



 **SWISS FOOD & NUTRITION VALLEY**
Pioneering future-proof food systems. Together

STATE OF PLAY CULTURED FOODS 2.0

HOW CAN WE DRIVE IMPACT AT SCALE?

**4 DECEMBER 2024 | KEMPTTHAL, ZURICH
POST-EVENT REPORT**

Co-hosted by



With support from



**Welcome to
Zürich,
Switzerland.**

CONTENTS

01

SWISS FOOD &
NUTRITION VALLEY

02

THE SFNV
IMPACT PLATFORMS

03

THE EVENT

04

WHY
CULTURED FOODS?

05

CULTURED FOODS
& THE SDGS

06

SPEAKER
INSIGHTS

07

5 KEY TAKEAWAYS

08

CULTURED HUB
OPENING

09

KEEP IN TOUCH



01 SWISS FOOD & NUTRITION VALLEY

157

VALLEY PARTNERS

9

KEY STAKEHOLDER GROUPS

31

ECOSYSTEM EVENTS IN 2024



Pioneering future-proof food systems. Together.

Swiss Food & Nutrition Valley (SFNV) brings together stakeholders from across the Swiss food ecosystem to drive impact at scale - creating healthier food systems that benefit both people and planet.

SFNV is a purpose-driven, not-for-profit association, committed to strengthening Switzerland's role as a food nation.



Sustainable Proteins

From rethinking traditional agriculture to cultured meat.



Sustainable Packaging

Innovative solutions to turn the tide on waste



Food Systems 4.0

Digitalizing the food supply chain.



Future Farming

Finding new ways to feed the growing global population.



Precision Nutrition

Exploring the relationship between genes, nutrition and health.

02 THE SFNV IMPACT PLATFORMS

“Our Impact Platforms focus on five key areas where Switzerland has the expertise and technology to develop scalable solutions. They provide a structure to help us co-create and innovate through collaborative projects.”

Marta Antonelli

Head of Impact Platforms, SFNV

Key activities at a glance



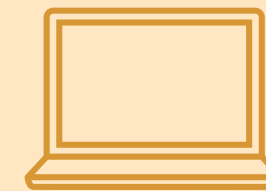
EVENTS



WHITE PAPERS



WORKING GROUPS



ONLINE FORUMS



03 THE EVENT

CULTURED FOODS 2.0

4 DECEMBER 2024 | SWITZERLAND



57

ATTENDEES

9

STAKEHOLDER
GROUPS
REPRESENTED

7

EXPERT
SPEAKERS

WHAT

Considering the significant challenges our planet faces from climate change and changing consumption patterns, collaboration for future-proof food systems has never been more vital.

SFNV's State of Play event brought together actors from across the Swiss innovation ecosystem to assess where Switzerland stands in the growing cultured foods sector.

This event allowed participants to network and share knowledge with innovators in the cultured food industry while gaining a deeper understanding of the evolving legal framework and exploring potential collaborations that could accelerate progress in the field.



04 WHY CULTURED FOODS?

Cultured foods – including cultured meat and fish, fermented foods, and other biotech products – offer a promising approach to address some of the most pressing challenges we face in creating a future-proof food system.



52%

ESTIMATED GROWTH RATE OF THE CULTURED MEAT MARKET FROM 2023 TO 2030.¹

THE CHALLENGES TODAY

14.5%

GLOBAL GREENHOUSE GAS EMISSIONS ATTRIBUTED TO ANIMAL AGRICULTURE.²

77%

GLOBAL FARMLAND USED FOR LIVESTOCK.³

THE OPPORTUNITY

\$25 BN

POTENTIAL WORTH OF THE CULTIVATED MEAT MARKET IN 2030.⁴

92%

THE CARBON FOOTPRINT REDUCTION POSSIBLE BY PRODUCING CULTIVATED MEAT WITH RENEWABLE ENERGY SOURCES.³

¹ Grand View Research <https://www.grandviewresearch.com/industry-analysis/cultured-meat-market-report>
² UN FAO <https://www.fao.org/family-farming/detail/en/c/1634679/>
³ The Good Food Institute. <https://gfi.org/cultivated/>
⁴ McKinsey, <https://www.mckinsey.com/industries/agriculture/our-insights/cultivated-meat-out-of-the-lab-into-the-frying-pan#/>



- **CHRISTINA SENN-JAKOBSEN**
CEO, SWISS FOOD & NUTRITION VALLEY

“Collaboration is at the heart of progress. By bringing the Swiss ecosystem together with leading international experts, we can better spot potential hurdles and find new ways to propel the cultured food industry forwards.”



