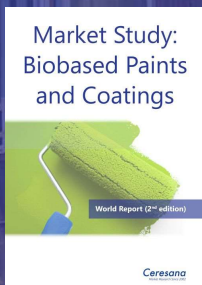
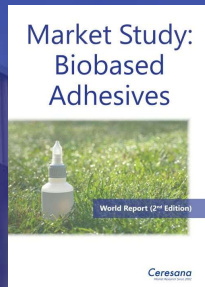
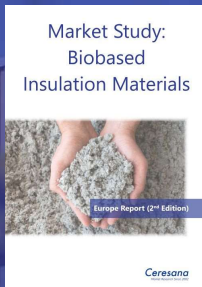
Biobased Construction Materials



Fossil-Based Construction Materials



Our Market Studies in Construction



Demand and Revenue Analysis

Showing demand and revenue of the product over time divided in regions

Product Types

Showcasing the demand for different materials

Applications

Detailing the key industries of use of the product

Country Profiles

The most important sales markets are examined individually. Demand and revenues split by applications and product types

Manufacturer Profiles

Company profiles of the largest manufacturers

Why We're Here

Our Motivation

Providing clarity, perspective, and confidence when navigating the fast-growing field of biobased construction materials

We provide a platform for:



Orientation



Inspiration



Connection

Agenda - Today

Wednesday, December 10



09:00 a.m. – 10:00 a.m.	Keynotes: Market Framework Conditions
	Oliver Kutsch (Ceresana) Bio-Based Construction Materials: Trends Across Key Segments
	Fernandina Valdebenito (Carpus+Partner) From concept to certification: How Bio-Based building materials are shaping the future of sustainable building certification
10:00 a.m. – 10:30 a.m.	Francesco Mirizzi (EIHA) How policies are shaping the market. The future of bioeconomy and biobased construction from a Brussels' perspective
	Panel (30 Min.)

10:30 a.m. – 11:30 a.m.	Keynotes: Building with Natural Materials
	Werner Schönthaler (Schönthaler Bausteinwerk GmbH) Building with Hemp and Lime – Genius through Simplicity
	Henrik Pauly (Hanfingenieur Henrik Pauly) Building Tomorrow Today: Hemp as the Catalyst for Transformation
11:30 a.m. – 12:00 p.m.	Matthias Schwarz (Rottal Hanf GmbH) New scalable solutions from industrial hemp – sustainable and versatile applications
	Paulo Canela-Lehner (Isolena Naturfaservliese GmbH) Natural Intelligence in Insulation: How Sheep Wool Supports Renovation and New Construction with Circular Design, CO ₂ Reduction and Proven VOC Neutralisation for High-Performance Buildings.
12:00 p.m. – 5:00 p.m.	Panel (30 Min.)
	Networking-Opportunity

Agenda - Tomorrow

Thursday, December 11



Keynotes: Circularity and Economy	
09:00 a.m. – 10:00 a.m.	Julia Seeliger (ECBF) Investing in the Future of Biobuilding: From the Investor Perspective – Key Risks, Opportunities and Investment Criteria at ECBF
	Dr. Roland Klein (Fraunhofer Institute LBF) Flame-retardant building insulation panels from agricultural residuals
	Dr. Ehab Sayed (Biohm Group) Toward a biomimetic future
	Janine Götz (DGNB GmbH) From Product to Impact: How the DGNB Navigator delivers the data backbone for sustainable building
10:00 a.m. – 10:30 a.m.	Panel (30 Min.)

