TOGE FUTURE FOOD ASIA'S BUILDING TOGETHER



2024 Year in Review

A Message from the Managing Director



E very time I fly home to Singapore from abroad, I relish the opportunity to admire the Republic's rooftop gardens and futuristic cityscape from the air. As a densely populated country located on a tiny dot of land, architects have spent decades devising new ways to sustainably build upwards and radically reimagine existing structures, while maintaining the distinct cultural heritage of the low-slung neighborhoods and hawker centres that give this mesmerising metropolis its beating heart.

I can relate to the architect's struggle because at GFI APAC, we're builders too—reimagining an existing food landscape that is no longer fit-for-purpose. Amid soaring protein demand and diminishing natural resources, our task is a classically Singaporean paradox: to make more from less.

One part of the solution is to rethink existing institutions and practices to better align with today's needs, as the National University of Singapore did in 2024 when it took a quiet food-science lab on the sixth floor of an academic building and transformed it into the Bezos Centre for Sustainable Protein. This world-class R&D facility, which was made possible through a strategic partnership between the Bezos Earth Fund and GFI, will pioneer new food formulations that bring together the best attributes of plants, microbes, and cultivated animal cells to craft delicious and affordable proteins with a fraction of conventional meat's ecological hoofprint.

To ensure that cutting-edge facilities like the Bezos Centre can be fully staffed by local talent, GFI APAC's Science and Technology team has also been working to create a regional future-food workforce from the ground up. As a result of our efforts, Singapore currently boasts six training modules at its universities and polytechnics dedicated to alternative proteins (up from just two in 2022), and more courses are set to launch in neighboring countries this year.

In addition to reimagining existing institutions, we've been busy working with government partners to develop first-of-a-kind models for everything from novel-food regulatory approval frameworks to halal standards for cultivated meat—blazing new pathways where they did not exist. We also uncovered new market opportunities for local plant-based meat producers through a consumer perception study across six Southeast Asian countries, which our experts shared with the public for free.

Perhaps most importantly, GFI APAC is building bridges between nations, strengthening the ties that link together high-tech hubs. Through the launch of a bilateral scientific symposium between China and Singapore, and presentations at events like the China International Food Safety and Quality Conference, our scientists and policy experts spotlighted the Lion City's leadership on the global stage and engaged key stakeholders in Asia's largest economy.

Further east, GFI opened its newest international affiliate in Japan last October. Then, a few weeks later, our Singapore-based team signed an MOU to significantly enhance scientific and policy collaborations with KoreaBIO and the Bio-based Future Food Industry Committee in South Korea. Such connections are vital because, as the world has seen with the transition towards clean-energy manufacturing, few alliances are more powerful than Asian innovation hubs working collaboratively to rapidly scale up new technologies.

This groundwork is only the first step towards reimagining the global protein supply to be more secure, sustainable, and just. But as you will see in this report, our team's efforts over the past 12 months have laid a much stronger foundation upon which Asia's future-food innovators can build and build we must.

Mirte Gosker

MIRTE GOSKER The Good Food Institute APAC

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About Us

Headquartered in Singapore, GFI APAC is Asia's leading alternative protein think tank. As an affiliate of the Good Food Institute Inc. ("GFI"), we are part of an international network of organisations located in regions with the greatest potential to accelerate food innovation, including the U.S., Brazil, Europe, India, Israel, and Japan. Together with our overseas partners, GFI APAC advances alternative proteins as an essential solution to meet the world's climate, health, food security, and biodiversity goals.

Our Team





MIRTE GOSKER **Managing Director**



KAROLIEN **VAN EMDEN Executive Support** Specialist



WASAMON NUTAKUL, PH.D. SciTech Manager



DEAN POWELL. PH.D. Senior SciTech Analyst



MAANASA **RAVIKUMAR, PH.D.** Senior SciTech Specialist



ARIN NAIDU Senior SciTech Ecosystem Specialist

DIVYA GANDHI JENNIFER MORTON Corporate Engagement





WEILONG CHNG Associate Director of Philanthropy



SAMUEL GOH **Policy Manager**



ANKUR **CHAUDHARY Policy Specialist**



RAJAGOBAL REDDY Policy Associate

RODRIGO BONILLA Communications Manager



RYAN HULING Senior Writer

Note: Staff structure as of March 2025.



