

WELCOME TO THE

Z I N T I N U S

FOOD TECH SUMMIT 2026

ZINTINUS

FOOD TECH SUMMIT 2026

AGENDA

12:30 Arrival

13:00 Food Tech Sector Insights

- The Drivers of Change of the Food System
- The Magnitude and the Impact of the Change
- State of Science in Food Tech
- The Value Creation Potential and ZINTINUS Investment Thesis
- The Food Tech Community

14:30 Coffee Break

15:00 Turning Promise into Opportunity
Examples of Impact and Value Creation

Presentations from
Planet A, Planted, Blue Stripes, NEOH, It's Fresh, KÄPÄÄ, and KITRO,
who will explain their strategies and business models.

Short Coffee break in between around 16:30

18:30 General Q&A

19:30 Get Together with a Flying Dinner
(serving you some of the delicious new food 🍴)



THE TRANSFORMATION OF THE FOOD INDUSTRY

AN OPPORTUNITY OF HISTORIC PROPORTIONS

ZINTINUS
FOOD TECH SUMMIT 2026

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 CANNOT GO ON LIKE THIS!

THE TRANSITION OF THE FOOD SYSTEM

DRIVERS OF CHANGE



01

CONSUMER
PREFERENCES



120bn

Dietary Supplements
market in the US / EU

~6-8%

CAGR

40bn

Alternative Protein
market (global)

7-9%

Growth of plant-based products
(Spain / Germany)

235bn

Functional Food
market in the US / EU

~4-5%

CAGR

51%

Customers willing to pay a **premium**
for health and sustainability

~50%

consumers
eat **plant-based protein**
every week

**Food is a top priority for
Gen Z and Millennials**

who heavily prioritize health,
sustainability, and functional benefits in
their diets over other expenses.

Sources: TechLabs EU, Precedence Research, Deloitte US consumer survey

02



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

~13.2% is lost **UPSTREAM** between harvest and retail (Food Loss Index) and

~19% is wasted **DOWNSTREAM** at retail/food service/households

Sources: [UNEP Food Waste Index Report 2024](#)

03

HEALTH
SYSTEM

NCDs

are linked to
diet-related causes

€ 1tn

global annual diabetes treatment cost

A 338% increase over the past 17 years

~700 m

people are suffering
from hunger

2,6bn

people have no access
to healthy diets

Sources: SOFI Report 2025 | DF Europe Compendium of Country Profiles 2025 | WHO 2025 | International Diabetes Federation Fact Sheets

04

FOOD
SECURITY

29%

population growth

from 2017 - 2050

100%

growth in protein demand

593 Mha

more land needed

4GT vs. 15 GT

GHG emissions to stabilize climate change at
2 degrees Celsius

Sources: UN World Population Prospects 2024 World Resources Institute Commonwealth Scientific and Industrial Research Organisation (CSIRO) European Parliament Research Service 2024

A COMMODITY?

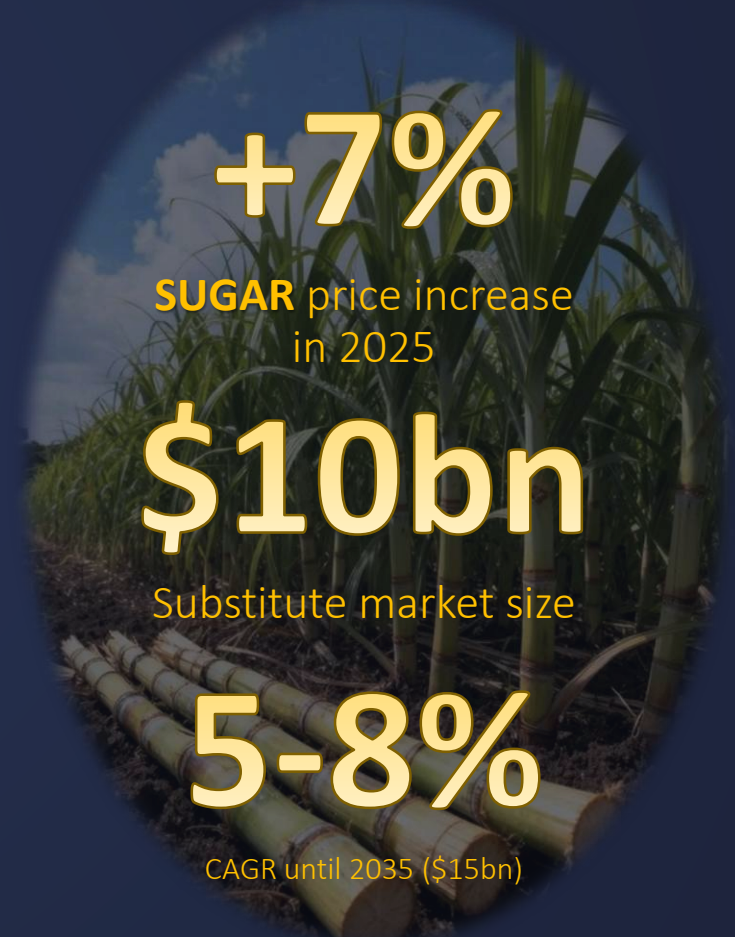
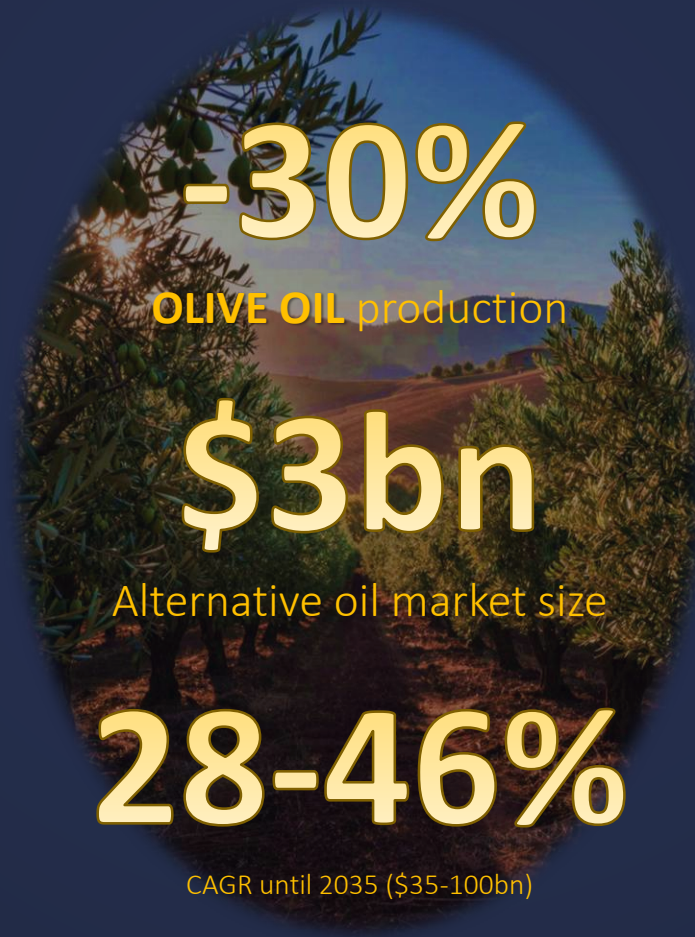


