
2026 STATE OF GLOBAL POLICY:

Public investment

in protein diversification to feed a growing world



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The cover image is courtesy of Fry Family Foods.

About the series

The State of the Industry report series is GFI's annual deep dive into the rapidly evolving alternative protein landscape. This flagship series provides a global snapshot of the industry, synthesizing company landscape and product trends, investment and sales data, new scientific advancements, and public investment and regulatory updates to highlight industry progress.

Tracking the technological and adoption readiness of the cultivated, plant-based, and fermentation sectors is a useful method to evaluate progress toward competing on price, taste, and availability with conventional meat. Readiness can be determined by assessing the progress, challenges, and overall risk across categories such as scientific feasibility, engineering viability, innovation capacity, value proposition, market acceptance, and license to operate. This series summarizes the current state of these factors using real-world developments from the past year.

Access the full suite of 2026 State of the Industry reports [here](#).

Important notes

- All figures are expressed in U.S. dollars where the \$ symbol is used. Other global currencies are clearly marked.
- The Good Food Institute is not a licensed investment or financial advisor, and nothing in this report is intended or should be construed as investment advice.
- An update to the report titles: In past years, GFI titled each State of the Industry report with the year covered in report content. Starting in 2026, the report titles now reflect the publication year (content timeframe remains the same).

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Executive summary

Five years in, governments have reached an inflection point

Five years since the Good Food Institute began tracking government investments in plant-based, cultivated, and fermentation-derived sources of protein, the industry and the world have changed considerably. GFI's 2021 report's cumulative total of approximately \$700 million in government investments has become at least \$2.5 billion as of 2025, and the 16 countries that had begun working to advance alternative proteins now number at least 33. Alternative protein sources now figure prominently in national economic and biotechnology strategies around the world, research programs increasingly include them as topics of interest, and regulatory authorities have begun dedicated efforts to clarify and facilitate the path to market. In short, governments have begun to act.

Trade tumult calls for innovation, reshoring, and resilient supply chains

Global uncertainty kicked up once again in 2025, but the progress that scientists, entrepreneurs, and policymakers have made in establishing that diversified protein sources offer benefits for the economy, environment, and food supply chain meant that these interventions were close at hand. As supply chains reacted to a flurry of new trade barriers, policymakers invested in secure domestic food supply chains through plant-based proteins, fermentation, and cultivated meat. Business support programs in Canada and France supported local farmers and producers to switch to locally grown protein crops; researchers in India, New Zealand, Spain, Switzerland, and more investigated new uses for local agricultural sidestreams; and

programs in Australia, Canada, China, India, South Korea, and more incentivized construction of shared biomanufacturing facilities to help retain businesses through their development.

This turn inward coincided with a greater appreciation for the benefits that new protein options offer agricultural regions, rural communities, and farmers. The aforementioned research on agricultural sidestreams aims to benefit local farmers by creating new markets and sources of value. Enterprising governments are funding this research to ensure that sidestreams from their agricultural sectors become foundational ingredients for next-generation foods. Additionally, policymakers are working to actively include and prioritize agricultural communities in production. Projects in Canada and Germany give farmers and producers essential resources to make the most of up-and-coming food products and production systems, while an EU-backed project in the Netherlands has put a cultivated meat production unit directly on a dairy farm.

Biotechnology and biomanufacturing strategies put new protein sources in the spotlight

China and the European Union led the world in new investments in 2025, with both recognizing biomanufacturing capacity as a strategic and economic priority. China's state-owned State Development and Investment Corporation announced nearly \$1 billion in investments in biotechnology facilities in 2025, specifically including food applications, while the European Union awarded over €100 million (\$113 million) in loans to plant-based and fermentation companies for scaling up, in addition to tens of millions more for research across the continent. India, Japan, and the United Kingdom similarly signaled intentions to invest more heavily in infrastructure development, while Australia, Canada, and the

Netherlands directly funded the construction of shared fermentation facilities to support domestic startups. Among major economies, only the federal government of the United States markedly drew back from food biotechnology investments amid government-wide cuts to science and technology, announcing only \$6 million in new research funding for plant-based, fermentation-derived, or cultivated protein sources.

