



The transformation of the food industry

An opportunity of historic proportions

ZINTINUS

VIENNA IMPACT INVESTMENT CONFERENCE 2025

ZINTINUS

ZINTINUS is a food tech venture capital fund focused on growth opportunities in Europe and the US

The **TRANSITION** of the **FOOD SYSTEM** is one of the **BIGGEST CHALLENGES** & one of the **BIGGEST OPPORTUNITIES** of our **TIME**.

As a Venture Capital Fund we are full focused on innovation in the Food Tech sector. Our aim is to make a positive contribution to the transition of the Food System. We are determined to support the upcoming wave of innovations, accelerate it and make it sustainable.

ZINTINUS





**FOOD IS ONE OF THE
MOST EXCITING THINGS
IN LIFE!**



\$ 8 trillion

Global Food Market
(3,1% CAGR)



WE CAN'T GO ON LIKE THIS!

THE TRANSITION OF THE FOOD SYSTEM

DRIVERS OF CHANGE



01

CONSUMER
PREFERENCES

Life
Vegan



Top 5

reasons

for paying a premium are
related to health and sustainability

~50%

consumers
eat plant-based protein
every week

4x

Growth to
market share ratio

2-3x

higher growth
of plant-based products

<https://gfieurope.org/european-plant-based-sales-data/>

02

CLIMATE CHANGE

33%

GHG emissions
induced by the Food System

50%

Habitable Land
used for Agriculture

75%

of agriculture land used for
Livestock

18%

Calorie Supply comes
from Livestock

37%

Protein Supply comes
from Livestock



02

CLIMATE CHANGE



1/3

of Food produced
is lost every year

03

HEALTH
SYSTEM

NCDs

are linked to
diet-related causes

€ 190bn

annual diabetes treatment cost
in the EU

>800 m

people are suffering
from hunger

2bn

people have no access
to healthy diets

04

FOOD
SECURITY

from 2017 - 2050

29%

population growth

100%

growth in protein demand

593 Mha

more land needed

4GT vs. 15 GT

GHG emissions to stabilize climate change at
2 degrees Celsius



FED UP WITH THIS?



OPTIMISM IS WARRANTED



INNOVATION IS NEEDED!!!

Alternative Proteins

„A snapshot ...“



Significant Positive Impact of Plant-Based Products

- ✓ 47 %-99 % less land
- ✓ 30%-90% less greenhouse gas
- ✓ 72%-99% less water
- ✓ no antibiotics.

All Good?

While many products achieved almost taste parity, some concerns aroused regarding their composition

- ⚡ **Highly processed**
- ⚡ **Controversial ingredients like**
 - Sodium
 - Sugar
 - Artificial colouring
 - Bulking ingredients like methylcellulose



It (can) will be done in a better way

Fermentation

- For **thousands of years**, fermentation has been used for food and drink products like yogurt, bread, beer and wine.
- Generation of **mycoprotein**, a single-cell protein from fungi through fermentation has turned into a very promising opportunity.
- **Rich in fibre and protein** but very **low in fat**, it is applied in various products, such as patties, cream cheese or chicken alternatives.
- One of its great advantages is the **structure of fungal fibres**, which enables the creation of food products with a composition similar to the original meat product.
- **Mycelium**, the vegetative part of the fungi, is the basis for a large variety of promising upcoming solutions.

-90%

water use
compared to plant based

-98 %

land use
compared to plant based

31x

faster growth
compared to plant based



THERE CAN'T BE ANY COMPROMISE ON:



TASTE



PROCESSABILITY

CLEAN
LABEL

INGREDIENTS

SOUNDS TO GOOD TO BE TRUE?
NOT QUITE!

**WELCOME TO THE NEW GENERATION OF
HIGH QUALITY PLANT-BASED FOOD!**

The logo for LAVIE, featuring the word "LAVIE" in a bold, black, sans-serif font. The letter "V" is stylized with a heart shape inside it. The logo is centered within a white circle.The logo for planted., featuring the word "planted." in a lowercase, purple, sans-serif font. A small trademark symbol (TM) is located at the top right of the period. The logo is centered within a white circle.The logo for PLANET FOODS, featuring the word "PLANET" in a bold, black, sans-serif font at the top, a stylized black circular graphic in the middle, and the word "FOODS" in a bold, black, sans-serif font at the bottom. The logo is centered within a white circle.

The logo consists of the words "LA VIE" in a bold, black, sans-serif font. The letter "V" is replaced by a heart symbol. The text is centered within a white circle, which is set against a dark blue background.

LA VIE

LA VIE

BACON, HAM AND LARDONS, WITHOUT MR PIGGY. 100% VEGGIE.

To save Mr Piggy's bacon we've created bacon, ham and lardons that are 100% vegan. Our products are perfect for sprucing up salads, making burgers or quiches and elevating pasta!