VICTORIA LAW Associate Director of Operations



Manager

ATHIRAH KAMARUZZAMAN **Operations Associate**



Research

Specialist

MICHELLE VINNETAN People & Culture



Science & Technology

Corporate Engagement



Policy

Communications

Operations

Our Mission

We envision a food system that can feed 10 billion people by 2050 while meeting global climate targets, protecting biodiversity, and maximising public health. By working with scientists, policymakers, and industry leaders, GFI APAC is a field catalyst that identifies the most effective solutions, mobilises resources and talent, and empowers partners to make alternative proteins—such as plant-based and cultivated meat—accessible, affordable, and delicious.

From Singapore to the World

GFI is driven by a big idea: If alternative proteins taste as good as conventional meat or better, cost the same or less, and provide equivalent or better nutrition, we can usher in a more sustainable and just food future in Asia and beyond.

Life cycle assessments show that by harnessing protein directly from its biological source, rather than feeding crops to farmed animals, food producers can slash meat's greenhouse-gas emissions by up to 98 percent. Alternative proteins can also reduce agricultural land and water use by up to 96 and 99 percent, respectively, thereby boosting food resilience and transforming scarcity into abundance.



Building the Future-Food Workforce

In his final major speech before passing the torch in 2024, Singapore's outgoing prime minister Mr. Lee Hsien Loong struck an optimistic tone. Following years of government investments into the city-state's protein innovation ecosystem, young Singaporeans could now take up careers that "did not even exist in their parents' generation," he said—including as novel food biotechnologists, which "means you take a plant and you make it look like Wagyu beef."

GFI APAC is supporting this shift by collaborating with a wide array of partners to create educational and workforce training opportunities that can accelerate Asia's food system transformation.

In March 2024, we worked with a coalition of public and private stakeholders to launch a first-of-its-kind career map designed to help students, scientists, and skilled workers from adjacent fields identify upskilling programmes and job opportunities in Singapore's plant-based meat sector. This tool was so well-received that

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Sfi Good Food Institute APAC

Developing Alternative Talent in Singapore

t to build a secure, sustainable, and just p

Mirte Goske Managing Dire GFL APAC

GFI APAC Managing Director Mirte Gosker was invited to deliver a keynote address a few weeks later at Singapore's Food Manufacturing Career Fair, where she spoke alongside high-ranking government officials, such as Minister of State for Education & Manpower Ms. Gan Siow Huang.

> Building on that initial success, we released <u>v2.0 of our Alternative</u> <u>Protein Career Pathways</u> feature in December, which added industry maps and job archetypes for cultivated meat and fermentation-derived protein development.

Our interactive website now breaks down every step of the value chain for all three alt protein pillars, to illustrate the essential components that bring high-quality products from ideation to grocery store shelves.



Within each job archetype, we outline the skills needed to obtain such a role. The website also lists a wide array of academic courses, degree programmes, and training platforms—including many developed in collaboration with GFI APAC—designed to help students and mid-career professionals learn necessary skills. Singapore alone now boasts six training modules at its universities and polytechnics solely dedicated to alternative proteins, up from just two in 2022.





Geneticist







Application Scientist Food Technologist

d Nutritionist ogist Extrusion Operator





Building on the template we pioneered in Singapore, GFI APAC's scientists have begun working with universities in Malaysia and Thailand to launch similar training modules.

GFI APAC SciTech Manager Wasamon Nutakul, Ph.D., and Senior SciTech Ecosystem Specialist Arin Naidu also collaborated with Thailand's Office of National Higher Education Science Research and Innovation Policy Council (NXPO) and Kasetsart University (KU) to organise a two-day workshop focused on enhancing the local R&D ecosystem, creating a skilled workforce, and establishing comprehensive infrastructure to support industry growth. Each session convened 40-45 stakeholders from startups, academia, government, funding agencies, and industry, to collaboratively prepare the country-renowned as the "Kitchen of the World"-to play a central role in the future of food.



Wasamon Nutakul, Ph.D. (left) and Arin Naidu (right)



Dr. Suvaluk Asavasanti, chair of the strategic agenda team for future food development, Thailand Science Research and Innovation (TSRI)



Opening New Market Pathways

To achieve their full potential as climate and food security solutions, alternative proteins must be accessible to all consumers. Building a truly inclusive, efficient, and secure protein production system requires making highquality, nutrient-rich, and culturally relevant foods available to every facet of society.

