

The Spanish alternative protein ecosystem at a glance

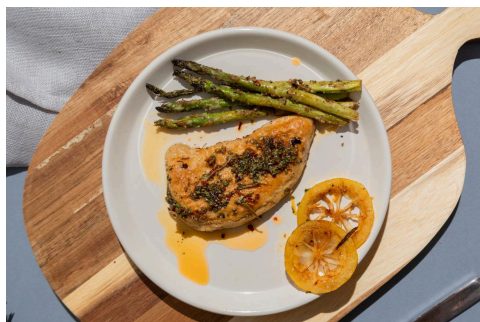
What are the main types of alternative protein?



Credit: Heura

Plant-based

Plant-based meat aims to look, cook and taste like conventional meat, but is made using ingredients from plants rather than animals.



Credit: Libre foods

Fermentation

Fermentation: In the context of protein diversification, fermentation refers to the use of fungi and microorganisms to produce foods and ingredients that deliver the same distinctive flavours and textures as meat, seafood, eggs and dairy – more sustainably.



Credit: Biotech foods

Cultivated

Cultivated meat is made from real animal cells, which are cultivated in fermentors (like those used for brewing beer) and mixed with plant ingredients to produce familiar meat products that are indistinguishable from conventional products.

The Spanish alternative protein R&I ecosystem: a great untapped potential

How well did the Spanish R&I ecosystem perform compared to Europe? (2020-2024)