VEGAN DISHES WITH ALL THE TASTYNESS OF MEAT

Make all the iconic dishes in a veggie version. Your guests will leave with a big smile and a little fat on their fingertips. If you're a bit peckish... we advise you to nibble on something before reading these recipes.



La Vie™ Vegan Bacon Pizza

Mix the peeled tomatoes with a little salt and olive oil. Spread a ladle of this sauce on spread pizza dough.



The La Vie™ Vegan BLT

Heat the pre-cooked La Vie™ bacon in a pan for about 20 seconds, with a drop of oil.



The La Vie™ Vegan Quiche Lorraine

Preheat your oven to 180°. Spread the dough in a pie pan and prick it with a fork.



planted.

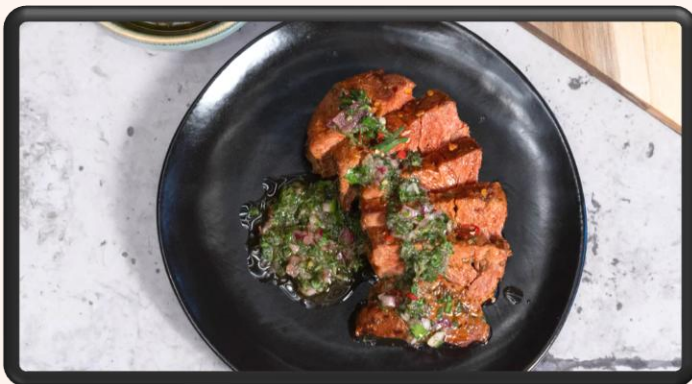
Why Planted?

Taste without additives

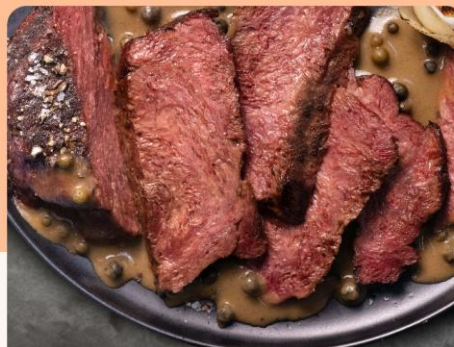
Planted consists exclusively of **100% natural ingredients**. We abstain from additives, flavor enhancers or flavors, but never taste! We have managed to create a unique flavor profile and texture that comes from natural ingredients and our technology, not additives. This makes every bite a treat for both our bodies and our palates.

Environment

These days, menu choices are increasingly made on the basis of environmental performance. Vegetarian and vegan options in particular are showing growing popularity as they are more environmentally friendly and sustainable. Restaurants that offer these options on their menu can thus not only protect the environment, but also appeal to a growing number of customers who value sustainability and conscious eating. Production of planted.chicken uses **85% less water** and emits **77% less CO₂** than conventional chicken production, making it the preferred choice for the environmentally conscious target group.



Our products



planted.steak

Thanks to our state-of-the-art fermentation process, planted.steak is juicy, tender and has an unmistakable umami flavor. True to our philosophy, it is made exclusively from natural ingredients such as soy protein, bean and rice flour, rapeseed oil, and once again sets a new standard in the category of plant-based meat products.



planted.chicken

Our first great love! This versatile meat is the perfect culinary basis for creativity in the kitchen. planted.chicken consists of just a few carefully selected natural ingredients: Peas, rapeseed oil, salt, water - and of course a healthy dose of vitamin B12 through fermentation.



planted.pulled

Shh! Spoiler alert: This is probably our staff's favorite product! Not only because it is the highest protein product on the market, but also because it is produced in a particularly sustainable way (the sunflower protein used comes from sunflower press cake, a waste product from the production of sunflower oil).

