# Biotechnology

at Future Food-Tech London 2026

Trends and innovation pathways shaping the future of food



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CNTA

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# INTRODUCTION

Food biotechnology no longer faces a scientific challenge, but a business one: scale-up, regulation and funding. This was the main insight we took away from Future Food-Tech London 2026 (24–25 September, InterContinental O2), viewed through the lens of the Biotech4Food project.

Future Food-Tech London brought together start-ups, major food and ingredients companies, investors, consultancies, and regulators over two days, with 50 sessions across the Main Stage, breakout rooms, and Innovation Stage. The CNTA team addressed listen, ask questions, build connections, and identify the most relevant insights.

This report is a special edition of CNTA's "We're there for you" series. It focuses solely on topics relevant to Biotech4Food, the project funded under the I3 instrument that helps European agri-food SMEs develop and adopt biotechnological ingredients, products, and processes. Its consortium brings together 7 clusters, 2 technology centres and 1 regional authority from 8 regions across 5 countries.

## How to read this report

- **Executive summary:** the six key ideas on one page. Start here if you have five minutes.
- **01 Highlights:** each idea with its data, a quote and what it may mean for Biotech4Food.
- **Biotech4Food's challenges in the light of London:** the project's four challenges matched with what we heard.
- **02 Agenda:** the sessions with a biotech angle, with summary, key messages, and in-depth analysis.
- **03 CNTA in London:** the precision fermentation roundtable moderated by CNTA.
- **04 Startups and 05 Signals:** the biotech startups to keep on the radar and what to follow over the coming months.

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# Executive summary

Of the 17 sessions we analysed in depth, five focused on biotechnology, and 19 of the 37 startups we profiled are biotech-based. These are the six ideas that kept coming back.

| Figure | What it measures |
|---|---|
| **2** | days of conference |
| **50** | sessions on the agenda |
| **17** | sessions analysed in depth, 5 of them focused on biotechnology |
| **63** | speakers heard |
| **37** | startups profiled, 19 of them biotech-based |

## 01 · Technology is no longer the barrier: the question is how it is used

Precision fermentation can produce almost any ingredient. Its value lies in providing a function that does not exist today, rather than copying what already exists.

> **For Biotech4Food.** The best way to assess SME projects is by their distinctive functionality and the range of applications, rather than by the technology used.

## 02 · Biotech acts as insurance when an ingredient becomes scarce

Buyers no longer pay for 'green' credentials alone. They pay for stable prices and a reliable supply in the face of volatility in cocoa, palm oil, and whey price volatility.

> **For Biotech4Food.** SMEs' business cases are stronger when they address a raw material shortage and the needs of a specific buyer.

## 03 · The challenge is no longer technological; it is scaling up

Moving from producing 5,000 litres to 50,000 litres is still uncharted territory, and Europe lacks the necessary production facilities. Start-ups reaching the market are making use of existing capacity.

> **For Biotech4Food.** Breweries, wineries, dairies, and other businesses with fermentation tanks can participate as contract manufacturers or early customers, without developing the technology themselves.

## 04 · Find your niche

Before moving into the mass market, you can fund the learning curve with infant, clinical and sports nutrition, cosmetics, and pet food. Demand for more protein and fibre in our food is being driven by GLP-1 drugs and interest in longevity.

> **For Biotech4Food.** The first market for a biotech ingredient is rarely mass retail, so it is worth planning a phased route to market.

## 05 · Regulation is part of the scaling-up process

Engaging with the regulator early and conducting toxicology tests on representative batches can prevent delays of between 18 and 36 months. The EU is considered to be slower than the UK, US or Singapore.

> **For Biotech4Food.** The regulatory strategy, including the use of side-streams, should be built into R&D from day one.

## 06 · Venture capital funds learning, not steel

Plants are better financed through grants, debt and guarantees for the first of their kind. Public funding varies widely between countries.

> **For Biotech4Food.** Interregional investment can offset the funding gaps between regions.



# 01

# HIGHLIGHTS

Six insights into biotechnology emerged across the sessions. Each insight was presented with supporting data and a quote, as well as its potential implications for Biotech4Food.

HIGHLIGHT 01 •

# Technology is no longer the barrier; the question is, 'What for?'

*Precision fermentation can produce almost any ingredient. However, industry will only be interested if it can perform a clear and distinctive function that is not currently available.*




A few years ago, at a conference like this one, the question was whether the technology would work. In London, however, that question had all but disappeared. At the precision fermentation roundtable, which was moderated by CNTA, the message was clear: any ingredient can now be produced. The remaining questions are what it will be used for, and how much it can be sold for.

On the biomanufacturing panel, Stéphane Mac Millan of Verley summed it up: producing a whey protein identical to that found in cow's milk is not enough because 'the cow already makes it'. The ingredient must offer functionality, nutritional value or price stability. The focus is therefore shifting from proteins that

simply replace existing ones to molecules with new functions, such as peptides, human milk components and minor plant proteins.

The molecule alone is not enough. It must also be demonstrated that it works across a wide range of products because this versatility underpins the business case. The most common mistake to date has been to develop the technology without first considering what the market needs.

- **"A toolbox":** precision fermentation is not a universal platform; it is most effective for molecules that are difficult to obtain (biomanufacturing panel).
- **1982 and 1990:** recombinant insulin and chymosin for cheese-making. Food biotech is not new; what is new is the precise programming of biology (Marie Asano, ECBF).
- **Six requirements:** have been identified: distinctive functionality, new functions, versatility, a viable business case, consumer involvement from the outset, and competitive pricing (CNTA roundtable).

*"The cow already makes it" — Stéphane Mac Millan, Verley.*

> **For Biotech4Food:** When selecting and supporting SMEs, first establish what new function the ingredient brings and in how many applications it has been proven for, before enquiring about the technology.

*Heard in: Biomanufacturing spotlight · CNTA roundtable four · Commercial readiness test.*

HIGHLIGHT 02 •

# When an ingredient runs low, biotech companies sell their products as a way of insurance

*Innovations that are merely interesting tend to move slowly. However, when it solves a real shortage, companies, governments and investors act immediately.*



If there was one shared concern, it was the availability of raw materials. Cocoa, coffee and palm oil are grown in very few regions, and each harvest brings more climate shocks. This is changing the way biotech ingredients are sold.

Alex Neves of Clean Food Group illustrated this shift by referencing the company's own experience: when the company was founded in 2022, customers inquired about sustainability; nowadays, they demand a reliable supply and predictable pricing. The company's yeast-derived fat, which is a cocoa butter equivalent, is being marketed as a hedge against the cocoa crisis. Meanwhile, Cargill is testing cocoa powder substitutes and collaborating with biotechnology companies to develop alternative fats and flavour molecules, with the aim of building resilience without abandoning the original ingredient.

The same logic applies to whey, the price of which has doubled in just a few years, as well as to tropical fats. GST, a spin-off from the Technical University of Munich, converts organic waste into triglycerides using yeast. Currently, production costs €5–6/kg, compared with €1.2–1.5/kg for palm oil. The target is to reduce this to around €1/kg by 2030.