- **YANNICK GÄCHTER**
CEO, THE CULTURED HUB

“As one of the world’s most innovative nations, Switzerland is well positioned to play a key role in scaling cultured foods. Our jointly developed facility embodies the collaborative spirit of the Swiss food ecosystem.”



05 CULTURED FOOD & THE SUSTAINABLE DEVELOPMENT GOALS



SDG 2: Zero Hunger

Cultured foods offer the potential to enhance food security by improving access to new, nutritious, protein-rich options that in the longer term may be more affordable than the animal-based originals.



SDG 3: Good Health & Wellbeing

Cultured foods can be tailored to provide essential nutrients, reduce saturated fats, and eliminate potentially harmful substances in their production, such as antibiotics or hormones.



SDG 13: Climate Action

Cultured meat has a smaller carbon footprint than traditional livestock farming and uses a significantly lower amount of water resources. Switching to cultured foods reduces the need for deforestation and changes in land use for agriculture.



SDG 14: Life on Land

The production of cultured foods often requires less land, reducing deforestation and habitat destruction, while limiting livestock farming and animal-slaughter alleviates pressure on ecosystems and wild animal populations.



The further integration of cultured foods into global food systems can significantly contribute to achieving the UN Sustainable Development Goals (SDGs), driving positive change toward a more future-proof food system for all.

06 SPEAKER INSIGHTS

YANNICK GÄCHTER

CEO, THE CULTURED HUB



KEY TAKEAWAYS

Our planet has boundaries, and we are crossing them! These challenges offer opportunities and we need to act fast. I believe that Switzerland can lead the way.

- Cultured foods represent a significant opportunity to sustainably address the planet's pressing challenges.
- Switzerland is well-positioned to make a global impact through its expertise and innovation.
- There is still progress to be made around consumer support, which is crucial to realising cultured food's potential.
- The Cultured Hub can help scale the development of market-ready, sustainable, healthy, and affordable products - accelerating progress and building on Switzerland's global impact.