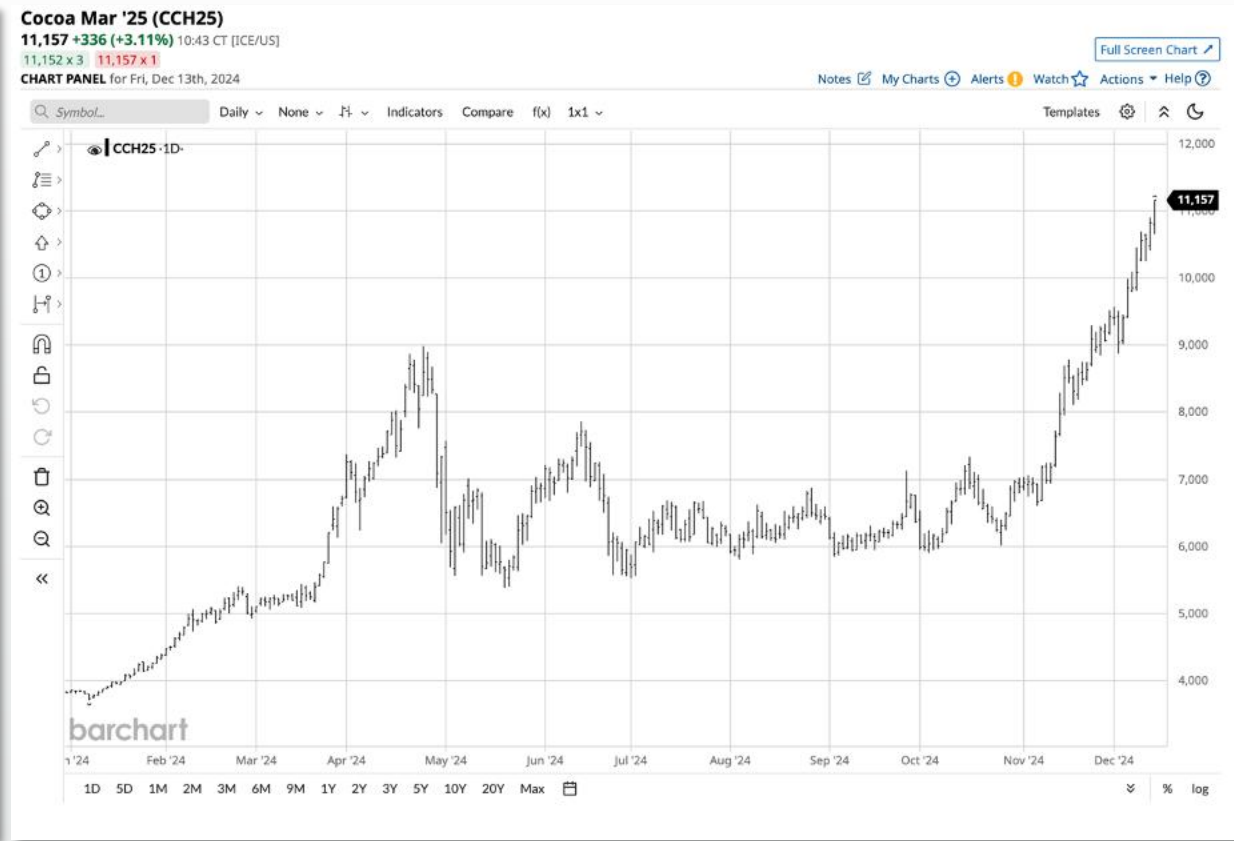
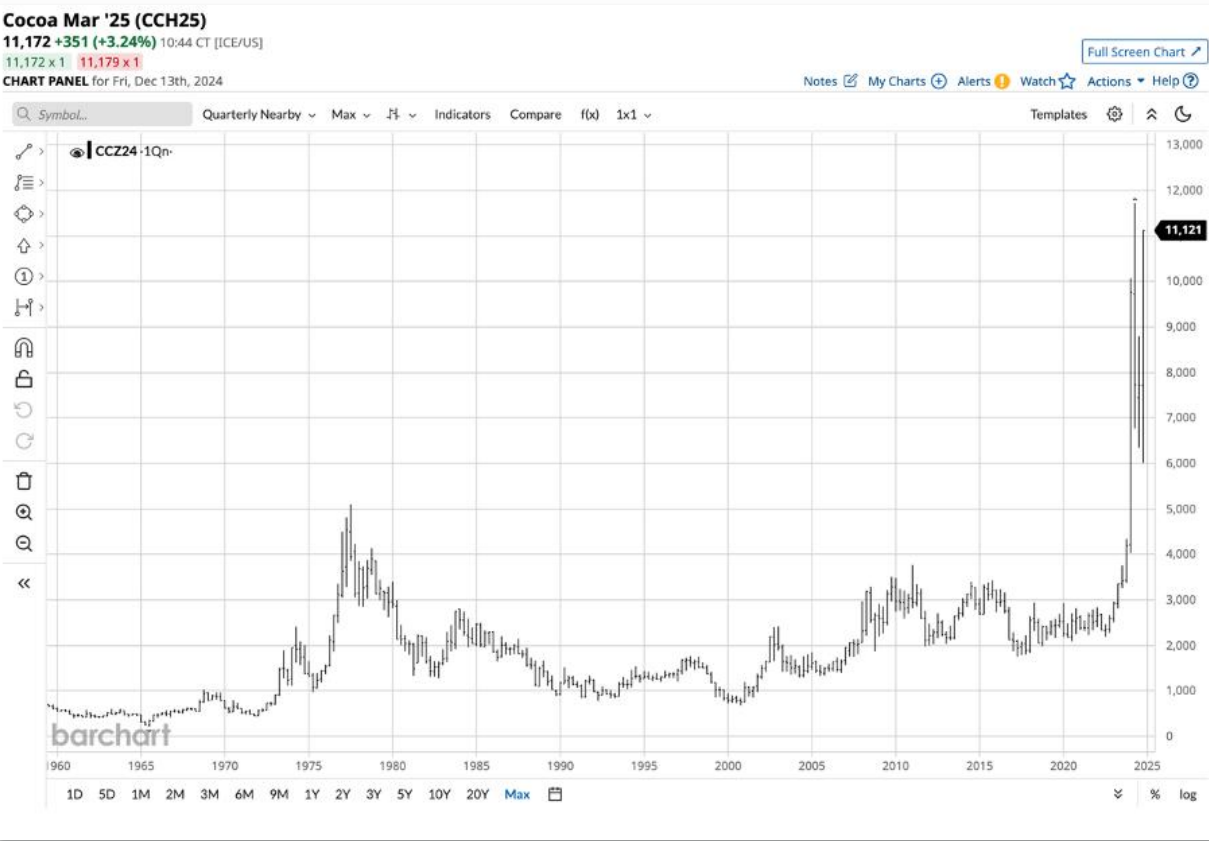