Scarcity drives hyperinflation



Scarcity – the catalyst for change of the food system

Traditional supply chains for cocoa, coffee, olive oil, and sugar are fracturing under climate stress (El Niño, drought) and geopolitical instability. This has created a **structural opening** for alternative ingredients—no longer just "niche" health products, but essential **supply chain risk mitigators**. The market for these alternatives is shifting from *novelty* to *necessity*, with Growth Indicators (CAGR) often outperforming the traditional commodities they replace.





FED UP WITH THIS?



OPTIMISM IS WARRANTED



INNOVATION IS HERE

(LITERALLY IN THE ROOM)

Food Preservation

Food Waste Analytics

**Recombination of
Technology and
Ingredients**

**Functional Food
Enhancement**

New Ingredients
(nutritious + delicious + affordable)

**Exploiting the Full
Potential
of a Fruit and Vegetables**

Alternative Protein
(yummy + healthy + affordable)

**Functional
Supplements**

**BUT BEFORE
THAT**

A FEW MORE THINGS

THE MARKET

Commercial & Industry Update

ALTERNATIVE PROTEIN slowed down in the US but has huge potential

Plant-based meat by numbers: Grim reading for the US retail market, brighter spots in foodservice and globally May 16, 2025 | Elaine Watson

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

US retail sales of plant-based meat fell 7.5% to \$11.3 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 5.2% to \$782.2 billion, accounting for 69% of category sales, while sales of fresh meat—a category that has been going backwards since Q3, 2021—fell 12.1% to \$349.7 million.

The only subsegment showing growth in the week ended April 20 was plant-based steaks and roasts (+0.7%), with outlets, strips and nuggets (+1.9%) and refrigerated seitan (+1.7%) also showing gains.

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 decline, falling 26% to \$1.1 billion in the year to April 20.

For context, Circana data crunched by 210 Analytics show US retail sales of conventional fresh meat rose 6% over the same period (volumes +1.9%), while sales of fresh chicken meat and 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 \$1.2 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.

\$ 8bn
US Plant-based food market 2024

Main drivers for slow down:

- High price premium
- Food inflation leading to a “trade down” effect
- Controversial discussion about Ultra Processed Food (UPF)

Signs of growth in certain categories
(plant-based protein powders and liquids, bars, ready-to-drink beverages, tofu, tempeh, and seitan, baked goods)

Penetration within households remained high

High growth expectation form coming years

9-12%

Expected CAGR

Source: [AFN](#), [GFI](#), [Green Queen](#), [BevIndustry](#)

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



\$ 33bn
US Plant-based food market projection for 2032

The May issue of Beverage Industry noted that sports and protein drinks are going beyond their traditional use for muscle building and training. Experts stress that the modern consumer is turning to these beverages for health and wellness.

