



YEAR IN REVIEW

2019



THE
GOOD FOOD
INSTITUTE

PROTEIN REIMAGINED. IMPACT AMPLIFIED.

YOUR IMPACT AMPLIFIED



I support GFI because they embody the greatest impact coupled with the highest integrity. They are creating a global food revolution by bringing together and advising scientists, entrepreneurs, investors, and government officials.”

—CAMERON ICARD,
BOARD MEMBER, DONOR

Dear Friends,

Without imagination, we cannot see beyond the status quo. Without focusing on impact, we cannot change the status quo.

Bold imagination and a commitment to driving change unify The Good Food Institute’s visionary donor family, our tireless team, and the paradigm-shifting scientists, policymakers, students, investors, corporate executives, and entrepreneurs we support.

Together, we are building a sustainable, healthy, and just food system.

The year 2019 saw stunning developments across plant-based and cultivated meat. Plant-based meat took fast food by storm. The world’s largest meat producers added plant proteins either to their product lines or to their investment portfolios. The Indian, European, Japanese, and Singaporean governments began funding cultivated meat research. The Food and Drug Administration (FDA) and the U.S. Department of Agriculture (USDA) announced a joint regulatory framework, bringing cultivated meat a step closer to our tables.

Our second annual Good Food Conference convened global food conglomerates and startups, corporate venture arms and impact investors, life science companies and university researchers, and government officials and students. With so much creativity and capacity for impact at the same table, significant progress is often just a connection or conversation away.

This year in review highlights the progress GFI’s donor family, advisors, volunteers, and team have made in fostering a collaborative scientific ecosystem, securing government support and fair regulation, and growing protein innovation in the United States and around the world.

Indeed, 2019 marked our most ambitious, impactful year to date, and we have our extraordinary donor family to thank. GFI’s work is possible only due to your daring vision and commitment to this theory of change. Your support of GFI radiates across the entire ecosystem and around the globe. You imagine a future of nourishment, abundance, and compassion. Together, we are creating that future.

With gratitude and heartfelt optimism,

Bruce Friedrich
Co-founder & Executive Director



YEAR IN NUMBERS



5

GFI international teams in strategic, high-impact markets



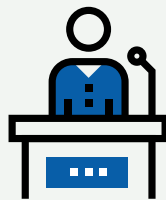
14

open-access research projects funded through GFI's Competitive Research Grant Program



300+

meetings with food manufacturers, retailers, and foodservice providers about growing the plant-based market



900+

scientists, entrepreneurs, investors, policymakers, and companies at the 2019 Good Food Conference to accelerate alternative proteins



8,330+

media hits, quotes, and op-eds to build public enthusiasm for alternative proteins and shape the policy debate



1,915,477+

views of Executive Director Bruce Friedrich's TED talk about plant-based and cultivated meat, which elevated this game-changing sector in 25 languages

WHAT'S INSIDE

04

GFI at a Glance

06

Milestones

08

Science and Technology

10

Corporate Engagement

12

Policy

14

GFI Around the World

18

Good Food Conference



4 years as an ACE Top Charity

"Our impression, from a variety of sources, is that GFI has been involved in one way or another in a large portion of the major developments in the plant-based and cell-cultured meat sectors since their founding. ... There are few charities working in this area, and GFI has shown strong leadership and efficiency."

GFI AT A GLANCE

GFI is a nonprofit working to create a sustainable, healthy, and just global food system. Plant-based, cultivated, and other alternative proteins offer a better way to feed the world.



A paradigm shift is happening right now in how we make food choices, and GFI is finding the solution for a sustainable food supply, which will improve the environment and animal welfare.”

—STEVE BECUTI, DONOR

The Challenge:

- Current meat production is unsustainable and inefficient. It is a key driver of climate change, environmental degradation, and antibiotic-resistant disease.
- Yet these facts have not sparked significant behavior change: People are eating more meat than ever in the United States and around the world.

GFI's Solution:

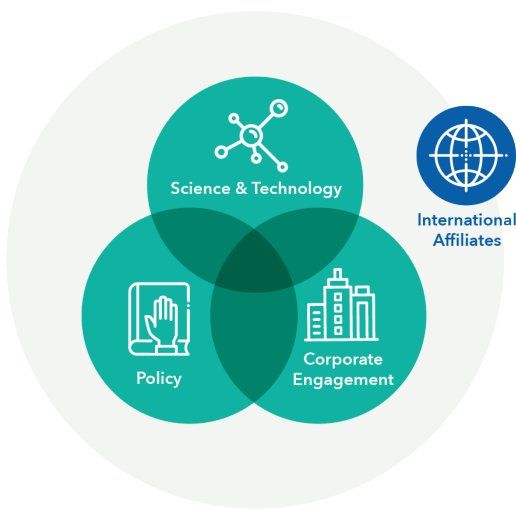
- We can create meat from plants or cultivate it directly from cells more sustainably and efficiently.
- We will make more progress by changing the default choices than by trying to change every single person's mind.

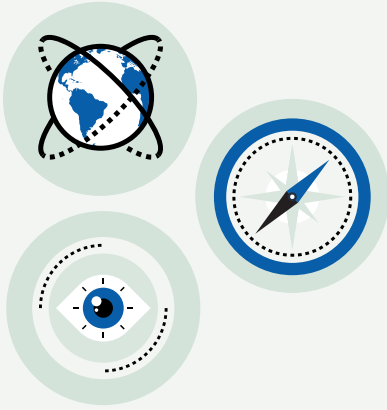
GFI is accelerating the transition of the global food system to alternative proteins by making them more delicious, affordable, and accessible than conventional animal products.