- **2022-today:** the sales pitch shifted from sustainability to supply security (Clean Food Group).
- **×2:** whey prices have doubled in a few years; Fermotein competes with it at a positive margin (The Protein Brewery).
- **"Optionality":** Cargill does not see the substitute as the main ingredient, but rather as a credible alternative that builds resilience.

***"When we started in 2022, the context was sustainability. In the last two years, however the focus has shifted to supply security of supply and price volatility" — Alex Neves, Clean Food Group.***

> **For Biotech4Food.** The most promising value chains for SMEs are those built around a raw material under pressure, such as cocoa, palm oil, whey, or coffee, and an industrial buyer that needs to secure its supply.

*Heard in: Commercial readiness test · From vision to reality · Lessons from resilience.*

HIGHLIGHT 03 •

# The challenge is no longer technological. It's about scaling-up!

*The science behind the new ingredients is sound. The hard part is producing them on an industrial scale. The most common suggestion for overcoming this obstacle was to use existing plants.*







When asked about the main obstacle, Imran Afzal of the UK's National Alternative Protein Innovation Centre (NAPIC) emphasised the importance of infrastructure. While scaling from 50 to 5,000 litres is well understood, reaching 50,000 litres remains uncharted territory. Europe has very few plants in which to attempt this. Processes do not behave in the same way at 10 litres as they do at 10,000 litres.

This is why many start-ups have decided not to build their own factory, at least for now. Clean Food Group bought a one-million-litre plant that would cost over £100 million to build from scratch, while Pacifico Biolabs uses unused beer tanks leased from breweries for production. According to Pacifico, the brewery earns the same profit from leasing the tanks as it would from using them to brew beer.

The scale-up session summed it all up with one key message: trying to do everything alone is the costliest mistake. Contract manufacturers, open pilot plants such as Bio Base Europe, and innovation centres are available from day one.

- **5,000-50,000 L:** the fermentation scale-up that nobody has mastered yet (NAPIC).
- **£100M+:** the replacement value of the one-million-litre plant Clean Food Group bought in Liverpool.
- **~4 months:** the time it took Pacifico to convert its first brewery site.

## *“Infrastructure, infrastructure, infrastructure” — Imran Afzal, NAPIC.*

> **For Biotech4Food.** A plant with idle capacity is exactly what many start-ups are looking for. Breweries, wineries and dairies in the consortium regions can enter this business as contract manufacturers or first customers, without developing the technology.

*Heard in: From vision to reality · Biomanufacturing spotlight · Commercial readiness test · Innovating with scale in mind.*

HIGHLIGHT 04 •

# Enter through the niches that pay

*Biotech ingredients are used in specialised nutrition, cosmetics, or pet food before entering the mass market. And GLP-1 drugs and the pursuit of longevity are creating new demand for protein and fibre in every bite.*




Many companies start where buyers pay the most. Verley added a functionalisation layer to its precision-fermented whey protein in order to break into the sports, medical, and clinical nutrition markets before reaching cost parity. All G has received approval in China for precision-fermented lactoferrin, a high-margin ingredient used in infant formula. Clean Food Group sells to the cosmetics industry while awaiting food approval, and Meatly has obtained UK approval for cultivated chicken in pet food.

Meanwhile, GLP-1 drugs and interest in longevity are shaping the demands of consumers who are eating less and making more careful choices: they want more protein to help maintain muscle mass and more fibre. This is where biotech ingredients such as mycelium come into their own. The Protein Brewery's Fermotein powder contains complete protein and fibre, as well as naturally occurring spermidine, while Pacifico's product contains 54 g of protein and 23 g of fibre per 100 g of dry weight. Stable postbiotics, such as those from SciencePower, and microalgae fibre from CaBloom, are also relevant to this trend.

However, European labelling regulations are a constraint. While protein has authorised health claims, such as those relating to muscle mass maintenance, autophagy and spermidine do not. Furthermore, 'probiotic'

is considered an unauthorised claim. In the US, products claiming to 'stimulate GLP-1' are already on sale, whereas in Europe, such claims are tightly restricted and consumers are more sceptical.

- **~7 %:** of the UK population say they have used GLP-1 drugs (YouGov survey for the Food Foundation, 2026).
- **~30 million:** possible GLP-1 users in the US by 2030 (GreyB).
- **52 %:** of consumers would rather age slowly, while only 11 % want to reverse ageing (FoodNavigator).

## *"Food prevents, but rarely cures on its own" — Megan Rossi, Bio&Me, and Smart Strains.*

> **For Biotech4Food.** The first market for an SME's biotech ingredient is rarely the supermarket shelf. A staged route (high-margin niche, less regulated market, mass market) is worth planning, with benefits anchored in claims the EU already allows.

*Heard in: Biomanufacturing spotlight · Commercial readiness test · The next generation of healthy food · Healthy longevity.*

HIGHLIGHT 05 ·

# Regulation is part of the scaling-up process

*Leaving regulation to the end forces repeat testing and delays the launch. And the EU is seen as slower than its competitors.*



"Your regulator is your friend" was the message from the biomanufacturing panel. Engaging with the regulator before submitting the dossier, presenting a coherent explanation of the product, and planning the required batch scale from the outset can avoid repeat testing. If authorisation tests do not use batches representative of commercial production, the launch can be delayed by 18 months to three years, according to NAPIC. Faster, less expensive in vitro toxicology methods make it possible to assess the impact of each process change during scale-up.

The examples of speed came entirely from outside the EU. The UK Food Standards Agency (FSA) completed eighty-three authorisation assessments in 2025/26 and runs a sandbox for cultivated products. The Protein Brewery sold first in the US and won EU authorisation for Fermotein, the first mycelium approved as a novel food in the EU, in June 2026, six years after it was founded.

By-products present another challenge. Spora, the innovation centre of the Alchemist restaurant, brought a cocoa-free chocolate made from brewers' spent grain to market in four months. Its main obstacle was not funding, but internal bureaucracy and regulations that, in some countries, still make it difficult to turn by-products into food.

- **18–36 months:** of delay if regulatory tests are not planned with real production batches (NAPIC).
- **83:** authorisation assessments completed by the UK FSA in 2025/26.
- **6 years:** from The Protein Brewery's founding to EU authorisation of Fermotein.

## *"Your regulator is your friend" — Biomanufacturing panel.*

> **For Biotech4Food.** The regulatory strategy (novel food, strain status, use of side-streams, claims) should be part of SMEs' R&D from day one. The consortium can pass on to the authorities the call for a European sandbox and clearer rules for side-streams.

*Heard in: Biomanufacturing spotlight · Innovating with scale in mind · Commercial readiness test · From food-tech to food-love.*

HIGHLIGHT 06 •

# Venture capital funds learning, not steel

*Investors no longer buy the promise of transforming the food system: they want realistic payback and competitive prices. And plants need a different kind of money.*



A decade ago, investment was driven by a “build it and they will come” mentality. Today, commercial considerations take precedence. With interest rates well above zero, venture capital is there to fund learning and commercial risk; once the technology is proven, plants are better financed through debt, project finance, or grants for first-of-a-kind facilities. The European Innovation Council proposed public guarantees for the first food-sector plants of their kind, an approach already common in other sectors.