“The rise of fitness-focused lifestyles has fueled demand for sports and protein drinks that go beyond hydration and muscle recovery. Consumers are looking for products that support 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

By Amy Mehal Published on May 26, 2025 | Last updated May 26, 2025 ALT PROTEIN | ALT DAIRY | CONSUMER TRENDS & INSIGHTS



PLANT-BASED growth continued in most parts of Europe (amidst regulatory friction)

The base is strong, now it's time to grow: how 2025 set the stage for the next phase of Europe's protein transition

\$12,5bn

EU Plant-based food market expected for 2025

The hundreds of rings inside old Beech trees reveal a mix of thick rings made of softer wood from some years, and thinner, denser rings from others. This is because, while they may grow bigger and faster in warm years when the sun shines and the rains are abundant, these are not necessarily the years they make their strongest wood. In fact, without the slower, more resilient growth of earlier years spent beneath the canopy of larger trees, they are weaker and more susceptible to storms and other environmental stresses.

In the world at large, alternative protein in 2025 has been a year of turbulence. On the surface, however, the European alternative protein ecosystem has continued to grow. This year has sought to consolidate and strengthen the scientific, industry and regulatory ecosystems, setting up a robust base for the next phase of growth.

It's safe to say the environment for green technologies worldwide has changed in recent years, with economic slowdown, rising geopolitical tensions and burgeoning misinformation all compounding to slow the initial explosion of growth in the late 2010s. Alternative proteins have been no exception. Rising costs and a more uncertain environment have led to a period of consolidation and strategic focus. Companies that have less insulation than more established players to weather the market shocks.

Attacks on plant-based foods in Europe, particularly by the UK, have led to increased labelling restrictions, initially defeated in 2020, were resurrected by EU policymakers and supported by the European Parliament, paving the way for bans on the use of meaty names for plant-based foods.

Misinformation is also prevalent, particularly in discussions about nutrition, with plant-based meat sometimes being tarred with the same brush as ultra-processed foods, often without solid evidence.

The strong fundamentals beneath the surface

But these surface-level challenges don't tell the full story. Where private investment has faltered, public investment in science has continued to grow. Our latest reports on the scientific funding and publishing ecosystems revealed that alternative protein research has nearly tripled since 2020, with almost 800 academic papers published in 2024 and public funding increasing from €80 million to over €320 million.

Growth in public funding and publications per year by alternative protein pillar in Europe

Main drivers:

- Growing share of flexitarians (i.e. 40% of the German population)
- Price parity (or even leadership)
- Improved quality and taste of products
- Clean label, organic ingredients (Consumer consciousness keeps growing)
- Culinary adaptation
- Volume growth higher than total value

10%

Expected CAGR

When is a sausage no longer a sausage? European Parliament answers after long grilling session

\$26,5bn

EU Plant-based food market projection for 2033

Copyright AP Photo

By Marta Iraola Iribarren
Published on 08/10/2025 - 16:41 GMT+2 • Updated 18:52

Share Comments

The European Parliament has voted to ban meat-related terms like “burger” and “sausage” for plant-based products, prompting backlash from consumer and environmental groups.

There has long been a debate within the European Union over how to name plant-based foods. These products are becoming increasingly popular, yet uncertainty remains about how they should be labelled and promoted within the single market.

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

FUNCTIONAL FOODS & DIETARY SUPPLEMENTS ARE SURGING

Main drivers:

- Longevity / Health aging
- Consumer awareness / education
- Growth areas:
 - Gut health, Mental wellness, Stress, Sleep, Performance with strongest need
 - Weight management + Metabolic Health
 - increasingly shaped by GLP-1 usage and adjacent behavior changes
(lower sugar, higher protein, smaller portions, nutrient density)
- Trust and verification gained importance
(consumers increasingly expect clean-label)

7 %

Expected CAGR



\$ 399bn

Global Functional Food
market size in 2025



\$ 983bn

Global Functional Food
market size expected for 2034

Food Waste Reduction

Not only a sustainability metric, but a critical part of future Supply Chain Strategies



The "Hidden Harvest"

- **Old View:**
"Waste reduction is mainly a **moral obligation / CSR target.**"
- **New View:**
"Waste reduction is a **non-inflationary supply source.**"
- **"The Efficiency Dividend":**
Increase availability by saving what is already grown

The Scarcity Argument: Waste as a "Ghost Crop"

- If we face a 10% crop failure in wheat due to heatwaves (scarcity), but we currently waste 30% of bread at retail/consumer level, reducing waste by one-third negates the crop failure entirely.

(Security Implication: Nations are realizing that Food Waste Reduction = National Security. It reduces reliance imports.)

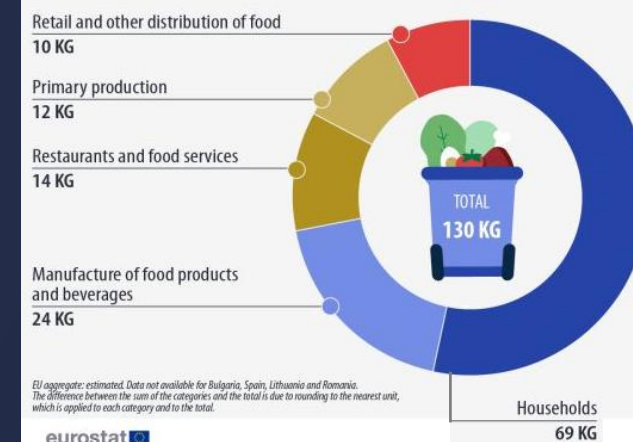
8-10%

of Gobaal GHG emissions

130kg

per inhabitant in the EU

Food waste in the EU by main economic sectors, 2023
(kg per inhabitant)



FOOD TECH SCIENCE

Our view on the sector

Foods under scarcity

INGREDIENTS | SUSTAINABLE FOOD PRODUCTION | 2025 FOOD AND BEVERAGE TRENDS

How to Solve the Cocoa Challenge

New ingredients, angles, options to extend or replace chocolate

By Kantha Shelke PhD, CFS



Replacing cocoa—partially or entirely—requires a deep understanding of cocoa's complex characteristics and multifaceted role in formulation and processing.