A commodity?



Scarcity drives hyperinflation





No chocolate. No kidding.

Now at REWE

The ice cream that catches you cold - even in October

This is what innovation tastes like - smooth salted caramel, crunchy hazelnuts, and the rich, chocolatey taste of ChoViva. The result? A new ice cream experience that's simply delicious. Because who says you can't enjoy a scoop of innovation in October? Now available at REWE.



Out now!



Food Tech Sector Update

Commercial & Industry Update

The alternative protein slow down in the US continued ...

**Plant-based meat by numbers:
Grim reading for the US retail market, brighter spots in foodservice and globally**

US retail sales of refrigerated plant-based burgers have continued their precipitous decline, dropping 26% YoY in the 52 weeks to April 20.

Image credit: istock/Natalia Semenova

May 16, 2025 | Elaine Watson

US retail sales of plant-based meat fell 7.5% to \$113 billion in the year to April 20, 2025, with units down 10%, according to new data from SPINS shared with AgFunderNews.

Sales of frozen meat alternatives were down 5.3% to \$782.3 million, accounting for 69% of category sales, while sales of refrigerated alt meat—a category that has been going backwards since Q3, 2021—fell 12.1% to \$349.7 million.

The only subsegments delivering growth over the 52-week period were frozen plant-based loaves and roasts (+0.7%), refrigerated cutlets, strips, and nuggets (+8.3%), refrigerated dogs (+1.9%), and refrigerated seitan (+1.7%), albeit off a small base.

Sales of refrigerated plant-based burgers, which were driving significant growth in the category a few years ago as retailers experimented with merchandising brands such as Beyond Meat in the conventional meat case, continued their precipitous decline, dropping 26% YoY.

For context, Circana data crunched by 210 Analytics shows US retail sales of conventional fresh meat rose 6% over the same period (volumes +2.7%), while sales of frozen processed meat & poultry were up 10.9% (units +10%), and sales of frozen unprocessed meat & poultry were up 4.2% (units +3.3%).

Pockets of growth in some plant-based categories in US retail

In calendar year 2024, SPINS data analyzed by the Good Food Institute (GFI) and the Plant Based Foods Association in a recent report shows that US retail sales of most plant-based categories were down last year against a backdrop of rising sales for conventional meat & seafood (+4%) and dairy milk (+1%).

According to the GFI, sales of plant-based meat and seafood sales dropped 7% to \$12 billion in 2024 (units -11%) while sales of plant-based milk fell 5% to \$2.8 billion (units -1%). Overall, plant-based food sales at US retail fell 4% to \$8.1 billion with unit sales down 5%.

US household penetration has stabilized at around 40% for plant-based milk and 13% for plant-based meat, adds the GFI, noting that pricing for most plant-based categories remains “two to four times higher than conventional counterparts on a per-pound, per-gallon, or per-dozen basis.”

It adds: “Plant-based meat and seafood’s dollar share was 1.7% of total retail packaged meat dollar sales, or approximately 0.8% of the total meat category. In the natural channel, the category’s share of packaged meat dollar sales was notably higher at 8%.”

However, it’s not all doom and gloom, says the GFI, noting that several plant-based categories demonstrated growth in 2024 including plant-based protein powders and liquids, bars, ready-to-drink beverages, tofu, tempeh, seitan, and baked goods and other desserts.

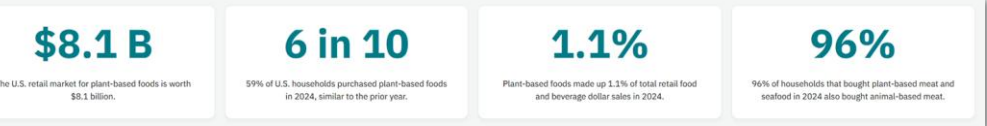
Source: [AFN](#)

Plant-based meat continued to slow down in the US.