Geography matters. The Netherlands and the Nordic countries have plenty of public funding; other regions have much less. And the food industry spends less than 2 % of its revenue on innovation, the lowest share among major sectors.

To reduce technical risk, investors prefer standard bioreactors and modular designs: replicating a proven unit eight times is not the same as scaling one a hundredfold.

- **<2 %:** of revenue spent on innovation by the food industry, according to the investor panel.
- **€10–30M:** invested by the EIC per company, always alongside private investors.
- **~100 meetings:** what it took The Protein Brewery to close its Series B.

## *“Venture capital should fund learning, not steel” — Panel · Who pays for the next generation of food-tech?*

> **For Biotech4Food.** SMEs need a staged funding map (grants, equity, debt), and the gaps between regions justify the interregional investment the project promotes.

*Heard in: Who pays for the next generation of food-tech? · From vision to reality · Commercial readiness test.*

# Biotech4Food's challenges in London

The four challenges that the project addresses were identified in London using concrete data. The most debated topics were regulation and funding.



| Biotech4Food challenge | What we heard in London | What it means for the project |
|---|---|---|
| **Regulatory barriers (novel foods, side streams, differences between Member States).** | The UK FSA claims faster reviews (83 assessments in 2025/26 and a sandbox). The first EU-authorised mycelium took six years and sold in the US first. Side-stream rules hold back upcycling. | Build the regulatory route into R&D from the start; pass on the call for an EU sandbox and clear side-stream rules. |
| **Competition with established ingredients and weak links between supply and demand.** | Buyers decide on price, supply security, and functionality. Convincing pitches showed verifiable data: litres, tonnes, nutrition panels, bite curves. | Start from a buyer's problem and a distinctive function; co-develop with industry from the beginning. |
| **Access to finance** | Rates moved from about 0 % to 3–5 %. Venture capital is shifting to later rounds. The EIC co-invests €10–30M; CBE JU funds first-of-a-kind plants. Public funding is concentrated in the Netherlands and the Nordics. | A funding strategy by stage and type of risk; interregional instruments to close the gap between regions. |

| Biotech4Food challenge | What we heard in London | What it means for the project |
|---|---|---|
| **Expertise gaps (IP, investment, prototyping)** | Science-led startups need commercial profiles. The remedies cited were early techno-economic analysis, one-stop shops (NAPIC), and open pilot plants (Bio Base Europe). | Clusters as one-stop shops: map pilot capacity, connect with contract manufacturers, and train on techno-economic analysis and investor readiness. |


02
DARREN KIDD
LABCORP
STEPHANE MAC MILLAN
VERLEY
JIM MELLON
AGRONOMICS
AGENDA

Five main stage sessions carried the biotech debate. They are listed in chronological order and all take place on Thursday 24 September.

| Time | Session | Main topic |
|---|---|---|
| **10:00–10:40** | From vision to reality: where food-tech innovation gets stuck | Bottlenecks and scale-up |
| **11:40–12:25** | Biomanufacturing: how a novel ingredient reaches the market | Precision fermentation and regulation |
| **14:20–14:50** | Innovating with scale in mind | Process design, data, and regulation |
| **16:00–16:45** | Commercial readiness test | Three fermentation startups before a buyer and an investor |
| **17:00–17:40** | Who pays for the next generation of food-tech? | Funding |

**10:00 ·**

# From vision to reality: where food-tech innovation gets stuck

*Main Stage · Industrial scale-up, alternative proteins, food biotechnology*



**In 30 seconds.** Foodtech innovation is not solely held back solely by funding or regulation. It faces a series of bottlenecks, including making the numbers add up, manufacturing on a large scale, securing consumer acceptance, determining what can be claimed on the label and sharing data. All of these issues need to be anticipated from the laboratory stage.

**Who spoke.** Katia Merten-Lentz (Food Law Science & Partners, moderator) · Geert Maesmans (Cargill, VP R&D Food EMEA) · Imran Afzal (NAPIC, CEO) · Simon Guyomard-Norman (Arthur D. Little) · Tom Whitehead (Intellegens).

## Key messages

1. **There is no single 'valley of death', but rather a range of challenges to consider**, including unit economics, manufacturability, consumer acceptance, resources and approval. Not every innovation is revolutionary: much of it uses existing technologies, approved ingredients and supply chains.
2. **Scale-up infrastructure is the number one bottleneck.** In the UK and Europe, this issue is more significant than regulation.
3. **The critical fermentation jump is from 5,000 to 50,000 L.** Distributing or parallelising production can be more convincing than scaling up, and "takes a year off the timeline".
4. **Techno-economic analysis is only as good as its assumptions.** One company thought its biggest risk was yield; it turned out to be the contamination rate.
5. **AI accelerates, but sensory validation is still human.** It is most effective in scaling-up, but the next bottleneck is data sharing.

**In depth: eight bottlenecks.** Scale-up infrastructure; the leap from 5,000 to 50,000 litres; developing a commercial mindset too late (science-led start-ups need 'second and third founders' with commercial expertise); supply-chain fragmentation (NAPIC aims to be a one-stop shop); discontinuous funding (it was proposed that funding be linked across successive stages); timeframes that are misaligned with investors' expectations of returns within 3–5 years; unclear claims that prevent premium pricing; and regulation, which remains a major obstacle, although the FSA's sandbox has brought regulators and industry closer together.

**Where the sector is heading.** Cargill works with startups on cocoa substitutes and with biotech firms on fats and flavour molecules as "optionality," not replacement. Afzal called the EU Protein Action Plan "aspirational." Published on 7 July 2026, it aims to raise EU-origin protein from 25 % to 35 %, focused on feed and legumes; GFI Europe called it a "missed opportunity" for fermentation.

> **What it means for Biotech4Food.** For a SME-based industry there is a moderate-risk innovation route (the "600-metre mountain": authorised ingredients, available technologies, own side-streams). The high-tech route requires planning scale-up and claims from the start.

**Open questions.** Who funds shared scale-up infrastructure in Europe, and what level of access do SMEs have? Will the EU have a sandbox that is comparable to the UK's?

**11:40 •**

# Biomanufacturing: How a novel ingredient reaches the market

*Biomanufacturing spotlight: How do novel ingredients win the path to market? · Main Stage · Precision fermentation, cellular agriculture, industrial scale-up, regulation*




**In 30 seconds.** A biomanufactured ingredient succeeds in the market if it offers functionality that cannot be achieved otherwise, enters high-margin niches and scales up without requiring its own plant. Addressing regulation early can accelerate approval. Success in this sector depends not simply on the best science, but on getting the sequence right: which molecule to produce, which market to enter first and how to scale without tying up capital in stainless steel.