PHOTO COURTESY OF T. Haegava USA, Inc./ Adobe Stock

December 26, 2024



Two-thirds of the world's cocoa, derived from fruit of the *cacao* tree (*Theobroma cacao*) comes from two equatorial West African countries, Ivory Coast and Ghana, a precariously narrow geographic region. This leaves the global supply of chocolate's key ingredient highly vulnerable to a multitude of impacts including climate change, disease, political strife, and outdated agricultural practices, blight, and supply chain disruptions.

These challenges already have caused lower cocoa yield and supply instability, leading in turn to quality and safety concerns, with heavy metal and pesticide contamination from archaic farming and handling practices. Meanwhile social and environmental issues including child labor, economic inequity, and high-carbon-emission transportation methods tied to unsustainable farming practices are compounding these interconnected issues.

PROGRESS MADE

- Various studies underscore the **necessity for alternative ingredients**
- Progress has been made on **cellular agriculture, fermentation, molecular reconstruction, & the high-value upcycling of agricultural sidestreams**

SECTOR ACTIVITY

- Planet A scaled ChoViva **cocoa-free chocolate 8x**
- **Mission Barns received FDA** clearance for its cultivated fat
- Traction for fermentation-derived **vanillin, fat alternatives and egg analogues**

CHALLENGES AHEAD

- **Consumer adoption** hurdles remain for some alternatives
- **Scaling** sustainable supply chains remains **capital intensive**
- **Regulatory process** for some ingredients still a **bottleneck**

OUTLOOK

Scarcity-driven demand accelerating alt-ingredient uptake, giving brands more reliable recipes when key inputs become expensive or hard to source

Source: [Prepared Foods](#), [Forwad Fooding](#),

Mycelium and biomass fermentation

Mycoprotein Can Be Digested Just As Well As Meat, But It Needs to Be Maximised: Study

By Anay Mridul — Published on Feb 16, 2026 — Last updated Feb 13, 2026 FERMENTATION-BASED ALT PROTEIN FOOD & NUTRITION HEALTH



Courtesy: The Protein Brewery



4 Mins Read

Mycoprotein can deliver significant nutritional benefits with high protein digestibility and mineral accessibility; however, its true potential depends on the fungal strain and how it's cultivated.

Protein from fungi is as complete and digestible as that from chicken, beef and fish, according to a new study shedding light on the potential of mycelium.

Mycoprotein, derived from filamentous fungi, has been around for decades and has sustained a reputation as a healthy, sustainable protein source.

As attention turns to protein quality and micronutrient access, alternative proteins have come under scrutiny. This is mainly because most plant proteins, on their own, don't contain all essential amino acids, and aren't as easily digestible as animal-derived sources.

Mycoprotein isn't a plant-based ingredient, though. And a new study by the University of Borås in Sweden highlights how fungi can match or even beat animal proteins when it comes to protein and mineral accessibility.

PROGRESS MADE

- The **Protein Brewery's Fermotein** received **EFSA approval** (more approvals expected in 2026)
- **Self-affirmed GRAS** for several mycelium foods in U.S.
- New scientific evidence that **fungi can match** or even **beat animal proteins** when it comes to **protein** and **mineral accessibility**.

SECTOR ACTIVITY

- **Kinoko-Tech** starting APAC production (700+ tons capacity)
- **Planetary** acquired **Libre Foods** for EU consolidation

CHALLENGES AHEAD

- **EU EFSA novel food approvals** remain slow
- Scaling requires **CAPEX-heavy** facilities
- **Differentiation** in a crowded fungi segment

OUTLOOK

Mycelium is moving from **niche to mainstream**

Investor momentum holds despite broader Plant-Based slowdown

Source: [Green Queen](#), [Cultivated X](#)

Molecular Farming

Israel's PoLoPo Targets High-Protein Potato Chips with Molecular Farming Platform

By Anay Mridul — Published on Jul 28, 2025 — Last updated Jul 25, 2025

FUTURE FOODS ALT PROTEIN FOOD & NUTRITION



Courtesy: Tal Shahar



5 Mins Read

Israeli molecular farming startup has pivoted its business model to develop high-protein potatoes for the chip industry.

Tel Aviv-based food tech firm PoLoPo is aiming to disrupt the \$53B potato chip industry and meet the protein moment with its molecular farming platform.

The startup, which turns potatoes into protein factories via molecular farming, had begun as a supplier of ovalbumin (the main protein found in egg) to food industry customers, before diversifying into patatin (the native protein in potatoes).

Now, it is making a strategic shift from producing powdered proteins to supplying high-protein potatoes for the snacking sector. The company expects to receive US approval for its molecular farming platform, called SuperAA, by the end of 2025.

