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Food tech angel investors

Editor Update: Thanks to new information and data from VCs - we've updated and re-arranged the list of most active foodtech investors. That change was uncomfortable: supply chain pain, soaring consumer and material prices, and a changing climate are each threatening the security of our food system. But there were certainly upsides. A growing awareness of food as a driver of climate change combined with favorable investment conditions and a new normal of investment via Zoom calls all drove record amounts of capital into transformative FoodTech startups. We're leaps closer to moonshot technologies that will grow nutritious, affordable food for billions of people without ravaging the planet. Importantly: FoodTech-focused funding hit its stride from a combination of new and established specialised FoodTech VCs, rising interest from traditional Venture, early checks from Accelerator/VC hybrids, and emerging new formats like investment syndicates and rolling funds. We at FoodHack couldn't avoid getting involved in the funding boom too, rolling up our very own FoodHack Syndicate in November this year and backing 3 early-stage startups since with a group of FoodTech focused angels. You can apply to join our syndicate or apply for funding for your startup here. So this week, we're rounding up the highlights of FoodTech investment in 2021, looking at who's been most actively cutting checks, what they're backing and where we think this is all going. By The Numbers Our research uncovered 90+ active investors in FoodTech (and counting). The vast majority are focused exclusively on Food and Ag, though some are traditional VCs extending into FoodTech. We forecast FoodTech investment will reach approximately \$50B in 2021, a 60%+ increase over 2020 (itself a record-breaking year with \$30B raised). Q1 + Q2 deal activity alone was \$24B, and funding velocity has only picked up since. Europe's tech scene saw over \$100B in annual funding, with \$100M funding rounds going through approximately every other day. The lion's share is fintech, enterprise software, and mobility. With 47 investments in 2021, Big Idea Ventures is the most active FoodTech VC, one of only 8 that have made 20+ investments in the space of this year. Top FoodTech Investment Headlines A few trends jumped out in reviewing this year's FoodTech investment activity: European Funding Boomed Europe's tech unicorn herd is now 321 strong, 100 of which hit their 10-figure valuation in 2021 and 11 of which are FoodTech focused. FoodTech is well-represented in the mix, with Doordash's acquisition of Wolt marking one of the year's most successful exits which yielded 200x returns for early investors, like Sweden's EQT Ventures. Europe's growth has been fueled by new funds, like Eatable Adventures' €50M fund, and a second, €180M fund from Five Seasons Ventures. It'll take a few weeks for the dust to settle on year-end figures, but early reports are showing a nearly double total volume invested from last year's record €3B in European FoodTech. IPOs Floundered & Delayed It's been a rough year for IPOs, and not just for FoodTech. Take the 50+ US tech IPOs so far this year: all but one are now in a bear slump, trading 20+% below their highest price after opening. Banner FoodTech IPOs have largely underperformed, like Oatly plummeting to 50% of their opening price or Deliveroo executing "the worst IPO in London's history." Downstream Is Up While both upstream (B2B tech and products) and downstream (products consumers buy) investment boomed this year, downstream investment rebounded after slipping behind upstream for the first time last year. This year saw especially significant downstream gains in three areas: Cellular meat: investors are fuelling 9-figure late-stage rounds to break ground on cultivated meat manufacturing facilities, like last week's Future Meat Technologies \$347M round with backing from ADM and Tyson. eGrocery: remains the hottest investment segment, with many chasing the success of firms like Gorillas (\$1.3B funding, \$2B+ valuation) and Getir (\$1B funding, \$8B valuation). Farms of the future: like cellular meat, this space requires immense capital to scale. Early leaders amassed massive go-to-market war chests, like Infarm's \$200M recent Series D. New concepts are also raising significant amounts, like Smallhold's speciality mushroom farms \$25M series A led by Astanor Ventures. Who's writing the most checks? The most active investment segment (in terms of the number of checks written) are accelerator / VC hybrids like SOSV and Big Idea Ventures. These accelerator-driven early-stage funders don't write the largest checks (accelerators typically do \$100k-\$200k first checks with up to \$1M-\$3M in follow-ons), but actively leverage their expertise and networks in FoodTech to help startups scale from MVP. Most of the companies that go on to lead larger rounds start with accelerator-like VCs. Following closely behind the accelerators of the world are speciality VCs -- funds that focus on a particular niche or segment ie alt protein or cultivated meat -- like Food Labs, CPT Capital, Blue Horizon and Unovis (all of which rank in the top 10 most active investors we identified). The top 25 list shows that it is not just one type of fund backing the FoodTech sector, instead it's a mix of accelerators, speciality VCs, traditional VCs, AngelList rolling funds, and syndicates that make up total funding activity. FoodTech's investment infrastructure matured