

GFI Science & Technology Program

SciTech Program Outputs Achieved in the Past 18 Months (January 2021 –June 2022)

GFI's SciTech program primarily works toward achievements under ACE's Research and Education program types.

Analysis outcomes

The primary outputs of the analysis team are industry-level analyses, publications, conference presentations, workshops, technical web explainers and resources, research solutions, and reference tools. These resources provide a survey of the alternative protein industry, including technical challenges and opportunity areas.

Our analyses and publications released in the last 18 months include:

- Cultivated meat life cycle assessment and techno-economic analysis (LCA/TEA): GFI published analyses forecasting the costs and environmental impacts of a future large-scale cultivated meat facility of cultivated meat using information from more than 15 companies in the industry. We shared these results in a [webinar](#) attended by 484 participants, which now has 2,201 views on YouTube. We provided additional explainers for these analyses via a [blog post](#) (GFI's top performing blog for the past 18 months) and a [TEA statement](#).
- Cultivated meat growth factor and media projections: We analyzed the results from a survey conducted by GFI and TurtleTree Scientific, gathering data from 19 cultivated meat manufacturers and 21 suppliers of culture media components or formulations to better understand how cell culture media and growth factors are being used and developed by the cultivated meat industry. The [resulting analysis](#) has been viewed more than 3,800 times on our website.
- Plant-based meat production volume modeling report: There have been more than 1,300 unique submissions to download this [report](#), a scenario-based exploration of the substantial ingredient supply chain needs, manufacturing facility requirements, and level of investment necessary to avoid future supply constraints and successfully meet a global plant-based meat

production target of 25 MMT annually within the next decade. We further describe these findings in an accompanying [blog](#).

- Scaffolding Biomaterials for 3D Cultivated Meat: We published this [review article](#) in the January 25, 2022 issue of *Advanced Science*, which has now been cited 17 times. The paper discusses the properties of vertebrate skeletal muscle that will need to be replicated in a successful product and the current state of scaffolding innovation within the cultivated meat industry and highlights promising scaffold materials and techniques that can be applied to cultivated meat development.
- Plant-based meat technical deep dives: We published technical deep dives on [crop development](#), [ingredient optimization](#), and [end product formulation and manufacturing](#), with more than 3,000 total views for all three pages. These explainers provide in-depth information on plant protein fundamentals, plant protein sources, crop genetics, crop processing, use of byproducts for sustainable food production, and considerations for manufacturing processes of plant-based meat.

Additional technical tools and resources that we maintain for the community include:

- On an ongoing basis, our subject matter experts publish new concept notes in our Solutions Database which identify commercial whitespaces, research gaps, technological needs, and investment priorities at each stage of the alternative protein value chain. We added 12 new solutions to our [database](#), which currently contains 50 research opportunities, in addition to 53 commercial white spaces and 40 ecosystem-level needs.
- We maintain literature libraries for [plant-based meat basics](#), [plant-based patents](#), and [plant-based theses](#) to provide a central location for plant-based research and innovations for anyone wanting to dig deeper into the information offered in our deep dives. This resource gives scientists and innovators easy access to all of the most relevant science in the field in one convenient place.

In addition to publishing and maintaining these tools and resources, our team works with industry as subject matter experts through:

- Technical workshops and industry presentations: we have presented to more than 25 organizations ranging from boutique biotechnology companies to government groups to multinational leaders in agricultural processing, with formats ranging from workshops to roundtable discussions to formal presentations.
- Information-sharing virtual meetings: in addition to our formal technical workshops, we have engaged in hundreds of informal calls with industry partners, academic researchers, investors, and nonprofit organizations.
- Industry events: our subject matter experts gave more than 20 presentations at conferences or as guest lecturers, primarily to audiences with scientific backgrounds.

Research funding outputs

Our work to secure alternative protein R&D funding generally spans three activities:

1. Effectively mobilizing GFI research funds to address high impact alternative protein research white spaces. Outcomes include:

- Allocating GFI research funding to high-impact plant-based, fermentation, and cultivated meat research projects
 - Completing a program evaluation and implementing changes to the structure and operation of GFI's Research Grant Program in response to input from internal and external stakeholders in order to improve efficiency and impact
 - Catalyzing grantee collaborations through organized online grantee events
 - Expanding the alternative protein scientific knowledge base through amplification of research results, talks, and publications from GFI grantees. In 2021, GFI grantees published 16 scientific papers. In the first half of 2022, they have already published an additional 17 papers.
2. Providing technical support to researchers applying for grants to improve their competitiveness and success in securing funding. Outcomes include:
- Creation and publication of the research funding database; monthly and ad-hoc sharing of relevant funding opportunities through GFI newsletters and direct outreach to researchers
 - Individual support to 35+ researchers on alternative protein research-focused grant proposals, including three multi-institutional multi-million dollar research proposals submitted to government funding opportunities.
3. Educating and influencing non-GFI funding organizations to shift research funding to alternative protein research. Outcomes include:
- Technical consultation on alt protein research priorities for USDA ARS and the Foundation for Food and Agriculture Research (FFAR)
 - RFP development and technical support for GFI Brazil, GFI Israel, GFI Europe [REDACTED] and their research funding efforts
 - Technical support and proposal review for A*STAR, a European-based foundation, FFAR, USDA, and NASA
 - Support of the GFI Policy team on letters and comments to government funding agencies.

Since the launch of GFI's Research Grant Program in 2018, we have awarded \$13 million to 81 research projects in 17 countries around the world. This makes GFI the largest international alternative protein research funder in the world, in terms of the number of grants awarded. In 2021, we funded 37 research proposals at a total of \$5.5 million. For 2022, we are completing our review process for our annual proposal solicitation cycle now and expect to be offering grant awards to a new cohort of researchers in early September. We had 195 applicants to this year's RFP and we anticipate funding 15-20 projects.

Our RFP this year focused on solutions to address three specific technical challenges facing alternative proteins: a) biological processing methods for creating functional plant-based ingredients; b) animal-free, non-recombinant albumin and transferrin for cultivated meat; and c) creation of flavor components for alternative seafood. Our grant funding mechanism is highly tailored toward the most neglected areas and is focused on counterfactually bringing new investigators into the field, favoring

first-time grantees over follow-on funding to prior grantees. We support existing grantees in their efforts to apply for and secure follow-on funding from governments; as of July 2022 GFI grantees altogether have been awarded at least \$16.9 million from government funding agencies for alternative protein research.

We maintain resources to support researchers seeking funding and collaborators, regardless of whether they are GFI grantees, including our:

- [Scientific research database](#), a body of research labs driving advancements in alternative proteins.
- [Collaborative research directory](#), a list of researchers who are active or interested in alternative protein research and who are seeking collaboration opportunities with students, labs, and companies.
- [Research funding database](#), a range of public and private grant opportunities for scientists seeking support for their alternative protein research. This is a global repository of grants the GFI team identifies as having a high propensity for alternative protein R&D. Our team builds relationships with grantmaking institutions to encourage investment in the sector. The database sees more than 150 users per month and we actively circulate it among top researchers worldwide.

Research and training ecosystem-building

In addition to building capacity for the alternative protein field via the Alt Protein Project and direct one-on-one advisory support of individual researchers and educators, the primary outputs related to building a thriving research and training ecosystem are resources and events that equip students, educators, researchers, and industry professionals with the knowledge needed to build or join the alternative protein workforce.

GFI's [Alt Protein Project](#) finds, trains, and empowers motivated, visionary students to build the alternative protein field at their universities. In relation to our student groups, GFI serves as an advisor, convener, and amplifier. We maintain a collection of resources, provide strategic guidance, support professional development, and help student groups maximize their counterfactual impact. In the past 18 months, our core outputs included:

1. Building scalable resources and processes to prepare for program expansion
 - In 2022, we launched our [resource hub for university ecosystem-builders](#) with detailed how-to models on [laying the foundation for a successful student group](#) (complete with strategic planning resources), [building alternative protein courses and majors](#), [stimulating alternative protein research](#), and [generating awareness about alternative proteins](#). These resources synthesize our learnings and success stories from the past two years of building the alternative protein field at universities via the Alt Protein Project, with the aim of equipping university stakeholders around the globe to seed education and research programs at their respective institutions.
 - We streamlined our program operations, codified them in our master program operations SOP, and built a regional mentorship system to allow student groups to

leverage the local expertise and connections of our international affiliates and synchronize their activities with GFI Global's strategy.

2. Doubling the number of student groups

- In 2022, we successfully led our first formal wave of program expansion. We built and executed our program expansion plan and stewarded roughly 30 groups through the rigorous evaluation process. Ultimately, we selected 20 new groups to join our 2022 cohort, which includes groups from 14 countries across five continents—including our first groups from Asia, Africa, and Australia. This brings our total number of student groups to 36.
- We also built and executed the first-ever training program for the Alt Protein Project. This 5-week program was designed to prepare our new cohort of student groups to advance our core objectives, practice effective communication and leadership, and build a high-impact strategic plan. We had a total of 106 registrants and all 20 new groups completed the training. Check out the [full playlist](#) for all five weeks of training sessions.

In the past 18 months, our 16 existing Alt Protein Project student chapters accomplished many exciting milestones. Some top highlights include:

- Across our global community, student groups hosted 150 events about alternative proteins—engaging over 3,000 live attendees.
- The Chapel Hill Alt Protein Project launched the university's first course on alternative proteins titled *The Cellular Agriculture Revolution* and maxxed out enrollment (50 students) on the second day of registration. The group is working to make this a permanent course housed in the biology department starting next year. The Chapel Hill Alt Protein Project also planned and executed the alternative protein track of UNC's [2022 Clean Tech Summit](#) which ran from March 29-30, 2022.
- The Dutch government has agreed to invest [€60M in cellular agriculture](#) in a plan focused on education and research over the next five years. The Wageningen Alt Protein Project contributed to the education section of the project's dossier behind-the-scenes.
- The Stanford Alt Protein Project launched their course on Rethinking Meat with faculty sponsor Professor David Lobell. For the first iteration of the course in 2021, the course had 100 enrollees. For the second edition in 2022, the course had over 300 enrollees and sparked a dialogue across campus about skyrocketing student demand for alternative protein education. GFI recently [published their story](#) on our blog.

