

GFI's GLOBAL HIGHLIGHTS

April 2024

The top highlights:

- **GFI published the [2023 State of the Industry Reports](#), the most authoritative, open-access reviews of the three core pillars of alternative proteins to date.** The reports and corresponding [webinars](#) feature commercial landscape updates, sales and investment data, consumer research, scientific progress, and policy and regulatory developments.
- **GFI APAC Managing Director Mirte Gosker delivered a keynote presentation at Singapore's 2024 Food Manufacturing Career Fair**, attended by the Minister of State for Manpower and leaders from top polytechnic institutes. She highlighted Singapore's position as a regional hub for alternative proteins, emphasized the need for a robust workforce, and discussed upskilling programs GFI APAC developed in collaboration with academic and industry partners.
- **GFI's SciTech team played a key role in CASA-Bio synthesis meetings, collaborating with federal R&D agencies to identify mutual interests for a U.S. bioeconomy roadmap.** CASA-Bio is a National Science Foundation-led initiative advancing the U.S. bioeconomy through collaborative research and development across federal and non-federal organizations. After intensive discussions and stakeholder engagement, CASA-Bio established alternative proteins as one of their seven priority themes, with helpful votes of approval from stakeholder organizations such as NASA and Bayer. GFI will work with CASA-Bio to orchestrate workshops to draft five-year R&D roadmaps for several areas, including Protein Diversification for Food, Health, and Environment to support the U.S. bioeconomy.
- **GFI India collaborated with the Ministry of Science and Technology to help shape the Regulatory Conclave on Smart Proteins in New Delhi, a significant event for advancing regulatory frameworks for smart proteins.** The gathering, which included top food safety and food processing officials, was a direct result of the team's ongoing collaboration with the Ministry's Department of Biotechnology and Biotechnology Industry Research Assistance Council. During the event, GFI India SciTech Specialist Chandana Tekkatte presented safety and regulatory recommendations for smart proteins, emphasizing their importance in biomanufacturing policy.
- **GFI's partners at the Bezos Earth Fund announced a new \$100 million [AI for Climate Nature Challenge](#)**, that, among others, prompts the question, "How can we feed the growing population without hurting the environment?" Alternative proteins are featured as one of the first focus areas of the challenge, highlighting the growing focus on alternative proteins as a critical solution in the climate space. Be sure to sign up for updates [here](#).



How we're contributing to our core objectives

The following objectives capture GFI's approach to accelerating the development of alternative proteins and transforming the global food system. Below is a sampling of last month's work.

GFI fosters a strong open-access alternative protein research and training ecosystem

- GFIC, an independent strategic partner that does mission-aligned work in mainland China, launched a [new report](#) on protein resources in China. The report provides a comprehensive analysis of approximately 100 crops and microbial proteins that could be mass-produced in China for plant-based and fermentation-based meat. Sixteen crop finalists were ranked based on their feasibility for comprehensive utilization, providing detailed insights into the current industry chain and ongoing research.
- GFIC also launched an [open application](#) for research funding on underutilized crops in China based on their protein resources analysis report. GFIC SciTech Consultant Minqi Wang and GFIC SciTech Manager Yeshe Liang hosted a [webinar](#) with a popular food media platform in China, Foodmate, to share a detailed look at the analysis's findings and recommendations and introduce the research funding priorities.
- Lead Scientist Prier Panescu, Ph.D., led a three-hour pre-conference workshop and chaired the first day of the inaugural Alternative Fats and Oils summit in San Francisco. The summit gathered foodtech experts, ingredient and consumer goods companies, and investors to hear insights on scalable production methods, cost optimization, and regulatory considerations.
- GFI APAC SciTech Engagement Specialist Arin Naidu delivered a keynote address at the first-ever Philippine Alternative Protein Symposium, which drew over 40 researchers focused on R&D prioritization and bottleneck resolution to accelerate the domestic alternative protein sector.
- Arin hosted GFI APAC's first Science of Alt Protein [webinar](#) of the year, which featured Danai Georgiadou, Ph.D., a stem cell biologist from Singapore's science agency (A*STAR) with a background in primary cell line isolation and characterization.
- Principal Scientist Elliot Swartz, Ph.D., hosted this month's Cultivated Meat Collaborative [webinar](#) featuring a presentation from ERIDIA, a joint venture between the Bühler Group and ZETA. The seminar featured ERIDIA's bioprocessing solutions for the cultivated meat industry, focusing on the importance of scalability.
- GFI Europe Head of Science & Technology Seren Kell presented alongside Thomas Herget of Merck at a [webinar](#) on alternative protein R&D priorities. The webinar was hosted by INPART, a platform that supports scientific collaborations between R&D-intensive companies and INPART's network of thousands of universities and technology transfer offices, for their latest "[global challenge campaign](#)" to advance solutions on sustainably feeding global populations. As a strategic partner for the campaign, Seren provided insight into the major technical barriers facing the alternative protein industry, and her webinar encouraged INPART's global network to propose collaborations with alternative protein companies to address these challenges.
- GFI India selected three postgraduate students for the inaugural [Smart Protein Advanced Research & Knowledge \(SPARK\) Fellowship](#) program. The fellows will conduct fully-funded, six-month research projects at premier R&D institutions in India. The program will also facilitate translational research collaborations and commercialization of outcomes with GFI India's industry partners.