06 SPEAKER INSIGHTS

RALPH LANGHOLZ
VICE PRESIDENT,
THE SWISS PROTEIN
ASSOCIATION



KEY TAKEAWAYS

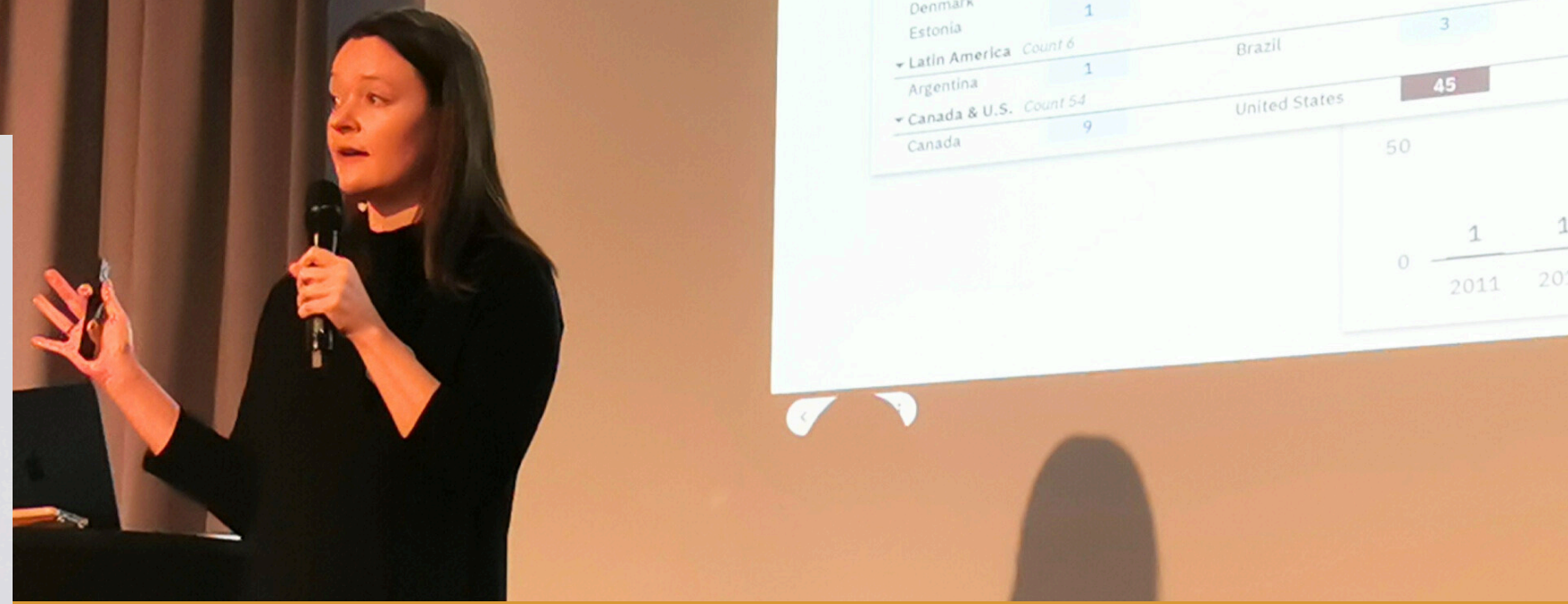
Two of the key advantages of Switzerland are its transparency and the relative speed of the application process.

- Collaboration across the ecosystem is creating the right conditions for promoting alternative proteins in Switzerland and beyond.
- Although certain countries have approved cultured meat, it is still being determined when to expect the first authorisation in Switzerland.
- Novel food applications related to cultured foods in Switzerland will proceed, and internal industry tastings are to be expected in the future.
- Switzerland looks to regulatory developments in the EU for handling food applications - the structure of the EU application document and the check for potential GMO-derived ingredients are the most important factors.

06 SPEAKER INSIGHTS

CARLOTTE LUCAS

HEAD OF INDUSTRY,
THE GOOD FOOD
INSTITUTE EUROPE



Denmark	1	Brazil	3
Estonia	1		
Latin America	Count 6		
Argentina	1		
Canada & U.S.	Count 54	United States	45
Canada	9		
			50
			0
			1
			2011
			20

KEY TAKEAWAYS

We see a lot of potential here in Europe. R&D and scaling challenges remain – that is why The Cultured Hub is such an amazing initiative.

- There is a growing recognition by governments around the world about the role cultured foods can play in addressing global challenges. With that we've seen an increase in public funding and the explicit mention of cultured foods in national biotech plans in countries like the US and the UK.
- Within cultured foods, challenges related to R&D and scaling remain. However, challenges also present opportunities. We're starting to see stakeholders working together to build robust ecosystems that facilitate collaboration.
- Many Europeans believe that meat consumption is too high – even in certain southern European countries that are less open to food innovation - showing the potential for further development of sustainable options such as cultured products with the right positioning and local context.

06 SPEAKER INSIGHTS

ILLTUD DUNSFORD
CEO AND CO-FOUNDER,
CELLULAR AGRICULTURE



KEY TAKEAWAYS

We have to change how we produce food. It's not just meat. It's an evolution of the agricultural process that recognizes planetary limits.

- Cellular Agriculture Ltd's goal is to ensure that cultivated meat becomes accessible to everyone. To achieve this, industrial scaling is vital.
- Climate change is reshaping the landscape of food production, influencing where and how we can cultivate various products. In response, companies are exploring innovative solutions, such as the cultivation of coffee and chocolate, to adapt to these changing conditions.
- Some progressive farmers are already pioneering and exploring more future-proof agricultural approaches, showing opportunities to collaborate and explore.