Main drivers for the slow down are:

- **High price premium** versus conventional counterparts
- **Food inflation** leading to a “trade down” effect
- Controversial discussion about **Ultra Processed Food (UPF)** and the correlation with Alternative Protein.

However, there were also **signs of growth** in certain categories (plant-based protein powders and liquids, bars, ready-to-drink beverages, tofu, tempeh, and seitan, baked goods) and the penetration within consumer households remained high.



Source: [GFI](#)

SPORTS DRINKS

2025 State of the Beverage Industry: Sports, protein drink market experiences growth

Market appeals to more consumers thanks to health and wellness attributes

By Chloe Alverson, Associate Editor

Image courtesy of BODYARMOR/The Coca-Cola Co.

July 2, 2025

[f](#) [x](#) [in](#) [e](#) [p](#)

The May issue of *Beverage Industry* noted that sports and protein drinks are going beyond their traditional use for muscle building and training. Experts shared that the modern consumer is turning to these beverages to support active lifestyles and overall well-being.

“The rise of fitness-focused lifestyles has fueled demand for sports and protein drinks that go beyond hydration and muscle recovery,” said Mitch Madoff, head of retail partnerships at Keychain, New York. “Consumers want products that fit their holistic wellness goals, leading brands to innovate with clean ingredients, low sugar and added benefits like electrolytes and plant-based proteins.”

Tofu Emerges As Bright Spot in Embattled US Plant-Based Category

Source: [Green Queen](#)

By Amy Mridal — Published on May 26, 2025 — Last updated: May 26, 2025 [ALT PROTEIN](#) [ALT DAIRY](#) [CONSUMER TRENDS & INSIGHTS](#)

... while growth continued in most parts of Europe

Overall pattern for **Alternative Protein** in Europe:

Mixed but resilient—with sales volumes rising across several large markets as prices eased and private-label grew.

What grew inside the basket:

- **Cheese** outperformed in France & Italy (from a low base).
- **Yoghurt** rebounded in Spain; barista milk was a UK bright spot.
- **Plant-based meat** held up better in cooking formats (mince/strips) than center-plate items (burgers/fillets) in the Netherlands.

Price & range dynamics: Retailers leaned into value/private-label (notably FR/DE/IT/ES) to widen reach; this helped volumes even where value growth was modest.

Price-parity initiatives that began in 2023 continued spreading across European banners into 2024 (e.g., Lidl and others), supporting trial at mainstream price points.

Plant-based sales in Europe 2024

- **France:** 2024 plant-based market **€537m, +8.8% vs. 2023**; all tracked categories grew in value, units and volume.
- **Germany:** **€1.68bn, +1.5% value** with **+7.1% volume**, indicating price normalization; Germany remains Europe's largest market by size and per-capita spend.
- **Italy:** **€639m, +7.6% value** vs. 2023; **plant-based cheese** doubled in value **2022→2024** (small base).
- **Spain:** **€491m, +6.6% value; +9.8% volume**, with plant-based milk near **10% share** of total milk.
- **Netherlands:** **€288m, -5.9% value**; volumes/units trended down.
- **UK:** **£904m (€1.07bn), -4.1% value**; declines slowed; **barista milks +10.4% volume**.

Source: [GFI](#) & [TableMedia](#)

Market projections remain strong for coming years

Plant-based meat

Region	2024/23 size	2030 projection	CAGR
United States	\$3.21B (2024)	\$8.70B	18.1%
Europe	\$2.14B (2023)	\$7.83B	20.4%
Asia-Pacific	\$1.37B (2023)	\$4.82B	19.7%



Plant-based dairy (all dairy alternatives: milk, yogurt, ice cream, cheese, creamers, etc.)

Region	Latest base	2030 projection	CAGR
United States	\$7.27B (2024)	\$14.28B	12.0%
Europe	\$5.52B (2023)	\$11.71B	11.4% ('24-'30)
Asia-Pacific	\$11.76B (2022)	\$31.85B	13.3% ('23-'30)



Source: Grand View Research

Food Tech Sector Update

Governmental Initiatives

Upgrading the Food System will remain a priority

CLIMATE CHANGE & HEALTH

NEWS > AGRICULTURE AND FOOD

POLITICO

Fixing our broken food systems: The \$10T question

"We have come to the end of the road," leading climate economist warns.

SHARE

POLITICO PRO Free article usually reserved for subscribers



Experts found that policies were inflicting vast health and environmental costs that could be mitigated by steps such as producing and eating less meat, and supplying more food locally | Sergei Supinsky/Getty Images

FEBRUARY 5, 2024 4:00 AM CET
BY PAULA ANDRÉS

Fixing broken food systems could generate up to \$10 trillion in economic benefits per year globally, according to leading scientists who say politicians are doing too little to tackle the single largest threat to human and planet health.