significantly this year, with a wide range of fund types at different stages with it. The list also highlights that venture funding (as a whole, and even in FoodTech) is getting more competitive. In our research we found 7 new funds that launched in 2021 including Synthesis Capital, Good Startup, Green Generation Fund, E2JDJ, World Fund, Nucleus Capital and Gullspang Re:Food, all popping up and deploying their fair share of early stage funding this year. Quick disclaimers: all data is sourced from Crunchbase and where possible, direct from the source of the fund themselves. As data on total funds deployed is hard to come by, we made the list based on total deals closed - meaning that the list clearly favors early stage investors - like accelerators. The list would look very different when you factor in total volume deployed (another report, for another day). Lastly, when preparing this list, several funds reached out to mention that accelerators shouldn't be on the same list as VCs. Ultimately, we see hybrid accelerator/VCs and VCs in the same business of selling money to startups. It's just two different approaches to sourcing deal flow and varying check sizes. 27 Most Active FoodTech Investors of 2021* Big Idea Ventures: with three funds focusing on alt proteins, environmental impact, and rural development, BIV takes the top spot in terms of deal activity and has inked with leading alt protein startups like Innocent Meat, Shik Meat, Biftek, and Good Catch. 2021 FoodTech investments: 47 SOSV: following closely after is the hybrid VC/accelerator based out of the US that invests throughout the tech ecosystem, but has a strong portfolio in alt proteins and B2B technologies (inc. Sundial Foods, New Wave Foods, Finless Foods & NotCo.) 2021 FoodTech investments: 33. Food Labs: the Berlin-based VC and venture studio's portfolio is rock-solid: Gorillas, Infarm, Formo, and Yababa, to name a few. Strong track record of investing early in companies that go on to secure investment from Tier 1 VCs. 2021 FoodTech investments: 28. CPT Capital: the food & materials VC invests in the future of protein, investing mainly in pre-seed, seed, and Series A rounds for companies like Enough, Aleph Farms, and Redefine Meat. 2021 FoodTech investments: 23. YCombinator: the world-known startup accelerator has been biting into the FoodTech scene lately, having backed several leaders in cell-based, alt-protein and eGrocery including QOA, Juicy Marbles, Orbillion Bio and Byte Kitchen. 2021 FoodTech investments: 23. Blue Horizon Ventures: another leading alt-protein-focused VC, Blue Horizon based out of Zurich, Switzerland funds and supports early-stage companies like Biomilq, Planted, and Cubiq. 2021 FoodTech investments: 22. Sustainable Food Ventures: Founded by Ryan Bethencourt and Mariliss Holm, SFV invests early across all proteins (inc. cellular, plant-based, recombinant). This year's highlights include De Novo Dairy, Aqua Cultured Foods, and Libre Foods, offering early-stage funds via an AngelList rolling fund. 2021 FoodTech investments: 21. Rockstart: part accelerator/part fund based out of Amsterdam, Rockstart is an early stage investor across Energy, AgriFood and Emerging Technologies. This year's investment include Reduced, Flowaste, Food4All, & Lunch.co with an average of €100-€500k checks. 2021 FoodTech investments: 17. Veg Capital: plant-based fund managed by Vegamunity co-founder Matthew Glover offering early-stage investment in animal-replacing products like VFC, Mighty Pea, THIS, and Hooked. 2021 FoodTech investments: 16. Tet Ventures: led by veteran FoodTech VC Neeraj Berry with the support of Gorman biscuit giant Bahlsen. Tet is a highly-active firm making early-stage investments. Highlights include Kingdom Supercultures, Gorillas, and Planet Fwd. 2021 FoodTech investments: 16. Unovis (New Crop Capital): leading and pioneering alt-protein VC with deep expertise and investments in Abbot's Butcher, NUMU, and Wicked Foods. 2021 FoodTech investments: 15. Astanor Ventures: highly respected specialised VC with strong track record in sustainable food, ocean, & ag startups deploying large check sizes well into the later stages. Highlights include: v2food, plantible, kuleana. 2021 FoodTech investments: 15. Temasek: the Singapore government-owned investor is a cornerstone in Singapore's strong FoodTech and alt protein sector, investing throughout the FoodTech space in companies like The EVERY Company, Perfect Day & Bowery Farming. 2021 FoodTech investments: 15. Sparklabs Cultiv8: sustainable Australian FoodTech accelerator with strong network for startups. Portfolio includes Melibio, Shandi Global, and Stenco. 2021 FoodTech investments: 14. Anterra Capital: investing early-stage in startups serving farmers, animals, and consumers like Berkeley Yeast, Slingshot, and Lollipop. 2021 FoodTech investments: 12. Rage Capital: sustainability-driven investor with a strong portfolio including Blue Nalu, Splendid Spoon, and Clara Foods. 2021 FoodTech investments: 12. PeakBridge: investment manager with FoodTech focus and a rockstar team deep in the sector. Early investments include Nick's, Vanilla Vida, and Orbisk. 2021 FoodTech investments: 12. Five Seasons Ventures: after closing and deploying their first €77M fund with startups like the nu company, Vly, and THIS, Five Seasons is administering their new €180M fund for Series A and B investments in European startups. 