Keynotes: Innovative Bio-Based Materials	
10:30 a.m. – 11:30 a.m.	Helge Schmitt (Mycolutions GmbH) Mycolutions: Circular and healthy materials using mycelium
	Nelson Vega (Fungarium) Mycelium Materials in construction, a roadmap for industrial developments
	Paul Lynch (EcoCocon) EcoCocon – A biobased system already at scale
11:30 a.m. – 12:00 p.m.	Panel (30 Min.)
12:00 p.m. – 05:00 p.m.	Networking-Opportunity

Technical Information



Access to the Keynotes

The keynotes and panels are accessible via the same Teams link which you can find on our event platform under “**Event Links**”



Asking Questions

During the keynotes and panels, you will be muted and the camera disabled. During the panel section of the event, you can engage by raising your hand or writing in the chat. The questions you ask will be addressed in the panels.

Thank you – Let's Begin



Thank You to Our Sponsors:

Share Your Thoughts

Take part in our feedback survey
on the event platform

Ceresana



The Bio Building Material Market

Opportunities & Obstacles

Oliver Kutsch
CEO

Ceresana

Dynamics of the Construction Industry



One third of waste generated by the construction industry



Goal 2050 zero emission buildings



New Construction Products Regulation in 2026



Market Overview

Industries and Regions



Regional Focus

Europe



Year

2025

Forecasts 2026-2033



Data Presentation

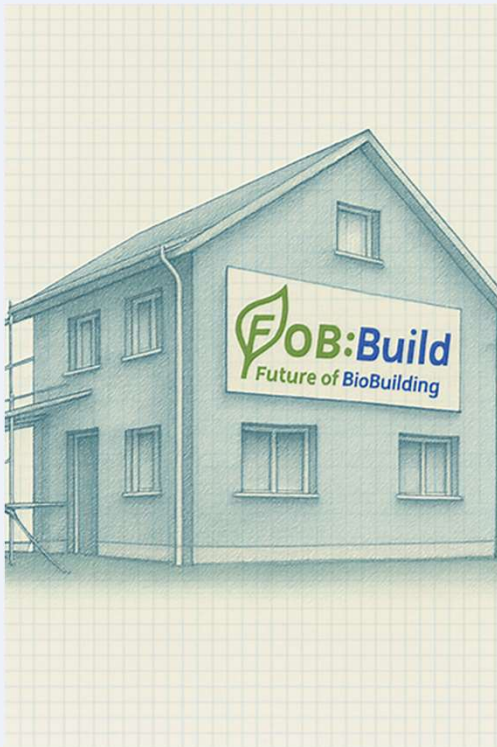
Percentages



Market Focus

Demand

Planning Our House



**Insulation
Material**

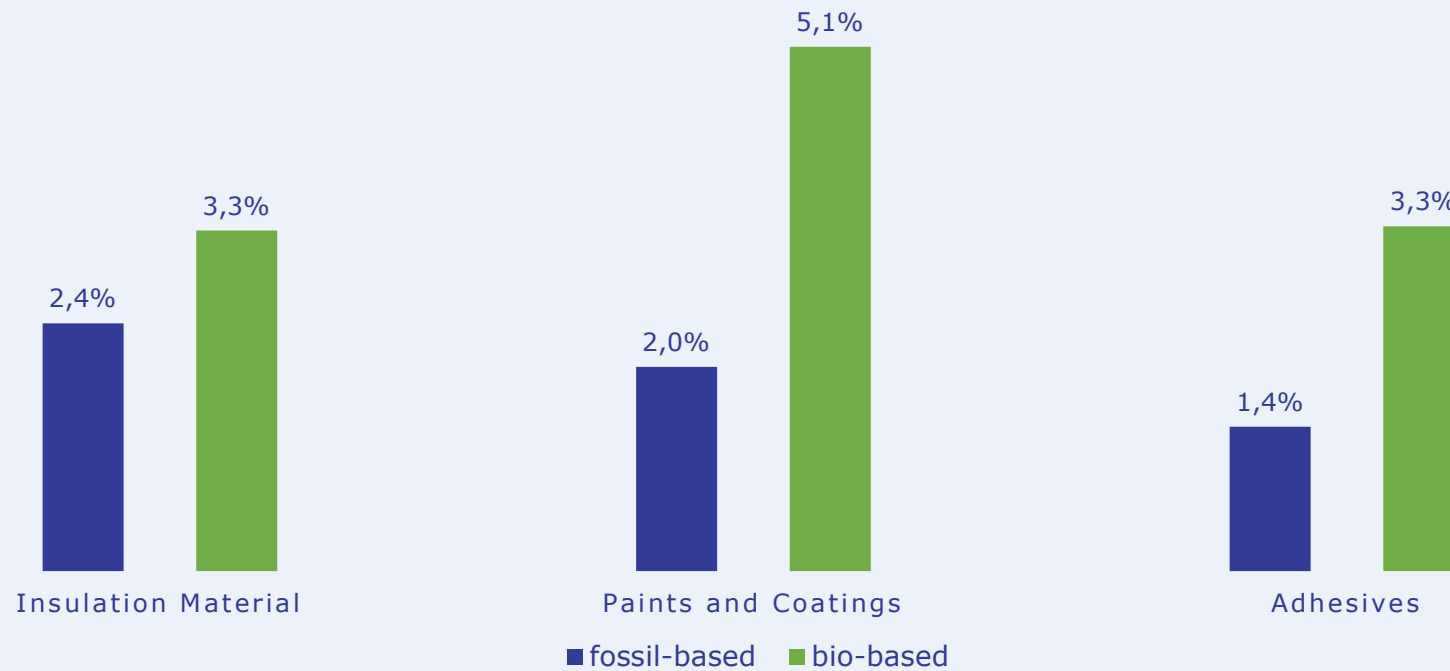


**Paints &
Coatings**



Adhesives

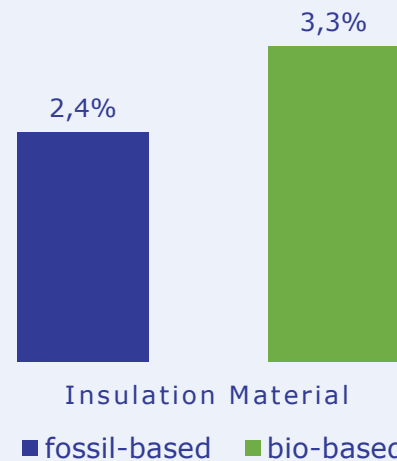
Future Growth of Construction Materials



Insulating Our House



Insulation Material



Source: Market Report Biobased Insulation Material – Europe (2nd Ed.) from Ceresana; (Europe market data for 2025)

Biobased Insulation Material

Overview



Conventional Materials

Glass wool, stone wool, EPS/XPS foams

Biobased Alternatives

Cellulose

- Made from paper, cardboard, wood residues
- Forms: blow-in flakes or insulation mats

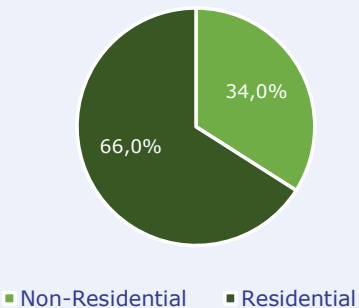
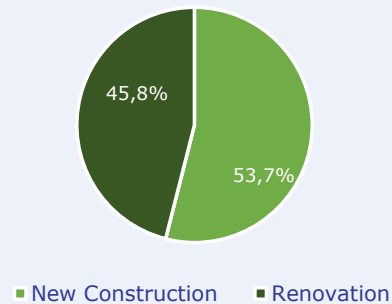
Wood-based

- Made from residual coniferous wood
- Forms: Fiber boards or loose

Source: Market Report Biobased Insulation Material – Europe (2nd Ed.) from Ceresana;
(Europe market data for 2025)