More than a billion people around the world including millions of people in Southeast Asia adhere to halal food standards, for instance, so for cultivated meat to make the leap from novelty to the norm, it is crucial that there are viable pathways to achieve this certification.

That's why it was so encouraging when, in a major ruling, the Fatwa Committee of the Majlis Ugama Islam Singapura (MUIS)—the sole entity with legal authorisation to issue halal certificates in Singapore—announced in February 2024 that <u>under certain conditions</u>, cultivated meat consumption can be permissible as halal. This announcement was made at MUIS's invite-only Fatwa Conference, which included a panel featuring GFI APAC SciTech Specialist Maanasa Ravikumar, Ph.D. The fatwa came after more than a year of thoughtful deliberations by the Islamic council, during which GFI APAC experts provided numerous technical presentations about the process of cultivating meat from animal cells.

To build on this momentum, GFI APAC is now engaging with halal authorities and experts in other countries, including Malaysia and Indonesia, to emphasise the need for cultivated meat to be examined for halal permissibility.





As innovative new methods of food production emerge, it is critical that religious and policy decisions are carefully considered and informed by input from leading subject-matter experts. The consultation with GFI APAC helped MUIS better understand the science of cultivated meat, which enabled us to make an informed decision about a matter of global significance.

NURUL HIDAYAH ABUBAKAR, Assistant Director, Islamic Religious Council of Singapore (MUIS), Fatwa Lab Project Our Policy team is also spearheading efforts to <u>align regional regulatory</u> <u>frameworks</u> through the <u>APAC Regulatory Coordination Forum</u>, which GFI APAC helped co-launch with APAC Society for Cellular Agriculture. At Singapore International Agri-Food Week in November 2024, this coalition of industry and policy experts jointly unveiled <u>new white papers</u> focused on two areas in need of greater alignment within the cultivated meat space: cell line development and cell culture media. Both papers aimed to further establish a regional consensus on how the building blocks of cultivated meat production can be efficiently assessed for safety and then rolled out into the global marketplace.

Just as Asia understood the enormous economic potential of accelerating renewable-energy technologies to satisfy soaring global demand, all countries will inevitably need innovative ways to make more meat with fewer resources—and our region is once again laying the groundwork to sell the world what it needs.



Accelerating International Scientific Collaboration

GFI APAC co-hosts inaugural China-Singapore alt protein symposium

In collaboration with the Singapore Institute of Food and Biotechnology Innovation (SIFBI), NUS (Suzhou) Research Institute (NUSRI Suzhou), and our strategic partners at GFI Consultancy, we co-organised a <u>bilateral</u> <u>symposium</u> between Chinese and Singaporean alternative protein researchers. The first-ofits-kind event was held in a hybrid format, drawing more than 60 participants from academia, research institutes, industry, and government agencies.

China allocates more public funding for agricultural R&D than any other country and is a critical partner in scaling up global alternative protein development and manufacturing. By bringing Chinese scientists together with food innovators from Singapore, we are accelerating international collaboration across the world's most populous continent.







As a living laboratory for food security solutions, Singapore is where many cutting-edge protein innovations are pioneered, refined, and rolled out to consumers—but we need international partners to rapidly ramp up commercialisation and manufacturing to a global scale. By working closely with partners like GFI APAC, we can facilitate stronger scientific and industry connections between Singapore, China, and other Asian innovation hubs to create a strategic alliance greater than the sum of its parts.

SHARON TAY, Director, Food Manufacturing and Agri-Technology, Enterprise Singapore



Supercharging Science in South Korea

In November 2024, GFI APAC signed a <u>memorandum of understanding</u> with KoreaBIO and the Bio-based Future Food Industry Committee aimed at accelerating alternative protein development in South Korea. As part of the agreement, which was launched during a ceremony attended by GFI founder Bruce Friedrich, the tri-party partnership will include market research and technical knowledge exchanges, policy coordination on novel food regulations, and joint webinars, workshops, and presentations on novel food innovation.