In addition to our student group communities, GFI hosts a number of additional events and resources to educate and connect researchers around the globe:

- Our monthly Science of Alt Protein seminar series, which has drawn 3,109 live attendees and 12,215 views of seminar recordings over the past 18 months.
- Our invite-only monthly Cultivated Meat Collaborative seminars, which have been attended by 660 live attendees and more than 1,300 YouTube views (noting that most companies choose to circulate the recording of their presentation only within the collaborative). The membership list, now at 422 members, has more than doubled in the past 18 months.

- Our quarterly Ask GFI: Career Conversations webinars dive into career opportunities in the alternative protein sector and give career seekers an opportunity to ask GFI experts any questions they have about entering the field. Over the past 18 months, this webinar series reached 209 live attendees and 1,954 views on YouTube.
- Our [massive open online course](#) has grown to include 9,568 participants across 116 countries. In October 2021, our team launched updated lectures for our [online course](#), including the addition of a module on fermentation. Additional lectures are in the process of being built across the three production platforms.
- Our [curriculum repository](#) (358 page views), which includes syllabi, slide decks, recommended readings, and assessment tools from existing alternative protein curricula. All featured resources are open-access, ready for educators to adapt as needed. The curriculum repository went live in September 2021.
- Our [course database](#) (205 page views), which maps educational programs around the globe focused on alternative proteins and their enabling technologies. The course database was launched in February 2022.
- Our [careers portal](#), which includes a talent database for employers to access and a jobs board for career-seekers to access. This portal primarily targets opportunities for folks with technical backgrounds, since technical talent presents the greatest challenge to growth for most alternative protein companies we speak to.

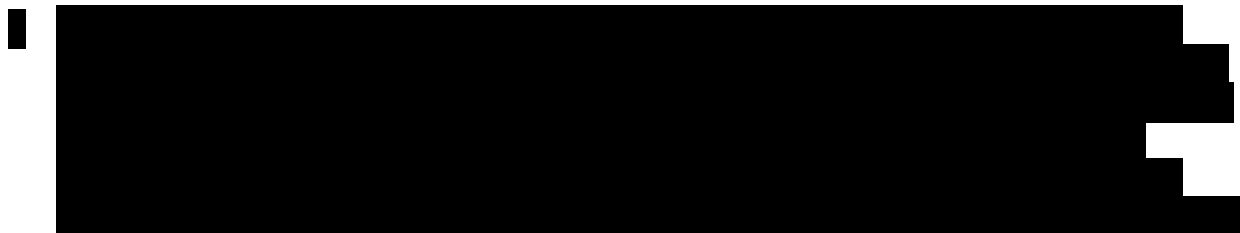
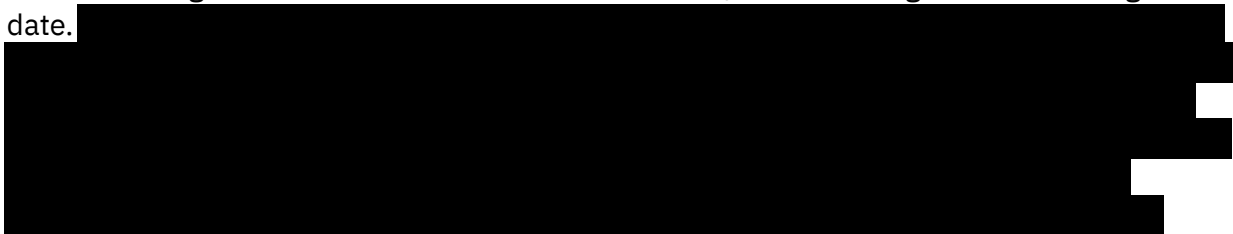
GFI Policy Program

Policy Program Outputs Achieved in the Past 18 Months (January 2021 –June 2022)

GFI’s Policy program primarily works toward achievements under ACE’s Legal or Policy Work and Product Labeling program types.



- The U.S. Department of Agriculture (USDA) announced a \$10 million investment in October 2021 to create the National Institute of Cellular Agriculture at Tufts University. This is the USDA’s first significant investment into cultivated meat, and the U.S. government's largest to date.



Chair of the House Appropriations Committee Rosa DeLauro [called for](#) “parity in research funding for alternative proteins” in the Agriculture Appropriations Subcommittee’s annual budget hearing with Secretary of Agriculture Tom Vilsack in April 2021. She went on to say: “The United States can continue to be a global leader on alternative protein science, and these technologies can play an important role in combating climate change and adding

resiliency to our food system.” She reaffirmed her support in another hearing a month later stating: “We should pursue parity in research funding for alternative proteins, a compelling option for addressing agricultural emissions.”

- [REDACTED] California Assemblymember Ash Kalra and several California-based alternative protein companies to secured [\\$5 million for alternative protein R&D](#) at three University of California campuses: Berkeley, Davis, and Los Angeles. This is the largest amount a state legislature has ever set aside for this purpose. [REDACTED]
- Breakthrough Energy incorporated GFI’s policy recommendations into [their 2021 federal climate policy playbook](#) that positions alternative meat as a critical component of reaching net-zero emissions.
- In 2021, GFI and a handful of companies that make plant-based meat played a major role in defeating three [label censorship bills](#) including two in Texas. We also worked with conservative and libertarian organizations to oppose this legislation. [REDACTED]
- We have three active lawsuits challenging label censorship laws on constitutional grounds. Together with the ALDF, we secured a favorable [summary judgment ruling](#) from a federal district court in Louisiana in March 2022. The court held that Louisiana’s label censorship law unconstitutionally restricted free speech, and it enjoined the state from enforcing the law. Together with ALDF and ACLU-MO, we also filed an amended complaint in federal district court in Missouri, raising additional legal challenges to that state’s label censorship law. (We began this campaign in Missouri in 2018.)
- The U.S. Department of Agriculture (USDA) [denied](#) a 2018 petition from the U.S. Cattlemen’s Association to create a new policy on the use of meat and beef terms on plant-based and cultivated meat product labels. The agency’s reasoning echoed the arguments that GFI made in a [comment we filed on behalf of ourselves, Finless Foods, Hungry Planet, Impossible Foods, Light Life Foods and Field Roast Grain Meat Co., Sweet Earth Enlightened Foods, and Tofurky](#).
- After becoming an Observer Organization to the Codex Alimentarius Commission (CAC), a global food safety and labeling standard-setting body with 188 member countries, GFI participated in the CAC’s annual meeting in November 2021. GFI submitted [written comments](#) on the topic of “new food sources and production systems” (NFPS) and presented our position during the meeting, advocating for an inclusive approach to incorporating alternative proteins into Codex’s standards-setting processes. The CAC agreed to provide an opportunity for members and observers to weigh-in with recommendations on how Codex should approach NFPS, including alternative proteins.

[REDACTED]

When a subcommittee of the Codex Executive Committee (CCEXEC) issued a circular seeking member and observer comments relating to how Codex should approach NFPS in March 2022, GFI submitted comments, which incorporated input from plant-based, fermentation, and cultivated meat industry leaders. We also conducted outreach to the Codex delegations of multiple countries, including the United States and Singapore, both of which met with GFI to discuss our input. Several countries aligned with GFI’s recommendations on how Codex should address alternative proteins, and the comments are reflected in the CCEXEC subcommittee’s June 2022 [interim report](#) on the subject.

- [REDACTED]

[REDACTED] he FAO [plans to convene an expert consultation](#) to develop a document with up-to-date technical knowledge on the food safety aspects of cultivated meat production. [REDACTED]

- At the United Nations Food Systems Summit (UNFSS) in September 2021, Singapore’s Minister for Sustainability and the Environment Grace Fu argued that [alternative proteins are an important tool for addressing food security](#). [REDACTED]

[REDACTED]

GFI Corporate Engagement Program

Corporate Engagement Program Outputs Achieved in the Past 18 Months (January 2021 – June 2022)

GFI's Corporate Engagement program primarily works toward achievements under ACE's Research, Corporate Outreach, Institutional Vegan Outreach, and Capacity-Building program types.

Research and reports

GFI's Corporate Engagement team has conducted research on the state of the alternative protein landscape and the most pressing challenges to scaling alternative proteins, which has resulted in the creation of reports and informed strategy and prioritization for direct engagement. Here are just a few of our achievements:

- GFI published our signature annual State of the Industry Reports (SOTIR) for [cultivated meat](#); [plant-based meat, eggs, and dairy](#); [fermentation](#); and [alternative seafood](#). Our [blog post](#) describes key insights of these studies and you can read a quick overview of each 2021 SOTIR [here](#). These reports have been commended by corporate executives and investors for helping them more fully understand opportunities in the industry. We've received feedback that the reports are "highly valuable for planning purposes." We also conducted webinars for each report: [Cultivated](#), [Plant-Based](#), [Fermentation](#), and [Seafood](#), reaching 807 unique live attendees and 4,400 recording viewers (as of July 28th, 2022).
- GFI, in partnership with the Plant Based Food Association (PBFA), commissioned 2018-2021 retail market sales and household panel data on plant-based foods from SPINS. This data played a key role in building out the above mentioned SOTIR's and were also featured in a [2021 retail market data whitepaper](#), [online webinar](#), and a variety of other materials throughout the GFI network. This data is important for the many industry stakeholders who don't have the budgets to purchase it themselves. In recent weeks and months, GFI has been

working closely with PBFA on commissioning data at the end of 2022 to continue to provide these meaningful insights into the plant-based sector.

- GFI's Sustainable Seafood Initiative team published an [Alternative Seafood Industry Report](#) in September 2021 accompanied by a [webinar](#) and networking session (seven months prior to publishing an Industry Update alongside the other State of the Industry Reports in April 2022).
- GFI's supply chain team helped migrate our listing of the biggest challenges and whitespaces in alternative proteins, along with our database of 94 of the most needed research, ecosystem, and commercial solutions, to our new website platform. The [Solutions Database](#) and [Innovation Priorities](#) are based on interviews with hundreds of alternative protein industry participants from every step of the value chain, along with hundreds of hours of desk research on market-shaping approaches and the growth of similar sectors such as renewable energy, electric vehicles, and biotechnology. Based on the industry interviews and internal analysis, the supply chain team identified the top dozen bottlenecks in the alternative protein value chain in order to identify the most important startups to support, suppliers to engage, technological breakthroughs, and policy support mechanisms.
- GFI [released a report](#) in January 2022 estimating ingredient and end-product manufacturing infrastructure targets the industry must meet to satisfy anticipated global market demand by 2030. You can [view a webinar](#) exploring the paper or [download the slide deck](#). The report predicts significant end product manufacturing and ingredient constraints if commonly-cited consumption predictions are achieved, underscoring the significant needs and opportunities in the plant-based meat supply chain.