Biobased Insulation Material

Construction Segments



New Construction vs. Renovation



Non-Residential vs. Residential

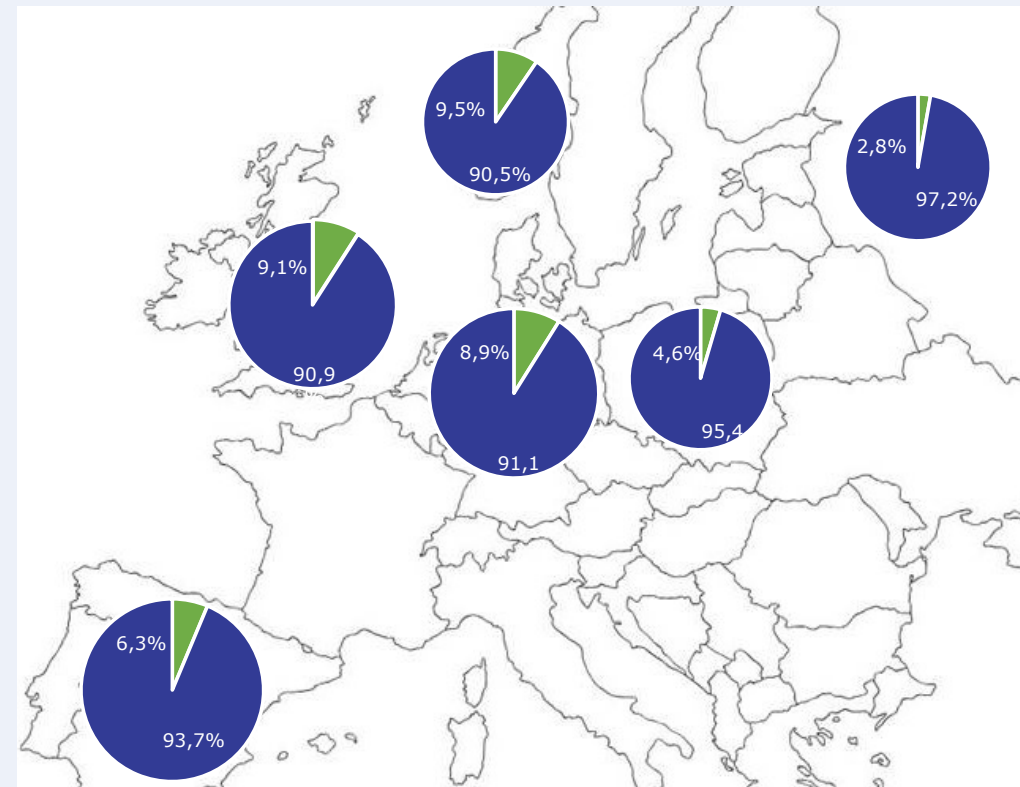
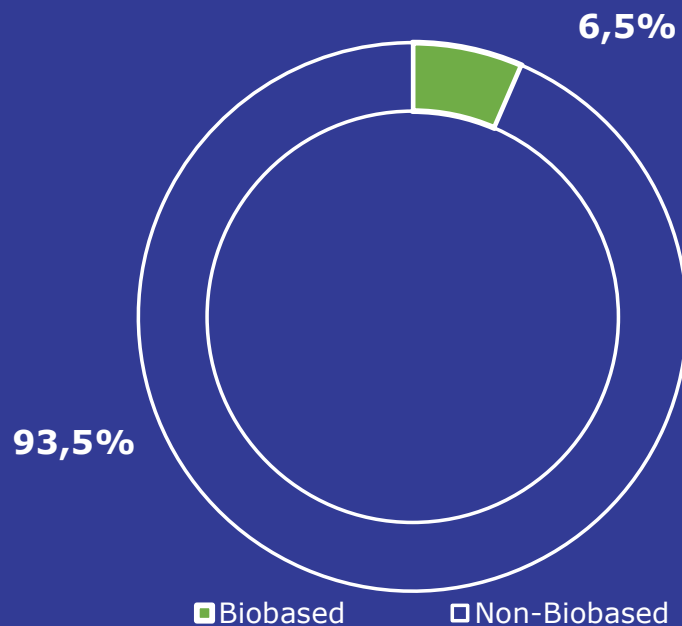