2021 FoodTech investments: 12. AgFunder: Silicon Valley-based VC fueling innovation in food & ag now raising their fourth fund (\$75-\$100M, Seed & Series A). Strong team with deep knowledge in the sector, backing visionaries like Juicy Marbles, Bear Flag Robotics, and Kula Bio. 2021 FoodTech investments: 12. S2C Ventures: multi-stage fund with multiple successful exits (Beyond Meat, sweetgreen) and promising portfolio (Good Eggs, Future Meat Technologies, Apeel Technologies). 2021 Foodtech investments: 12. Siddhi Capital: disruptive early-stage F&B investor deploying a total of \$30M this year with an average check size of \$3.5M and backing leaders like Bluenalu, Myco, and Kencko. 2021 FoodTech investments: 11. Trellis Road: pre-seed and seed fund based out of Stockholm, Sweden, focusing on high-impact startups. Strong team and network, with investments in QOA, Mission Barns, and Bluu. 2021 FoodTech investments: 11. Good Seed Ventures: funding the transition to a sustainable food system, and with remarkably no external capital raised. Backing companies like Formo, Perfeqgt, Libre Foods, and Planted. 2021 FoodTech investments: 11. The Kitchen Hub: active funder in Israel's incredible FoodTech scene, with investments in Aleph Farms, Imagindairy, and Yofix. 2021 FoodTech investments: 11. Good Startup: working to remove animals from the food system via the Good Protein Fund, an open multi-stage fund for alt proteins. Previous investments include Impossible Foods, The EVERY Company, and VitroLabs. 2021 FoodTech investments: 11. Bread and Butter Ventures: early stage VC investing largely in FoodTech, including startups like Traive, Hungry+, Milk Movement. 2021 FoodTech investments: 10. Gaingels: pioneering LGBTQIA+ social change investment syndicate with \$500M+ invested since 2019, including in FoodTech startups like BIOMILQ, Sundial Foods, Bowery Farming, and Snackpass. 2021 FoodTech investments: 10. View: Database of 90+ Active FoodTech Investors* all investment counts based on either publicly-available data, or confirmed directly with relevant investors. If you have revised numbers to share, let us know by writing at team(at)foodhack.global 2022 Challenges & Trend Forecast How will all these funds be applied in 2022? Here are a few directions we see FoodTech VC going in 2022: AgTech Growth: our food security outlook is bleak. Fertilizer shortages and a changing climate are putting a lot of pressures on how we grow food, which means any innovation in agriculture will make a huge impact. We've seen 20% more funding in Q1-Q3 2021 than we did in all of 2020, and expect that trend to continue. Global Growth: Silicon Valley's share of the venture pie is diminishing, down to 27% of all US dollars this year, mirroring a global diversification of investment we see in FoodTech. Food & Ag investment in India alone is up 97% YoY. We see more VCs investing across regions than pre-pandemic, a trend sure to stay even once we're long past canceled flights and pajama Zoom calls. New funding options: the barrier to entry for running an investment group - be that a traditional VC or a syndicate - is getting ever easier as new investment tools emerge to help first time fund managers start and run (like AngelList and Vauban) and foodtech deal flow gets ever easier to access (thanks to platforms like FoodHack and Vevolution). This year saw the launch of 7 new foodtech focussed funds and countless syndicates (like ours) and we see no signs of this slowing in the new year. * Chilly IPOs: there's a SPAC crackdown in the works on top of a lackluster year for tech and FoodTech IPOs, which will keep IPO-hungry companies skittish. Keep an eye on Eat Just and Infarm as litmus tests of how markets will react to FoodTech stocks in 2022. Inflation & Rising Food Prices: with record-breaking food price jumps in Q4, returns on FoodTech investment are facing headwinds in 2022. This is particularly true for margin-sensitive consumer products, but will change the financial pressures and priorities for growth startups. Valuations: Based on internal research, we've seen valuations across the foodtech sector reach all-time highs, with the normalization of companies raising on average at 30-80x revenue (or with no revenue at all) and the valuation boom reaching the pre-seed and seed stages where \$8M - \$25M pre-money valuations are more frequent than not. Whether this is a sign of the times or a trend that's here to stay, only time will tell. Gig Economy: delivery companies are dependent on contractors and gig workers, a cheap workforce that's only staffed when demand is high. Europe is cracking down on this model, requiring gig economy companies to form employer-employee relationships. We don't expect this to slow the growth of eGrocery, but it will eat into margins and shorten runways enough to impact valuations, IPO timelines, and share prices. See this year's shutdown of instant grocery delivery startup 1530. The Takeaway 2021 was a bumpy ride but throughout the year FoodTech funding has stayed strong. Though with rising inflation rates and major IPO crashes, 2022 could go either way. Even whilst looking clear-eyed at that turbulence, we're fired up about the capital raised, the number of new entrants in the market - from funds to startups - and the overall growth the FoodTech sector's had and having through this time. Traditional VC will continue to upload gazillions into the metaverse, and always favor near infinite-margin enterprise software. So to have serious capital focused exclusively on making our Food and Ag system better -- while making tech-like returns -- is significant cause for hope. Love it @ Hate it

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