



Securing a Good Food Future

Europe 2023 Mid-Year Impact Update



“ The time to act is now. ”



At the time of writing this impact update, GFI Europe is undertaking an exciting leadership transition. After four incredibly impactful years as Managing Director, Richard Parr has stepped back to take a more strategic role at GFI Europe. He has handed over the critically important work of leading the team and driving forward our programmatic impact to Alex Mayers. Richard didn't want to miss out on a final opportunity to share our work and thank our community of visionary donors and advocates, so in true GFI style, the introduction to this update is a collaborative effort.

As one of us looks back on four years of championing sustainable proteins, the other looks forward to the work of securing a future where they deliver on their world-changing promise.

Together, we're delighted to share this impact update with you.

At our weekly GFI Europe team meetings, there is always a moment where we are left speechless by the depth and breadth of impact our team's work is having. The awe-induced silence is swiftly followed by a desire to share and celebrate these achievements with you, our GFI community. It is only through your vision and support that our team is able to do the outstanding work it does; from boosting government funding for sustainable proteins to empowering the next generation of scientists and innovators.

To share all these impactful activities in one update would likely block your inbox, so instead we've tried to include a selection of recent highlights and introductions to our growing team, which we hope you will enjoy and share with your friends, families, and networks.

The sentiment of looking back in celebration and forward with purpose is echoed throughout this update. As Europe and the world face rising temperatures and growing instability, the planet and all who call it home are facing increasingly urgent challenges. The time to act is now, and sustainable proteins remain one of our greatest hopes.

With gratitude and optimism,

Richard and Alex, former and current Managing Director respectively, GFI Europe

Welcome to the team



GFI Europe continues to grow in size, reach, and impact. We are now a 24-strong team of people dedicated to advancing the sustainable protein ecosystem across Europe. With every new team member, we increase our mission impact and move the world closer to a more sustainable, secure, and just future. Your support makes this change possible.

Cédric Puisney



The Good Food Institute established the Alt Protein Project, a global student movement, so that motivated, visionary students could lead their universities to transform the way we produce food — creating a system that is sustainable, secure, and just. Thanks to donor support over the last year we have more than doubled the number of Alt Protein Projects in Europe.



Our Science and Technology Team set to expand for impact

“ Together, we are enabling a future food system that can solve some of the world’s biggest problems. ”

by Seren Kell

Senior Science and Technology Manager, GFI Europe



I joined GFI Europe in 2021, and I feel incredibly lucky and proud to catalyse the underlying science of sustainable proteins. Together, we are enabling a future food system that can solve some of the world’s biggest problems.

GFI’s supporters across Europe and beyond are powering our growth, and we’ve recruited two new Scitech experts to amplify our work in Europe and take the sustainable protein technical research field to the next level. Stella and David are using their skills and experience to help cement GFI Europe’s position as a unique source of expertise and bridge-builder for Europe’s scientific community, and we’re thrilled to welcome them to the team.

Q: What inspired you to work at GFI?

A: Prior to joining GFI, I was working in the lab, and the impact of my research always felt a long way off. That’s no longer the case.

Advancing sustainable proteins lies at the intersection of three issues I deeply care about and which we urgently need to take global action on: climate change, animal welfare and antimicrobial resistance. I was so excited to find a role where my background as a scientist enables me to contribute to GFI’s world-changing mission.



Dr Stella Child
Research and Grants Manager

Q: What about your new role are you most excited about?

A: I can’t think of a better thing to work on than making our food system safer, fairer, and more sustainable. Our planet faces many challenges, but improving the way we produce protein has the potential to solve several issues simultaneously. As a scientist, you want to bring about positive change in the world, and I feel privileged and proud to be a part of a team that is making such a huge impact at a global level.



Dr David Hunt
Research Support Manager

Impact spotlight on.....GFI in Germany – results of our country expert strategy

by Alice Ravenscroft

Head of Policy, GFI Europe

Boosting government funding for sustainable protein research and ensuring supportive policy frameworks is fundamental to building a global food system that meets climate goals while sustainably feeding billions.

Around 80% of Europe's research and innovation funding is awarded at a national level by governments with varying approaches and attitudes towards sustainable proteins. In order to influence and maximise our impact, we shortlisted countries that are vital to shaping the protein transition and leading innovation in the sector, and then prioritised hiring local, on-the-ground experts.

Germany was the first country where we took this approach, recruiting Ivo Rzegotta as our Public Affairs Manager for Germany in December 2021.

Since joining GFI, Ivo has been tirelessly advocating support for sustainable proteins as a critical piece of the climate policy puzzle, and his efforts are already starting to pay off.