Source: Market Report Biobased Insulation Material – Europe (2nd Ed.) from Ceresana; (Europe market data for 2025)

Biobased Insulation Material

Regional Biobased Market Share in Europe in the Construction Industry

Average Biobased Share in Europe in the Construction Industry

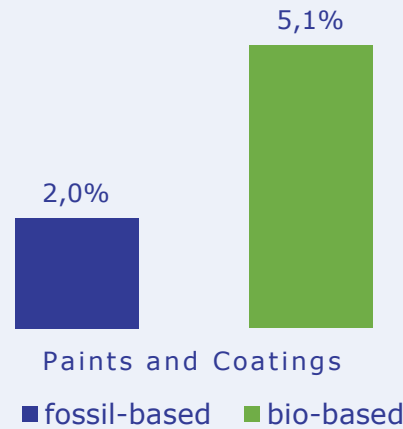


Source: Market Report Biobased Insulation Material – Europe (2nd Ed.) from Ceresana; (Europe market data for 2025)

Painting Our House



Paints & Coatings



Biobased Paints & Coatings

Overview



Biobased Paints and Coatings

- Forms: interior and exterior surfaces

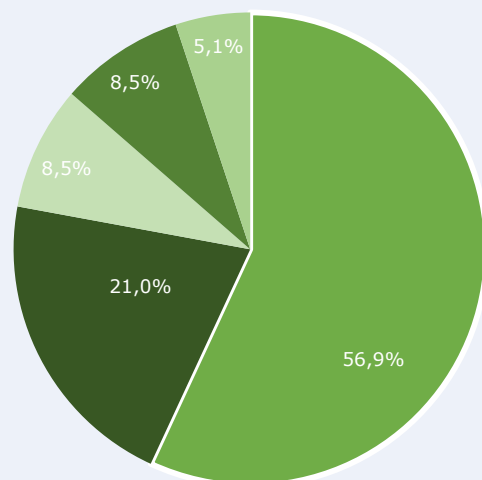
Made from

- Pigments: minerals, earth pigments, and organic origins
- Solvents: essential oils and other plant-based compounds
- Additives: emulsifiers or mineral fillers

Source: Market Report Biobased Paints and Coatings – Europe (1st Ed.) from Ceresana;
(Europe market data for 2025)