FOOD SECURITY



HOME / 30 BY 30

30 by 30

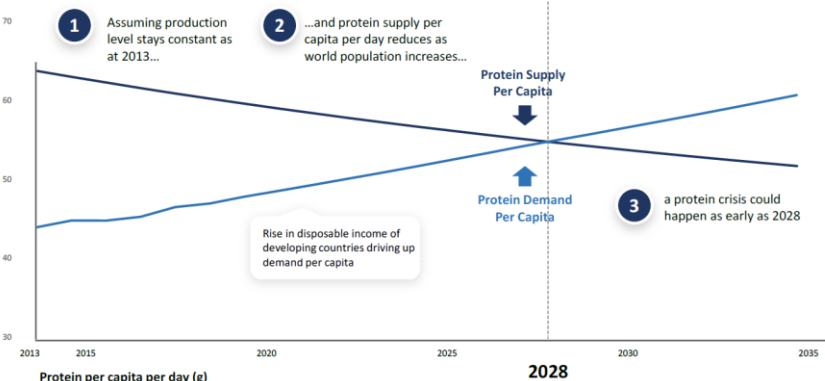
Strengthening our food security



With the majority of our food imported, local production is important to reduce our reliance on food imports. It can also mitigate the impact of supply disruptions.

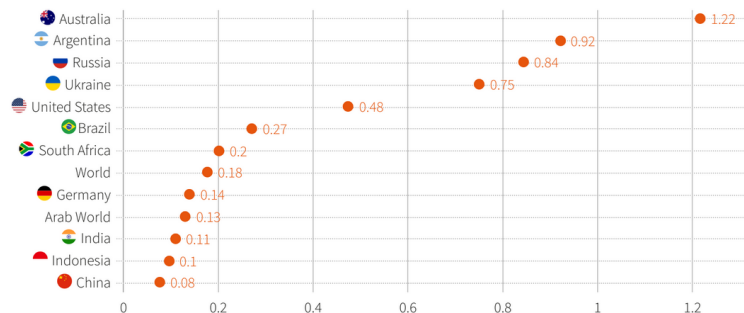
That is why we're working towards '30 by 30' — to build up our agri-food industry's capability and capacity to sustainably produce 30% of our nutritional needs by 2030. This goal also features in the Singapore Green Plan 2030, and will help build a more resilient food future.

The "protein paradox"



Arable land per capita (hectares per person)

Despite its large land size, China's arable land per capita is smaller than the world's average.



Note: As of 2021
Source: The World Bank
Reuters Graphics

Governmental support programs continued to emerge

Governmental programs have been on the rise, particularly in Asia to address concerns about food security. Sustainability remains and additional driver for governmental support.

EUROPE

- **Vision for Agriculture and Food (2025):** Long-term competitiveness + resilience, farmer income, fairer value chains, waste reduction.
- **Protein diversification push:** the Commission signaled work toward an **EU protein diversification plan** (reducing import dependence; boosting plant/alternative proteins).

China

- **“No. 1 Document” (2024 & 2025):** annual top-level policy blueprints put **food security** front-and-center—farmland protection, grain/yield stability, **biotech cultivation pathways**, and support to grain-producing regions.
- **China’s 10-year initiative:** China launched a 10-year food security initiative (2025–2035) to strengthen self-sufficiency and resilience amid geopolitical tensions, climate risks, and slowing growth.

Japan

- **Basic Law amended (2024)** to **prioritize food security** and a **sustainable food system**; follow-on work in 2025 revises the **Basic Plan** to operationalize targets (self-sufficiency, climate-smart ag, smart-farming uptake)

Singapore / ASEAN

- **Singapore “30×30” support:** continued **ACT Fund** grants (applications through **Dec 31, 2025**) to scale local high-tech farming—core to the city-state’s **food-security** target.
- **ASEAN sustainable agriculture declaration (Oct 2024):** leaders adopted a region-wide commitment to **sustainable ag practices** and **resilient value chains**

Politics & Law

European Commission Commits to Developing a Protein Diversification Plan

April 1, 2025

Earlier this year, European Parliament members Anna Strolenberg and Sigríð Friis wrote a [letter](#) to Agriculture Commissioner Christophe Hansen, calling on him to develop an EU strategy on protein diversification. The letter was supported by a broad coalition of MEPs from across the political spectrum.

Source: [Veconomist](#)

China announces rural revitalisation plans in annual policy blueprint

By Reuters

February 23, 2025 12:14 PM GMT+1 · Updated February 23, 2025



A farmer walks next to a harvester operating at a wheat field in Wei county of Handan, Hebei province, China June 11, 2021. REUTERS/Tingshu Wang/File Photo Purchase Licensing Rights

SHENZHEN, China, Feb 23 (Reuters) - China will deepen its rural reforms as part of efforts to revitalise the agricultural sector and bolster food security in the face of U.S. tariffs, an economic slowdown and climate change, state media reported on Sunday, citing a rural policy document.