Governments who include new protein production systems in their biotech strategies are ensuring that biomanufacturing capacity is capable of addressing future crises. Because biomanufacturing infrastructure can often be adjusted to produce a wide range of bioproducts such as food, fuel, medicines, chemicals, construction and manufacturing materials, and more, governments increasingly deem the sector necessary for national security, strategic readiness, and resilience to a wide range of economic shocks. However, this necessary volume of infrastructure is best maintained between crises through the production of mass-market, high-volume products that require larger production facilities and tighter safety protocols. New foods from fermentation and cultivation fit this description. Commercial production facilities can be designed with the right specifications to switch between many bioproducts, large enough to produce critically needed materials at scale, operated by a permanent, trained workforce, and financially supported on an ongoing basis by consistent, free-market demand. By investing in research hubs like the Novel Protein Bio-Manufacturing Innovation Center in China, the Cultivate at Scale facility in the Netherlands, or the Neptune BioInnovation Centre in Canada, policymakers are developing high-quality, popular consumer goods that can sustain a biomanufacturing base and create a pipeline for startups to move from research to commercial production.

New cultivated meat products cleared for sale; plant-based labeling debates continue

In 2025, Food Standards Australia New Zealand (FSANZ), who regulates food products in both countries, approved a cultivated quail product, joining Singapore and the United States as the third jurisdiction to greenlight a cultivated meat product. FSANZ also became the second jurisdiction after the United States to utilize a specific process for approving cultivated food products separate from their novel foods framework. South Korea finalized a similar process in 2024 and has received several applications, while plans to develop processes based on these examples are underway in Abu Dhabi, China, Japan, and the United Kingdom. In 2025, the United States also gave the regulatory green light to two other firsts: the first cultivated seafood product and the first cultivated pork product.

The debate over how to properly label alternatives to animal products is by no means settled, and developments cut both ways in 2025. At issue is whether products can use “meaty” terms like “sausage” or “steak” or animal-related words like “chicken” or “pork.” Crucially, research shows that consumers do not find these terms misleading when properly described as plant-based, and that these terms provide important information on taste and preparation that makes them easier to use. In jurisdictions like some European Union countries that are otherwise working hard to stimulate demand for plant-based foods to support the environment and public health, allowing the use of these terms on labels should be considered a priority.

Ongoing regionalization of investment trends, but some shared goals

Regional trends, resource profiles, and cultural perceptions continued to drive divergence in regional approaches to developing new food production systems, though some global trends emerged. While governments across the world were most likely to invest in biomass and precision fermentation, governments in the Asia Pacific region invested more heavily in cultivated meat, while those in Europe and the Americas invested more in plant-based proteins. Research grants were common across borders—sometimes literally, with several bilateral research grants announced in 2025—but Europe and the Americas tended to prefer business grants and loans to support commercial enterprise, while the Asia Pacific region typically funded new facilities directly, either as publicly operated organizations or through public and private investments. And though governments invested in new ways to produce all kinds of foods, Europe led the world by far in developing and producing plant-based and fermentation-enabled cheese.



Plant-based meat and dairy alternatives made using Kerry Ingredients. Photos courtesy of Kerry.