Biobased Paints & Coatings

Industries Market Share



■ Construction ■ Industry ■ Transportation
■ Wood Processing ■ Others



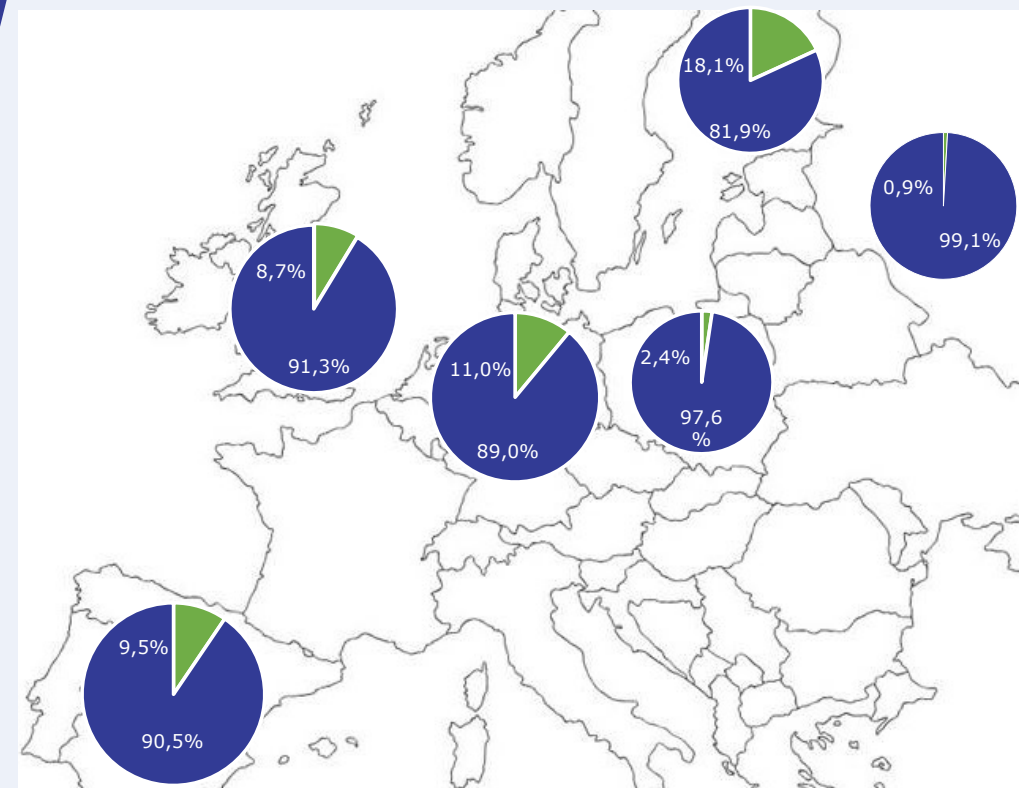
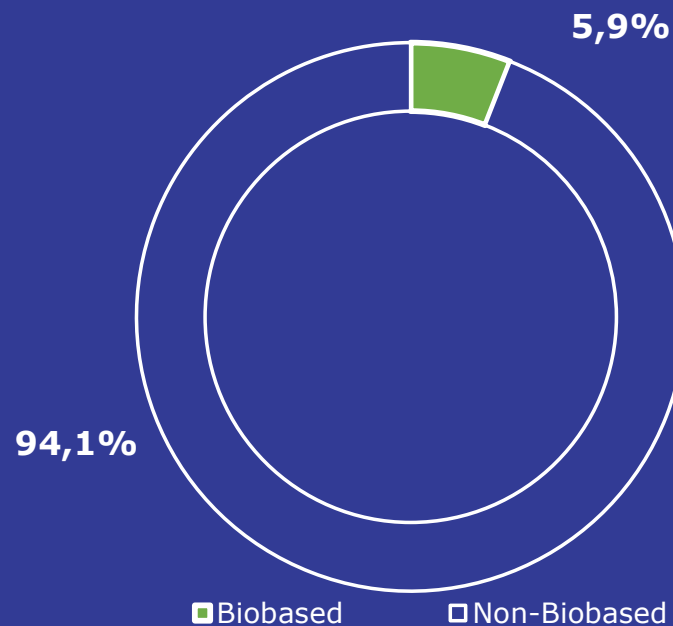
Construction is the most important industry for biobased paints and coatings

Source: Market Report Biobased Paints and Coatings – Europe (1st Ed.) from Ceresana; (Europe market data for 2025)

Biobased Paints & Coatings

Regional Biobased Market Share in Europe in the Construction Industry

Average Biobased Share in Europe in the Construction Industry

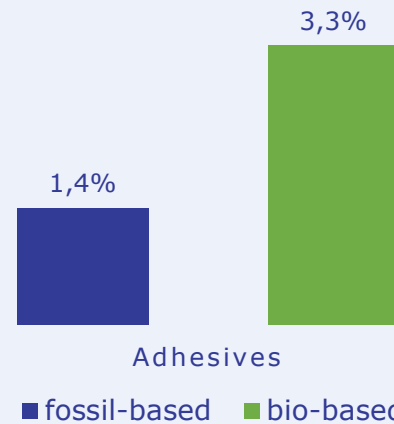


Source: Market Report Biobased Paints and Coatings – Europe (1st Ed.) from Ceresana; (Europe market data for 2025)