The State Council's annual rural policy blueprint, known as the "No.1 document", outlined plans to improve rewards and subsidy systems for major grain-producing areas, promoting the industrialisation of biotech cultivation among other measures, state news agency Xinhua reported.

Source: [REUTERS](#)



OUR IMPACT PLEDGE

Impact management @ZINTINUS

We analyze ESG and impact pre investment and manage our portfolio companies closely

Investment process

ESG Questionnaire and Due Diligence

Each company fills out a questionnaire that covers all relevant topics within the ESG spectrum. It helps us focus on potential issues and set board agendas on future issues to address.

Company and contact	How are you involved in the business operations of the company? Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures.	Yes
Board & Management	How are you involved in the business operations of the company? Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures.	Yes
Carbon	How are you involved in the business operations of the company? Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures.	Yes
Water	How are you involved in the business operations of the company? Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures.	Yes
Waste	How are you involved in the business operations of the company? Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures.	Yes
Energy	How are you involved in the business operations of the company? Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures.	Yes
Human Resources	How are you involved in the business operations of the company? Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures.	Yes
Customer Health, Wellbeing, and Safety	How are you involved in the business operations of the company? Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures.	Yes
Customer Privacy, GDPR	How are you involved in the business operations of the company? Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures.	Yes
Product Quality & Safety	How are you involved in the business operations of the company? Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures.	Yes
Product Innovation	How are you involved in the business operations of the company? Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures.	Yes
Product Sustainability	How are you involved in the business operations of the company? Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures.	Yes
Product Labeling	How are you involved in the business operations of the company? Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures.	Yes
Product Affordability	How are you involved in the business operations of the company? Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures.	Yes
Product Accessibility	How are you involved in the business operations of the company? Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures.	Yes
Product Security	How are you involved in the business operations of the company? Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures. Please provide details of all subsidiaries and joint ventures.	Yes

Definition of impact metrics and calculation

For each company, ZINTINUS identifies relevant outcome pillars and metrics. Sustainable development goals

e.g. reduced greenhouse gas emissions compared to traditional protein products

Name of indicator	Description of indicator	Measurement formula	Weighting	Underlying assumptions	Data collection tool
Weighted AI Automation rate	Weighted AI automation rate is the % of model that is fully automated vs. what still requires manual training.	annual average	18%		AWS
Accuracy rate (precision)	Accuracy rate describes the % of all accurately labeled images (vs. total nr of images)	annual average	18%		AWS
CO2 saved (tons)	CO2 saved sums the saved kg multiplied by the avg. CO2 per kg of food waste.	Sum - cumulative YTD (EOY)	25%	1 kg of edible food waste = 4.7kg of CO2	Quicksight Report (AWS)
Food waste saved per property %	Avg. edible food waste saved per property measured longer than 5 months	annual average	25%	only include customers who've measured longer than 5 months and have implemented min. 3 actions	Quicksight Report (AWS)
Content downloads (people reached)	Avg. of Q3 2025 with new website content downloads from website (case studies and other resources)	sum / cumulative EOY	7%	Launched new website: June 15 downloads per month for 5 months	Hubspot CRM
Website visits # in '000 (monthly)	# Website sessions per month	monthly numbers	7%		Google analytics

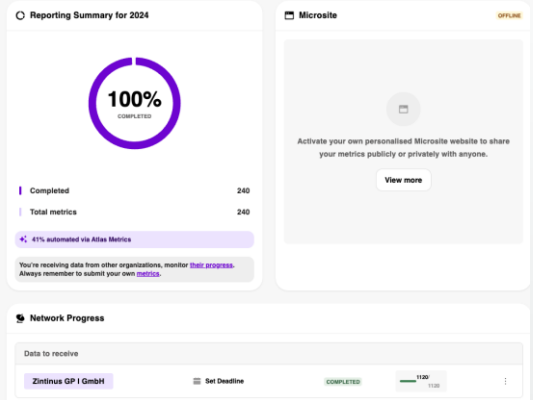
Portfolio management

ESG reporting

- Invest Europe Framework via Atlas Metrics
- Follow-up on outliers and questionable numbers

Impact KPIs per company

- Collect data against identified metrics using a mix of company-reported data, targeted surveys and other benchmarks