Our Programmatic Priorities:

- **SciTech:** Bridging gaps in scientific research, funding, and talent across the alternative protein sector.
- **Corporate Engagement:** Helping the food industry and investor communities put delicious, affordable alternative proteins on every menu and in every food retailer.
- **Policy:** Advancing government investment in sustainable proteins as well as fair regulation and legislation.

GFI works around the world with team members based in the United States, Brazil, India, Europe, Asia-Pacific, and Israel. We engage companies across the supply chain—from startups to legacy meat and food conglomerates, major chain restaurants, and retailers—as well as individual scientists, policymakers, investors, and entrepreneurs.





Maximizing Our Impact

We share knowledge freely. In a field where many innovators seek novel solutions to the same set of problems, GFI's research, data, and insights are open-access and support the progress of every innovator in this space.

We focus on the white space. GFI advances high-impact, tractable solutions in areas where too few people are working.

We take a big-picture perspective. GFI works across the plant-based and cultivated industries, the public and private sectors, and international borders, as well as into future decades. We spot and address today's industry-wide challenges, and we forecast and avert obstacles.

The Alternative Protein Landscape



Plant-based meat, eggs, and dairy are produced directly from plants.

Like animal products, they comprise protein, fat, vitamins, minerals, and water. Next-gen plant-based options look, taste, and cook like conventional choices.



Cultivated meat is produced directly from animal cells. Meat cultivation facilitates the same biological process that happens inside an animal by providing warmth and the basic elements needed to build muscle and fat.



Ingredients produced via fermentation are also used to make alternatives to legacy meat, eggs, and dairy. Microorganisms are programmed to produce specific animal proteins or fats during fermentation, or microorganisms' own high-protein biomass is used.



Alternative proteins do not rely on conventional animal agriculture. Their production, therefore, requires far fewer natural resources, causes much less pollution, needs no antibiotics, and eliminates farm animal suffering. Protein innovation opens up a world of opportunity for flexibility, resilience, and justice in our global food system.

MILESTONES

GFI donors empowered us to advance alternative protein science and support industry development. Together, we go further, faster. This is impact amplified.



January

- The world's first massive open online course on alternative proteins hits the web, courtesy of the GFI SciTech team. [\(Page 9\)](#)



March

- The USDA and FDA announce joint oversight of cultivated meat, a momentous step that brings cultivated meat closer to market. [\(Page 12\)](#)
- Inspired by consultation with GFI's corporate engagement team, MorningStar Farms commits to making their product line 100 percent plant-based by 2021. This will eliminate 300 million eggs from the supply chain annually. [\(Page 10\)](#)
- With the support of GFI Brazil, the largest egg producer in Brazil launches a plant-based egg product: N.Ovo. [\(Page 15\)](#)



May

- GFI's state of the industry reports for plant-based foods and cultivated meat provide the first in-depth description and analysis of the alternative protein investment landscape. [\(Page 11\)](#)



February

- The Indian government announces plans to establish the Centre of Excellence in Cellular Agriculture for cultivated meat research in partnership with GFI India. [\(Page 16\)](#)
- Alternative protein science gets an infusion of \$3 million for critical open-access research through GFI's inaugural Competitive Research Grant Program. [\(Page 8\)](#)



April

- GFI India helps secure a \$640,000 grant from the Indian government for cultivated meat research—one of the largest investments in cultivated meat research ever made by a government. [\(Page 16\)](#)
- GFI's Sustainable Seafood Initiative and *Good Food Startup Manual* are honorees in *Fast Company's* 2019 World Changing Ideas awards. [\(Page 11\)](#)
- Bruce Friedrich brings alternative proteins and food technology to the TED stage. [\(Page 19\)](#)

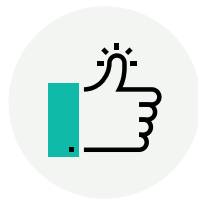
“Driven by a sense of urgency to mitigate the impact of animal agriculture on sustainability, climate change, and global health, [GFI’s] main priority is to foster and support innovation in the alternative protein field. ... The vast majority of entrepreneurs have told us time and time again how important GFI has been in eliminating many of the challenges of establishing their startups.”

—AGFUNDER NEWS



July

- GFI, the ACLU, and ALDF sue the state of Arkansas on behalf of Tofurky to overturn its label censorship law as unconstitutional. [\(Page 13\)](#)



September

- In response to GFI lobbying, Congress affirms support for funding alternative protein research in the U.S. government’s fiscal 2020 agricultural appropriations report. [\(Page 13\)](#)
- More than 900 industry experts gather in San Francisco at the 2019 Good Food Conference. [\(Page 18\)](#)



November

- GFI India hosts The Future of Protein Summit in partnership with Humane Society International and the Government of India’s Ministry of Food Processing Industries. [\(Page 16\)](#)



June

- Cultivated meat startups, scientists, and stakeholders—including Merck and GFI—form the Cultivated Meat Modeling Consortium. [\(Page 8\)](#)
- *Food Technology*, the trade publication for the world’s largest body of food technologists, publishes “Formulating with Animal-Free Ingredients” by GFI food scientist MJ Kinney. [\(Page 8\)](#)



August

- Leading Israeli universities Hebrew University and the Technion work with GFI Israel to add alternative protein courses to their 2020 curricula. [\(Page 14\)](#)
- GFI Europe incorporates in Belgium and begins establishing operations across the continent. [\(Page 14\)](#)