Interior Design of our House



Adhesives



Biobased Adhesives

Overview



Conventional Use of Adhesives in Construction

Wallpaper paste, for window installation, roof coverings, floor and wall adhesives, assembly adhesives

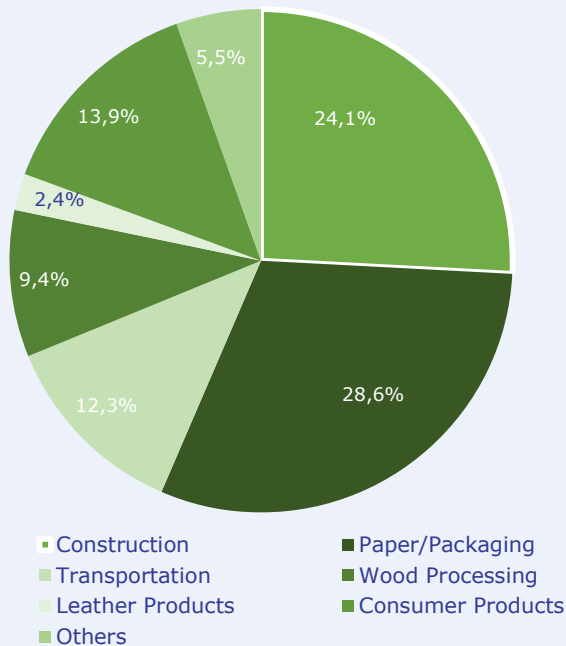
Biobased Alternatives

Example: cellulose derivatives for wallpaper paste

Source: Market Report Biobased Adhesives (2nd Ed.) from Ceresana; (Europe market data for 2025)