Industry convening and knowledge-sharing

In an effort to continue scaling our impact beyond 1:1 engagements, over the past 18 months the Corporate Engagement team has developed or continued a number of programs designed to convene industry participants around key topics. Below are just a few of our achievements:

- GFI launched a new initiative in June 2022 called LINC (Learn, Inspire, Network, Collaborate). LINC leverages GFI's unique position in the alternative protein ecosystem to bring together companies across the global value chain to gain key insights into the alternative protein market and foster new collaborations and partnerships. LINC seminars are structured to include both knowledge sharing and networking opportunities. They take place quarterly and each topic is centered around overcoming barriers for alternative proteins to compete on the key drivers of consumer choice: taste, price, or convenience. The inaugural event focused on "Enhancing plant-based products with fermentation and cultivated technologies". We had ~60 live participants, and an opening keynote by Feike Sijbesma (Honorary chairman DSM, Board of Unilever, Board of WEF, Board of IMF). The seminar was followed by a networking session in which 69 introductions were made among the 22 live attendees.
- GFI launched a Mentor Program to connect entrepreneurs and startups with experienced

subject matter experts and scale impact by helping more entrepreneurs than our team has capacity to meet with 1:1. More than 200 people applied to the program, resulting in a pilot cohort of 24 mentors from 10 countries. Areas of expertise cover a broad range of critical challenges for emerging companies including fundraising, manufacturing, formulation, legal issues, go-to-market strategy, sales and marketing, and more.

- The Corporate Engagement team manages the GFIdeas community: an international community of entrepreneurs, scientists, students, and subject matter experts who are driving alternative protein innovation. Of the 2,800 total members in the GFIdeas Community, 1,298 have joined since January 2021.
- GFI's [Business of Alt Protein Seminars](#) share knowledge related to starting and scaling an alternative protein company. Since January 2021, we have hosted 16 seminars on topics ranging from sensory research, to scaling internationally, to building a high performing team. 7,124 people registered for the seminars and 2,951 people attended the live sessions. An additional 20,918 people have viewed the [recordings on YouTube](#).
- GFI launched a pilot Entrepreneur-in-Residence (EIR) Program. The EIR Program is designed to catalyze the creation of a force-multiplying company that provides a broad-impact solution for the alternative protein sector as a whole. The call for applicants resulted in 130 submissions. The selected entrepreneur will be announced in Fall 2022. The Entrepreneur in Residence will work with GFI for a period of six months during which they will build the foundation of an alternative protein startup.
- Inspired by feedback from investors through meetings and GFI's annual investor survey, GFI ideated, researched, strategized, and is continuing to work with the [GlassWall Syndicate](#) as a knowledge partner to launch the Emerging Growth Consortium, an investor group for later-stage investors (Series B and above) interested in the alternative protein industry. If launched successfully, the [Emerging Growth Consortium](#) will provide later-stage investors with a formal network that offers a time-efficient and fit-for-purpose solution to common hurdles investors face when considering later-stage investments in alternative proteins, including difficulty conducting deep technical due diligence of companies and accessing high-quality deal flow. The consortium will also aid alternative protein companies, who often struggle to raise later rounds in this high-tech and capital-intensive industry. This is critical as such investment is needed to grow the alternative protein industry. We are currently working with the GlassWall Syndicate to recruit investor members.
- GFI staff members have attended dozens of industry events to put GFI's insights and ideas in front of thousands of industry insiders and enable hundreds of conversations with key investors, entrepreneurs, ingredient and equipment suppliers, contract manufacturers, and other important service providers to the alternative protein ecosystem:
 - Our supply chain lead spoke at and attended dozens of virtual and in-person events, including IFFA (processing equipment show in Germany), EY Innovation Studio,

- National Restaurant Association show, Plant-Based World Expo, Expo West, Southern California IFT suppliers expo, World Agri-Tech, Future Food-Tech San Francisco, Future Food-Tech NYC, three Buhler extrusion workshops, GFIdeas mixer in SF, Barclays Alternative Protein Showcase, EAGxBoston, EA Global Virtual 2021, EATV NYSE launch, and the Soy Nutrition Institute Summit.
- CE team representatives presented, served as a panelist, and/or moderated sessions at more than ten investor-facing events, reaching more than 600 investors and other select audience members. Speaking engagements included in-person conferences (e.g., Future Food Tech Alternative Proteins), virtual conferences (e.g., Cell-Based Meats & Seafood Summit, Bernstein Digestible Disruption Conference), investor webinars and calls held by banks (e.g., Credit Suisse, Macquarie, BNP Paribas) for their institutional investor clients, presentations to impact investment groups (e.g., Toniic, Unreasonable Group), and presentations to large groups of investment organizations (e.g., BlackRock, State of Wisconsin Investment Board).
 - In the first half of 2022, GFI's investment team began serving as a knowledge partner for bank-hosted alternative protein conferences and events, and executed the first such event with Barclays. This strategy entails GFI ideating conferences that will effectively bring together investors and alternative protein companies, proposing our ideas to potential investment firm partners, and co-planning the event together, including speakers and attendee recruitment. The Barclays Alternative Protein Showcase was a strong first event, bringing together 11 later-stage alternative protein companies with high-quality institutional investors for intimate meetings and networking. It received strong positive feedback. A second conference is currently being planned with Bank of America.
 - GFI hosted a virtual pitch slam competition at the September 2021 Good Food Conference. Out of 103 startups that applied, GFI selected 12 to pitch. As a result, the startups were able to increase awareness of their companies and objectives across an audience of potential investors, partners, and journalists.

Direct engagement

GFI's Corporate Engagement team has held hundreds of high-impact 1:1 meetings with food industry stakeholders. Below are just a few examples:

- GFI U.S. held at least 233 meetings with investors, including venture capital firms, growth equity firms, private equity firms, family offices, pension plans, sovereign wealth funds, foundations, and other institutional investors. Meetings ranged from serving as introductions to alternative proteins, GFI, and how GFI supports investors, to in-depth discussions of alternative protein investments, sustainability characteristics, commercial landscape, sales and price trends, scientific and technological developments, policy, and more. Investors who

lead Series A deals or participate in Series B or above deals were prioritized for such meetings. Select prominent firms with whom GFI met include Baillie Gifford, Bank of America, Barclays, Bernstein, BlackRock, BNP Paribas, [REDACTED] Citibank, Credit Suisse, Fidelity, GIC, General Atlantic, Goldman Sachs, HSBC, Jefferies, J.P. Morgan, Macquarie, Mitsui, MUFG, NEPC, Oman Investment Authority, Ontario Teachers' Pension Plan Board, Paine Swartz, SK Group, Temasek, UBS, and Wellington.

- GFI supports startups as they raise capital from venture capital investors through 1:1 consultations and by maintaining databases to connect startups and investors. For example, we review the pitch decks of promising alternative protein startups to provide feedback as they fundraise for their companies. Since 2021, we have reviewed 49 pitch decks of alternative protein companies. GFI's Fundraising Database (further details provided in the open access resources section below) now includes fundraising information entered by 112 companies who seek to get on the radar of an expanded network of alternative protein investors. And at least 62 startups that are actively fundraising have been granted access to GFI's Investor Directory - a database of investors who have signified interest in funding alt protein startups.
- GFI's startup team has met with at least 146 entrepreneurs and startups and an additional 46 accelerators, incubators, and investors to accelerate the alternative protein startup ecosystem.
- GFI has excellent relationships with the largest food and meat companies in the world. We work regularly with the big three meat companies as well as with [REDACTED] three massive food conglomerates:
 - Between January 2021 and June 2022, GFI gave four different presentations to a leading meat company, held several additional calls with their team, and provided data and insights to their corporate ventures team.
 - We influenced one major meat company to sign on a letter of commitment to participate in a possible NSF funding Industry-University Cooperative Research Center (IUCRC) focused on cellular agriculture and cultivated meat.
 - We've facilitated introductions between some of the largest food and meat companies and alternative protein startups, some of which have led to ongoing partnership discussions.
 - Some of the largest food and meat companies that we've repeatedly engaged with have subsequently developed partnerships with and/or acquire alternative protein companies.
 - In 2021, a major meat producer came to us for guidance in preparation for their meeting with the USDA regarding proposed nomenclature for cultivated meat; we influenced the company to adopt our recommended nomenclature and provided resources to help them support that position in their USDA meeting.

- GFI held virtual meetings with 171 ingredient suppliers, infrastructure/B2B investors, manufacturers, equipment suppliers, and service providers for the alternative protein sector to share GFI resources, make connections, provide insight on strategic plans related to alternative proteins, understand challenges, and present on the whitespaces and needed solutions to scale the alternative protein supply chain.
 - GFI continued to foster close relationships with major ingredient suppliers, such as [REDACTED]
 - In 2021, GFI presented at the opening of the new Ingredion plant protein processing facility.
 - (R) Contract manufacturing capacity for alternative proteins is very limited, but forms an important scale-up pathway for startups who are demonstrating commercial traction. Throughout 2021 and 2022, GFI has conducted more than a dozen engagements with existing contract manufacturers to convince them to enter the alternative protein category, organized a panel on contract manufacturing for the virtual Good Food Conference, and added additional companies, consultants, and pilot plant facilities to our [directory of co-manufacturers, pilot plants, private labelers, and consultants](#). This directory now includes 86 contract manufacturers, 156 pilot plants, and 23 manufacturing & operations consultants. Our supply chain lead also contributed additional names to GFI's [ingredient supplier database](#), which now includes 471 companies.
- [REDACTED]
- GFI's corporate engagement seafood specialist engaged with stakeholders along the value chain to make the case for investing in and/or producing alternative seafood:
 - We held at least 45 meetings with alternative seafood-focused startups around the world to address the unique challenges that alternative seafood startups face—often related to consumer interest/demand and formulation. These meetings provided opportunities to share GFI resources, facilitate introductions, and gather information about the category's challenges to inform GFI's seafood strategy.
 - We engaged more than 17 ocean conservation-focused investors. This included a presentation to 20 members of 1000 Ocean Startups, a coalition of VCs, incubators, accelerators and matching platforms to scale at least 1000 ocean-focused startups by the end of the decade. The coalition has invested in at least 12 alternative seafood

startups.