GFI Japan Launches

In October, Japan officially became the seventh region to be home to a GFI affiliate. "Just as Japan developed and exported the cutting-edge technologies that brought solar power and other renewables to the world, we now have an opportunity to pioneer the next generation of alternative proteins—the food equivalents of clean energy," says Kimiko Hong-Mitsui, GFI Japan's founding managing director.

Japan has been a leader in fermentation-based food production for over a thousand years and has deep expertise in biotechnology. In 2023, then-Prime Minister Mr. Fumio Kishida <u>hailed</u> alternative protein technologies as an important part of "realising a sustainable food supply," and his government awarded <u>tens of millions</u> of dollars in funding to alternative protein companies as part of a larger food-sustainability moonshot.



THE STRAITS TIMES

SUPERCHARGING 'FUTURE FOODS' IN ASIA AND BEYOND

The challenges ahead are substantial and time is not on our side, but by bringing Singapore's brightest minds together to unleash the climate-mitigation potential of 'future foods,' NUS could reignite humanity's hope for a better tomorrow, fuel domestic economic growth, and help sustainable proteins finally achieve escape velocity.

MIRTE GOSKER, in a co-authored column with Mr. Zhou Weibiao, acting director of the Bezos Centre for Sustainable Protein at NUS



Credit: National University of Singapore

Bezos Centre for Sustainable Protein Announced in Singapore

GFI APAC joined forces with the Bezos Earth Fund to celebrate the <u>launch</u> of the Bezos Centre for Sustainable Protein at the National University of Singapore (NUS)—the first facility of its kind in Asia. At the launch, Managing Director Mirte Gosker joined GFI CEO Ilya Sheyman for an exclusive lunch session with the President of Singapore, who is also the NUS chancellor. Gosker then delivered a speech at the afternoon opening ceremony alongside Sir Andrew Steer and Dr. Andy Jarvis from the Earth Fund.

Streamlining Safety Approvals for Novel Foods

At last year's Roundtable on Novel Food Regulations, an annual event hosted by the Singapore Food Agency (SFA), GFI APAC helped debut the Safety-Assessed Media Ingredient (SAMI) list—a joint initiative developed with Vireo Advisors, LLC, and the Future Ready Food Safety Hub, with input from SFA. The SAMI list aims to foster an internationally harmonised approach to assessing the safe use of culture media components that support the growth of cells used to make cultivated meat and seafood.

GFI APAC Senior SciTech Analyst Dean Powell, Ph.D., who co-led the SAMI project, has also been selected to represent Australia in working groups run by the International Organization for Standardization (ISO) intended to develop global standards for plant-based and cultivated meat.



Dr. Powell (center-right) met with regulators and industry stakeholders at the SFA roundtable.

Reports and Resources

Click on cover images to open reports.



A first-of-its-kind report that examines current and projected rates of plant-based meat adoption, health motivations, highand low-interest consumer segments, and sentiments on emerging categories like 'blended' meat (see Page 16).



APAC REGULATORY Cell Culture Media Components White Paper



A duo of white papers aimed at coordinating regulatory approval processes for cultivated meat across the APAC region.



TATSUYA SHIMIZU, MD, PH.D., FISHR, FSBE Tokyo Women's Medical University



PROF. KEISUKE GODA University of Tokyo



ASSOCIATE PROF. DU JUAN Singapore Institute of Technology



Open-access messaging guide for the precision fermentation sector, jointly developed with Cellular Agriculture Australia and more than a dozen local industry partners.

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State of Play for APAC

A comprehensive overview of the regional alternative protein industry, with a focus on national regulatory frameworks, government initiatives, and market growth in key countries.

Science of Alt Protein

A quarterly webinar series that spotlights top APAC researchers and their alternative protein breakthroughs.



DR. DANAI GEORGIADOU Bioprocessing Technology Institute, A*STAR

Live Events

From Singapore and South Korea to China and Azerbaijan, GFI APAC's thought leaders hit stages across Asia to engage influential audiences and government officials about the most effective methods of reimagining protein.