06 SPEAKER INSIGHTS

CHRISTINE SCHÄFER

SENIOR RESEARCHER,
GDI GOTTLIEB
DUTTWEILER INSTITUTE

Cultural traditions don't have to be seen as a barrier but rather a framework to introduce a balanced food system.



KEY TAKEAWAYS

- Willingness to try cultured products varies based on demographics and attitudes, with those who are conscious about their diet showing greater openness.
- Product naming and presentation significantly influences public perception. For many, the term “cultivated meat” is more appealing than “lab-grown meat”.
- Among the six dimensions of food culture – pleasure, social, health, control, rituals, and rootedness – pleasure, social, and health positively impact willingness to try novel foods.
- Cultural traditions need not be a barrier to introducing new foods but can instead be a framework to create a balanced food system.

06 SPEAKER INSIGHTS

SIMONA FEHLMANN
CEO, SALLEA



KEY TAKEAWAYS

Switzerland is not only home to international corporations with a wealth of knowledge and expertise in the food sector, but it also has a strong pool of talent, which is essential to any startup's growth.

- To make cultured foods economically scalable, more collaboration is needed between parties, connecting the dots between biotech, farmers, and food producers.
- To bring the relevant authorities up to speed and remove regulatory hurdles, the ecosystem must engage in open discussions, and show both incremental and substantial improvements.
- Transparency and the clear communication are essential to building consumer trust and removing any unclarity surrounding cultured foods.
- Texture can be a challenge within cultured meat products, and this is where sallea's scaffolding product can help.

06 SPEAKER INSIGHTS

IRA VAN EELEN

COFOUNDER,
RESPECTFARMS
BOARD MEMBER,
CELLULAIRE
AGRICULTUUR NEDERLAND

We need a level playing field to create cultivated meat. We also need to create a supportive ecosystem.



KEY TAKEAWAYS

- As we transition to cultured meat, it's essential to repurpose existing livestock infrastructure and support farmers in adopting sustainable business models to ensure their livelihoods remain viable.
- Farmers should be actively involved in addressing the challenges cultivated meat still faces, ensuring their expertise and resources are included.
- Cultured meat offers countless opportunities in quality, sustainability, and innovation.
- Cultured food tastings can help foster enthusiasm and understanding, driving market adoption.

07 5 KEY TAKEAWAYS



Opportunities in Innovation and Sustainability

Cultured foods present immense opportunities for quality, sustainability, and innovation. Addressing challenges like texture and scaling are pivotal to realising their potential.

Collaboration for Scalability and Adoption

Achieving economic scalability and market acceptance for cultured foods demands robust collaboration across the biotech, agriculture, and food production sectors. Initiatives like The Cultured Hub are vital for scaling, building trust, and driving adoption.

Farmer Inclusion and Infrastructure Adaptation

Transitioning to cultured meat requires repurposing existing livestock infrastructure, supporting farmers with sustainable business models.

Cultural and Public Perception

Acceptance of cultured foods is influenced by demographics, attitudes, and cultural traditions. Effective naming (e.g., “cultured meat” over “lab-grown meat”) and clear messaging are critical for facilitating growth.

Switzerland has a role to play

Switzerland, with its innovation and expertise, is well positioned to make a global impact on cultured food solutions.

08 THE CULTURED HUB

The Cultured Hub is a state-of-the-art biotech facility and scale-up platform

Equipped with advanced product development labs, cell culture, and fermentation capabilities and equipment, and with its ecosystem of partners, the Hub empowers start-ups and organizations to accelerate the development of market-ready, sustainable, healthy, and affordable products.

- Located in Kempththal, a burgeoning hub of innovation in Europe
- Enables scaling from small-scale laboratory experiments to 1,000-liter pilot operations without heavy capital investment
- Companies save time and significant capital and can keep equity and their IP.
- Provides access to centuries of collective experience in food processing, product development, production, marketing, and market launches.



Would you like to know more?

Reach out to
Yannick Gächter
CEO of The Cultured Hub



THE
CULTURED
HUB

A joint venture created by

BÜHLER

Givaudan

MIGROS

09 KEEP IN TOUCH



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