- Based on [GFI's consumer research](#), there is a lack of awareness and education around alternative seafood. To mitigate this and to help generate consumer demand, GFI shared alternative-seafood specific insights and opportunities with more than a dozen consumer-facing ocean-focused organizations including The Monterey Bay Aquarium's Seafood Watch program, Marine Stewardship Council (MSC), and the Environmental Defense Fund (EDF).

Open-access resources

GFI creates open-access resources to support the alternative protein industry. These resources expand our impact by providing self-service guidance to industry stakeholders and serving as a funnel for direct engagement.

- GFI grew its [Investor Directory](#) (a directory of investors interested in alternative proteins and open to companies reaching out to them for funding) by 75% from 209 investors in January 2021 to 366 investors in June 2022. Two hundred investors in the directory can invest over \$1 million in a single deal, 116 of those can invest over \$5 million, and 77 over \$10 million.
- GFI partnered with FAIRR to co-develop ESG (environmental, social, and governance) reporting frameworks to supply investors and companies involved in the alternative protein industry with powerful, standardized tools to monitor, measure, and report industry-specific risks and opportunities. The frameworks and their associated technical guides were developed in response to growing investor interest in alternative proteins and investors' desire to measure and analyze ESG characteristics of alternative protein companies and business lines. Until now, such measurement and analysis has been hindered by a lack of industry-specific measurement and reporting guidelines. The ESG frameworks address this gap by serving as industry-specific tools that public and private companies may use to report on the performance of their alternative protein businesses. Investors can use the frameworks to conduct due diligence on companies involved in alternative proteins and gain transparency into the related characteristics of such companies. The frameworks also serve as roadmaps for ESG best practices within the industry. The frameworks and guides were nearly final as of June, 2022 and will be [published in September, 2022](#).
- The Corporate Engagement team sends regular newsletters to keep industry stakeholders informed of the latest developments in alternative proteins:
 - Over the past 18 months (from January 2021) the subscriber list for the Alternative Protein Opportunity, CE's flagship newsletter, grew by more than 100% from 5,190 to 12,739 subscribers. Notably, while the subscriber list grew, the average open rate held steady at 42.21%. The [Alternative Protein Opportunity](#) features a full suite of alternative protein industry updates including new entrants, partnerships, facilities,

- distribution (retail, foodservice, and ecommerce), investment, science and technology, and policy updates. The newsletter fills an important gap, serving as a comprehensive source of alternative protein industry developments. It has received positive feedback from industry stakeholders. The most recent edition can be found [here](#).
- The Corporate Engagement team launched [The Alternative Protein Opportunity: Catalyzing Investment](#) quarterly newsletter and drafted and sent out four newsletters through June 2022, which have been well-received by readers. The newsletter includes quarterly investment data and insights, fund raises and news, a selection of GFI resources, and a list of venture capital funds focused on alternative proteins that are fundraising (the only such publicly available list that we are aware of). Results of GFI's annual investor survey and startup survey, which are completed by hundreds of respondents, are disseminated via the newsletter. The latest newsletter (sent out in July 2022), may be accessed [here](#).
 - The GFIdeas newsletter is a resource for the members of the GFIdeas [community](#). The monthly newsletter features a compilation of business and research opportunities in alternative proteins, including accelerator/incubator programs, research grant programs, product competitions, and career opportunities, as well as recent research and news in the alternative protein space. The most recent edition can be found [here](#).
 - We published a quarterly alternative seafood-focused newsletter—Turning the Tide—to keep business, policy, and SciTech-interested readers up to date on alternative seafood news, research, and opportunities. The newsletter was discontinued in March 2022 in an effort to consolidate GFI's newsletters. Alternative seafood news can be found in [our other newsletters](#). Turning the Tide had 2040 subscribers with an average open rate of 60%.
- The CE team launched a [fundraising database](#) to enable investors to identify alternative protein companies who are currently engaged in a fundraising round and explore funding such companies. The database lists alternative protein fundraising round characteristics, including asset type, round type, target deal size, and target investor type. As of June 2022, there were approximately 60 deals listed in the database, ranging from pre-seed to Series B.
 - The CE team also refreshed and expanded a list of [industry consultants](#) specializing in one or more segments within the alternative protein industry. Consultant expertise spans the technical and scientific, business strategy, and regulatory and food safety areas. These consultants are well-positioned to offer valuable insight for evaluating potential companies to invest in.
 - The retail team published a [merchandising guide](#), [price white paper](#), and leveraged the [annual U.S. retail sales insights](#) as well as several GFI events to provide additional support to retailers.

GFI APAC [REDACTED]

GFI APAC [REDACTED] Program Outputs Achieved in the Past 18 Months (January 2021 – June 2022)

GFI Asia Pacific [REDACTED] works primarily toward achievements under ACE's Research, Legal or Policy Work, Corporate Outreach, Education, Media Outreach, and Capacity-Building program types.

GFI Asia Pacific

Science and Technology

GFI Asia Pacific (APAC) aims to be the driving force behind alternative protein innovations in the world's most populous region. We work with top scientific researchers and institutions to accelerate a shift away from industrial animal agriculture across Asia, not simply through changing consumer habits, but by harnessing science and technology to cut animals out of the global food system. In a region where conventional meat and seafood consumption has been projected to rise by an additional 70+ percent in the coming decades, there is no place on the planet where a change of trajectory is more urgently needed.

Building the talent pool

- Throughout 2021 and 2022, our team has been engaging research communities at up to 30 of APAC's top institutions, including universities, polytechnics, government research institutes, and industry bodies to accelerate alternative protein science with the goals of improving product taste and driving down costs. Through our Science of Alt Protein seminar series we've engaged more than 200 Asian alt protein researchers. As of August, our network includes 372 researchers from public and private research institutions. In August 2021, we launched Southeast Asia's first [undergraduate-level](#) university module and in January 2022 we launched the first [graduate-level university modules](#) – both focused specifically on alt proteins at Nanyang Technological University and the National University of Singapore. This is the result of

18 months of engagement with professors and advisors from the third- and first-ranked universities in Asia (namely Professor Chen at NTU and the Food Science department at NUS). Every module we've offered has been fully enrolled with a sizable waitlist, which illustrates the substantial room for future coursework expansion.

- Widening the technologist talent pool is critical in Asia to resolve industry bottlenecks and accelerate a shift to alternative proteins. To build that pool we have been helping to create alt protein-focused student organizations at APAC's top research universities (including University of Melbourne in addition to NTU and NUS, noted above). These new student organizations will be announced as part of the 2022 cohort of GFI's global Alt Protein Project.
- In collaboration with several government bodies, including Singapore's Economic Development Board and Enterprise Singapore, we are projecting out the anticipated technical talent needs for plant-based, fermentation-enabled, and cultivated proteins through industry talent need surveys and estimated person-hours to support anticipated production volume requirements. For example, Singapore's PB meat projections are tied to the government's goal of producing 30% of its nutritional needs locally by 2030 ("30 by 30"). The research aims to answer the question of how many skilled workers will need to be trained and hired locally in order to handle the PB meat portion of that (estimated at 6% market share).

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Corporate Engagement

GFI APAC’s collaborative work with private-sector stakeholders has facilitated strategic upstream partnerships and accelerated investments into plant-based, fermentation-enabled, and cultivated proteins, resulting in expanded manufacturing capacity, reduced supply-side bottlenecks, and greater production cost savings—all of which lead to more affordable and accessible alternative protein options for regional consumers. Saurabh Bajaj, director of investments at Proterra Investment Partners (and former CEO of Eat Just Asia), offered this endorsement: “GFI APAC plays a vital role as a force multiplier for Asia’s plant-based and cultivated protein sectors, working collaboratively to change the trajectory of food production by making it more sustainable and just. Their experts are on a first-name basis with many of the most important policy stakeholders and companies in the region—including mine—and deeply respected locally. When I need a reliable partner for a high-priority project, GFI APAC is my first call.”

- Throughout 2021 and 2022, GFI APAC has directly engaged with more than 80 entrepreneurs and startups in order to facilitate greater knowledge-sharing and collaboration across the private sector).
- Throughout 2021 and 2022 GFI APAC’s experts have also delivered presentations to senior team members from major global food brands, among them conventional fish, poultry, and pork giants who are in the global top three of their categories. We have also presented about the manifold benefits of alternative proteins to investors from multinational banks like UBS, Malaysia’s largest financial services group, and J.P. Morgan.
- In late 2021, GFI APAC launched our [Alternative Protein Ecosystem Database](#)—a first-of-its-kind resource that consolidates important details about Southeast Asia’s plant-based supply chain, including directories for local ingredient sourcing, pilot production facilities, co-manufacturers, consultants, and many other essential B2B services.
- In 2021, our [Good Food Restaurant Scorecard](#) analyzed local menus at 20 of the largest food chains—both regional and international—across 11 APAC subregions. To share our findings, we partnered with popular plant-based food discovery app ‘abillion’ to host a webinar focused on successful alt protein marketing techniques at quick-service restaurants, which drew attendees from Kerry, CP Kelco, Nippon Ham, and Cargill, among other food industry giants.
- In May 2022, we beta-launched our new [GFIdeas APAC](#) community, a hybrid initiative that aims to bring key stakeholders from the alternative protein sector in Asia Pacific together to exchange ideas, share insights, and collaboratively accelerate the industry.

Education and Media

Supporting all of the programmatic work above, GFI APAC’s Communications team works to keep alternative proteins in the headlines and on the minds of influential stakeholders across Asia.