October

- GFI director of policy Jessica Almy makes the case against government censorship of plant-based food labels at the *Wall Street Journal’s* Global Food Forum. [\(Page 13\)](#)



December

- The district judge in our Arkansas label censorship lawsuit blocks Arkansas from enforcing plant-based label censorship while our lawsuit is pending. [\(Page 13\)](#)



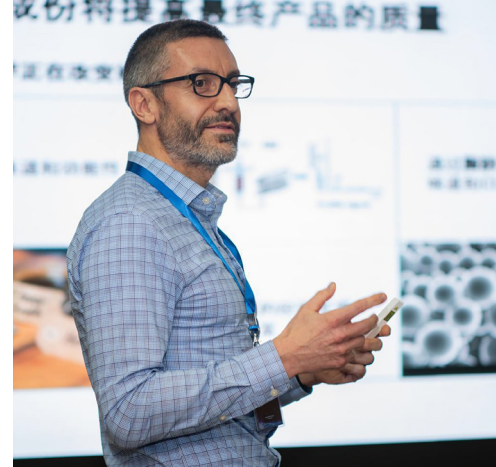
SCIENCE AND TECHNOLOGY

You want to build a just food system.
We're laying the foundation.

A strong open-access research environment and talent pipeline are critical to fostering good food innovation. Gifts from GFI supporters enable GFI SciTech director David Welch and his team to identify and bridge gaps in research, funding, and talent for the alternative protein sector.

Identifying Technological Bottlenecks

GFI scientists map the technological landscape and forecast the sector's trajectory to determine the most important white space



In the News
.....

opportunities. We share these learnings broadly through trade publications, white papers, and speaking events. In 2019, we published articles in [Chemical Engineering Process Magazine](#) and [Food Technology](#), the trade magazine for the world's largest body of professional food technologists. We also published a [white paper](#) on decreasing the cost of cell culture media. In partnership with Merck KGaA, MosaMeat, and others, we helped launch the [Cultivated Meat Modeling Consortium](#) to accelerate problem-solving through computational modeling.

Eliminating Obstacles

Having identified which areas of innovation are most critical, GFI scientists engage experts and institutions to catalyze open-access research and early-stage commercialization. We seeded alternative protein R&D with nonprofits, universities, and government agencies—both domestically and internationally. We collaborated with university researchers to submit a \$10M proposal to the USDA and a \$6M proposal to the UK government for plant-based-meat crop research. GFI scientists advocated alternative protein research at the Foundation for Food and Agriculture Research, ClimateWorks, the Institute for Protein Design, the National Science Foundation, and many more.

Our SciTech team worked across the investment community to increase the capital flowing into this space. We helped Purple Orange Ventures establish a funding program offering grants of \$120,000 EUR to recruit entrepreneurial scientists into the sector. We explained alternative proteins to a wide range of investors, including the venture arm of a multinational automation and robotics company, CleanTech Investment Banking, and a group of 35 institutional investors managing a total of \$11.5 trillion in assets.

We continue to bring life science and tech companies into this sector. In 2019, our scientists

Competitive Research Grant Program

In February, we announced the [14 recipients](#) of our inaugural [Competitive Research Grant Program](#), 11 of whom had not previously conducted plant-based or cultivated meat research. The first year of this program more than doubled the open-access cultivated meat research funding of the past 20 years. It represents the largest infusion of grant money for plant-based meat research ever.

Companies have reached out to grant recipients requesting to apply their research findings. One of the world's largest cultivated meat companies will test growth factors developed by one of our grantees.

The second round of our grant program has expanded the research areas and pool of available funding. We received high-impact proposals from 135 applicants across 25 countries. We will fund 12 to 18 of these projects.

Alt-Meat Trounces Animal Meat's Massive Inefficiencies

By Dr. Liz Specht

"While the planet arguably benefits the most from these meats' higher production efficiencies, the market efficiency gains will be hugely beneficial for the bottom line."

We don't have to give up burgers to address climate change. We just have to give up the cows.

By Dr. Liz Specht

"By changing how we produce meat, we can transform the meat industry from a leading cause of global warming to the main tool for mitigating and even reversing climate change."

Tomato tuna anyone? Plant-based meat has moved into the seafood aisle

"If you can give consumers everything that they like about fish but do it with plants, it's going to be 10 times as efficient and significantly less polluting."

—Bruce Friedrich

“GFI’s research grants are enabling fundamental open-access science. That, in turn, enables scalability and an ecosystem approach to accelerating this space in ways the private sector alone cannot.”

—MAX ELDER, INSTITUTE FOR THE FUTURE

shared their expertise with many national and multinational companies—including Mitsubishi, 3M, and GE Healthcare—and conducted full-day workshops at various life science companies. We supported internal project development relevant to cultivated meat at a global life science company, a protein engineering research institute, and a multinational chemicals company.

Deepening the Talent Pool

GFI's SciTech team is building a robust, collaborative community of researchers and fostering the next generation of protein innovators. We reached thousands of scientists through targeted speaking engagements, including at the International Life Sciences Institute, the Engineering Biology Research Consortium, and the National Academies of Science, Engineering, and Medicine. We also spoke with undergraduate and graduate students at top universities, including Princeton, Stanford, UC Berkeley, Wageningen University in the Netherlands, and Shenzhen University in mainland China.