As a field catalyst for the sector, GFI brings together a wide range of partners to advance our mission. Together with allies from the German ecosystem, Ivo is working with parts of the governing coalition to secure funding for sustainable proteins in the upcoming federal budget. Discussions on this are taking place both in a broad-based roundtable format and in bilateral one-on-one meetings.

Ivo has also emphasised the role of sustainable proteins in a number of official consultations on upcoming government strategies, such as the National Food Strategy, the German Bioeconomy Strategy, and guiding principles for the labelling of plant-based meat and dairy products.

To anchor sustainable proteins more firmly in the government's agenda, Ivo initiated a joint letter from 40+ German stakeholders calling for more research funding, solid and transparent regulation, and a level playing field.



In May of this year, we published **Alternative Proteine in Deutschland**, a landmark first State of the Industry report for Germany. This is a detailed review of the German ecosystem for sustainable proteins, covering market development, the commercial and scientific landscape, and 15 recommended measures for policymakers on the federal and state levels.

To further our impact, GFI Europe is working on an Alternative Proteins Policy Plan for Germany, the execution of which will be a significant priority over the coming year. Alongside a consulting company, we are developing a detailed and executable strategy, which will identify and quantify the benefits of sustainable proteins for Germany's society and economy. This strategy will make the case for political action to support the ecosystem and set out concrete policies that can be taken up by the government.

Having a GFI expert on the ground in Germany allows us to secure a wealth of national media coverage and speaking opportunities, elevating the national dialogue on the potential of sustainable proteins. Ivo has delivered keynotes at the Smart Proteins Summit and the German Biotechnology Days, secured more than 100 positive pieces of coverage in German media, and has been quoted in a wide range of leading German publications including outlets like **Handelsblatt** and **WirtschaftsWoche**. Other German coverage highlights include GFI President and Founder Bruce Friedrich's interview with **Tagesspiegel**, one of the country's biggest national newspapers.

Press coverage like this is a force multiplier, inspiring new innovators, investors, advocates, and scientists to move into the sustainable protein space. It also supports our conversations with policymakers, nonprofits, and other relevant stakeholders.

GFI's work with national governments makes clear that in many countries – in Europe and beyond – policymakers are learning about sustainable proteins for the first time and trying to determine how their governments should support this sector. Policymakers require detailed, credible, country-specific information to inform their strategic decisions, and this is where GFI comes in.

With donor support, we will continue to advocate at a national, EU and global level for a surge in government investment in sustainable proteins, ensuring they have an efficient path to market and fair regulation. With the right policies and public investment in research and development to improve taste and price, we can seize this tipping-point moment and usher in a more sustainable, secure, and just future.



“ Thanks to the support of GFI's donors, we're working intensively in Europe's largest economy to ensure that policymakers in Germany are actively shaping the field of sustainable proteins. Our work with stakeholders is generating more public funding for research and capacity building, ensuring solid and transparent regulation, and creating a level playing field so that plant-based and cultivated meat become the new default for more and more consumers. ”

Ivo Rzegotta, Senior Public Affairs Manager Germany



Providing insights and optimism to the industry - GFI releases analysis of European plant-based sales

by **Charlotte Lucas**

Senior Corporate Engagement Manager, GFI Europe

When GFI was founded, the sustainable protein industry in Europe was just getting started, and relatively few plant-based food companies existed. Early adopters faced a lack of free open-access resources and opportunities to make connections that are crucial to success in the market.

Thanks to GFI's community of supporters powering our progress, we're growing a robust and vibrant sustainable protein ecosystem. Europe is now home to more than 500 plant-based, cultivated meat, and fermentation companies, and the sector is growing quickly.

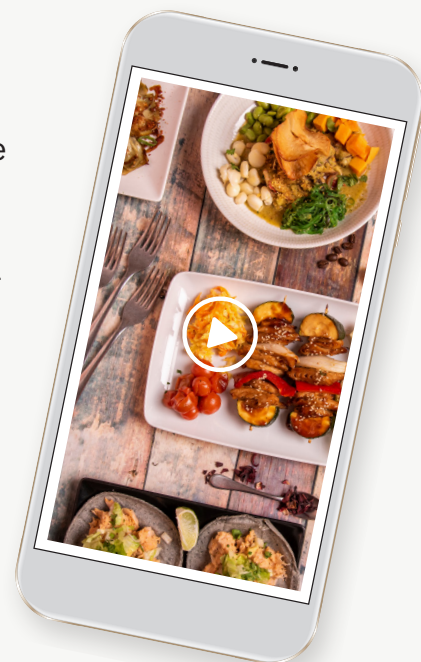
To ensure it reaches its full potential as swiftly as possible, we are convening industry innovators from across the continent at GFI-hosted events, roundtables, and major industry conferences. To drive industry-wide innovation that benefits all, we've launched our new initiative, GFI LINC (Learn, Inspire, Network, Collaborate), which already has over 300 members. Through GFI LINC, we're leveraging our unique role as an industry catalyst to foster collaborations and generate insights to address the industry bottlenecks that threaten the success of the sector.