- In the past 18 months, our work has been featured (in some cases, multiple times)—by: [TIME magazine](#), [CNBC](#), [CNN](#), [Reuters](#), the [South China Morning Post](#) (Hong Kong’s newspaper of record), the [Bangkok Post](#), the [Straits Times](#) (Singapore’s top newspaper), [Channel NewsAsia](#), [Deal Street Asia](#), [Financial Times](#), [Tech in Asia](#), [Tatler Asia](#), [The Business Times](#), [The Nikkei](#) (world’s largest business newspaper), Bloomberg, Yahoo!, [The Star](#), [VnExpress](#), and the [New York Times](#).
- A key part of our media and education strategy is to proactively cultivate relationships with influential editors and place original columns in publications and resources that have millions

of readers. For example, we recently co-authored a column with the vice president for agri-food at Singapore's Economic Development Board ("Boosting Singapore's food security by making meat without animals") which was simultaneously published on July 4, 2022 in [Singapore's top newspaper](#) and on [official government websites](#).

- GFI APAC's digital platforms are designed for stakeholders from across the alt protein sector to learn about the latest industry research as well as collaboration opportunities.
 - Our recently revamped website ([GFI-APAC.org](https://www.gfi-apac.org)) serves as a comprehensive hub for alt protein innovation in Asia,
 - GFI APAC's [LinkedIn page](#) has more than 10,000 followers (the number of followers has more than doubled year over year).
 - GFI APAC's experts broadcast live from many notable Asia's gatherings, such as the [first street hawker stall on Earth to sell cultivated meat](#) to consumers.
 - We have also been the very first organization to break Asia-focused news of global significance, including:
 - [China's inclusion of cultivated proteins](#) in its five-year agricultural plan for the first time. TIME magazine also [hyperlinked to our breaking post](#).
 - [Breaking ground on Asia's largest cultivated meat facility](#).
 - [The opening ceremony at FoodPlant](#), Singapore's first shared facility for small-batch food production.
 - [Ceremonial groundbreaking of Eat Just, Inc.'s new state-of-the-art protein processing facility in Singapore](#).

Education and Events

In addition to speaking at major forums like the Global Food Security & Sustainability Summit and the Southeast Asia Agri-Food Roundtable, we also work to host events both on our own and collaboratively with external partners.

- At the 2021 Good Food Conference, GFI APAC ran eight simultaneous APAC-focused closed-door roundtable discussions, which included more than 100 invited stakeholders, including representatives from the Food Standards Australia New Zealand, Hong Kong Science and Technology Parks Corporation, Singapore Food Agency, UBS, Thai Union, and the Asian Development Bank.
- GFI is now an official organizing partner of the Singapore International Agri-Food Week (SIAW) event, which has an audience of more than 1,000 key stakeholders hailing from industry, government, and academia.. In advance of SIAW, we are coordinating with more than 50 companies and organizations to accelerate solutions on consumer education for cultivated proteins, projecting talent gaps, highlighting supply chain opportunities for ingredient diversification, and supporting regulatory processes.

We have also worked closely with our partners at the Singapore Food Agency and Nanyang Technological University to officially launch a full-day scientific symposium for the first time in SIAW's history. This symposium has now been [publicly announced](#), and as a direct result of our influence will be heavily focused on alternative proteins and building a more secure food future in Asia without industrial animal agriculture.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

GFI Brazil

GFI Brazil Program Outputs Achieved in the Past 18 Months (January 2021 –June 2022)

GFI Brazil works primarily toward achievements under ACE’s Corporate Outreach, Media, Legal or Policy Work, Research, and Capacity-Building program types.

Corporate engagement

GFI Brazil is responsible for engaging two of the top five global meat companies and supports the creation of startups, like Fazenda Futuro and N.Ovo. In 2021 and 2022, the Corporate Engagement team grew from one to three employees and established a department strategy in order to achieve goals. The team works toward three priority areas: innovation (focused on the development of the Brazilian innovation ecosystem), private sector (focused on engaging large companies and developing the market), and data (focused on updating relevant market and consumer data).

In the last 18 months, GFI Brazil’s Corporate Engagement team made progress in all areas of its strategy. For example, we engaged investors, created specialized funds for the alternative protein sector (such as Enfini), and presented opportunities to the most significant local investors, such as Santander, Safra, and Credit Suisse. We shared the first iteration of a consumer research report for 2020, and we’re currently working to update the research. We have also worked closely with the major meat companies to advise on the incorporation of alternative protein production. The following are major achievements from January 2021 to July 2022:

- GFI offered data and supported JBS in expanding their plant-based brand (Incrível).
- GFI supported JBS as they entered the cultivated meat sector. We shared our expertise and data, and offered policy and market updates. GFI Brazil was instrumental in the development of JBS’s cultivated meat strategy and in 2021, JBS announced its [100MM USD investment](#) in cultivated meat including investing in an Innovation Center in Brazil.

- GFI supported BRF, a major Brazilian meat company, to enter the cultivated meat market. BRF had already expanded its plant-based portfolio (Sadia Veg & Tal) with the support of GFI Brazil. In 2021, they announced a partnership with [Aleph Farms](#).
- GFI Brazil collaborated with Plant Plus and Marfrig to solve challenges related to their joint venture (Plant Plus).

Media

Between January and December 2021, GFI Brazil was mentioned in 570 articles in the press, including interviews, full articles, and citations of research data. Ninety-five percent of the articles had a positive impact, and 28% were published in A media (high relevance). The following are major achievements from January 2021 to December 2021:

- GFI Brazil contributed to Estadão, one of the most read newspapers in the country, through four pieces on cultivated meat and vegetable milk. See [here](#), [here](#), [here](#) and [here](#).
- GFI Brazil contributed to a series of reports on alternative proteins on TV Brasil, a Brazilian government channel. See [here](#), [here](#), and [here](#);
- An interview with GFI Brazil's SciTech President appeared in [Marie Claire](#) magazine, titled "Alternative protein: created in the laboratory, promises health for the body and the planet."
- GFI Brazil's SciTech President did an interview for [Folha de São Paulo](#): "Fighting food waste is key to advancing sustainability."
- GFI Brazil's Managing Director interviewed with [BBC](#): "Climatarians: the diet against climate change that gained strength in the pandemic."
- [JBS's official website](#) disclosed the company's investments to consolidate itself in the cultured meat market, highlighting a statement from GFI Brazil about the partnership that made the strategy possible.
- [Estadão](#) published an article based on research by GFI Brazil on the opportunities and challenges for developing the national plant-based industry.
- [Folha de São Paulo](#), the [BBC](#), and the [Terra website](#) published an interview with GFI Brazil's Managing Director.
- The [Embrapa website](#) released preliminary yet promising research supported by GFI on the use of cashew fiber in plant-based foods.
- [CNN](#) reported increased investments in alternative proteins in 2021 based on GFI data.
- GFI Brazil was invited to assume a biweekly news column on the [plant-based Brasil website](#) focused on Brazilian additives, ingredients, and industry news.

Between January and June 2022, 409 pieces were published citing GFI Brazil, including full articles, citations of research data, and interviews. Ninety-nine percent of these media comments had a positive tone, and 32% were reported in A media (high relevance). As a result, we had a media return valued at R\$6,981,111.00. The following are major achievements from January 2022 to July 2022:

- GFI Brasil contributed to [CNN](#)'s article "World Meat Free Day: market grows and adapts to new habits."
- GFI Brazil contributed to [BBC](#)'s article "It's not just price: why beef is losing space on Brazilian plates."

- The BBC News published an article on its [website](#) and on [Youtube](#) explaining why Brazilians are reducing their meat consumption. According to the article, the reasons go far beyond price: health, global hunger, animal welfare and sustainability are all included. The GFI Brazil team was a key contributor to the article.
- [CNN Brazil](#) published an article about World Meat Free Day. The text states that the market for alternative proteins continues to grow in the country, stimulated especially by the population's desire to reduce animal products. GFI Brazil was a key contributor to this article.
- JBS, in partnership with GFI Brazil, published [branded content](#) in Jornal Valor Econômico, the most significant financial newspaper in Brazil, stating that alternative proteins are one of the key strategies for the future of food. The text includes an interview with GFI Brazil's Managing Director and cites the corporation's main initiatives in this sector.
- The newspaper Estadão, one of the most read in the country, published an [article](#) based on a study by GFI Brazil about the demands of the plant-based industry, highlighting that 84% of brands operating in the country would like to have more national ingredients to develop products. This article highlights GFI Brazil's work around open-access research in the Amazon and Cerrado Biomes to discover new native ingredients that can serve the alternative protein sector and actions to promote carioca beans, a national raw material with the potential to match soybeans and peas.

Social Media

On Instagram, we reached the mark of 3,170 followers, 2,465 on LinkedIn and 212 on Youtube.

In 2021 we also launched the Can Imagine campaign, consisting of 3 short videos. Video 1 was shared by Brazilian actor and activist Bruno Gagliasso, who has 20 million followers on Instagram. The videos also had:

26.6 thousand views on Instagram

17.7 thousand views on LinkedIn

14.3 thousand views on Youtube

Policy

The transparent nature of our open-access resources and the quality data we produce have allowed us to work with key players in government and policy. We have built alliances within the government and have made progress in favorable regulatory and tax agendas. Our Policy team strengthened state partnerships and expand alternative protein discussions. The following are major achievements from January 2021 to July 2022:

- GFI Brazil initiated discussions to create/update the Brazilian regulatory framework for alternative proteins in order to develop a pro-investment and competitive environment for the sector. We have engaged Ministries and agencies (such as Anvisa, MCTI, and MAPA) in these discussions, and we made publicly available the three regulatory studies contracted by GFI from ITAL (Food Technology Institute). These studies (linked in the resources section below) will be used as the scientific foundation for the regulatory debate within the government throughout 2022. GFI Brazil presented studies to government agents and advocated for their

incorporation into the Brazilian Government's knowledge repository. After presenting the studies, we defined an advocacy strategy involving unique actions for companies at the Alt Proteins Working Group at ABBI (Brazilian Bioinnovation Association).