The SciTech team developed and published a wide suite of introductory resources to support innovators, scientists, and students in exploring this sector. We launched a no-cost online course (see right), published a long-form [Reddit series](#) on the science of meat cultivation, and developed an alternative protein resource guide for university students.



New Meat: A Massive Open Online Course

After our collaborations with Stanford and UC Berkeley to establish courses on alternative proteins, we launched GFI's massive open online course, which teaches the basics of plant-based and cultivated meat. More than 3,000 scientists, academics, industry representatives, and others have enrolled to date. We've also begun work on additional modules that we will roll out in 2020.

“GFI was a huge part of my journey. I met Aylon from the business development team in November last year, and he's the one that convinced me to start a company at all. ... Then I also took this massive open online course that GFI produced that really helped me learn the ropes in terms of how to make alternatives to animal products.”

—Sri Artham, Hooray Foods



CORPORATE ENGAGEMENT

You know collaboration is critical.
We're bringing everyone to the table.



In the News
.....



Engaging stakeholders across the for-profit sector is essential to transforming global markets. GFI corporate engagement director Alison Rabschnuk and her team are galvanizing the food industry and investor community to put delicious, affordable alternative proteins on every menu and in every food retailer.

Inspiring Investment and Innovation

We built relationships with more than a dozen of the world's leading consumer

packaged goods companies, hosted discussions and all-day workshops with a variety of multinational food and meat companies, and gave dozens of presentations to corporate venture, venture capital, and institutional investor groups.

Although most of this work is protected by nondisclosure agreements, we are thrilled to share that our corporate engagement team helped Kroger add a plant-based line to their portfolio.

"GFI has been a great resource—both in helping us build relationships with partners in the plant-based space and in sharing broad retail market data that has informed our decisions."

—Gil Phipps, Kroger

We also worked with Perdue to add plant proteins to their product line and inspired MorningStar Farms to make their entire product line fully plant-based by 2021, which will take 300 million eggs out of production annually.

More than 300 entrepreneurs joined our GFIdeas community to learn from food industry experts and make connections—the co-founders of Netherlands-based Rival Foods met via GFIdeas. We launched the GFI Investor Directory, which lists investors interested in protein innovation as well as their typical investment type, stage, and amount. The GFI team also provided additional early-stage support, such as pitch deck reviews and strategic planning discussions, to help drive successful seed rounds.

Sustainable Seafood Initiative

GFI's Sustainable Seafood Initiative addresses innovation and market gaps for plant-based and cultivated seafood. In 2019, we completed our strategic plan, advocated public funding for seafood innovation, and expanded our resources for plant-based and cultivated seafood companies.

"GFI has been a wonderful partner, not only to my company but all the companies in this space—in researching the business landscape and helping us to understand where the market is going, in understanding the science and how to advance our technology, and in building relationships with investors and larger food companies." —David Benzaquen, Ocean Hugger Foods

"GFI, their white papers, their publications, and all the work they do on policy has created such awareness. That GFI goes across all these categories and now is expanding globally—it has made the difference in this industry. We're very thankful for all of GFI's work." —Lou Cooperhouse, BlueNalu

How to Invest in the Meatless Burger Boom

"We think the plant-based meat category is looking a lot like how the plant-based milk category looked about 10 years ago before almond and soy milk could be found in the refrigerated case next to dairy milk."

—Alison Rabschnuk

The New Makers of Plant-Based Meat? Big Meat Companies

"When companies like Tyson and Smithfield launch plant-based meat products, that transforms the plant-based meat sector from niche to mainstream."

—Bruce Friedrich

Americans crave Impossible Burger, Beyond Meat in 2020

"2019 was a big year for plant-based meat. ... It really feels like the tipping point, but it's just the beginning. We're in the early days of a major shift."

—Caroline Bushnell

Expanding Accessibility and Accelerating Growth

We continued to drive accessibility for plant-based foods. Through 80 meetings or calls with foodservice providers and retailers, we made the business case for plant-based foods and shared best practices for marketing, merchandising, and menuing to the mainstream. We advised executives and R&D teams for national quick-service restaurant chains and opened conversations with influential foodservice distributors. We collaborated with Unilever, New Hope Network, the Food Marketing Institute, and Open Table to create informational webinars.

The GFI team made the case for alternative proteins at influential forums, such as the National Restaurant Association's Restaurant Innovation Summit, the Alternative Protein Show, the Sustainable Foods Summit, and Food & Ag at the Intersection Symposium, which Farmers National Company hosted and 300 production agriculture representatives attended.

We published [state of the industry reports](#) for cultivated meat and plant-based meat, eggs, and dairy. The reports illustrate the tremendous growth and innovation across the alternative protein sector, covering the top companies and investors, key U.S. regulatory updates, and the first in-depth investment landscape analysis using custom datasets curated by GFI.

GFI's [Sustainable Seafood Initiative](#) and [Good Food Startup Manual](#) were both honorees in *Fast Company's* 2019 World Changing Ideas awards. The publication's senior editor said: "This year's awards were the most competitive we've ever had. *Fast Company* editors, reporters, and a venerable group of guest judges pored over the [more than 2,000] entries, looking for the ideas that we felt had the most creative solutions—and the most potential for impact and scalability."

“Without GFI and the corporate engagement team, we would be two, three years behind. Hats off and thank you very much for being such an incredible part of our success.”