Source: [Frontiers](#), [Nature](#), [Nature](#), [Green Queen](#)

PROGRESS MADE

- Higher, more reliable expression yields via host engineering
- Scale-up innovations: moving beyond labor-intensive infiltration
- Stronger analytical chemistry for GMP credibility (host-cell proteins, impurities)

SECTOR ACTIVITY

- Moolec soy & pea proteins USDA approved; offtake deals signed
- PoLoPo: moved beyond filing/pilot samples: successful outdoor field cultivation (5 tons) and plans for a pilot-scale processing facility

CHALLENGES AHEAD

- Regulatory scrutiny of GMOs in EU
- Consumer acceptance uncertain
- Field-to-factory scaling still unproven at commodity volumes
- IP competition between molecular farming and fermentation players

OUTLOOK

Molecular Farming has significant potential but is still in the early days of development. If successful it could become a game changer

3rd Generation Plant-Based Solutions

I was surprised to like the vegan dishes as much as the meat courses — and maybe even more.



I didn't expect to, but I loved the vegan dishes just as much as the meat.
Erin McDowell/Business Insider

Despite living in New York City, where there are numerous vegan and plant-focused restaurants, I don't typically seek out vegan restaurants.

As a self-proclaimed meat lover, I was genuinely surprised by how much I enjoyed Eleven Madison Park's plant-based dishes — in fact, I enjoyed them just as much as the meat-based courses.

The three meat dishes I tried were all flavorful and beautifully executed. However, I realized I would've been perfectly happy with the all-vegan tasting menu, which had just as many dynamic flavors. As a result, I would be much more open to eating at a vegan restaurant after this experience.

PROGRESS MADE

- 3rd Gen products formulated with cleaner and shorter labels
- Proprietary formulation and recipe are key for differentiation
- Taste & texture advancing to new levels
- Standard „outsourcing“ to contract manufacturer not a sustainable path

SECTOR ACTIVITY

- Planted launches new facility in Memmingen (8 tonnes / day)
- Plant-based starting to regain momentum in hospitality
- IKEA Partners with La Vie To Make Bacon-Topped Vegan Hotdogs
- JUST Egg sales surged 5x amid egg shortages

CHALLENGES AHEAD

- Consumer Trust remains fragile due to questionable 1st/2nd Gen products
- Price parity / leadership a key necessity
- Regulatory and naming/labeling pressure in Europe
- Continued Category consolidation as weaker players exit

OUTLOOK

Shortage in animal protein will be a catalyst for plant-based products
Customers satisfaction / delight will ultimately drive market share

Source: [Reuters](#), [Business Insider](#)

Cultivated meat / fish is produced by cultivating animal cells directly



PROGRESS MADE

- Cell lines: more stable, scalable starting biology
- Serum-free / animal-component-reduced media
- Bioprocessing & scale-up: more credible paths to high cell density manufacturing
- Not resolved yet: Media economics at commodity scale, High-density bioreactors, Texture at volume

SECTOR ACTIVITY

- Australia approves cultivated quail (Vow); restaurant launch imminent
- Wild Type salmon approved by FDA; debuting in Portland
- Upside & GOOD Meat expanding tastings; pilot plants under construction
- M&A activity (Meatable acquiring Uncommon pork tech)

CHALLENGES AHEAD

- High CAPEX and operating costs
- State-level bans (Italy, Florida, Arizona) create uncertainty
- Consumer awareness still low outside early adopters

OUTLOOK

Category advancing slowly but steadily; still a long-term play requiring significant capital and regulatory navigation

Source: [The Washington Post](#), [BioRxiv](#), [Science Direct](#), [Springer Nature](#)

Functional Ingredients

From fermented proteins to medicinal mushrooms and gut health staples

SPRINGER NATURE Link

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Home > World Journal of Microbiology and Biotechnology > Article

Postbiotics: an insightful review of the latest category in functional biotics

Review | Open access | Published: 02 August 2025
Volume 41, article number 293, (2025) [Cite this article](#)

Ayodeji Amobonye, Brynita Pillay, Felicity Hlope, Stella Tofac Asong & Santhosh Pillai

7960 Accesses | 19 Citations | 7 Altmetric | 1 Mention [Explore all metrics](#)

Abstract

Postbiotics have recently emerged as one of the latest functional food products due to the ever-evolving landscape for microbiome-targeted health interventions. Postbiotics, along with other functional biotics, viz., probiotics, prebiotics and synbiotics, confer their health benefits mainly via the modulation of the gut microbiota. Postbiotics are considered more promising than probiotics as they elicit similar effects, despite being inactivated, thus relegating concerns of strain activity and stability that have been raised about probiotics. This review attempts to provide critical insights into postbiotics by firstly revising its definition to create a streamlined framework for further discourse on the interplay between postbiotics, nutrition, microbiota, and health. Similarly, this review establishes the nexus between postbiotics and probiotics while highlighting that postbiotics can also be derived from other microbes apart from lactobacilli such as yeasts and fungi. Furthermore, an overview of the extraction and production of postbiotics are presented as well as the biochemistry of short-chain fatty acids, enzymes, peptides, polysaccharides, peptidoglycans and teichoic acids, which have all been identified as postbiotic components. Finally, their bioactivities (antioxidant, anti-inflammatory, antidiabetic, immunomodulatory, anti-hypertensive, antimicrobial) and the patent landscape of postbiotics are evaluated to promote its innovative applications in the food, veterinary, pharmaceutical and cosmetic industries. Having identified major gaps and areas of improvement, it is believed that this critical review will serve as a guide in the increasing effort to advance the industrial potential of postbiotics.