- GFI wrote amendments to neutralize the label censorship bills in the House, adding affirmative definitions of allowance to use terminologies such as meat, milk, and cheese in plant-based and cultivated products. After aligning our project with ABIA (Brazilian Food Association) and ABBI (Brazilian Bioinnovation Association), we started working together to address our legislative agenda.
- There are two Bills in the Brazilian House limiting the use of terms like meat and milk to animal products, and GFI has succeeded in convincing the rapporteur at the House to present a substitutive text explicitly allowing the use of these terms for alternative protein products. We are also writing a proactive Bill around the use of these terms for plant-based products. In 2021, GFI was granted official observer status and started participating in Codex Alimentarius activities. We attended sessions from the Codex Committee, such as the [Codex Committee on Food Labelling \(CCFL\) Pre-CCFL Information Session for Delegates](#), and the [Webinar for Codex Observers](#), to learn about Codex Observers' roles and operational procedures. GFI created a Codex Team and collaborated with member countries (Brazil, Israel, Singapore) to ensure a favorable environment for alternative proteins. We also submitted a Conference Room Document (CRD), which advocated for an open process to consider these issues.
- In May 2022, the Brazilian Government published Decree No. 11.087/2022, which created a specific classification for plant-based milk in the Table of incidence on Industrialized Products Tax (TIPI) with a zero rate. Milk and dairy animal products were already included in TIPI, with a zero tax rate. Plant-based milk will also have the tax exemption.

Research

At GFI Brazil we believe that supporting research is crucial to maximizing our country's potential and developing the alternative protein sector. Our SciTech team has sought funding opportunities, engaged and capacitated Brazilian researchers, and tracked the research we've previously funded. The following are major achievements from January 2021 to July 2022:

- GFI launched the [Biomes Project](#), which aims to promote scientific initiatives about Brazilian biodiversity. Our main goal is to develop the alternative protein market by utilizing and adding value to native products from the Amazon and Cerrado biomes. We received 80 research proposal submissions from 34 research institutions located in 14 different Brazilian states. We will fund 13 research projects (7 have already started, and the others are in the hiring phase). This initiative is supported by the donations of two international organizations.
- GFI Brazil promoted GFI's [Research Grant Program](#) in 2021 by organizing webinars, communication materials, and conducting 1:1 meetings. In addition, we strongly supported more than 40 Brazilian researchers from different organizations (EMBRAPA, ITAL, UNICAMP, UNIFESP, UNISINOS, CEFET-MG, USP) during the first phase of the Grant Program submission. As a result, Brazil submitted 19 research proposals in the first phase, of which 5 have been approved for funding.
- GFI announced the global launch of GFI's Field Catalyst and Discovery Grants RFP (part of GFI's research grant program) in April 2022. The SciTech team has been planning actions to

promote these grant opportunities in Brazil. We plan to host a virtual workshop to present more details of the new mechanisms and offer space for Brazilian researchers to ask questions. To expand participation we are publicizing through social media and newsletters. As Brazil has limited research funding, we are prioritizing support for local researchers who submit proposals.

Resources

GFI Brazil creates and shares freely the most recent data about the alternative protein sector, including the mapping of white spaces, market research, consumer data, and white papers. We are dedicated to advancing open-access research on alternative proteins and creating an ecosystem for this sector's scientific and academic development. The following are major achievements from January 2021 to July 2022:

- GFI Brazil's SciTech team developed the Science and Technology Mapping in Alternative Proteins in Brazil with data from the [GFI Collaborative Research Directory - CRD](#). We have been using this map in our presentations and promoting it on social media (LinkedIn, Instagram), and it is also available on our website. It is a strategy to give researchers more visibility and inspire those who are not yet engaged in the CRD.
- GFI Brazil hosted a survey to identify white spaces in the alternative protein industry in Brazil (in Portuguese). The survey was sent to ingredients industries and meat, dairy, and egg plant-based producers and aimed to accelerate innovation in the alternative protein sector by mapping the main challenges for developing plant-based products. The report, called "[Opportunities and Challenges in the Production of Products Made from Plants Analogous to Animal Products](#)," was supported through the contributions of 21 companies and is available on the GFI Brazil website (in Portuguese).
- We worked with a team of consultants to develop activities that promote cultivated meat in Brazil. The first deliverable of the consultancy, a [glossary of technical terms on cultivated meat](#) (in Portuguese), is finished and available on the GFI Brazil website.
- GFI Brazil developed the [Cultivated Meat White Paper](#) (in English and Portuguese). The document contextualizes challenges in the development of cultivated meat in Brazil. The white paper has been presented to the Ministry of Science, Technology, and Innovation and other government representatives.
- In 2021 GFI developed a Nutritional Study of plant-based products. The study aimed to meet a demand of the Department of Inspection of Plant Products from the Ministry of Agriculture, Livestock and Supply (DIPOV/MAPA). Some discussions took place at the Alternative Protein Working Group in the Brazilian Association for Bioinnovation (ABBI) based on the study. Our SciTech team is working on an article based on the study to share on our website.
- GFI Brazil hired the Food Technology Institute (ITAL) to develop three regulatory studies (comprising [plant-based products](#), products obtained by [cell culture](#), and products and ingredients obtained through [fermentation](#)). They were released in March of 2022. For this initiative, we presented the regulatory studies to government agents and advocated for their incorporation into the Brazilian government's knowledge repository. After presenting the studies to the government, we defined an advocacy strategy involving unique actions for companies at the Alt Proteins Working Group, Government officials, and public opinion in

general. We are working on a resource to highlight and share the technical knowledge created in these studies.

- Our [map of the alternative protein sector](#) identified at least 100 companies operating in the plant-based and cultivated protein market and accounted for at least 98 new products. This mapping is available on GFI Brazil's website.

Capacity-building

GFI Brazil is committed to the development of each individual on our team, offering opportunities to strengthen their skills and abilities. The following courses were offered to the entire team between January 2021 and July 2022:

- GFI Brazil attended a Regulatory Training, hosted by ITAL. Led by the Policy Team, the objective of the training was to share technical Alt. Protein Regulatory affairs information with the team.
- GFI Brazil offered the team a "Project Management" training to empower the team to carry out current and future projects confidently. The training lasted four months and was intended to teach, refresh, train and update the steps of managing a project from beginning to end and to plan and execute multi-step processes. Through this training we have built a more confident team "speaking the same language, " and have mapped all projects and processes with appropriate goals and metrics.
- In 2021, GFI Brazil launched our second Engagement Brazil Survey, aimed at allowing the team to anonymously express their opinion and suggestions about GFI Brazil's work and management. This survey is a fundamental tool for GFI to evolve and meet our employees' needs constantly.
- GFI also prioritizes capacity-building outside our organization. In 2021, the SciTech team held technical presentations at 32 events, including symposia and workshops. Topics included alternative proteins and emerging markets, new protein sources, cellular agriculture, tissue engineering, and ingredient opportunities for the plant-based market from species native to the Amazon and Cerrado Biomes, among many others. The events were held in partnership with universities, scientific and innovation institutes, and the government. We had more than 8,200 participants attend the events, including researchers, students, professors, and industry and government professionals. We were able to share technical information on alternative proteins with more than 15 universities, education and research institutions, companies, professional councils, government agencies and public research institutions across the country.

Education

GFI Brazil works to create a strong research and education ecosystem around the alternative protein sector. In 2021, GFI Brazil developed educational programs in partnership with universities and research institutions to provide data and technical support to strengthen the academic programs, attended workshops and ministered lectures to enrich discussions on alternative proteins among students, researchers and professors. Highlights include:

- With the collaboration of GFI Brazil, the Federal University of Paraná (UFPR) is launching the third edition of the course on Cellular Agriculture. We also engaged the Federal University of Campinas (UNICAMP), and they plan to launch a course focused on the development of plant-based food due at the end of 2022.
- GFI Brazil developed a course on the Brazilian Alternative Protein landscape. The course comprises nine classes recorded by our SciTech team that offer an introduction to alternative proteins. The content will be open to students, professionals, and the general public. The classes were recorded in 2021 and GFI Brazil will purchase a platform to offer the course free of charge on our website (in Portuguese with Spanish subtitles).
- GFI promoted a series of scientific workshops to disseminate knowledge on the science, technology, and regulatory issues around cultivated meat. Several Brazilian regulatory bodies were represented, including the General Food Office at the National Health Agency (GGALI/Anvisa) and the Department of Inspection of Animal Products of the Ministry of Agriculture (DIPOA/MAPA). Scientists and international regulators from agencies such as the USDA, FDA, and EFSA were speakers. More than 60 Brazilian government officials attended each session of our workshops.
- In the first half of 2022, our SciTech team gave four technical lectures on alternative proteins. We had more than 120 attendees.

GFI Europe

GFI Europe Program Outputs Achieved in the Past 18 Months (January 2021 –June 2022)

GFI Europe works primarily toward achievements under ACE’s Legal or Policy Work, Research, Corporate Outreach, and Media Outreach program types.

Policy

GFI Europe has successfully influenced UK government policy in support of alternative proteins. In July 2021, after considerable engagement with GFI Europe including a tailor-made round table for the authors and extensive resource-sharing, the UK’s National Food Strategy (the first major review of the UK food system for 75 years) recommended [£125m be invested in alternative protein research and innovation](#).

Since then, GFI Europe’s policy team has engaged policymakers from the Department for Environment, Food and Rural Affairs and the Cabinet Office to ensure these recommendations are implemented. After a knowledge-sharing workshop organized by us and two further discussions with the Brexit Opportunities Unit, in January 2022, the Brexit Opportunities Report committed to [supporting innovation in the sustainable protein sector](#) through regulatory measures.

In May 2022, we organized the UK’s first parliamentary reception dedicated to cultivated meat in collaboration with Ivy Farm Technologies, which resulted in GFI Europe’s detailed briefing on why alternative protein R&D is a major opportunity for the UK reaching around 50 MPs. It also inspired the first ever parliamentary debate on cultivated meat, at which the Minister for Farming, Fisheries and Food reiterated the commitments of the National Food Strategy White Paper, which had been released a few days earlier in June 2022. It promised to “keep the UK at the front of this growing and innovative sector by supporting alternative protein research and innovation” and promised “£120 million investment in research across the food system in partnership with UKRI....including in alternative proteins.”