—ERIC CHRISTIANSON, PERDUE FARMS



Driving Evidence-Based Consumer Strategy

In 2019, GFI conducted 11 consumer research projects to inform strategy across the alternative protein sector. In collaboration with leading food innovation firm Mattson and with technical advising by Memphis Meats, we developed evidence-based [science communication tools](#) for the cultivated meat industry and identified "cultivated" as the optimal term for meeting the criteria of transparency, differentiation, and appeal.

We tested consumer acceptance of plant-based and cultivated meat in the United States, India, and China, and we published our findings in the academic journal *Frontiers*. Mindlab partnered with us to study consumers' implicit perceptions of the plant-based category, and we shared our [learnings](#) with food professionals through webinars and meetings.



POLICY

You don't accept the status quo.
Neither do we.

Plant-based and cultivated meat are clear, highly tractable solutions to the challenges governments want to address. Under the stewardship of GFI policy director Jessica Almy, GFI defends a fair, competitive market for alternative proteins and advances public investment in research and development.

Leveling the Playing Field

In 2019, we vigorously opposed label censorship of plant-based and cultivated products across the United States, defending free speech and fair markets on behalf of alternative protein manufacturers. (See far right.)

At the federal level, GFI urged the FDA to ensure that their approach to modernizing standards of identity would not interfere with the ability of alternative meat and dairy producers to use familiar terms on their labels. We submitted public comments, delivered oral testimony, and met with FDA leadership to advocate that updated standards keep pace with innovation.

The GFI team met with the USDA Food Safety and Inspection Service administrator to discuss the agency's investigation of plant-based meat labels in supermarkets. We learned of the investigation through one of our Freedom of Information Act requests.



In the News
.....

Establishing an Efficient Regulatory Pathway

GFI has been actively shaping the U.S. regulatory framework for cultivated meat through oral remarks and regulatory submissions to the USDA and FDA. GFI met with the USDA's Foreign Agricultural Service to provide an overview of the cultivated meat industry, answer technical questions, and establish GFI as a key resource. We arranged a tour of a cell-culturing company's lab for the U.S. Government Accountability Office, which is preparing a report on federal oversight of cultivated meat.

We celebrated a legislative win when the fiscal 2019 agriculture appropriations bill was signed into law without a harmful rider that we energetically fought. The rider would have required new regulations and given sole jurisdiction over cultivated meat products from livestock and poultry to the USDA.

Securing Government Funding

The GFI policy team met with congressional staff to share information on alternative protein technologies and advocate federal R&D funding to support the science behind these technologies. We met with and submitted [comments](#) urging investment in alternative proteins to White House officials in



Protein Policy Around the World

Our U.S. and international policy teams provided regulators in India, the United Kingdom, Canada, Singapore, Australia, and New Zealand with resources for developing cultivated meat policy frameworks, and we are cautiously optimistic about the development of clear, swift regulatory approval processes in these countries.

Meat, Milk Groups Seek to Defend Supermarket Turf

"I don't think consumers are stupid. They know what they are buying," said Jessica Almy [at the *Wall Street Journal's* Global Food Forum]. "To ask the government to come in and censor the competition really is unfair."

What can fight climate change and antibiotic resistance? More sustainable meat

By Jessica Almy

"Just as past federal R&D funding by the United States has sparked revolutions in computing, genomics, manufacturing and other fields, federal funding for research on plant-based and cell-cultured meat could help accelerate progress in these two sectors."

Can plant-based foods be called "meat"?

"Producers are afraid of the new competition, and they've enlisted the government's help to censor the labels of their competitors. ... It violates the First Amendment for governments to come in and censor products ... sometimes with the threat of jail time for calling a veggie burger a veggie burger."

—Jessica Almy

“By educating policymakers on label standards and regulatory issues, GFI helps us get our products on the shelf. Not just in the U.S. but across the world.”

—JOSH TETRICK, JUST

the Office of Science and Technology Policy and the Office of Management and Budget.

We submitted appropriations report language requests for fiscal year 2020 to key members of Congress asking them to include language directing the USDA and the National Science Foundation to fund research on plant proteins and cellular agriculture, and our lobbying efforts prevailed: The 2020 Senate agriculture appropriations report includes language encouraging research funding for plant protein functionality through the National Institute for Food and Agriculture. It also includes new language providing extra funding for the Agricultural Research Service to conduct research on pulses. (This is in addition to similar report language we advocated in the House.) We extend our thanks to the lobbyists at Sidley Austin who worked tirelessly alongside us pro bono.

Shaping the Conversation

We made the case for a level playing field and public investment through dozens of media appearances, including on CNN; letters to the editor in the *New York Times*, the *Wall Street Journal*, and the *Guardian*; and op-eds in *Newsweek*, *USA Today*, the *Hill*, and more.

GFI's team put protein innovation center stage at more than 50 high-impact events, including the *Wall Street Journal's* [Global Food Forum](#) and the Food Policy Impact Conference hosted by the Institute of Food Technologists and the American Society for Nutrition.

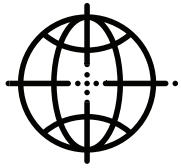


Free Speech and Fair Markets State-Level Campaign

We responded in full force to legislative efforts meant to restrict meat terms on the labels of food that is not from slaughtered animals. These bills violate producers' First Amendment rights, are unnecessary (federal law already prohibits misleading labels), and disrupt the free market by favoring one industry over another.

We opposed label censorship bills in 26 states by hiring contract lobbyists, sending team members to lobby, submitting more than 30 letters to over 600 legislative offices, and leading twice-weekly calls for a coalition with 10 other organizations that oppose such bills.