Source: [Springer](#), [ScienceDirect](#), [Pepsico](#)

PROGRESS MADE

- **Microbiome-targeted ingredients:** shift from “probiotics-only” to postbiotics + precision prebiotics
- **Precision fermentation** as a functional-ingredient engine: better mapping from lab

SECTOR ACTIVITY

- **Prebiotic beverages** moved from “brand deals” to **incumbent rollout**: Pepsi launched Pepsi Prebiotic Cola nationwide
- **KÄÄPÄ Biotech** gained **EFSA** approval for its NordRelease process, enabling EU-wide sales of functional mushroom powders
- **TurtleTree** received an **FDA “No Questions”** letter for **precision-fermented lactoferrin**, clearing the way for functional use in foods

CHALLENGES AHEAD

- **COST:** Scaling fermentation and mushroom ingredient production **remains costly**
- **Consumer trust:** clear health claims still under **scrutiny**
- **Regulatory pathways** for novel bioactives **remain slow and fragmented**

OUTLOOK

Functional ingredients are moving mainstream as major brands scale proven formats, especially in gut health, fermented bioactives, and medicinal mushrooms

THE FRAMEWORK

Governmental Initiatives

Upgrading the Food System will become 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/Gettyimages

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

China food security Economy / China Economy

Why China's next 5-year plan will double down on food security

Beijing has made huge strides in its self-sufficiency push – but trade tensions, climate risks and supply-chain shocks keep fears alive

Mandy Zuo in Shanghai

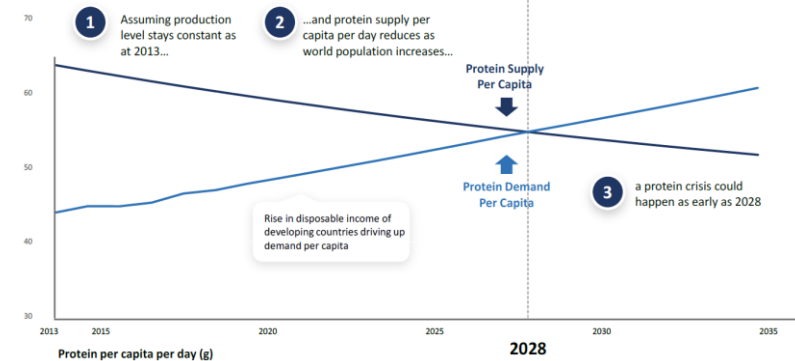
Published: 6:00am, 16 Oct 2025 | Updated: 6:14am, 16 Oct 2025

SCMP Series

China's 15th 5-year plan
[13 of 13]

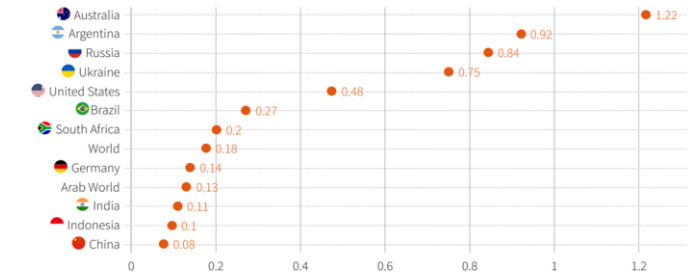
As China drafts its 15th five-year plan – the next entry in a line of expansive blueprints that have set the tone for the country's development over more than seven decades – we examine how these documents inform and reflect high-level policy priorities, what to expect in the coming iteration and why food security is set to remain a cornerstone in Beijing's push for self-reliance.

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

The rise of a Food Security Crisis is certain, if the Food System isn't upgraded in time

Governmental support programs continued to emerge

Politics & Law

European Commission Commits to Developing a Protein Diversification Plan

April 1, 2025

Earlier this year, European Parliament members Anna Strolenberg and Sigrid 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.

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_Veconomist](#)

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 signalled 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" adjusted:** despite a notable setback - continued **ACT Fund** grants to scale local high-tech farming—core to the city-state's **food-security** target. New targets include local production of 30% of the protein demand and 20 per cent of the country's consumption of fiber
- **ASEAN sustainable agriculture declaration (Oct 2024):** leaders adopted a region-wide commitment to **sustainable ag practices** and resilient value chains

OUR INVESTMENT HYPOTHESIS

ZINTINUS

INVESTMENT HYPOTHESIS

- **The change of the Food Sector will be inevitable and massive.**
(if 10% of the market moved into alternatives by 2030, this corresponds with an opportunity > \$ 800bn)
- **The change will happen in all areas of the Food Sector.**
Consumer products, ingredients, packaging, systems, etc.
- **Some of the most promising scientific concepts might take a lot of time and capex.**
Therefore, our view is: we don't LIKE science – we LOVE it, but we only invest in Business.
- **We know, that it takes time - The Food Sector is sluggish and in parts risk-averse.**
Therefore, adoption takes time, but can quickly accelerate when a decisive inflection point is reached. Understanding market context is essential.