In turn, through workshops and written feedback, GFI Europe influenced UKRI, the UK Government's primary funding body, to focus on taste, price and accessibility of alternative proteins in their new report 'Alternative Proteins Roadmap – identifying UK priorities'. This will help to ensure that as much as possible of the £120 million mentioned in the National Food Strategy White Paper will go towards these high-priority technical barriers for advancing alternative proteins. We have subsequently been invited to continue to work closely with key decision-makers at UKRI and its subsidiary research councils (e.g., BBSRC) to help them shape the specific focus and funding mechanisms for future alternative proteins calls. Our Corporate Engagement team helped to identify these bottlenecks and opportunities for scaling alternative proteins by expanding [GFI's Advancing Solutions for Alternative Proteins \(ASAP\) project into Europe](#). The results of ASAP help to inform conversations with, and focus the efforts of, scientists, policymakers and industry across the continent.

GFI Europe also helped lead the charge to [successfully defeat a proposed expansion of EU labeling restrictions](#), which could have banned plant-based dairy products from being sold in cartons, displaying allergen information or even using images of their own products. GFI Europe worked with a wide range of partners to ensure these potentially damaging plans were taken off the table in May 2021, ensuring engagement with each of the 27 EU member states involved in the negotiations. We also spearheaded a joint letter from 21 NGOs calling for the proposal to be rejected, which was shared by major environmental influencers George Monbiot and Greta Thunberg and led to coverage of the issue in Politico and The Independent.

Research

In June 2022, we co-launched an [Innovation Prize](#) with EIT Food, which will award €100,000 each to up to four research projects across Europe, focused on reducing the costs of cell culture media - one of the biggest cost-drivers for cultivated meat. In addition to unlocking EIT Food's share of this funding for high-impact alternative protein research, this opportunity will attract more researchers and scientists to apply their expertise to the sector, building the alternative proteins ecosystem further.

Corporate Engagement

We [partnered with the organizers of IFFA](#) – the world's largest meat processing, packaging and ingredients trade show – to incorporate plant-based and cultivated meat into their most recent show. In an important shift away from their traditional exclusive focus on conventional meat, for the first time in May 2022, the conference was billed as a meat and alternative proteins trade show. GFI Europe led a series of fully-booked 'discovery tours', introducing around 120 attendees to alternative protein exhibitors, and presented at the IFFA forum lecture event to educate the established food sector about alternative proteins, as well as sharing a dedicated alternative protein booth with ProVeg International and the German Association for Alternative Sources of Protein (BALPro). Successfully securing a positive reception for alternative proteins at this event was important since the established food industry has the expertise and infrastructure to help the alternative protein sector to scale as quickly as possible.

In June 2022, GFI Europe, in partnership with GFI U.S., [launched a new initiative](#) that brings together companies across the global value chain on a quarterly basis to gain insights into the alternative protein market and foster new collaborations. We have onboarded over 140 people from 85

companies to the community, including representatives from large food & meat companies like Unilever, Nestle, Vion, Danish Crown, Hormel as well as leading alternative protein companies like Beyond Meat, Impossible Foods, Mosa Meat, and Heura.

Media

Through extensive outreach to journalists, we have been able to secure over 800 pieces of positive media coverage for sustainable proteins in outlets across Europe including [The Guardian](#), the [BBC](#), [El País](#) and [Der Spiegel](#). We also launched a [GFI Europe website](#) in August 2021 to serve as a hub of information and resources on the European alternative protein sector, and began a regular [email newsletter](#) in January 2022 to influence policymakers, industry and scientists. This coverage and communications work helps to humanize and increase understanding of the sector, in turn increasing positive attitudes towards alternative proteins and attracting government support, investment, and academic interest.

GFI India

GFI India Program Outputs Achieved in the Past 18 Months (January 2021 – June 2022)

GFI India works primarily toward achievements under ACE’s Corporate Engagement, Education, Research, Legal or Policy Work, and Media Outreach program types.

Corporate Engagement

GFI India’s flagship initiative — the [India Smart Protein Innovation Challenge \(ISPIC\)](#) — focused on training the next generation of innovators to develop smart protein products that offer safe, nutritious, and sustainably-sourced solutions to animal-sourced foods for the global food system. The aim of ISPIC was three-fold: to educate a strong pool of industry-ready smart protein talent including scientists, employees and entrepreneurs; to encourage & inspire innovation, creativity, and problem-solving for key white space commercial and research opportunity levers identified; and to engage by creating meaningful and structured avenues for young and motivated talent to showcase their ideas, receiving tangible outcomes for both participants and the industry stakeholders alike. ISPIC 2021 offered INR 21,00,000 in prize money across the top 20 teams — four times higher than ISPIC 2020, which offered INR 5,00,000 in prize money to the top four teams. The program was run in partnership with [CIIE.Co](#), supporting partners, and our smart protein ecosystem partners.

Education

ISPIC 2021 was split across two tracks, i.e. Innovation and Entrepreneurship and saw 745 participants from 500+ universities in 100+ cities across 25 states, with 320 candidates certified through the online Phase 1 Digital Lab, speaking to our vision of creating impact pan-India via this intervention. Of these participants, 96 teams were formed for the Innovation Phase (Phase 2), of which 53 teams moved on to the Inspiration Phase (Phase 3). During Phase 3, these 53 teams were provided with additional resources and group [mentoring sessions](#) of up to 25 hours. The final phase saw 23 teams showcasing their solutions in front of an expert panel of judges as per their chosen track ([Track 1](#) and [Track 2](#) Demo Days). Participants were provided pitching resources and 1:1 mentoring from the GFI India team. Reflecting on their overall experience of ISPIC on a scale of 1-10, 75 percent of participants rated their experience as 9+ and 20 percent of participants rated their experience as 8.

The [ISPIC Inspiration Webinars](#) serve as instructional standing resources for GFI India's (nearly 1000 member) [community](#) and have garnered more than 4500 cumulative views already. We were also approached by [Food Safety Works](#) to feature the webinars on their [Training Academy Portal](#) which has over 5,000 registrations and on the associated [Learning App](#) which has 500+ downloads. Once listed, the update would go out as part of their newsletter to around 30,000 subscribers.

In early November 2021, against the backdrop of a sustained pandemic, GFI India hosted the Smart Protein Summit 2021, with the singular aim of transforming the future of food in India to address issues like malnutrition, climate change, food insecurity, and public health risks. The virtual Summit drew in encouraging levels of engagement as entrepreneurs, respected academic researchers, as well key corporate and government stakeholders participated in the event as keynote speakers, panelists and audience members. The [Smart Protein Summit 2021](#) saw 1890 registrations and 1134 attendees i.e. a 60% turnout rate, which was encouraging, given growing digital fatigue and with average virtual event turnout stats reported at ~47%. The Summit welcomed stellar keynote speakers, such as [Mr. Suresh Narayanan](#) (MD & Chairman, Nestle India), [Mr. Siraj Chaudhry](#) (Fmr. Chairman, Cargill India; Current MD & CEO, NCML), [Ms. Vinita Bali](#) (Fmr. CEO & MD, Britannia Industries; Fmr. VP, Coca Cola) and [Dr. Uma Valeti](#) (CEO/Founder, UPSIDE Foods).

The summit was focused on moving the sector forward through new product launches and commitments to a National Mission for Smart Protein (more information on this in the Policy section below). We hosted [curated closed-door roundtable discussions](#) with our stakeholders across science, business and policy, and presented the [economic analysis research](#) undertaken in partnership with Deloitte India.

Research

Although India's smart protein sector has truly taken off over the last two years with new products going to market every few months, more than [50 startups](#) active in the space, 200+ SKU's on the Indian market, and an ecosystem of [80+ companies](#) supporting the growth of these startups, there's a lot that remains to be seen and the market size of the smart protein sector in India hasn't been comprehensively mapped before. GFI India has been working with Deloitte India to gauge what smart protein could mean for India's economic future in terms of market size, export potential, and job creation. We have considered plant-based meat, eggs, dairy, fermentation-derived meat and cultivated meat for this study.

Our market size models were built using the data from primary research done by GFI India on the consumer awareness and replacement potential of alternative proteins along with the assumptions on taste and price parity. We validated our assumptions on taste and price parity to conventional animal products through detailed primary interviews conducted with stakeholders across the value chain. We worked with startups, large corporations, ingredient suppliers, co-manufacturers, and distributors across smart protein categories in India, and all of this data was fed into Deloitte India's proprietary models to arrive at the final numbers for this analysis. The top line figures show that the total market potential (domestic market size + exports) for smart protein in 2030 ranges from INR 11,270 crore (USD 1.4 billion) to INR 30,134 crore (USD 3.8 billion). The [Smart Protein Market Size & Export](#)

[Potential in India by 2030](#) 2-pager provides further details about market size specific categories, and the detailed report with the economic impact and job creation numbers will be available later this year.

Policy

GFI India deepened its engagement with high-level governmental bodies and critical research organizations including the Ministry for Food Processing Industries, the Department of Biotechnology, the Food and Safety Standards Authority of India, NITI Aayog, the Biotechnology Industry Research Assistance Council, the Sector Skill Council for Food Processing, the Agricultural & Processed Food Products Export Development Authority, as well as notable industry associations such as the Federation of Indian Chambers of Commerce & Industry, to secure their buy-in and work together to kick off a “National Mission for Smart Protein.” Through multi-stakeholder consultations, GFI India proposed several key action plans for 2022-2023. Leaders of key institutes and government agencies have unilaterally expressed enthusiasm and willingness to partner with GFI India on convening a “Smart Protein Task Force” and participate in industry stakeholder consultations to build the entrepreneurial ecosystem for alternative protein. Furthermore, we have worked with several government agencies and institutional partners – including ICAR-Indian Institute of Millets Research, Central Institute of Fisheries Education, and the University of Trans-Disciplinary Health Sciences and Technology (TDU) – all of whom have MoU's with GFI India and as a part of that MoU have agreed to participate in the Smart Protein Scientific Forum. We have further government agencies and institutes that will be onboarded to this initiative soon and we are aiming to make an announcement at the Smart Protein Summit 2022. We have also confirmed their participation to establish the Smart Protein Scientific Forum, a national platform and council of scientific leaders who will map several opportunities in the development of alternative protein in India across the value chain, and then identify topic areas for R&D and talent development. GFI India also had discussions with academic, regulatory and export development bodies to build supportive regulatory frameworks and policy platforms to increase the domestic production and export of alternative protein ingredients and end-products from India.