Our efforts prevailed in 14 states, including Texas, Nebraska, and Virginia. Along with the American Civil Liberties Union and Animal Legal Defense Fund, we sued the states of Missouri and Arkansas on behalf of Tofurky to overturn label censorship laws as unconstitutional. A federal court has blocked Arkansas from enforcing its law because the judge concluded that our lawsuit is likely to prevail on its claim that the law violates the First Amendment by censoring free speech.



GFI AROUND THE WORLD

You want to change the world.
We have a global mission.



In the News
.....

GFI Europe

Europe is one of the biggest potential markets for alternative proteins and home to much of the world's scientific and commercial talent. GFI Europe managing director Richard Parr and his team combated label censorship, advocated fair regulation and public investment, and seeded positive public opinion.

GFI Europe worked with allies to fight legislative proposals that would ban terms such as "burger" or "sausage" on plant-based products across the European Union. This coordinated effort included media activity, petitions, legal analysis, social media campaigns, and direct lobbying. The team has been garnering public support through media appearances and speaking engagements across Europe, including in the United Kingdom, Italy, and the Netherlands.

GFI Israel

Israel, "The Startup Nation," is a global leader in science, agriculture, and food tech. GFI Israel managing director Nir Goldstein is growing our impact in this innovation hub.

After meeting with high-level government officials at the Ministry of Economy and Innovation Authority, GFI Israel

secured government support for alternative protein innovation at Israel's newly established National Food Institute. GFI Israel organized events for dozens of investors and hundreds of food tech professionals, consulted with some of Israel's biggest food companies, and published an [article](#) in *Frontiers* titled "Tissue Engineering for Clean Meat Production."

GFI Israel scientist Dr. Tom Ben-Ayre will teach a first-of-its-kind protein innovation [course](#) at the Hebrew University in 2020 and is working with Technion to launch their own course.



Cultivating Government Support

GFI Europe is encouraging UK government investment in alternative proteins. The team convened scientists—including the UK's leading cultivated meat researcher and the former head of the influential Biotechnology and Biological Sciences Research Council—to advance this work. With GFI Europe's assistance, this coalition of scientists advocated alternative proteins to the research councils that control funding.

The Europe team also formed a strong relationship with the UK Food Standards Agency. GFI Europe presented the agency with an evidence-based approach to cultivated meat regulation, and GFI SciTech director David Welch visited in person to build on the momentum.

"[Cultivated meat] is a massive commercial opportunity, which companies, universities and governments should seize the opportunity to support and invest in."

—Richard Parr

The race for protein: How Israel can become leader in Future of Protein

By Nir Goldstein

"The Government of Israel has to define alternative protein technology as a national priority. Like cyber. Like desalination technology. The Israel Innovation Authority must finance groundbreaking research and innovation through start-ups, the academia and industry."

Introducing Futuro: Brazilian start-up launches 'tech-based' vegan burger

"The Good Food Institute is helping Latin American food and drink companies develop animal-free products and worked with Fazenda Futuro on this project. 'The history is very close to what happened with Mantiqueira [when developing its vegan egg N.Ovo],' said [Gus] Guadagnini."

“By introducing cultivated meat to the traditional pharmaceutical industry and getting them on board, GFI has managed to shorten the time to market tremendously.”

—SHIR FRIEDMAN, CO-FOUNDER & COO, SUPERMEAT

GFI Brazil

Home to the world's largest meat company, Brazil represents an urgent need and tremendous opportunity for protein innovation. GFI Brazil managing director Gustavo Guadagnini helmed GFI Brazil's most impactful year to date.

GFI Brazil took their work with the Brazilian government to new heights. For example, the team worked with Brazil's Ministry of Agriculture, Livestock, and Supply to launch a knowledge-exchange collaboration with their research institute, EMBRAPA—one of the world's largest food technology research establishments. Over a series of meetings and workshops, GFI scientists and EMBRAPA scientists shared insights into alternative protein R&D. Brazil was one of the leading countries for alternative protein competitive grant research proposals.

GFI Brazil arranged and advised the first policy discussion about animal-free meat, eggs, and dairy in the Brazilian government. We are cautiously optimistic that government agencies may support favorable alternative protein regulations in Brazil.

The Brazil team cultivated strong relationships with the Ministry of the Economy, the Brazilian Agency for Industrial Development, and the Ministry of Science, Technology, Innovation, and Communication.

The team met with executives and representatives from major food companies and facilitated high-impact connections. They worked closely all year with leadership for one of the world's largest supermarket chains and are advising a leading global meat producer on diversifying with plant-based products.



Building the Brazilian Market

When GFI Brazil began their work three years ago, no Brazilian plant-based meat, egg, and dairy industry existed. In 2019, they celebrated product launches from Grupo Mantiqueira (the largest egg producer in Brazil), the startup Fazenda Futuro, JBS (the world's largest meat producer), and Marfrig (the world's second-largest beef company), among others.

GFI Brazil worked for two years with Grupo Mantiqueira to help the company enter the plant-based market. Their first plant-based egg product, N.Ovo, received excellent media coverage and positive market reception. The Brazil team also worked with Fazenda Futuro to launch the Futuro Burger, the first next-gen plant-based burger in Brazil. The company sold 20 metric tons in their first month alone.

JBS released a plant-based burger in Brazil in May. During a panel at our conference, Christy Lebor, who leads global innovation for JBS, stated, "When you look at something like plant-based or cell-based ... it fits perfectly in what we want to do and want to achieve."