**Who spoke.** Marie Asano (ECBF, European Circular Bioeconomy Fund, moderator) · Darren Kidd (Labcorp, in vitro toxicology) · Stéphane Mac Millan (Verley, precision-fermented dairy proteins) · Jim Mellon (Agronomics) · Rebecca Lamb (Food Standards Agency) · Muriel Dewilde (Bio Base Europe Pilot Plant).

## Key messages

1. **Precision fermentation is a toolbox, not a universal platform.** It makes sense for molecules that are hard to obtain or to improve functionality, not to copy a cheap commodity.
2. **Performance before cost parity.** Enter high-margin niches such as infant or clinical nutrition and bring costs down as you scale.
3. **"Your regulator is your friend."** Talk to the regulator before filing the dossier and arrive with a coherent product story.
4. **Do not build a factory.** Use contract manufacturers, idle capacity, or second-hand equipment, then find a partner to build and operate the plant.
5. **Less regulated markets as a testing ground.** Pet food and cosmetics bring revenue and experience while human food approval is pending.

**In depth: from lab to market, stage by stage.** The two most debated stages were manufacturing and technical scale-up.

| Stage | Typical bottleneck | Proposed lever |
|---|---|---|
| **1. Choice of molecule** | Reproducing something that already exists and is cheap | Complex or scarce molecules: human-milk components, minor plant proteins, untapped biodiversity |
| **2. Cost vs performance** | Not reaching cost parity at first | Performance first: Verley functionalises its whey for sports, medical and clinical nutrition |
| **3. Safety and toxicology** | Process changes that alter the toxicological profile and force repeat tests | Define product and process before the dossier; in vitro methods to measure each change |
| **4. Regulation** | Waiting for the final product to talk to the regulator | Early contact and a justifiable story of what it is, how it is made and why each test was run |
| **5. Scale of the regulatory programme** | Finding out late that batches of a certain scale are required | Plan that scale from the start and use the batches as customer samples |
| **6. Manufacturing** | Contract manufacturers are costly and lack purification kit; Verley received three "unacceptable" quotes | Phase 1, contract manufacturer; phase 2, a partner that builds and operates. Alternatives: idle capacity, breweries, distressed assets |
| **7. Technical scale-up** | Reaching the plant without testing the process under representative conditions | A scale-down model of the final plant and techno-economic analysis with verifiable milestones |

**Two routes to earlier market entry.** One is pet food: Meatly secured UK approval for cultivated chicken in pet food, although this market is highly price sensitive. The other is to target markets with faster approval pathways, such as Singapore, the US, China, and the Gulf states. All G secured approval in China in August 2025 for precision-fermented lactoferrin.

**Where the sector is heading.** Idle fermentation capacity and second-hand equipment are becoming available, and more contract manufacturers are competing for customers than four years ago. Fermentation-derived fats and oils are marketed as a hedge against raw material price volatility. The start-up sector is undergoing a shake-out (Meatable announced its closure in December 2025), while the UK is stepping up regulatory activity; the FSA highlighted a recent group of sixteen precision fermentation products. Animal-

free toxicology is gaining ground, and the FSA is checking that substitutes do not put consumers at a nutritional disadvantage.

> **What it means for Biotech4Food.** Industry can enter biomanufacturing as a capacity partner or as a customer for differentiated ingredients, without developing the technology. SMEs preparing novel food dossiers could save time with in vitro toxicology, if EFSA accepts it at the pace the FSA funds it.

**Open questions.** Will European fermentation startups launch outside the EU first? Is buying second-hand or distressed assets a repeatable model?

14:20 •

# Innovating with scale in mind: what separates commercial winners from the rest

*Main Stage · Scale-up, digitalisation, infrastructure*




**In 30 seconds.** Scaling up is not moving from a small fermenter to a large one: it is bringing a product to market with stable production, reliable supply, and consistent quality. The panel dismantled two myths: that scale-up is linear and that it must be expensive from day one. One of the costliest mistakes is trying to develop everything in isolation.

**Who spoke.** Jess Spiring (FoodNavigator, moderator) · Stefania Stoccuto (Siemens) · Derek Oxford (Total Grow Control) · Sonalika Jain (NAPIC).

## Key messages

1. **Scale-up is neither linear nor necessarily expensive at first.** What works at 10 litres does not behave the same at 10,000, but there are creative ways to progress before demonstration scale without big investments.

2. **Design backwards, with the factory in mind.** Start from the commercial plant (energy, water, wastewater, utilities) and work back to the lab. A modular "Lego" design and a reusable pilot plant avoid paying twice for the same investment.
3. **Data discipline from the lab.** If machines from different suppliers do not speak the same language, costly data islands appear.
4. **Regulation is scale-up too.** Toxicology tests for a novel food must use representative batches; leaving it to the end can delay market entry by 18 to 36 months.
5. **Not collaborating is the costliest mistake.** Innovation centres, shared pilot plants, contract manufacturers, and founders who have already failed are shortcuts many startups miss.

**In depth: the costliest mistakes.**

- **Underestimating energy, water, and wastewater** (Total Grow Control): a company can run short of power or water if it grows faster than planned, and the municipality may reject its effluent.
- **Over-optimising in the lab:** a strain that is perfect in the lab can fail at the slightest industrial variation; processes that tolerate a range of conditions are better.
- **Systems that do not talk to each other** (Siemens): integrating equipment from different suppliers seems optional at first and costs much more later.
- **Not using digital twins:** many startups wrongly believe they cannot afford them, yet they reduce risk and reassure investors.
- **Leaving regulation to the end** (NAPIC): it forces repeat tests on representative batches.

**Context.** NAPIC, the UK's alternative protein innovation centre, was launched in August 2024 with around £38M of public funding and more than 120 industry partners.

> **What this means for Biotech4Food.** This advice applies to any SME taking a new product or process from pilot scale to industrial production: review power, water, and effluent capacity from the outset; design the pilot plant for reuse; standardise data protocols; and plan regulatory testing using representative batches. NAPIC recommended speaking much earlier to entrepreneurs whose projects have failed: their experience can reveal creative options, such as repurposing existing facilities rather than building new ones.

16:00 •

# Commercial readiness test: which food-tech makes it?

*Main Stage · Fermentation, novel ingredients, industrial scale-up, startups*




**In 30 seconds.** Three fermentation startups, all at Series A or later, faced the scrutiny of an industrial buyer and an investor. All three already sell or are about to, and all three have scaled without building a new plant. Their pitch is no longer sustainability but price, supply security, and nutritional value.

**Who spoke.** Examiners: Romeo Frega (ABF Ingredients, industrial buyer view) and Mark Durno (NourishTech VC, investor view). Startups: Alex Neves (Clean Food Group, UK) · Jan Hendrik van Gilst (The Protein Brewery, Netherlands) · Zac Austin (Pacifico Biolabs, Germany).