A changing world calls for a changing methodology

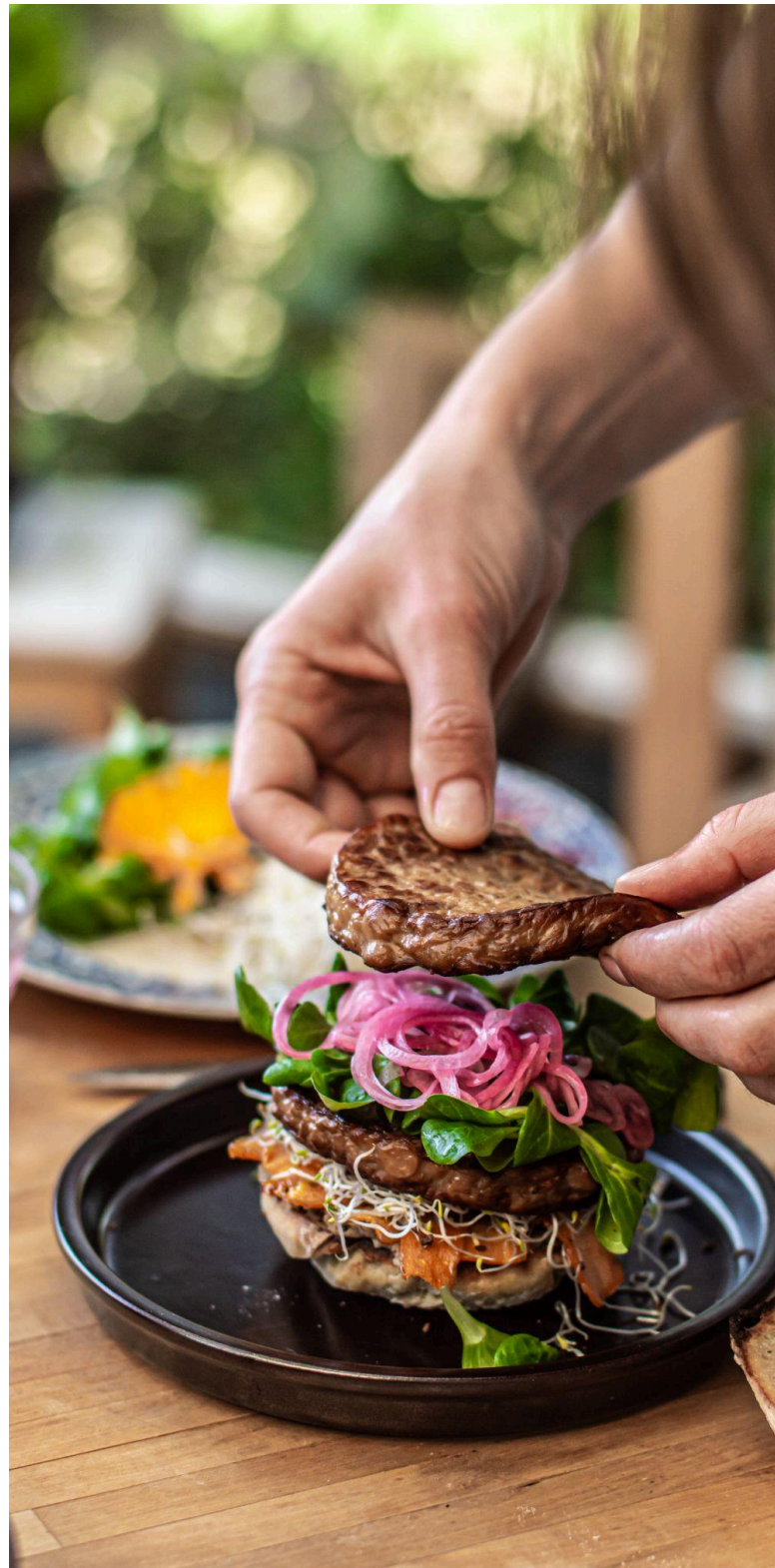
If the world has seemed to become more complex in the last five years, so too has the process of tracking and categorizing investments in alternative proteins. Companies in the sector are now receiving government-backed loans, loan guarantees, blended finance, and direct investments in addition to direct grant funding; new research often cuts across multiple technology sectors and product categories; and large commitments to build out biotechnology leadership and biomanufacturing capacity often highlight food production without specifying the exact amount of investment in it. These developments bode well for plant-based, fermentation-enabled, and cultivated protein sources as they are increasingly included in general research calls, investment portfolios, and bioeconomy plans.

However, these developments also make the clear, consistent tracking of government investment into alternative proteins more complex, and render previous methods of reporting these investments less accurate. China's large investments in broad biotechnology efforts through a state-owned corporation, for example, raise uncertainties in determining how much investment comes from public sources, how much supports companies creating alternative proteins (or upstream or downstream enabling infrastructure), and to what degree the provided investment is nonrepayable or concessional. Moving forward, these reports will feature as much detailed information on the past year's activity as before, including relevant statistics, but without pursuing a single top-line annual funding number. Much of the data underlying these statistics can be found in the [Public Investment Database](#), which now includes over 1,000 research projects, business grants, loans, loan guarantees, initiatives, investments, and more.

Government support is necessary for a resilient, sustainable, prosperous future

Despite the changes, much remains the same. GFI's 2021 report noted: "Governments worldwide are grappling with how to feed growing populations and keep their economies strong in the face of fragile supply chains, intensifying climate events, and the looming threat of future pandemics and antibiotic resistance." These threats have become only more evident in the years since, but so too has the potential of new food technologies to address these challenges. Forward-looking governments have rallied behind plant-based protein sources to support agricultural communities and public health goals, fermentation technology to supercharge biomanufacturing capacity and valorize underused resources, and cultivated meat for point-of-need nutrition and sustainable animal proteins. All of these new protein sources can help create a resilient, prosperous food system.

Unfortunately, the gap between what is available and what is needed also remains significant. Five years ago, a Global Innovation Needs Assessment found that governments must invest \$10.1 billion in alternative proteins on an annual basis to fully reap the rewards of a mature alternative protein sector, including up to 9.8 million jobs, \$1 trillion in economic value, and benefits for food resilience, global health, and environmental security. Despite progress and enthusiasm from policymakers worldwide, governments' estimated investment in 2025 amounts to no more than 10 percent of this benchmark. Though broader biotechnology development programs show promise for creating the infrastructure and workforce needed for a more resilient food system, dedicated funding to increase consumer appeal and availability of new protein sources is necessary to build a future-proof food system.



Bärta burger patties and alder smoked cold cut.
Photo courtesy of Bärta