Marfrig and ADM partnered to bring the plant-based "Rebel Whopper" to Burger Kings across Brazil. Now they've expanded that partnership to launch international plant-based brand The Revolution.



GFI AROUND THE WORLD

You want to make a difference.
We want to multiply your impact.



In the News
.....

GFI India

Under the leadership of managing director Varun Deshpande, GFI India has developed extraordinary relationships with key government agencies across India, including the Ministry of Food Processing Industries, the Food Safety and Standards Authority of India, and the Government of Maharashtra.

With the support of the Chief Minister's Office of Maharashtra, GFI India collaborated with the Institute of Chemical Technology to establish the Centre of Excellence in Cellular Agriculture. This is the world's first government-sponsored research center focused entirely on cultivated meat. GFI India also helped secure a \$640,000 government grant to the Centre for Cellular and Molecular Biology for cultivated meat research, one of the largest grants for the sector anywhere in the world.

With funding from the Bill & Melinda Gates foundation, the team has been building an open-access database of plant protein research focusing on millets, which are drought- and flood-resistant.

GFI India engaged numerous other influential stakeholders across the investment and research landscape, including impact venture fund Omnivore VC, international conglomerates Reliance Industries and Godrej Group, and universities such as the Indian Institute of Technology-Delhi and the National Institute of Food Technology, Entrepreneurship, and Management.

"I was vocally skeptical about the potential of alternative proteins in India, but after collaborating with GFI over the past year, Omnivore is now planning to accelerate the sector's growth in the region in partnership with them." –Mark Kahn, Omnivore

Hear Mark Kahn and other leading thinkers speak about the sector on GFI India's new podcast, [Feeding 10 Billion](#).



The Future of Protein Summit 2.0

GFI India co-hosted the second annual [Future of Protein Summit](#) in New Delhi along with Humane Society International and the Government of India's Ministry of Food Processing Industries. The event facilitated connections among more than 300 policymakers, scientists, and entrepreneurs from India and all over the world.

At the summit, two members of Parliament and the CEO of the government's premier policy think tank, NITI Aayog, publicly affirmed their support for alternative proteins. Further, leadership from India's four top universities began planning a consortium for cooperative cultivated meat research and commercialization.

"The state-funded Institute of Chemical Technology (ICT) ... has joined hands with The Good Food Institute ... to set up a 'Centre of Excellence in Cellular Agriculture', which will see the Mumbai laboratory coming up in the first phase, followed by a larger research facility at ICT's Jalna campus by 2021."

Food start-ups get a leg up with new manual

"Aspiring food entrepreneurs can now tap on a manual to uncover the dos and don'ts of incorporating a food start-up in Singapore. 'The Good Food Start-up Manual: Singapore Edition' was launched on Nov 29 by The Good Food Institute, a US-based non-profit funded by the Bill & Melinda Gates foundation, and Feed 9 Billion, a Singapore-based innovation platform."

Quantum Leap: Alternative meat market is expected to grow 10 times by 2029

"If consumers don't have access to products that taste the same or better and cost the same or less than the conventional animal products they already eat, then the market will not be truly inclusive of all sections of the income pyramid."

—Varun Deshpande

“GFI’s Asia-Pacific team is super dedicated and highly effective in delivering results in a way that suits the regional culture. We benefit hugely from their resources, connections, publicity, and technical papers.”

—CARRIE CHAN, AVANT MEATS

GFI Asia-Pacific

The Asia-Pacific region, excluding India, represents about 42 percent of the world's population: It is central to creating a good food future. GFI Asia-Pacific managing director Elaine Siu and her team are orchestrating strategic impact in key regions, including Hong Kong, Singapore, mainland China, and Japan.

In 2019, GFI Asia-Pacific forged a partnership between the China Plant-Based Food Alliance and GFI Consultancy (GFIC). The alliance is a government-owned industry association in mainland China that is well positioned to shape China's official policy related to alternative proteins. GFIC is a Chinese firm that advises investors, manufacturers, corporations, and startups. Owing to this collaboration, GFIC is contributing to a two-year research project commissioned by the Chinese Academy of Sciences that will advise the Chinese government on developing its plant-based protein industry.

GFI Asia-Pacific published the [China Plant-Based Meat Industry Report](#) about the current state of the plant-based meat industry in China.

“GFI’s data and research is the most powerful tool to use for Zhenmeat to understand a promising but complex market like mainland China.” —Vince Lu, Zhenmeat

From publications to speaking engagements and media appearances, GFI Asia-Pacific has been shaping public opinion in favor of alternative proteins. The team spoke at over 20 major conferences in Hong Kong, Singapore, mainland China, and Japan.



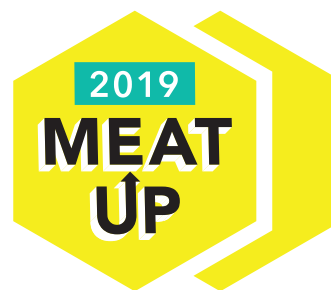
Fostering a Supportive Ecosystem

GFI Asia-Pacific engaged stakeholders across the startup, investment, research, and regulatory landscape. The team supported the first cultivated meat companies in Hong Kong (Avant Meats), Singapore (Shiok Meats), and Japan (Integriculture); established the Asia-Pacific alternative protein investor community; and reached out to researchers in Hong Kong, Singapore, and Japan.