## Key messages

1. **Scaling without new steel.** Clean Food Group bought a one-million-litre plant; Pacifico produces in unmodified beer tanks.
2. **Buyers no longer pay for "green."** They buy price and supply stability.
3. **A price equal to or better than the ingredient being replaced.**

4. **From meat substitute to nutritional value.** The Protein Brewery has taken its mycelium into nutrition for healthy ageing.
5. **Regulation sets the timetable.**

**In depth: three startups against five constraints.** Figures as reported by the companies.

| Criterion | Clean Food Group | The Protein Brewery | Pacifico Biolabs |
|---|---|---|---|
| Product | Oils and fats from non-GM yeasts; CleanButter, a cocoa butter equivalent | Fermotein®: mycelium powder (*Rhizomucor pusillus*) with ~50 % protein and ~30 % fibre | Fibrous mycoprotein with a chicken-breast bite |
| Cost and price | At scale, below cocoa butter, and its equivalents | Competitive with whey, at a positive margin | Up to 70 % cheaper than chicken |
| Manufacturing | Own 1M-litre plant in Knowsley (Liverpool); 2,750 t/ year | 2 × 85,000 L plant in Breda; 150 t run-rate | Rented brewery tanks; first site converted in ~4 months |
| Regulation | On sale in cosmetics; novel food dossier in preparation (UK first) | GRAS (US), Singapore, and EU novel food authorisation (June 2026) | Non-GM strain that, according to the company, needs no novel food authorisation |
| Entry market | Cosmetics; confectionery next | Sports and healthy-ageing nutrition, starting in the US | Hybrid meat, meat analogues, and pet food; German-speaking and Nordic countries |
| Revenue | First commercial CleanOil shipment in August 2026 | 10M servings sold in 2026; 3 active US clients | First retail products in the coming months |
| Funding | Just under £12M; £10M Series A under way | €70M in total | €7M Series A (May 2026) |

**Recurring patterns.** Reuse before building; a shift from sustainability messaging to a business rationale; verifiable data rather than promises; entry through profitable segments; nutrition as added value; and ingredients marketed under the customer's brand rather than a proprietary consumer brand.

**Details that matter.** Clean Food Group's yeasts can be fed on surplus bread. Pacifico says the tank accounts for only a small share of the final cost, with sugar and energy contributing the most; a 50/50 blend with beef almost doubles the meat processor's margin. The Protein Brewery raised its first funding round in 2020 and believes it should have asked for more; closing its Series B round took 100 meetings.

> **What this means for Biotech4Food.** These start-ups are both potential ingredient suppliers and potential customers for existing production capacity. Pacifico is explicitly seeking brewers and manufacturers with spare fermentation capacity, high-volume customers, and distributors in new markets. The use of sugar and surplus bread as substrates opens new customer opportunities for sugar producers and industrial bakeries.

17:00 •

# Who pays for the next generation of food-tech?

*Main Stage · Funding, venture capital, public funds*




**In 30 seconds.** Investors now demand solid business models, clear payback periods and products that compete on price. The challenge is no longer a lack of innovation but access to capital. The recipe: combine sources and match each one to the risk it should carry.

**Who spoke.** Martin Davalos (McWin Capital Partners, moderator) · Ali Morrow (Clay Capital) · Felix Leonhardt (Oyster Bay Venture Capital) · Nadav Berger (PeakBridge VC) · Diana Rucinschi (European Innovation Council).

## Key messages

1. **Commercial reality rules.** Whoever builds a plant must show a realistic payback and a price that competes with its market benchmark.
2. **Capital is scarce, not quality.** Startups are more mature, but the move from near-zero rates to 3–5 % has changed what is investable.

3. **Venture capital should not pay for steel.** It should cover learning and commercial risk; proven installations should use debt, project finance, or grants.
4. **Invest with the exit in mind.** Funds look at the intersection of health and nutrition, where potential buyers include pharma and insurers.
5. **The food industry invests little.** Less than 2 % of revenue goes to innovation, the lowest of the major sectors.

**In depth: what each instrument should fund.**

| Instrument | What it should fund |
|---|---|
| **Public grants** | Non-dilutive funding. The EIC focuses on deep tech (most food innovation is not); Circular Bio-based Europe funds first-of-a-kind and demonstration plants |
| **Venture capital** | Learning and commercial risk, not the bulk of a plant |
| **Patient capital and family offices** | Longer horizons to complete rounds |
| **Corporate venture funds** | Useful with caveats: they can limit who the company is later sold to; collaboration programmes such as Mondel¿z's CoLab have worked better |
| **Venture debt and project finance** | Installations that already work, with clear payback; the EIB is one of the largest providers |
| **Public guarantees for first plants** | Common in other sectors and rarely used in food; proposed by the EIC as a novelty |

**Three ways to reduce risk.** Use standard bioreactors and modular designs to reduce technical risk (Clay Capital); choose more cost-effective equipment where specifications are not critical (EIC); and develop a funding strategy from the outset, even if it evolves later.

**Public funds: Europe and each country.** The EIC invests €10–30M per company, always alongside private investors. The Netherlands and the Nordics have plenty of public funding; other regions have much less. France and the Netherlands stand out for combining funding, infrastructure, and institutional support. Large European companies take part in innovation less than their US or Chinese peers.

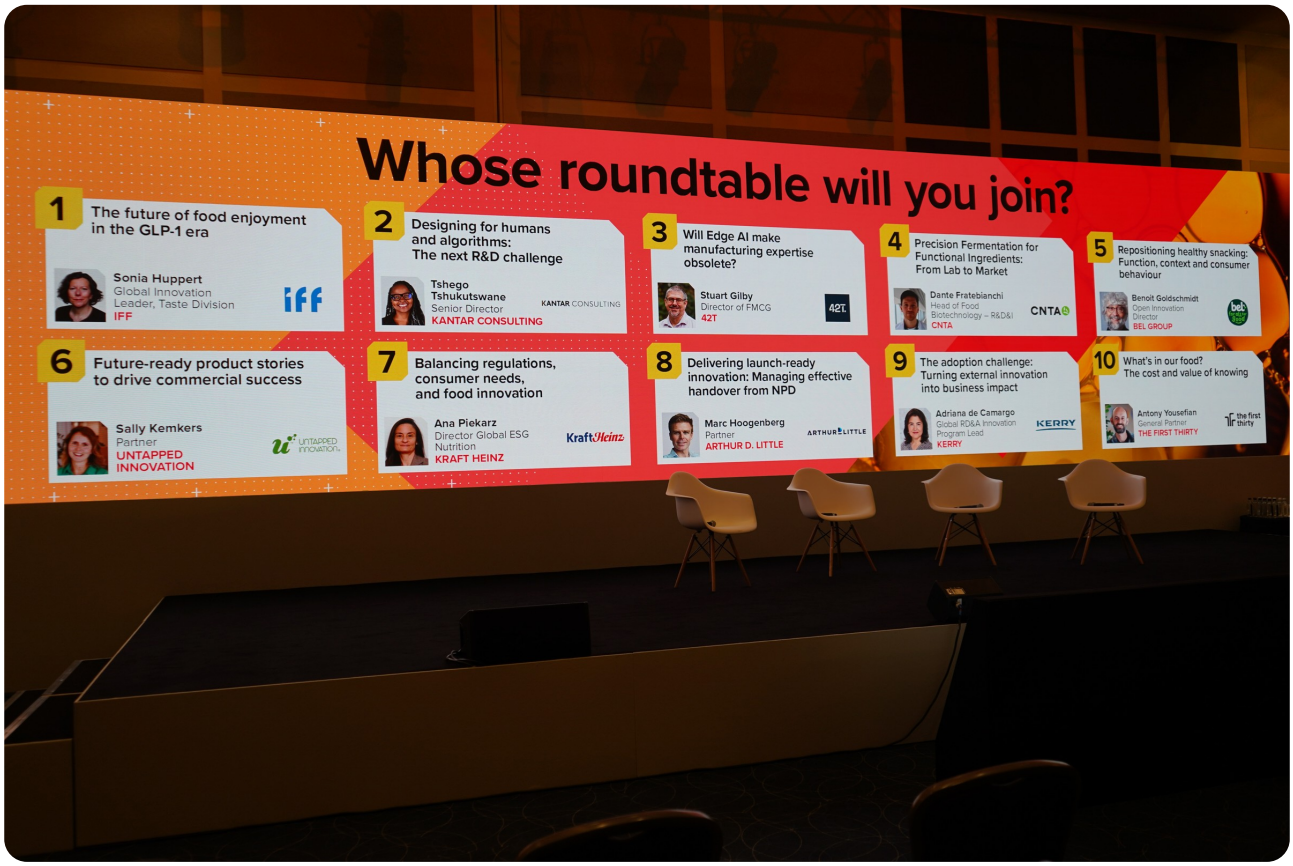
**Fact-check note.** Some figures are panellists' estimates: the ECB has been cutting rates since mid-2024, although the effect on return expectations remains.