5th



in number of **researchers**
671

1st



in **international collaborations**
61%

10th



in **patent publication**
2.2% of European total

6th



in number of **publications**
367

1st



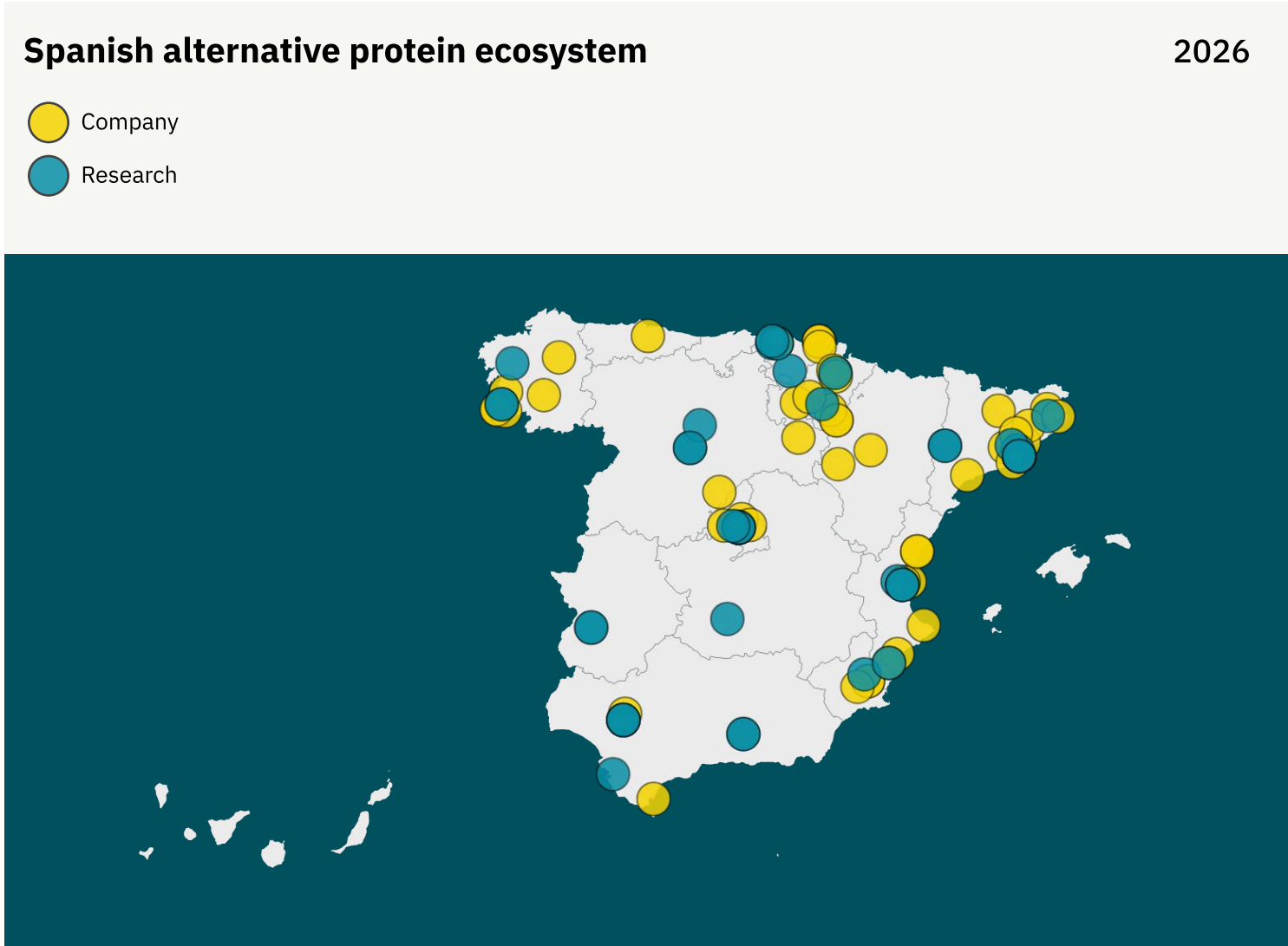
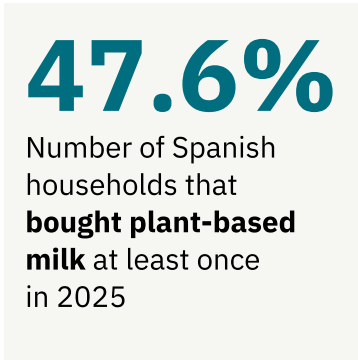
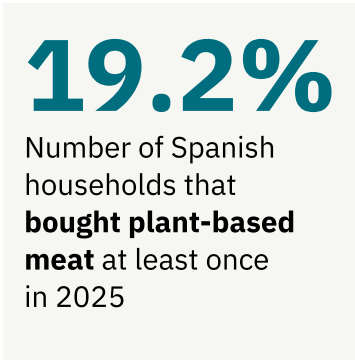
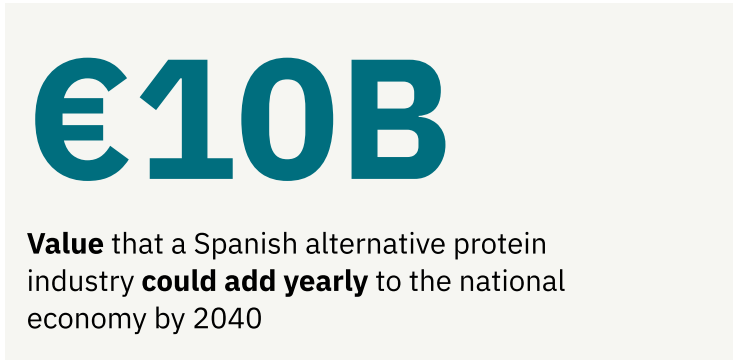
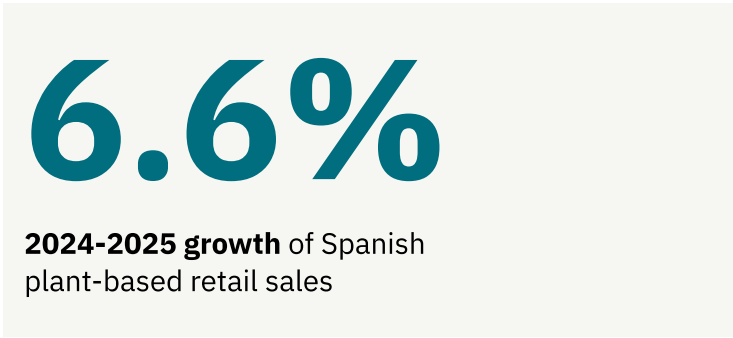
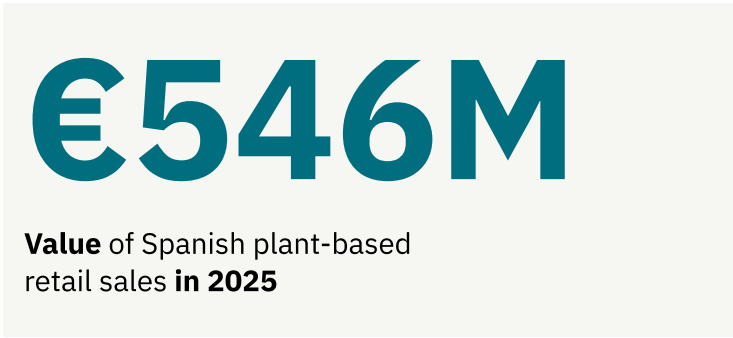
in **publications growth**
between **2020-2025**
542%