Biobased Adhesives

Industries Market Share



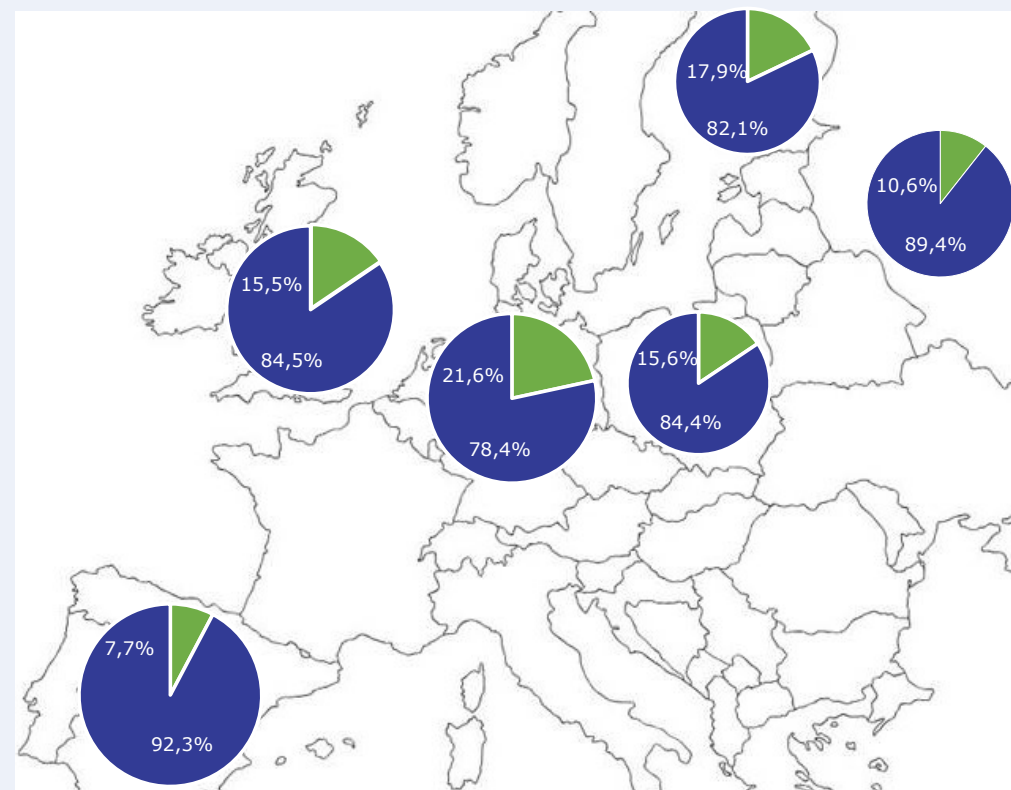
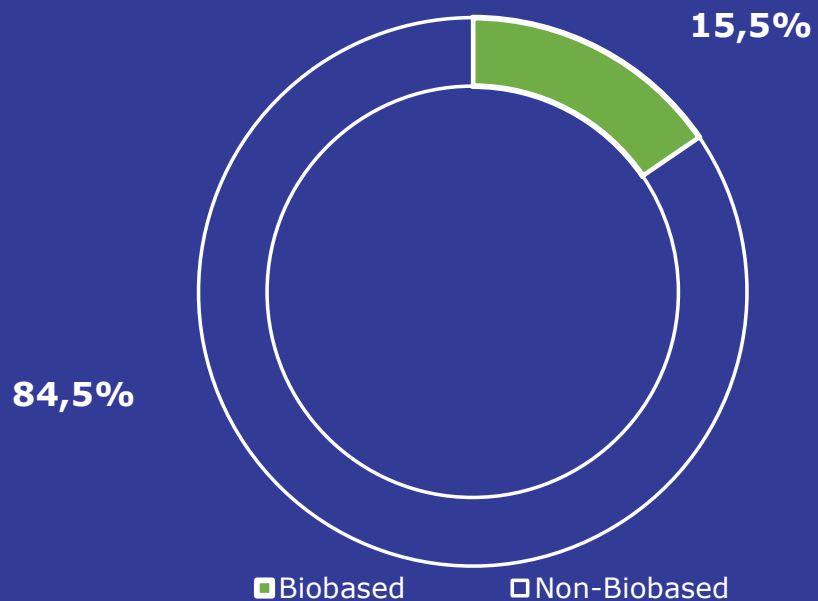
Construction is the second most important industry for biobased adhesives

Source: Market Report Biobased Adhesives (2nd Ed.) from Ceresana; (Europe market data for 2025)

Biobased Adhesives

Regional Biobased Market Share in Europe in the Construction Industry

Average Biobased Share in Europe in the Construction Industry



Source: Market Report Biobased Adhesives (2nd Ed.) from Ceresana; (Europe market data for 2025)

Interior Design of our House



Drivers of the Biobased Construction Material Market

Ceresana
Market Research Since 2002



Material and building performance



Regulatory and policy support



Advantages in sourcing and end-of-life



Growing demand from consumers

Hurdles of the Biobased Construction Material Market



Resource and cost constraints



Awareness and infrastructure challenges



Regulatory and systemic barriers



Complex life-cycle impacts

Our House



Interior



Exterior



Turning sustainability ambition into real buildings, real products, and real business models requires facts

Therefore, up-to-date and objective market knowledge is essential for well-founded decisions and a successful corporate strategy.

A photograph of a modern, two-story building with a light-colored wooden facade and a balcony. The building is set against a clear blue sky. In the foreground, there are green grass and yellow flowers, some of which are out of focus. A dark blue banner is overlaid on the top left of the image.

Thank You for Your Attention!

Ceresana

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Our next Events in 2026

Apply as Speaker and Sponsor & Register as Participant Now!



Future of Bio Adhesives
February 24 and 25, 2026



Future of Bio-Paints & Coatings

March 18 and 19, 2026



Future of Bio-Invest

April 22 and 23, 2026



Future of Bio-AI

May 12 and 13, 2026