> **What it means for Biotech4Food.** SMEs with industrial projects need a staged funding strategy combining grants, equity, and debt. Before deciding where to locate a plant, it pays to review European, national, and regional instruments. PeakBridge called for family-owned food companies to get involved, a profile quite common in the consortium regions.




# CNTA IN LONDON

CNTA took part as a Silver Partner of the conference for the first time, with a team of six, and moderated the roundtable on precision fermentation.




## ROUNDTABLE 4 ·

# Precision Fermentation for Functional Ingredients: From Lab to Market

*Thursday 24, 14:50–15:30 · Host: CNTA*

Itziar Ortega, CNTA's Head of Ecosystems and Open Innovation, moderated the roundtable, joined by Dante Fratebianchi, CNTA's Head of Biotechnology. It brought together more than 15 participants from academia, ingredient companies, consultancy, and industry, including Rodrigo Ledesma-Amaro (Bezos Centre for Sustainable Protein and Microbial Food Hub), Fabien Bouron (Cargill) and Eris Duro (Sagentia Innovation).





The first conclusion was clear: technology is no longer the obstacle. Precision fermentation has demonstrated that it can produce any ingredient, so the question is no longer whether it can be done, but what purpose it serves. An ingredient produced in this way will only interest industry if it offers clear, distinctive functionality that does not currently exist.

The value therefore lies less in producing a protein to replace another than in developing molecules, such as peptides, with new functions. The molecule alone is not enough: it must work across a wide range of products and be competitively priced. The most common mistake to date has been developing the technology without considering what the market needs.



## What an ingredient needs to reach the market

- Distinctive functionality

- New functions, not substitutes.
- Versatility across many applications.
- A viable business case.
- The consumer from the start.
- A competitive price.

> **Our takeaway.** Stop thinking about replacement and start with the need: new functionality, proven versatility, and consumer involvement from day one.

## Other roundtables with CNTA participation





- **Roundtable 1 · The future of food enjoyment in the GLP-1 era** (host: Sonia Huppert, IFF), with Fernando Caballo. Several participants are already working on ingredients, microorganisms and fibres that stimulate natural GLP-1 production, a promising line with little evidence so far. In the US, "boosts GLP-1" claims are on sale; in Europe claims are tightly restricted.
- **Roundtable 5 · Repositioning healthy snacking** (host: Benoît Goldschmidt, Bel), with Ruth Álvarez. The challenge is to move from reformulating ingredients to integrating product, experience, and consumer behaviour.

**The team.** Itziar Ortega (Ecosystems and Open Innovation), Dante Fratebianchi (Biotechnology), Ruth Álvarez and Fernando Caballo (Technology Watch and Competitive Intelligence), Macarena Baylos (Business Development Director), and Wissal Salem Bouchenaki (Business Development).




04

STARTUPS

We profiled 19 biotech-based startups, grouped into three families. Maturity and funding figures are as reported by the companies or the press.

**Biomass and lipid fermentation**
7 startups

**Precision fermentation, enzymes, and gene editing**
7 startups

**Microbiome and biotech services**
5 startups

## Biomass and lipid fermentation 7 startups

### Clean Food Group

Yeast-based fats that compete with cocoa butter

| | |
|---|---|
| **Country** | United Kingdom |
| **Founded** | 2022 |
| **Stage** | Selling in cosmetics |
| **Funding** | ~£12M raised |




Produces oils and fats with its own non-GM yeast strains, in a fermentation plant in Liverpool. CleanOil is already sold in cosmetics; CleanButter, a cocoa butter equivalent, is awaiting food authorisation.

**Did you know…?** Its yeasts can be fed on surplus bread.

**WHY IT MATTERS**

Partial hedge against cocoa volatility for chocolate, confectionery and baked goods, once authorised in the EU.

**Seen at:** Commercial readiness test (p. 26) **Web:** cleanfood.group

## Global Sustainable Transformation (GST)

Yeast fats from waste, with no palm or cocoa

| | |
|---|---|
| **Country** | Germany |
| **Founded** | 2022 |
| **Stage** | Demo scale |
| **Funding** | ~€2.7M in grants (SPRIND and EU) |




A spin-off from the Technical University of Munich. Its yeast fermentation platform, protected by seven patents, converts organic waste into triglycerides that replace cocoa butter, palm oil or sunflower oil.

**Did you know...?** Today its palm alternative costs €5–6/kg, compared with €1.2–1.5/kg for palm oil; it aims to get close to €1/kg by around 2030, with its first plant.

**WHY IT MATTERS**

Decouples fat supply from agricultural fragility: a hedge against cocoa and palm volatility for chocolate, baked goods and cosmetics.

**Web:** gstransform.de

## The Protein Brewery

Fermotein: mycelium with protein and fibre in a single powder

| | |
|---|---|
| **Country** | Netherlands |
| **Stage** | Commercial (US); authorised in the EU |
| **Funding** | €70M raised in total |



A mycelium ingredient with ~50 % protein, ~30 % fibre and micronutrients. The first mycelium authorised as a novel food in the EU (June 2026). B2B only, with no own brand.

**Did you know...?** Closing its Series B took around 100 meetings with investors.

**WHY IT MATTERS**

Nutritional density with a short ingredient list for sports nutrition, healthy ageing, bakery or beverages.