While there are more sustainable protein products than ever before, breaking through to compete with conventional animal products is not guaranteed. As with any emerging industry, the sustainable protein sector needs to be strategic to maximise its impact.

Another important way GFI accelerates growth is by bringing open-access data and market insight to the sector. These insights can inform critical decisions and strategies from product development to packaging design, enabling the industry to move faster than market forces alone would allow.



A particularly impactful development in this area came at the beginning of 2023 when the GFI Europe team published retail sales data and analyses for plant-based meat, seafood, eggs, and dairy in 13 European countries. This was the first time this data had been made publicly available since 2020. The countries covered in the report were Austria, Belgium, Denmark, France, Germany, Italy, Netherlands, Poland, Portugal, Romania, Spain, Sweden, UK, and a version of the report has been published in each respective language and shared freely with our networks.



Our analysis of NielsenIQ data across these 13 European countries shows sales of plant-based foods grew by 21% between 2020 and 2022 to reach a record €5.8 billion in Europe. The findings are promising, particularly given ongoing macroeconomic conditions, and they contradict the idea that the plant-based meat industry is losing momentum.

Following the release of the report, GFI Europe hosted a live webinar to discuss the practical insights it provides. It was an exciting opportunity for me to answer audience questions, including what GFI Europe thinks should be the sector's priorities to sustain and build growth over the coming years.

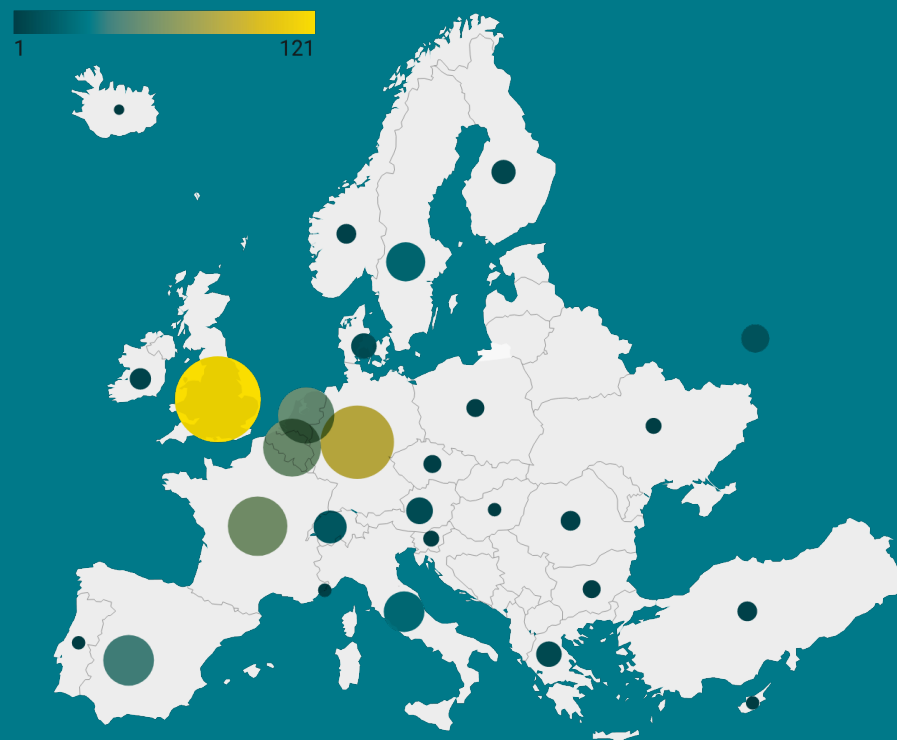
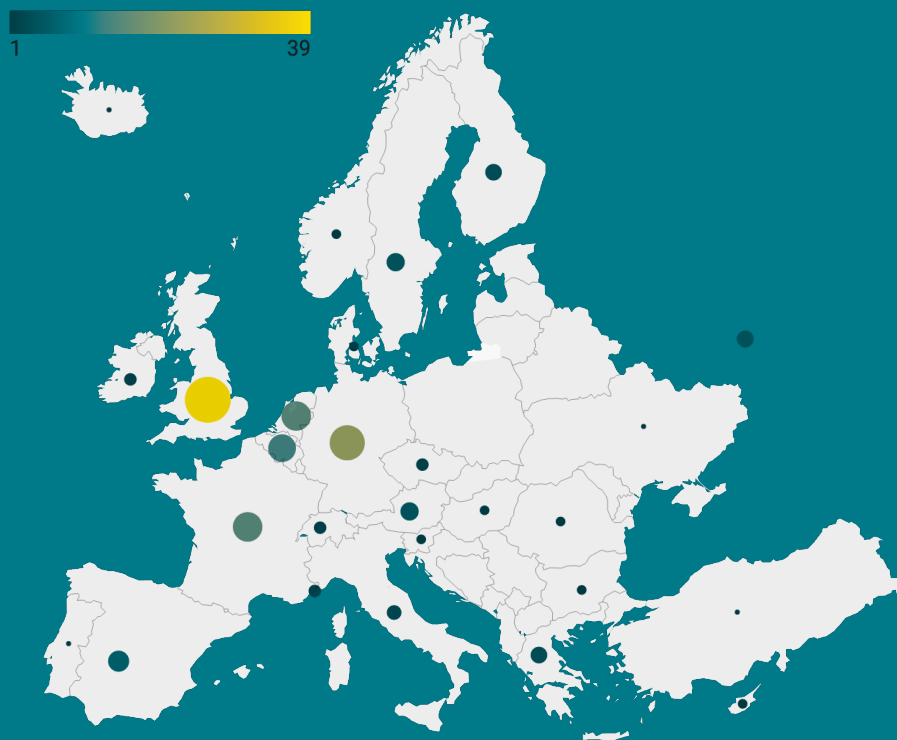
In response to this final question, I explained that consumer research shows that taste and price are key drivers of consumer behaviour. At present, consumers do not believe plant-based products have reached parity in either taste or price, and this needs to be a priority for GFI and the sector.