2nd



in amount of **research institutions** in the first **top 100** in Europe (10)

The Spanish alternative protein industry:
a promising ecosystem with challenges to address



Making Spain an alternative protein champion: recommendations for policymakers

Establish a dedicated funding instrument for alternative protein research and innovation.

Other European countries have shown that targeted funding is crucial to strengthening R&I and supporting their research communities. Just as with the AI sector, Spain should allocate specific alternative protein research funding, in line with the latest National Research and Innovation Strategy.

Include alternative proteins in Mediterranean diet guidelines.

The Mediterranean diet is one of Spain's most cherished food traditions, but current consumption patterns are drifting away from the diet's plant-centric principles. Plant-based alternatives could reduce processed meat intake and help make these traditional principles more accessible. Recognising their potential in the upcoming Spanish food safety agency guidelines would support both public health and the alternative protein sector.

Ensure appropriate financial mechanisms to support scale-up infrastructure development.

Infrastructure development can be expensive. Attracting private investment for large scale projects from risk-averse financial actors like banks is therefore challenging, particularly in innovative sectors. The public sector must therefore support strategic priorities to mobilise private funding, building on existing initiatives by Spanish regional economic promotion agencies and the European Investment Bank.

 **Green:** low complexity

 **Yellow:** medium complexity

 **Red:** high complexity

Ensure funding instruments for commercialisation R&I are fit for purpose.

Several relevant funding instruments for innovative sectors, such as PERTE-AGRO, have been inaccessible to alternative protein startups due to strict requirements, stifling the growth of the ecosystem.

Ensure the agrifoodtech regulatory sandbox addresses alternative protein challenges.

The current Spanish agrifoodtech sandbox should focus more specifically on regulatory challenges, such as those stemming from the EU's Novel Foods Regulation, which are critical for both the alternative protein sector and the wider agrifood industry.

Include plant-based meat products in new guidelines for school canteens, hospitals and other public services.

As public institutions increasingly commit to offering healthier and more sustainable meals, there is an opportunity to ensure these changes are also practical, inclusive, and appealing for citizens. Well-formulated plant-based meat products can help make balanced meals more accessible and familiar, particularly for children and people transitioning toward diets with a greater variety of protein sources. Plant-based meat can complement a higher intake of whole food legumes, vegetables and fruits in a way that ensures a richer nutritional profile overall and a wider range of flavours and sensory experiences.

Develop a national action plan for plant-based foods.

Several EU member states have already brought together farmers, consumers, civil society and experts to design national plant-based strategies that encourage both production and consumption of plant-based proteins. If Spain does not take similar action, it risks being left behind in the future of European and global food production.

Provide pre-submission guidance to streamline the regulatory path to market.

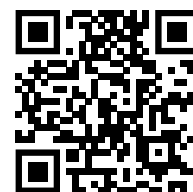
The Spanish food safety authority could play a pivotal role in helping Spanish alternative protein companies navigate EU regulations. Offering advice and guidance would help companies meet high regulatory standards and strengthen Spain's leadership in this emerging sector.

Develop our collective understanding of infrastructure capacity, potential and scale-up needs.

Alternative protein companies require scale-up infrastructure, yet some industrial facilities across the country are currently underutilised or abandoned. Identifying these sites and exploring their potential for retrofitting could reduce costs for the sector while revitalising communities that stand to benefit.

Facilitate diversification for traditional agrifood sectors.

Traditional sectors are often the first to adopt innovations that could diversify their business portfolio, as seen with energy companies and automakers embracing renewables and electric vehicles. In the food sector, this has begun in dairy and meat, but other traditional Spanish industries – such as wineries, breweries, and olive oil producers – could benefit from increased public support to encourage similar investments.



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