Portfolio Company	Impact Goal #	Impact Goal Description	Measurement unit	Weighting
Blue Farm	1	CO2 saved	in kg	83%
Blue Farm	2	Plastic saving	in kg	20%
DSM	1	Reduced consumption of water	in kg	40%
DSM	2	Reduced consumption of sugar	in kg	60%
Migley	1	CO2 saved	in tons CO2	40%
Migley	2	Water usage	in million liter	40%
Migley	3	Water reduction	in tons H2O	20%
Liliani	1	Customer Longevity Score	0-4 of 5 customer improvements	100%
Urbifarm	1	Reduction of CO2 emissions	in tons	70%
Arvifarm	2	Reduction of water requirements	in tons	10%
Urbifarm	1	CO2 saved	in tons	80%
Urbifarm	2	Water saved	in million liter	20%
Urbifarm	3	Water reduction	in tons	10%
Urbifarm	4	Water reduction	in tons	10%
Urbifarm	5	Water reduction	in tons	10%
Urbifarm	6	Water reduction	in tons	10%
Urbifarm	7	Water reduction	in tons	10%
Urbifarm	8	Water reduction	in tons	10%
Urbifarm	9	Water reduction	in tons	10%
Urbifarm	10	Water reduction	in tons	10%
Urbifarm	11	Water reduction	in tons	10%
Urbifarm	12	Water reduction	in tons	10%
Urbifarm	13	Water reduction	in tons	10%
Urbifarm	14	Water reduction	in tons	10%
Urbifarm	15	Water reduction	in tons	10%
Urbifarm	16	Water reduction	in tons	10%
Urbifarm	17	Water reduction	in tons	10%
Urbifarm	18	Water reduction	in tons	10%
Urbifarm	19	Water reduction	in tons	10%
Urbifarm	20	Water reduction	in tons	10%

Portfolio impact reporting

Aggregate data on impact metrics from different companies into a consolidated impact picture and narrative for the portfolio.

AN INDUSTRY IN TRANSITION

Consumer
Preferences

Sustainability

Food Security

\$ 8 trillion

Global Food Market
(3,1% CAGR)

Health
System

Regulation

Economic
Promotion

Fields of Innovation

A wide range of new sustainable and healthy alternatives is developing

Alternative Protein

- Plant-based Protein
Meat, Fish, Egg & Dairy
- Fermentation based Protein from
Mushrooms and Algae
- Cell-based Meat, Fish and Dairy
Alternatives

+96%
\$ 68.5 bn
2020-2025

Clean Nutrition

- Free From Products
(No Sugar, No Fat and no additives)
- Sustainable added value
(e.g. Good for you, for the environment and society)

+66%
\$ 64.1 bn
2020-2025

Functional Food

- Personalized Nutrition
(System Solutions)
- Healthy and Convenient Food
(Drinks, Snacks)
- Nutritional Supplements
- New Sources *(e.g. CBD, Acai)*

+38%
\$ 275.7 bn
2020-2025

Food Waste Reduction

- “Consume” instead of waste
- Upcycling Solutions /Side-stream and press-cake
- Tracking, Tracing & Analytics

33%
of annually produced
food is lost
\$ 1 trillion
total vlaue





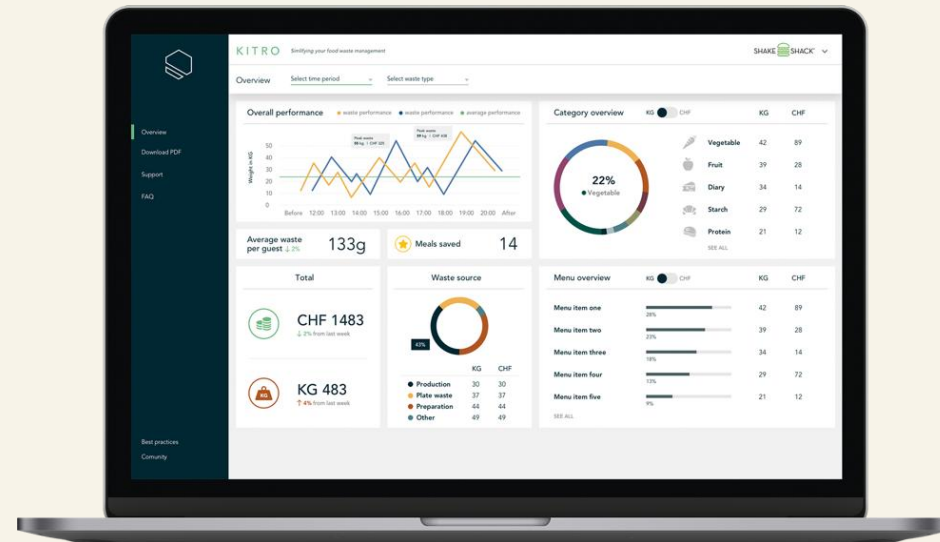
THE **FOOD WASTE** SOLUTION FOR MODERN KITCHENS

KITRO automates food waste collection using **AI-based computer vision** and provides **valuable insights** that help hotels, restaurants, etc. **save costs, reduce CO₂, and increase efficiency** without interfering with your kitchen operations.

Up to **60 %**
Food waste reduction
within 6 months



- Minimal installation effort
- No staff training required
- Extremely high detection accuracy
- Simple evaluation via a dashboard
- Advice from experienced experts
- High ROI





A wide range of opportunities...

ONE OF THE STRONGEST DRIVERS OF CHANGE IS ...



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