To achieve this parity, GFI will continue to call for more resources and investment in infrastructure and product innovation to take these sustainable options to the next level. To bring prices down, we need to scale up the supply chain, enabling plant-based foods to compete with their conventional counterparts.

With the ongoing support of our visionary donors, I'm excited to lead GFI Europe's work to ensure that sustainable proteins are accelerating as swiftly as possible.



“ I admire the work of GFI, from their highly informative newsletter to their innovative research projects, vast network, and knowledge database. GFI enables entrepreneurs, scientists, investors, and anybody willing to join to create a fairer food system, improving the lives of animals and people. Donating makes me a part of the change. **Jordi Morales Dalmau** ”

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The Power of Philanthropy

The next chapter for Europe's fledgling sustainable protein sector is critical. If we are to mitigate the enormous challenges presented by climate change, food insecurity, antibiotic resistance, and pandemic risk, changing the way we satisfy the demand for meat is essential.

Over the coming months GFI's team in Europe will be driving forward change across the sustainable protein ecosystem: accelerating growth in the scientific community, catalysing the success of companies through data and market insights, and working to position sustainable proteins at the heart of EU and national policymakers' climate mitigation strategies.

Now is our opportunity to accelerate this momentum towards a more sustainable food system, yet without philanthropy to catalyse our impact, industry and private investors alone cannot act swiftly enough to create a better future of food. We are full of gratitude for the support of our community across Europe and worldwide for enabling our progress thus far. By working together, our shared vision can bring about that future.

Thank you for being part of the global GFI community.

Sarah and Natasha, Philanthropy Managers
europe-philanthropy@gfi.org

Please get in touch. We love hearing from you.

“ I am convinced that supporting GFI is one of the most effective ways to maximise the impact of my charitable giving. The team is doing a fantastic job at accomplishing as much good as possible for the planet, for people, and for animals. It's incredibly fulfilling to know that I am saving and improving lives through my donations. ”

Charlotte Festa



gfi / Europe.



The Good Food Institute Europe is an international NGO helping to build a more sustainable, secure and just food system by transforming meat production. We work with scientists, businesses and policymakers to advance plant-based and cultivated meat – making them delicious, affordable and accessible across Europe. By making meat from plants and cultivating it from cells, we can reduce the environmental impact of our food system, decrease the risk of zoonotic disease, and feed more people with fewer resources. GFI Europe is powered by philanthropy and we offer tax-efficient giving solutions for residents of many countries.