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WHERE DO WE INVEST

Alternative proteins

- Plant-based Analogues for Meat, Fish, Egg & Dairy
- Biomass Fermentation based on Mushrooms, Algae etc.
- Molecular Farming
- Precision Fermentation and Cultivated-Cell-based products (long tail)

Clean nutrition

- Healthier alternatives (to Sugar, to Fat, to Colour, etc.)
- Clean labels (only including natural ingredients)
- Organic processing
- New healthy and clean ingredients

Functional Food

- Enhanced Drinks / Food
- Dietary Supplements
- Personalized Nutrition
- Healthy Aging
- Performance Improvement

Foodwaste reduction

- Shelf-life Extension & Quality Enhancement
- Food Waste Analytics
- Upcycling Solutions
- Tracking, Tracing & Analytics

Ingredients / B2B solutions

- Analogue ingredients addressing accelerating scarcity
- Enabling technologies
- Production infrastructure
- Systems

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WHERE DO WE INVEST

Main drivers

Climate Change and Supply Shortfalls

Health Systems /Consumer Preferences

Climate Change /
Food Security

Outcomes / Trends

Food scarcity

Healthy
nutrition

Longevity

Fortified
food

Food scarcity &
price increases

Our Focus

Alternative
proteins

Food waste
reduction

Clean food

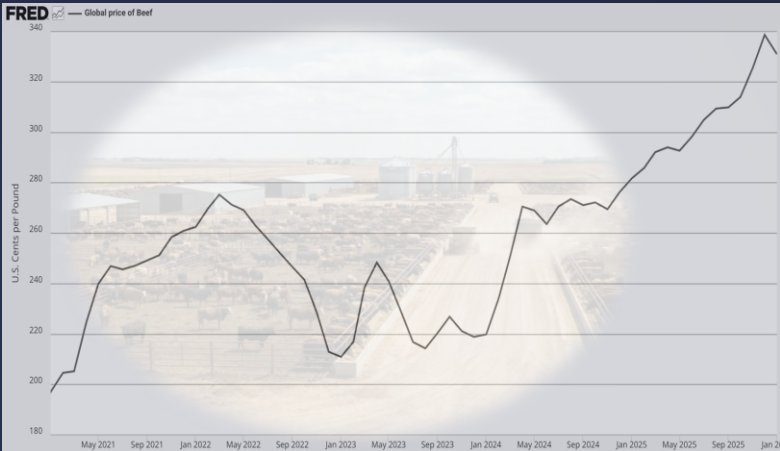
Functional Food

Ingredients / B2B
solutions

MARKET DISRUPTIONS – THE NEW NORMAL



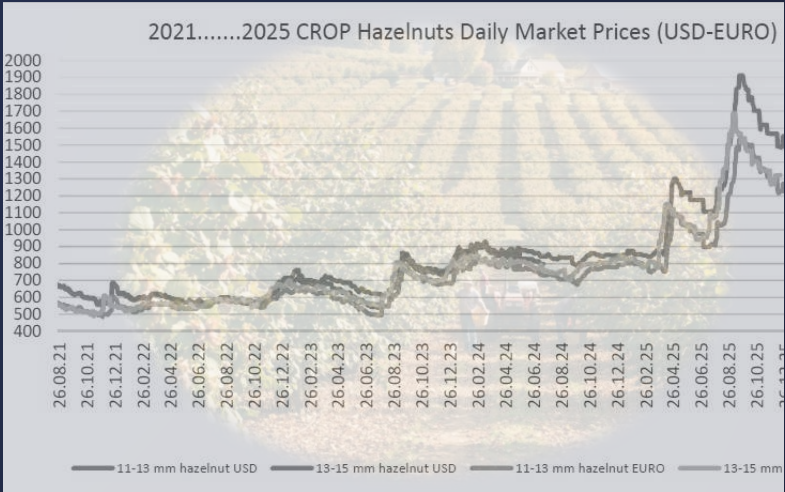
COFFEE remains volatile at a historically high level



BEEF has risen steadily over the last 5 years, remains at a high level



OLIVE OIL prices are highly volatile, affecting consumers & producers






























HAZELNUT prices have also experienced a steady rise in cost

ZINTINUS

PORTFOLIO ATTRIBUTION

Our portfolio is well distributed across our focus areas. Our excitement about B2B ingredients and solutions is growing.

	Alternative proteins	Food waste reduction	Clean food	Functional Food	Ingredients / B2B solutions
Planet A 					
planted.					
KÄÄPÄ 					
NEOH					
PARTAKE					
LA VIE					
It's Fresh!					
BLUE STRIPES					
GEM					
Blue Farm 					
KRAFTLING®					
Lifesum					
KITRO 					
MIGHTY 					

ZINTINUS

HOW WE INVEST

- **Our focus is on young companies that have achieved initial commercial successes**
Product market fit, management ability to execute
- **Before we invest, we validate feasibility, scalability, and economic viability**
To do that market and industry understanding are essential to assess market readiness, suitability and ability to scale
- **Before we invest, we spend significant time to get to know the founders / the management team.**
Because they are the major success factor for the investment case
- **When we invest, we want to be an active partner.**
Helping our portfolio companies on commercial, operational, and strategic topics
- **Value crystallization can occur in various ways or forms.**
We do assess exits routes as of our investment decision



OUR IMPACT PLEDGE

ZINTINUS ESG MANAGEMENT



ESG Due Diligence

Each portfolio company fills out a comprehensive ESG **questionnaire** that covers all relevant environmental, social, and governance topics.