**Seen at:** Commercial readiness test (p. 26) **Web:** theproteinbrewery.com

## Pacifico Biolabs

Mycoprotein with a chicken-breast bite, made in beer tanks

| | |
|---|---|
| **Country** | Germany |
| **Stage** | First volume customers |
| **Funding** | €7M Series A (2026) |




Protein- and fibre-rich mycelium with a fibrous texture, grown in 24 hours in rented standard brewery tanks. It uses a strain that, according to the company, does not require novel food authorisation.

**Did you know…?** A 50/50 blend with beef almost doubles the meat processor's margin, according to the speaker.

**WHY IT MATTERS**

Meat–mycoprotein hybrids for the meat industry, and tank rental as an extra source of income for breweries.

**Seen at:** Commercial readiness test (p. 26) **Web:** pacifico.bio

## Solar Foods

Protein made from $CO_2$, hydrogen and electricity

| | |
|---|---|
| **Country** | Finland |
| **Founded** | 2017 |
| **Stage** | First sales in the US |
| **Funding** | Listed on Nasdaq First North; ~€25M capital increase (Jan. 2026) |




Produces Solein, a protein powder obtained by gas fermentation: a microorganism grows by feeding on $CO_2$ and hydrogen, independent of crops and climate.

**Did you know…?** Business Finland has granted it €77.8M, conditional on the investment decision, for its second plant (Factory 02) in Lappeenranta, planned for 2026.

**WHY IT MATTERS**

A protein ingredient decoupled from agriculture. In the EU it is still awaiting novel food authorisation; in the US there is already a product on the market.

**Web:** solarfoods.com

## Dapibuset

Mycelium protein from straw, bagasse or okara, right next to the by-product

| | |
|---|---|
| **Country** | Sweden |
| **Founded** | 2023 |
| **Stage** | Pilot with commercial validation |
| **Funding** | Undisclosed round |




Koji-style solid-state fermentation in modular units installed wherever the by-product is. It has already made hybrid meatballs with Solina.

**Did you know...?** The plant goes to the waste, not the other way round: this avoids transporting bulky, perishable substrates.

**WHY IT MATTERS**

Upcycling of bulky by-products for companies with waste streams.

**Web:** dapibuset.com

## JOYN Foods

Mushroom mycelium to blend with minced meat

| | |
|---|---|
| **Country** | United States / Israel |
| **Founded** | 2021 |
| **Stage** | Commercial, >$250,000/month in sales |
| **Funding** | ~$10M raised |




Sells frozen edible-mushroom mycelium (50CUT brand) to be blended with minced meat. The mycelium is grown on partner farms on recycled substrates such as wood chips or brewer's spent grain, and binds without egg, breadcrumbs or methylcellulose.

**Did you know...?** According to the company, its ingredient costs 25–30 % less than the cheapest minced beef in the US.

**WHY IT MATTERS**

Hybrid meat lowers the cost per serving and adds fibre without changing processes. It already reaches institutional catering through Sysco, US Foods and Compass Group.

**Web:** 50cut.com

# Precision fermentation, enzymes, and gene editing

7 startups

## Verley

Functionalised dairy proteins from precision fermentation

| | |
|---|---|
| **Country** | France |
| **Stage** | Scaling up |




Produces whey protein by precision fermentation and adds a functionalisation layer so it can enter sports, medical and clinical nutrition before reaching cost parity.

**Did you know...?** Its CEO summed it up: copying whey is not enough, "the cow already makes it".

**WHY IT MATTERS**

Fermentation-derived dairy proteins will reach specialised nutrition before the mass market.

**Seen at:** Biomanufacturing spotlight (p. 21) **Web:** verley-food.com

## Eclipse Ingredients

Bio-identical human lactoferrin from precision fermentation

| | |
|---|---|
| **Country** | Australia |
| **Founded** | 2025 |
| **Stage** | R&D and scale-up |
| **Funding** | A$7M (2025) |




A CSIRO spin-out that produces human lactoferrin with yeast. Roadmap: cosmetics in 2027, then food and supplements, and infant formula towards the end of the decade.

**Did you know...?** Obtaining 1 kg of lactoferrin from milk requires around 10,000 litres.

**WHY IT MATTERS**

Of interest for dairy, infant and senior nutrition and supplements; the EU is not yet on its roadmap.

**Web:** eclipseingredients.com

## Pentasweet

Brazzein: a sweet protein made by fermentation

| | |
|---|---|
| **Country** | Lithuania |
| **Founded** | 2022 |
| **Stage** | Pre-industrial |
| **Funding** | €65M factory |



Building Europe's first brazzein factory in Vilnius, operational in the first half of 2027. It plans to apply to EFSA for authorisation as an additive.

**Did you know...?** Brazzein is around 1,500 times sweeter than sucrose.

**WHY IT MATTERS**

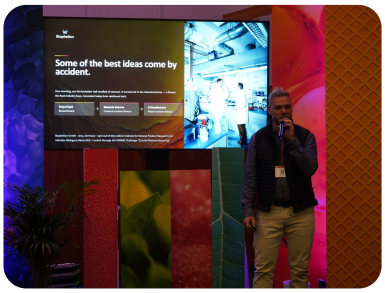
One more route to sugar reduction for confectionery, dairy, baked goods and beverages; pending authorisation in the EU.

**Web:** pentasweet.com

## Biophelion

Natural flavours and biosurfactants from waste

| | |
|---|---|
| **Country** | Germany |
| **Founded** | 2025 |
| **Stage** | Pilot scale |
| **Funding** | >€6M non-dilutive (SPRIND) |




Uses a fungus to ferment by-products from bioethanol, sugar and paper. Its first product, massoia lactone, provides a coconut aroma and qualifies as "natural".

**Did you know...?** It replaces extraction from the bark of a near-threatened tree.

**WHY IT MATTERS**

Natural flavours for bakery, dairy and beverages, and a possible outlet for agri-food waste.

**Web:** biophelion.com

## CaBloom

The creaminess of fat, without the fat, from microalgae

| | |
|---|---|
| **Country** | Finland |
| **Founded** | 2021 |
| **Stage** | Pilot production |
| **Funding** | Undisclosed |




Grows microalgae by fermentation on food-industry by-products and turns them into a fibre-rich powder that, once hydrated, gives a creamy texture that is stable to heat, freezing and pH changes.

**Did you know...?** It started out as Aircohol, making ethanol from captured $CO_2$; in 2025 it changed direction and name.

**WHY IT MATTERS**

Replaces fat, stabilisers and emulsifiers with a two-ingredient label (water and microalgae fibre) and adds around 10 % fibre.

**Web:** cabloom.com

## Caffree

Enzymatic decaffeination inside ready-made coffee

| | |
|---|---|
| **Country** | United States |
| **Founded** | 2023 |
| **Stage** | Pre-commercial |
| **Funding** | $4.9M (to be confirmed) |



A powder with three enzymes converts caffeine into theobromine at the plant itself, without solvents. The dose and time adjust the caffeine level.

**Did you know...?** It enables “half-caff” coffees made to order.

**WHY IT MATTERS**

Of interest to roasters and beverage makers; in the EU the food enzymes regulation would apply.