GFI Asia-Pacific launched [The Good Food Startup Manual: Hong Kong Edition](#) with Asia-based accelerator Brinc to support local alternative protein startups. In partnership with food innovation platform F9B, the team launched [The Good Food Startup Manual: Singapore Edition](#). Contributors include investors, startups, food manufacturers, institutions, and government agencies, such as the Singapore Food Agency.

THE GOOD FOOD CONFERENCE 2019

You want to lead the way.
We want to light it.



In the News



Our second annual Good Food Conference brought together over 900 attendees, including scientists, entrepreneurs, investors, policymakers, and corporate leaders, from 34 countries. Thousands of livestream viewers tuned in from around the world.

The sold-out event featured 50 speakers spanning the food and tech sectors. Journalists from top media outlets, such as the *New York Times*, BBC, *Wired*, and the *Wall Street Journal*, moderated panel discussions.

Featured Speakers



Tom Mastrobuoni,
Tyson Ventures



Seth Goldman,
Beyond Meat



Lavanya Anandan,
Merck KGaA



Sara Young,
MorningStar Farms



Uma Valeti,
Memphis Meats



Ann Veneman,
former U.S. secretary
of agriculture



Patty Trevino,
CKE (Carl's Jr.)



Christy Lebor,
JBS

WALL STREET JOURNAL

The New York Times

WIRED

Los Angeles Times

FINANCIAL TIMES

The Telegraph

BBC



BUSINESS
INSIDER

Vox

POLITICO

Dozens of reporters from leading publications attended, and the conference inspired more than 38 stories about the alternative protein sector, many of which were syndicated extensively.

During the conference's Innovators' Showcase, the pioneering founders behind Rebellyous Foods, Better Nature, Hooray Foods, Ecovative, Karana, and NovaMeat pitched their startups to titans of the food industry, global media, and venture capital.

"The Good Food Conference, a meeting of more than 800 plant-based and cell-based protein entrepreneurs, scientists, investors, and marketers, was the most upbeat, joyful, and youthful American agriculture gathering in years."

"The major players in the meat industry—Tyson, JBS, Perdue, Cargill—have all invested in making meat directly from plants or growing meat directly from cells. ... Consumers are also on board. Every time restaurants like White Castle, Carl's Jr. or Burger King introduce a new plant-based meat item, sales exceed expectations."

—Bruce Friedrich

In Its Second Year, the Good Food Conference is All About Growth

"All the cool kids in the alternative protein space gather to network, listen to panels ... and sample all the latest alt-protein treats. It's a madcap ride fueled by plant-based breakfast burritos (verdict: amazing) and lots of coffee."

From multinational life science and tech companies to game-changing startups and legacy food brands, an extraordinary range of generous sponsors made this conference possible. Special thanks to our presenting sponsor, MorningStar Farms!



In the last 10 minutes, I've met one of the largest foodservice distributors here in the Bay Area. One of the largest grocers in the country came to our booth and asked about selling our product. One of the largest investors in the Bay Area also came by. How do you get better connections than that?"

—SRI ARTHAM, HOORAY FOODS



It's hard not to come when virtually every single person from the biggest food companies to the smallest entrepreneurs to academic researchers are sending me emails and texts saying, 'Are you going to be at the Good Food Conference?'"

—JOSH TETRICK, JUST



It's incredible to see how many food industry incumbents have started getting interested in this field. Every major meat producer is here. Every major food producer is here. Every major biotechnology or industrial scaling company is here."

—UMA VALETI, MEMPHIS MEATS



This is the only food conference that I think everybody comes to and the best place to meet everyone. ... Flying 16 hours all the way from Singapore to San Francisco to be here for 96 hours for the Good Food Conference is so worth it."

—SANDHYA SRIRAM, SHIOK MEATS



The quality of the attendees that are here is tremendous. Right people, right place, right conversations."

—MICHELE FITE, MOTIF FOODWORKS



The Good Food Conference is the premier event for this whole alternative protein category. It's an enormous platform for creating collaboration. We are witnessing an absolute evolution, and frankly, it all happens here."

—LOU COOPERHOUSE, BLUENALU



Bringing Alternative Protein to TED

Speaking of high-impact conferences, GFI executive director Bruce Friedrich was named a 2019 TED Fellow and spoke on the mainstage of the annual TED Conference. His talk has been viewed almost 2 million times and translated into 25 languages since it went live in May. The *TED Radio Hour*, the seventh-most popular podcast in the United States (which also airs on more than 600 radio stations), featured Bruce in its "Climate Crisis" episode, and Kara Swisher, one of the world's most influential tech journalists, spotlighted Bruce on her podcast.

Right: (top to bottom and left to right) Impossible Foods director of research Celeste Holz-Schietinger and Clemson University associate professor Dilrukshi Thavarajah, Vox founder and editor-at-large Ezra Klein, Black & Veatch lead process engineer Kris Chatrathi and Unovis Partners & New Crop Capital managing partner Dan Altschuler Malek.

Bottom: Bruce Friedrich speaks at the 2019 TED Conference. Photo courtesy of Ryan Lash / TED.



GFI donors are transforming the food system.
Our supporters make reimagining protein possible.
The year 2020 will be GFI's most ambitious yet.

AMPLIFY YOUR IMPACT. JOIN US.



Stay in the know with GFI's email
newsletter and monthly reports!



[GFI.org/donate](https://gfi.org/donate)



866.849.4457



The Good Food Institute
1380 Monroe St. NW, Ste. 229
Washington, DC 20010
United States of America

The Good Food Institute, Inc.
501c3 Nonprofit Organization
TAX ID #81-0840578



GFIYR-2019