ADDITIONAL EVENTS INCLUDED:

- Thailand Future Food for Sustainability
- The Asia Sustainability Dialogue
- Australian Institute of Food Science and Technology Annual Conference
- AltProteins 2024
- Responsible Investor Asia
- Southeast Asia Roundtable, sponsored by Thai Wah, Temasek, and Rethink

Singapore International Agri-Food Week



Credit: Rethink

Bioplus Interphex



COP29



China International Food Safety and Quality Conference



In the News

GFI APAC's scientists and subject-matter experts are the go-to sources for journalists and editors seeking insightful commentary and context about Asia's fast-evolving alternative protein ecosystem. From exclusive columns in peer-reviewed academic journals to opinion pieces in national newspapers of record, our spokespeople drive the global conversation about where the future of food is headed.

nature

IN ASIA, ALTERNATIVE PROTEINS ARE THE NEW CLEAN ENERGY

As climate and food-security pressures intensify, the world's most populous continent sees clear opportunities to reimagine meat — just as it did for affordable solar panels.

South China Morning Post

LAB-GROWN MEAT LANDS ON HONG KONG PLATES AS AUSTRALIAN START-UP VOW BEGINS SALES

If past is prologue, once a promising new technology finds a solid foothold in Asia's largest economy, sweeping changes often follow – slowly at first, and then all at onc<mark>e.</mark>

> MIRTE GOSKER, GFI APAC Managing Director

Trends in Cell Biology

CULTIVATED MEAT: RESEARCH OPPORTUNITIES TO ADVANCE CELL LINE DEVELOPMENT

NIKKEI **Asia**

ASIA'S EMBRACE OF CULTIVATED MEAT WILL BRING INDUSTRY LEADERSHIP

The Asia-Pacific region is sprinting toward a more secure and sustainable food future. Governments here are guided by the firm belief that scientific innovation is not only beneficial to feeding future generations, it might be the only thing that can.

> **RYAN HULING,** GFI APAC Senior Writer

Comprehensive REVIEWS in Food Science

CULTIVATED MEAT MICROBIOLOGICAL SAFETY CONSIDERATIONS AND PRACTICES

THE STRAITS TIMES

DIFFERENT TYPES OF FERMENTATION TECH AND THEIR NUTRITIONAL BENEFITS

Fermentation-derived protein] has a very desirable nutritional profile – containing essential amino acids and fibre, while being low in fat. [...] Those attributes, if effectively combined with the meaty textural qualities of certain plant proteins, have the potential to create an end product greater than the sum of its parts.

MIRTE GOSKER

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The Year Ahead

Our team remains laser-focused on achieving the small steps and giant leaps that bring us closer to our goal of building a more secure and sustainable protein supply in Asia and beyond. Below are just some of the milestone moments we anticipate in the coming months and how they will enable us to make additional progress in the years to come.

Cultivated Meat Expected to Enter New Markets

Our experts are optimistic that 2025 will include the first-ever market approvals in <u>South Korea</u> and <u>Australia/New Zealand</u>, which share a regulatory body. <u>Thailand</u> could potentially follow suit, and <u>Malaysia</u> is currently conducting a feasibility study of its domestic cultivated meat sector, commissioned by its prime minister. The more gateways to entry there are, the fewer bottlenecks companies will encounter reaching consumers and the faster our policy team will be able to help other countries to come on board.



Australian startup Vow could soon secure regulatory approval for their cultivated quail product in their home country, following commercial launches in Singapore and Hong Kong. [Credit: Vow]

Forthcoming Study on Boosting Alt Protein Nutrition

Later this year, GFI APAC's SciTech team will publish the results of a study conducted by Altruistic Innovations focused on food technologies that can enhance alternative protein nutrition. Studies have shown that personal health is a major driver of plant-based meat consumption in Asia, so identifying steps companies can take to boost the nutritional profile of their products has the potential to significantly increase consumer uptake.



Plant-based chicken rice [Credit: Love Handle]

Sensory Study on Blended Meat

In 2024, several APAC startups started developing new 'blended' meat products that mix conventional meat with high-quality plant proteins in a way that reduces the overall percentage of animal-sourced ingredients in the final product, boosts nutrition, and aims to retain taste and price parity. A consumer perception study commissioned by GFI APAC and released last February revealed broad regional interest in such products. On average, 93 percent of surveyed consumers in Singapore, Thailand, Indonesia, Vietnam, Malaysia, and the Philippines said they are open to giving blends a try, potentially opening new market opportunities for local alternative protein producers.