**Web:** caffree.com

## OmnisOva

Gene-edited hens that lay eggs without their main allergen

| | |
|---|---|
| **Country** | Australia |
| **Founded** | 2022 |
| **Stage** | R&D: breeding its first flock |
| **Funding** | ~A$1.6M CRC-P grant (2023–2026) |

A Melbourne company that gene-edits hens to remove ovomucoid, the most heat-resistant egg allergen, and develops processing to deactivate the remaining allergens. It is already conventionally breeding a flock that will lay ovomucoid-free eggs. It works with CSIRO, Australia's national science agency, and aims to launch the first gene-edited animal food in Australia.

**Did you know…?** Its first gene-edited chick has already hatched, the first of its kind in Australia. According to the company, up to 10 % of children and around 1 % of adults are allergic to eggs.

**WHY IT MATTERS**

Eggs that are safe for people with allergies would open up a market of their own in bakery, egg products and infant food. In the EU, gene-edited animals are still covered by GMO legislation, so their arrival in Europe is not imminent.

**Web:** omnisova.com

## Microbiome and biotech services 5 startups

### SciencePower

Stable postbiotics with no cold chain

| | |
|---|---|
| **Country** | Italy |
| **Stage** | Ingredient on the market |
| **Funding** | Not public |




A sequential fermentation platform that mimics cross-feeding between gut microbes. Its postbiotic is a powder that is stable to heat and pH.

**Did you know...?** They claim doses from 50 mg a day.

**WHY IT MATTERS**

Stable ingredients for beverages, bakery and dairy; in the EU, postbiotics do not have a category of their own.

**Web:** sciencepower.com

### Key2Biotics

A CRO and CDMO dedicated solely to probiotics

| | |
|---|---|
| **Country** | Ireland |
| **Founded** | 2024 |
| **Stage** | Operating and generating revenue |
| **Funding** | ~€200,000 |




Formulation, stability, viability and product manufacturing for clinical trials with probiotics.

**Did you know...?** According to its analyses, more than 60 % of supplements bought in shops did not reach the live probiotic counts declared.

**WHY IT MATTERS**

Anyone launching food with probiotics must maintain the declared counts; in the EU, “probiotic” is considered an unauthorised claim.

**Web:** key2biotics.com

## Enbiosis

AI that designs formulations for the microbiome

| | |
|---|---|
| **Country** | United Kingdom / Türkiye |
| **Founded** | 2019 |
| **Stage** | Platform 2.0 (2026) |
| **Funding** | Self-funded |




Builds a digital twin of the microbiome and searches for the minimum set of food-grade precursors that produce a target metabolite. It licenses the formulations to manufacturers.

**Did you know...?** They call going from the desired metabolite back to the ingredients "retrosynthesis".

**WHY IT MATTERS**

A fast route to launching functional foods with licensed formulations, with EU claims as the limit.

**Web:** enbiosis.com

## Aelius Biotech

A gut in the lab to test food without animals

| | |
|---|---|
| **Country** | United Kingdom |
| **Founded** | 2018 |
| **Stage** | Operating and generating revenue |
| **Funding** | ~£2M (Mercia and North East Venture Fund) |




A Newcastle University spin-off. In vitro tests that simulate the three phases of digestion with cell-compatible mucus, to measure digestion, absorption and bioavailability before moving on to human trials.

**Did you know...?** It claims to have developed the world's first mucus compatible with cell cultures.

**WHY IT MATTERS**

Reduces risk and cost ahead of clinical trials for health claims, alternative proteins or new ingredients. Huel is among its customers.

**Web:** aeliusbiotech.com

## Potina

Oat drinks for children and a platform for lactoferrin

| | |
|---|---|
| **Country** | United Kingdom |
| **Founded** | 2024 |
| **Stage** | Drink on the market |
| **Funding** | Not public |




A brand of oat and banana drinks for children, sold in Tesco, that is developing a platform so that bioactives such as lactoferrin remain functional when consumed.

**Did you know...?** Its founder was Alpro's sales director for the UK and Ireland.

**WHY IT MATTERS**

Children's drinks with bioactives; food for infants and young children has specific legislation in the EU.

**Web:** potina.co.uk




05

SIGNALS

Ten signals worth following over the next twelve months. Most are regulatory or about scale-up capacity.

| Area | Signal | Where to look |
|---|---|---|
| **Ingredients** | Food authorisation of Clean Food Group's yeast fats (UK first, then EU) | FSA, EFSA; company press releases |
| **Ingredients** | First European launches with Fermotein after the June 2026 authorisation, and how they communicate benefits | Launch databases (Mintel GNPD); The Protein Brewery |
| **Ingredients** | Pentasweet's brazzein: EFSA dossier and the Vilnius plant, operational in H1 2027 | EFSA; Pentasweet |
| **Scale-up** | Converted breweries, new contract manufacturers, and open-access pilot plants in Europe | Capacity announcements; Bio Base Europe Pilot Plant |
| **Scale-up** | NAPIC's scale-up infrastructure map and one-stop-shop model | napic.ac.uk |
| **Regulation** | Speed of the FSA sandbox versus EFSA timelines, and any EU sandbox proposals | FSA; EFSA; European Commission |
| **Regulation** | EFSA acceptance of in vitro toxicology | EFSA |
| **Regulation** | Changes to the novel food and by-product frameworks that make it easier to turn spent grain, press cakes, pulps, or peels into ingredients | European Commission; EFSA |
| **Finance** | Public guarantees for first industrial food plants | EIC, EIB and national programmes |
| **Policy** | Whether the EU Protein Action Plan reaches human food, fermentation, and public procurement | European Commission; Member States |

# Closing: what it means for Biotech4Food

Biotech4Food's cluster network can connect the links that were missing in London: idle fermentation capacity, ingredient buyers, and SMEs with ideas. This is CNTA's reading, not a statement by the speakers.




## Agri-food SMEs

- Start from a buyer's problem and a function nobody offers today.
- Enter through niches that pay specialised nutrition, cosmetics, pet food.
- Use contract manufacturers or idle tanks before building; your own idle capacity can also be a business.
- Build techno-economic analysis and the regulatory route into R&D from day one.

## Clusters and technology centres

- Function as a one-stop shop: map pilot plants, contract manufacturers, and idle fermentation capacity across the 8 regions.
- Broker co-development between buyers and startups on concrete problems.

- Train on techno-economic analysis, regulatory dossiers, intellectual property, and investor readiness.

## Regions and authorities

- Stage-appropriate funding: grants for learning, guarantees, and debt for first plants.
- Support an EU regulatory sandbox and clearer rules for side-streams.
- Use interregional investment to close the funding gap with the Netherlands and the Nordics.

## Sources


- CNTA, “Asistimos por ti · Future Food-Tech London 2026” (in Spanish), Technology Watch and Competitive Intelligence, October 2026. Figures are as given by speakers and companies; the full report includes fact-check notes.
- Biotech4Food · I4BE
- European Innovation Council · Circular Bio-based Europe Joint Undertaking · NAPIC



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