Media

Through extensive outreach to journalists, we have been able to secure over 362 pieces of influential media coverage for alternative proteins in outlets across India, in mainstream media, startup press, financials, trade bulletins, and other publications. Of this, more than half of our media hits, 248 to be exact, were related to the Smart Protein Summit 2021.

Through 2021 and the first half of 2022, as in-person events gained momentum, the GFI India team spoke at 52 external events as panel experts on a range of scientific, policy and business related panels.

GFI Israel

GFI Israel Program Outputs Achieved in the Past 18 Months (January 2021 – June 2022)

GFI Israel works primarily toward achievements under ACE’s Research, Legal or Policy Work, Corporate Outreach, Education, Media Outreach, and Capacity-Building program types.

Science & Technology

1. GFI Israel initiated, advocated for (including in front of the Prime Minister) and gave scientific support to the launch of the world’s largest [Cultivated Meat Consortium](#) - an Israel Innovation Authority-funded group consisting of 24 academic labs and companies working together on cultivated meat R&D. The consortium is backed by \$18 million in government funding and received final approval in April 2022.
2. We significantly supported the increase in the amount of active academic labs researching alternative proteins from 28 in 2021 to an expected 60 by the end of 2022. To do so, GFI Israel held dozens of lectures and hundreds of individual meetings, and recently partnered with the Ministry of Science Technology and Innovation and the Ministry of Agriculture and Rural Development to launch a \$1.2 million [Alternative Protein Research Grant Program](#), with the government matching every GFI dollar four to one. This initiative will fund 13 academic research projects, and GFI will serve as an equal partner in all decision-making. At present, more than half of the academic researches in Israel have received some financial support from GFI.
3. The Alternative Protein R&D course, developed in 2019 by our Senior Scientist Dr. Tom Ben Arye, was taught in four universities in Israel this year, giving a first-of-its-kind comprehensive research education to hundreds of advanced-degrees students. Ten more universities are in the early stages of designing new courses with help from our curriculum repository.

Policy

1. GFI Israel developed a National Policy Plan together with Earnst & Young to set the roadmap for Israel’s leadership in alternative protein research and innovation. The plan details the

vision, major gaps and necessary government involvement, and calls for more than \$350M in public investment, which will result in significant benefits for the Israeli government, including job creation (more than 50,000 jobs), food security, improved export potential and increased tax revenue.

We work with the most senior government officials and political leaders to implement the plan's ambitious research funding, infrastructure establishment and regulation goals. The plan was presented to many senior officials, and led to several direct outcomes including our joint grant program with the Ministries of Science and Agriculture, a ~\$20M government bid for fermentation R&D infrastructure (to be announced by the end of 2022), a pilot novel food regulation process by the Ministry of Health and more. Between 2011 and 2021, the Israel Innovation Authority granted \$24 million across different projects to aid in establishing alternative protein startups and support more mature startups in building pilot facilities.

2.

[REDACTED]



- 3. GFI Israel’s Associate Director, Ari Ben Dror, was invited to the Israeli President's Residence as part of the Israeli Climate Forum, to participate in the forum on behalf of GFI Israel in the Food, Agriculture and Nature Cluster. Ari briefly met President Isaac Herzog and discussed GFI’s contribution to the forum while stressing the importance of highlighting alternative proteins as a key climate solution. Participating in the Israeli Climate Forum is one of several endeavors GFI Israel has undertaken in order to promote alternative proteins as an essential solution amid climate-centered governmental forums.

- 4. The GFI Israel team worked extensively with the Ministry of Foreign Affairs and multiple Israeli embassies to advance alternative protein and global collaborations, including the embassies in Japan, Singapore, and China. We also presented the case for alternative proteins in several international forums, including a FoodTech event that GFI organized with the Israeli Economic Mission to Rome and at a diplomatic conference dedicated to alternative proteins, organized by the Israeli Ministry of Foreign Affairs and the Israeli Export Institute.

Innovation

- 1. Working in the Startup Nation, our innovation theory of change is that we are most impactful at the venture-creation stages, while in later stages the existing innovation ecosystem is sufficient. Hence, we focus on mapping opportunities and creating general enthusiasm around the field through our annual State of Alternative Protein Reports, and by creating platforms to support startup formation and development. Among our recent achievements are the following:
 - a. Startup formation - GFI Israel provided direct consultation and guidance to six of the ten alternative protein startups established in Israel since the beginning of 2022. In July 2022 we held an early-venture acceleration day for eight up-and-coming startups that have yet to secure pre-seed investment but show great science and technology potential. The ventures presented their pitch decks to the GFI team for feedback, followed by 1:1 discussions with GFI’s Corporate Engagement, SciTech, Policy and Communications departments. The eight ventures were selected following a mapping

- of the most promising projects we have met during the past year, with the aim of helping them navigate through future steps in establishing an alternative proteins company and pursue the most relevant funding opportunities.
- b. Mapping opportunities - In March 2022 we published the State of the Innovation Report, revealing that while global investments in alternative proteins saw the rise of more than 60% in 2021, investments in Israeli alternative protein companies surged by more than 450%, with \$623M in raised capital, second only to the United States. GFI Israel held webinars in Hebrew and English presenting the main insights from the report, reaching 350 registered attendees and prompting 1,600 downloads of the report to date. The report garnered coverage from major local and international media outlets. We use the reports to drive action on many occasions, including presentations to senior government officials, industry CEOs, and university leaders.
 - c. Serving as an ecosystem catalyst - During 2022 alone, our Corporate Engagement department held 110 meetings with alternative protein startups, entrepreneurs, food companies and investors. In addition, we held 3 condensed workshops for leading VCs looking to identify opportunities for investment in alternative proteins.

Communications and community

1. Two unique factors propelling Israel to the forefront of the global ecosystem are its high concentration of alternative protein stakeholders and its cross-sectoral collaborative approach. To fully realize these advantages it is important to create a community for stakeholders to connect. To do this, we work along two main axes: (1) we hold occasional ecosystem events, bringing together stakeholders from across the entire value chain to interact with each other while deepening their knowledge on key subject matters; and (2) we established and maintain a dedicated Alternative Protein Science Community, which currently includes 136 scientists who are active in the field, from both academia and industry. The community members engage in meet-ups on different aspects of alternative proteins and regularly exchange insights and professional advice. Main events held recently to engage members from both of the mentioned axes include the following:
 - a. In June 2022 we hosted an event titled “Our Plate - Our Planet” in collaboration with PLANETech, a climate-tech ecosystem organization, in order to deepen the climate-related knowledge of the Israeli alternative protein startups. The event was sold out within 24 hours and attended by nearly 200 ecosystem stakeholders.
 - b. In May 2022, we co-organized the annual Israeli Fermentation Society Conference at the Technion – Israel Institute of Technology with nearly 400 attendees, including dozens of scientists, CEOs, and CTOs. Nir and Dr. Michal Halpert, our Director of Academic Engagement, presented the bottlenecks for commercialization of fermentation-based technologies, and stressed the need for significant governmental investments in fermentation infrastructure.
 - c. In March 2022 we hosted a full-house event titled “How to Build a FoodTech Unicorn”. Attended by 250 of Israel’s leading FoodTech CEOs, entrepreneurs, investors, researchers and policy makers, the evening’s main event was a panel with the CEOs and VP-R&Ds of 4 Israeli startups who have each raised more than \$100 million - Redefine Meat, Aleph Farms, Future Meat Technologies and Remilk.

- d. In June 2021, we held an invite-only Alternative Protein Leaders Meetup for more than 200 industry stakeholders. The Israeli Minister of Science Technology and Innovation declared that she would “work to increase academic scientific research and strengthen important infrastructure [...] and to remove regulatory barriers in the field to remove hurdles for the next great Israeli scientific or industrial discovery.” The CEO of the Israeli Innovation Authority declared that he would “do everything possible to promote Israel’s leadership in the field of alternative protein.”
2. Media appearances - we had 67 media appearances in 2021 and 54 in 2022 to date. We focus our professional messaging through the major financial outlets, and general public messaging through mass media newspapers, websites and TV.

Operations & Development

1. We are committed to providing a collaborative and inclusive work environment that encourages growth and personal development. Our top priorities include cultivating a culture of care and openness and supporting intrinsic motivation within each employee that is driven by mission-alignment. These priorities are reflected in the following outcomes:
 - a. Since its establishment in 2019, all but one GFI Israel employees have been retained. The one employee who was not retained still serves on GFI Israel’s board.
 - b. The GFI Israel team has grown by four new members since 2021 - International Collaborations Manager Hila Goldenberg, Business Analyst Miriam Kalman, Associate Director Ari Ben Dror, and Operations Manager Neta Rosenthal. In August 2022, Team members Alla Voldman and Dr. Michal Halpert were promoted to Director of Policy and Director of SciTech, respectively.
2. For example, the GFI Israel team has grown by four new members since 2021: International Collaborations Manager Hila Goldenberg, Business Analyst Miriam Kalman, Associate Director Ari Ben Dror, and Operations Manager Neta Rosenthal. In August 2022, Team members Alla Voldman and Dr. Michal Halpert were promoted to Director of Policy and Director of SciTech, respectively.
3. We value regular feedback and transparent communication with everyone on our team. In order to facilitate this consistent exchange of feedback and ideas, we implement several procedures throughout the year, including: an annual Engagement Survey, with the latest survey attaining a 90% response rates and 100% Overall Satisfaction; all team members undergo a performance review twice a year; cycle plannings (three times per year) always incorporate a reflection and feedback session; bi-monthly department project update sessions include a dedicated slot for project-based feedback from the entire team; and 1:1 monthly OKRA checkups (Objectives, Key results & Actions) include a feedback facet when relevant.
4. GFI Israel was granted a Certification of Proper Management, provided by the Israeli Registrar of Non-profit Organizations, which indicates the organization has passed a basic vetting by the Government of Israel.