- Academic Community Manager Nathan Ahlgrim, Ph.D., hosted the first Alt Protein Pipelines [webinar](#), which featured University of North Carolina at Chapel Hill student catalysts, professors, and an industry partner to talk about curriculum design and best practices for university courses dedicated to the science of alternative proteins.
- Associate Director of Scientific Ecosystems Amy Huang gave the kick-off lecture for the fourth instance of the Rethinking Meat course at Stanford University, originated by the Stanford Alt Protein Project ([GFI's college chapter program](#)). More than 150 students enrolled.
- Amy moderated the April Science of Alt Protein [webinar](#) featuring GFI grantee Dr. Fabiana Bressan from the University of São Paulo. Dr. Bressan gave an insightful talk on the potential of induced pluripotent stem cells generated through cellular reprogramming for cultivated meat production.

GFI influences the public sector to support alternative proteins

- GFI Brazil's Policy team organized an event in Brasilia to launch the [study results](#) on how alternative proteins positively impact Brazilian agribusiness indicators. The two-day event was attended by key political stakeholders within the agricultural sector, including members of Brazil's Ministry of Agriculture and the Inter-American Institute for Cooperation on Agriculture.
- GFI Israel Associate Director of Policy Adi Ben Tov and GFI Israel Director of Innovation and Business Engagement Aviv Oren represented GFI Israel at a foodtech delegation to the United Kingdom, a project developed in collaboration with the Israeli Export Institute, the British Embassy in Israel, and the Israeli Economic Mission to the UK. The delegation of ten foodtech companies, including three that specialize in alternative proteins, engaged with top retailers, local investors, and policymakers and gained insights into the United Kingdom's regulatory environment. Aviv presented a detailed overview of Israel's alternative protein ecosystem and current opportunities in the sector.
- Policy Specialist Michael Carter submitted GFI's [comment on promoting supply chain resilience](#) to the Office of the U.S. Trade Representative, highlighting how alternative proteins can help diversify food supply, reduce negative impacts on supply chains, and bolster domestic industry.
- Policy Associate Margaret Badding finalized an [industry sign-on letter](#) in support of our California budget request of \$10 million for alternative protein R&D. A total of 23 companies signed onto the letter, which will be shared with assembly members overseeing the budget.
- GFI Europe Senior Policy Manager Alex Holst and GFIC Director of Strategic Partnerships Grace Liu contributed insights and expertise for a recently launched [report on climate policy](#) published by the EU think tank Future Matters. The report applies a strategic prioritization framework to identify policy recommendations across three sectors—energy, industrial emissions, and agriculture and food—with alternative proteins prominently featured. Alex and over 20 European Commission and European Parliament staff attended the report's launch event.
- GFI APAC Policy Specialist Ankur Kumar Chaudhary hosted a panel of experts from Tissen Biofarm, Majlis Ugama Islam Singapura, and Cellular Agriculture Australia for a [webinar](#) to discuss cultivated meat regulatory developments in South Korea, Singapore, and Australia and what they



mean for the cultivated meat industry in APAC.

- GFI Europe Policy Manager Pauline Grimmer shared an analysis of alternative protein infrastructure and funding challenges in an [article](#) posted on the European Institute of Innovation and Technology website. The article kicks off a series highlighting central aspects of the Protein Diversification Think Tank's [policy brief](#), which was coordinated by GFI and published at the end of last year.
- GFI India released a [new regulatory guide](#) to help alternative protein startups navigate the process of incorporating a private limited company in India. The team worked with law firm BTG Advaya, a member of GFI India's Regulatory Advisory Council, to develop the guide.
- Legislative Director Pepin Tuma, J.D., alongside countless members of GFI and the alternative protein ecosystem, continued to advocate for alternative proteins amidst multiple state-level proposals to restrict sales or censor product labels. These efforts led to several positive outcomes for the future of alternative proteins by mitigating or defeating harmful legislation, including proposals to ban cultivated meat in Kentucky and for label censorship in South Carolina.