To better understand this emerging field, GFI APAC's Corporate Engagement team is collaborating with Food System Innovations, Singapore's Agency for Science, Technology, and Research (A*STAR), Palate Insights, and a wide array of regional industry partners, to conduct the first Asia-focused sensory study of blended products. The results of this groundbreaking study will empower us to provide expert guidance to all stakeholders about important considerations for this new food category.



PLANT-BASED MEAT'S SUCCESS IN ASIA BOILS DOWN TO COST AND OUTREACH

By addressing the cost hurdles keeping many shoppers away, and repositioning plant-based protein as not only a substitute but also a high-value ingredient that can be blended into the conventional meat supply, the sector can meet consumers where they are and satisfy Asia's surging protein demand without breaking the planet.

> **RYAN HULING,** GFI APAC Senior Writer

Unlocking New Funding Mechanisms

For the alternative protein sector to thrive over the long term, companies will need access to substantial new sources of scaleup funding. As a green financing hub, Singapore is uniquely wellpositioned to address this need by mobilising patient capital, developing funding structures, and mitigating risks to support sustainable food innovations. The city-state also has a proud history of pioneering innovative public-private partnerships and creative solutions to seemingly intractable problems.

GFI APAC's Corporate Engagement team believes that sustainable finance for alternative protein development represents Asia's <u>next</u> <u>big opportunity</u> to lead the way to a more secure and sustainable future on the world stage.



Powered by Philanthropy

Globally, meat consumption is the highest it's ever been—and rising fast, especially in Asia. As it is, 75 percent of all agricultural land is used to grow crops to feed to chickens, cows, and other farmed animals, or to graze them. That's an area as large as China plus India, *times two*, plus Indonesia. Now imagine how much more space will be needed as the world's appetite for protein continues to skyrocket. A collision between consumer demand and our planetary limits is inevitable if we do not radically change the math.

But just as humanity is not going to wholly abandon cars in favour of a return to eco-friendly bicycles, there is very little indication that global meat consumption will go down based on individual willpower alone—quite the opposite. Rather, we need to accelerate development of the food equivalent to the electric car. Technologies that allow consumers to continue engaging in practices they cherish—like eating chicken rice—in a more secure and sustainable way.

Gifts to GFI support our global network of seven organisations, including GFI APAC's team of scientists, corporate-engagement specialists, and policy experts, empowering us to modernise protein production, mitigate the environmental impact of our food system, decrease the risk of zoonotic disease, and ultimately feed more people with fewer resources.



To <u>contribute to our vital work</u>, scan this QR code or contact our Development team at APAC-Philanthropy@GFI.org for more information on how you can support GFI's global network of nonprofit organisations, including in APAC.



The way we produce meat and seafood is deeply connected to climate change, biodiversity loss, and ocean health. GFI is tackling the problem at its core by accelerating the shift to sustainable protein, which reduces pressure on marine ecosystems and cuts greenhouse gas emissions. Supporting GFI means investing in real, systemic change one that can create a more secure, sustainable, and equitable food system for the future.

KATHLYN TAN, GFI APAC board member and director of the Rumah Group & Foundation





文天 化人 TIANREN CULTURE

As the world's most populous continent and an epicentre of alternative protein innovation, Asia will determine the future of our global food system. By providing openaccess insights into everything from plant-based meat manufacturing to regulatory frameworks for novel foods, GFI APAC's expert team is perfectly positioned to drive change at a pivotal moment in history.

> SALLY TSAI AND WAYNE CHANG, Affinity Impact

Since joining GFI APAC earlier this year, I have been profoundly inspired by the passion and dedication of our team, and by the unwavering supporters who share our vision for a better food future in Asia. Philanthropy is the driving force that turns bold ideas into real-world solutions by fueling scientific breakthroughs, advancing policy progress, and opening new pathways to market.

> WEILONG CHNG, Associate Director of Philanthropy, Good Food Institute APAC

We are fortunate to collaborate with the dedicated teams at the Good Food Institute in the APAC region. Their professionalism and genuine passion for advancing the alternative protein sector have been instrumental in fostering a robust ecosystem in the region. GFI's commitment to the APAC area recognises that Asia plays a pivotal role in reimagining protein sources and, more broadly, transforming the global food system.

> **BOK WAI,** *Tianren Culture*





GFI-APAC.org