This helps us identify potential issues during our **Due Diligence** and set appropriate board agendas to address future challenges.



Impact Metrics Defintion

For each portfolio company, ZINTINUS identifies **relevant outcome-focused impact metrics** aligned with the United Nations Sustainable Development Goals

We then work with the companies to collect and calculate the necessary data for these impact KPIs.



Impact KPI Collection

Using a mix of company-reported data, targeted surveys, and other benchmarks, we collect data against the identified impact metrics for each portfolio company.

This allows us to **track the progress and performance** of our investments.



Impact Reporting Due Dilligence

We aggregate the data on impact metrics from our different portfolio companies into a consolidated **ZINTINUS impact report** for the entire investment portfolio.

This enables us to report on the overall positive impact we are creating.

THE COMMUNITY

Food Tech Platforms and Dealflow

ZINTINUS

COMMUNITY ENGAGEMENT

We actively participate and co-shape the Food Tech Echo System



Industry presence & partnerships

Z I N T I N U S at the core of the European Food Ecosystem



Platform Building & Ecosystem Activation

Building a Deal flow infrastructure by partnerships and communities

Industry presence & partnerships



ZINTINUS at the core of the **European Food Tech Ecosystem**

- **Partnership:** SIRAH Lyon, Food Innovation Camp (Advisory Board), Anuga 2025
- **Active Role:** Consumer Goods Forum, Anuga, ISM
- **Jury Member:** EIT Food Rising Food Stars, FI Europe, ISM Award 2026, Rentenbank etc.



Fabio Ziemssen
Zintinus

ISM Start-Up Pitches

Talks & Tasting Stage

02.02.2026
12:00 noon

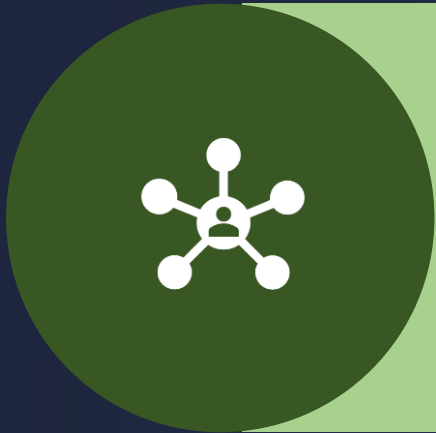
Meet me at



1-4 Feb 2026



Community Building & Ecosystem Activation



BUILDING A DEAL FLOW INFRASTRUCTURE BY PARTNERSHIPS AND COMMUNITIES

- **FoodTech VC Roundtable:** Strategic relationship building with funds and angels
- **Regular catch-ups:** Delaflow exchanges with VCs across focus geographies (DACH, FR, BENELUX, Nordics and Israel)
- **FoodTech Meetup:** Strategic partnership with Kitchentown, a FoodTech Makerspace (Pitch and Best Practice Sharing Events)
- Regular Update with **Retailers & FMCGs**
- Regular Exchange with **Associations**

SAVE THE DATE

KITCHENTOWN ZINTINUS anuga
proveg BALPro Food Campus Berlin UNTERNEHMER TUM
CROWDFOODS FOOD CAMP FOODHUB NRW

FOODTECH MEETUP

05.10.2025 | Anuga Trade Fair Cologne

Dear F&B Innovators and Changemakers,
at this year's Anuga – the world's leading trade fair for food and beverages – we are excited to invite you to an evening dedicated to shaping the future of food.

Co-hosted by KitchenTown, Zintinus, anuga, ProVeg, BalPro, Food Campus Berlin, crowdfoods, Food Innovation Camp and FoodHub NRW & UnternehmerTUM – this gathering is a must-attend for everyone passionate about innovation, sustainability, and real impact in the food industry.



AN INDUSTRY IN TRANSITION

**Consumer
Preferences**

Sustainability

**Economic
Promotion**

\$ 8 trillion

**Global Food Market
(3,1% CAGR)**

**Health
System**

Food Security

Regulation

ZINTINUS

OUR PORTFOLIO



The seamless plant-based milk combining health and taste in science-backed formulations.



Clean Energy Drinks & More



Nutrition Analytics
Personalised Diet



Vitamins you eat, not take



Naturally extend shelf life and enhance quality of fresh fruit



Delicious peace of mind for those with dietary restrictions



Make people switch from animal to vegetable fat with a smile



KAPAA brings you the highest quality functional mushroom extracts from Finland



Upcycle the entire cacao pod to make delicious and antioxidant-rich foods



The new standard for plant-based meat.
Delicious, clean, inspiring!



Reduce food waste, save money.
A state-of-the-art solution to effortlessly measure, monitor and reduce food waste.



Tasty as chocolate – sustainable as never before:
CHOVIVA



The new Snacking
Sugar replaced largely by plant-based fiber



THE TRANSFORMATION OF THE FOOD INDUSTRY

AN OPPORTUNITY OF HISTORIC PROPORTIONS

ZINTINUS
FOOD TECH SUMMIT 2026