GFI influences the private sector to prioritize alternative proteins

- GFIC CEO Doris Lee presented on the potential of alternative proteins and biomanufacturing in China to over 30 policymakers, academic scholars, and leading fermentation and cultivated meat companies at a [closed-door event](#) on building a strong agricultural economy with the National Development and Reform Commission (NRDC) management. The event provided a forum for industry representatives to discuss opportunities and challenges of future foods and how they can support bio-agriculture economic development in China.
- GFI's CE team published two webpages featuring the latest U.S. retail sales data for 2023. The [market research page](#) covers insights on 16 plant-based food categories, and the new plant-based meat and seafood [sales analysis page](#) dives deeper into the category to unpack sales performance drivers and key consumer insights. These resources provide a thorough, balanced, and actionable analysis of the current market, acknowledging both challenges and opportunities.
- Doris led a presentation introducing GFIC's newly released protein resources analysis at an [industry salon event](#) organized by ID Capital and Cargill China. The event centered on the topic of "nutrition for tomorrow" and attracted leading agrifood stakeholders, such as Yili (China's largest dairy enterprise), DSM, FrieslandCampina, CJ Foods, IKEA, and more. Cargill China, ID Capital, investors, and startups shared their solutions and insights for the ecosystem.
- GFI India CE Associate Aakashraj Bhole hosted a GFIdeas India [webinar](#) on the potential of pulses in alternative proteins for stakeholders in the pulse industry value chain. Featured speakers from the Alternative Protein Innovation Center, the ingredient company Proeon Foods, and the Global Pulse Confederation provided a holistic view of the pulse protein sector and marketing pulse-based protein ingredients.
- Aviv presented alongside experts in the Israeli foodtech ecosystem at a webinar for the Collier Institute of Venture - Tel Aviv University [startup competition](#). The session aimed to increase



engagement for the foodtech track of the competition, which will award a winning team a \$100,000 investment from CPT capital.

- GFIC Corporate Engagement Manager Ammelia Dai gave the opening speech at a future foods workshop in Shanghai for the New Zealand China Council and North Asia Centre of Asia-Pacific Excellence sustainable food study tour in China. Ammelia also spoke alongside industry players on a panel to talk about the alternative protein ecosystem and investor priorities in China.
- GFI APAC released [a new resource](#) for alternative protein startups facing challenges in fundraising, burn rates, and pricing. This is the first in a series of articles based on industry insights gleaned during interviews with founders and investors last year.
- GFI's CE team hosted a mixer in Boulder, Colorado, to launch the inaugural Colorado Sustainable Protein Network, bringing together a diverse group of stakeholders working toward creating a more sustainable food system. Colorado's First Gentleman and the founders of Colorado alternative protein companies gave remarks to the event's 55 attendees representing food and tech companies, sustainability NGOs, government agencies, academia, and regenerative agriculture organizations from across Colorado.



GFI positions alternative proteins as a scalable solution to global challenges

- GFI Brazil CEO Gus Guadagnini was featured in a [G20 livestream](#) event on sustainable food systems and agriculture hosted by O Globo and Valor, two of Brazil's most influential media outlets. Gus spoke alongside Gilberto Tomazoni, Global CEO of JBS, and Jaqueline Ferreira, Portfolio Manager at Instituto Escholhas, an independent nonprofit focused on socio-environmental issues and sustainable development.
- Founder & President Bruce Friedrich spoke on an [Earth Day panel](#) organized by Food Systems for the Future (FSF), Food Tank, and the Environmental Defense Fund (EDF) alongside fellow food systems leaders from Tyson, Bayer, FSF, EDF, and The Global FoodBanking Network. The discussion centered on methane mitigation, affordability, and nutrition, and Bruce highlighted alternative proteins as a critical intervention needed to decrease total methane emissions.
- GFI India Policy Manager Arghadeep Saha presented on alternative proteins and their potential to address India's national priorities around agriculture, nutrition, and climate change at a brainstorming session with stakeholders from the India Climate Collaborative, Environmental Defense Fund, International Union for Conservation of Nature, Public Health Foundation of India, and the Council for Energy, Environment, and Water. GFI India will continue to engage with these organizations to develop research projects around critical questions on the potential advantages of alternative proteins in India.

Top media mentions:

- Senior Communications Manager Ryan Huling wrote a [guest column](#) for Nikkei Asia, a top regional media outlet owned by the world's largest business newspaper, The Nikkei. His article spotlights

APAC's embrace of cultivated meat and novel foods, which could enable the region to dominate the future of food just as it has previously done for solar power and lithium-ion batteries. Excerpt: "History has shown that the longer countries wait to invest in the technologies of the future, the harder it is to ever catch up. Asia-Pacific governments and companies clearly see an opportunity to dominate the future of food production and are waving that flag proudly on the global stage."

- Associate Director of Industry Intelligence and Initiatives Emma Ignaszewski was quoted in an NPR WHYY [piece](#) on the plant-based meat industry and what the future consumer base for plant-based products could look like: "We're seeing younger generations, like Gen Z and Millennials, come into their purchasing power, and these generations are ... more likely to report caring about or making consumer decisions based on sustainability issues."

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From everyone on [Team GFI](#), thank you for your enthusiasm, partnership, and commitment to a better future.

Sincerely,



Bruce Friedrich
President and Founder

