



THE
GOOD FOOD
INSTITUTE



2017 YEAR IN REVIEW

Dear Friend,

The dawn of the next agricultural revolution is here.

As you read this report, I hope you are proud of and energized by the terrific progress that we achieved together in 2017, all of which was made possible by the generous support of friends like you. Thank you for sharing our commitment to creating a healthy, humane, and sustainable food supply.



Your partnership and financial support fueled GFI's growth as we worked to transform the industrialized meat, egg, and dairy industries by fostering innovation, providing technical and strategic support to good food startups, and forging powerful domestic and international partnerships. All these initiatives are laser-focused on advancing the shift away from the products of conventional animal agriculture and toward foods that are better for the sustainability of our global food system, human health, our environment, and animals.

We welcomed more than 20 talented professionals to the GFI team in 2017. In this report, you'll learn how your generous support enabled our scientists, innovators and business analysts, policy experts, and corporate engagement team to accelerate good food innovation.

Every member of our team is dedicated to transforming our planet's broken food system into one that can sustainably and humanely feed a global population that is slated to reach almost 10 billion people by 2050. With your continued support, we will achieve that outcome. I invite you to join us as we look back and celebrate the progress you made possible over the past year.

With heartfelt gratitude and optimism for the future,

A handwritten signature in black ink that reads "Bruce Friedrich". The signature is fluid and cursive, with a large initial "B".

Bruce Friedrich
Co-Founder & Executive Director





VISION

A world where the most affordable and delicious products are also good for our bodies and the planet. A world in which the vast majority of meat, eggs, and dairy is plant-based or clean.



MISSION

GFI harnesses the power of food innovation and markets to transform the global food system away from conventional animal products and toward plant-based alternatives and clean meat.

2,664

Media mentions of GFI in 2017

UP FROM 579 IN 2016 (AND 3 IN 2015)

361

Entrepreneurs in GFIdeas Community

THE MONTHLY CALL AND SLACK GROUP FOR PLANT-BASED AND CLEAN MEAT INNOVATION

50+

VCs and big meat companies that we met with

TO ENCOURAGE INVESTMENT IN PLANT-BASED AND CLEAN MEAT

100+

Plant-based and clean meat entrepreneurs receiving strategic and technical support in 2017

535

Congressional offices that routinely receive GFI materials

150+ CONGRESSIONAL STAFF ATTENDED OUR INAUGURAL RECEPTION

2,391

Media mentions of "clean meat" in 2017

(GFI COINED NOMENCLATURE) UP FROM 207 IN 2016

The Good Food Institute is a 501(c)(3) nonprofit organization - Tax ID 81-0840578. We are powered by philanthropy, relying on gifts and grants from our family of supporters to fulfill our mission. Find our financials at www.gfi.org.

GFI AGAIN HONORED AS TOP CHARITY



"Based on ACE's thorough analysis, we are convinced that GFI is one of the three best nonprofits for donors looking to maximize their positive impact for animals. We are impressed by GFI's leadership, strategy, transparency, and commitment to metrics and accountability. GFI is highly focused on removing animals from industrial agriculture, and ACE is pleased to recommend donating to them."

Jon Bockman, Executive Director, Animal Charity Evaluators



CHALLENGE

Industrialized animal agriculture is a significant contributor to the world's most pressing problems:



Feeding the World

Growing crops to feed them to farm animals is vastly inefficient, driving up the price of grains and legumes, and entrenching global poverty.



Climate and the Environment

United Nations scientists state that raising animals for food is "one of the major causes of the world's most pressing environmental problems, including global warming, land degradation, air and water pollution, and loss of biodiversity."



Keeping Antibiotics Working

The widespread use of antibiotics in farm animals is leading to the development of antibiotic-resistant superbugs; a report from the UK government calls the threat to the human race from superbugs "more certain" than the threat from climate change.



Reducing Needless Suffering

Industrialized animal agriculture subjects tens of billions of thinking, feeling animals to lives of extreme confinement, emotional trauma, painful mutilations, and inhumane slaughter.

SOLUTION

Use food innovation and markets to transform agriculture away from the use of animals and toward **plant-based and clean meat alternatives**.



What is plant-based meat?

Plant-based meat looks, tastes, and feels like conventional meat from animals but is comprised of plant-based ingredients. These products contain no cholesterol and are much better for the environment.



What is clean meat?

Clean meat is produced by taking a small sample of animal cells and replicating them outside of the animal. The resulting product is 100 percent real meat, but without the antibiotics, E. coli, salmonella, or animal waste.

WHAT WE DO

GFI IS ACCELERATING THE SHIFT TOWARD A HEALTHY, HUMANE, AND SUSTAINABLE FOOD SUPPLY.

HOW WE DO IT

Fostering Innovation

We promote scientific and technological research and innovation to accelerate the growth of plant-based and clean meat alternatives.



Supporting Startups

We provide mission-critical support to entrepreneurs and early-stage startups, contributing solutions at every point along the plant-based or clean meat supply chain.



Influencing Institutions

We work nationally and internationally to influence change at the highest levels of government and academia as well as among nonprofits, thought leaders, and in the media.

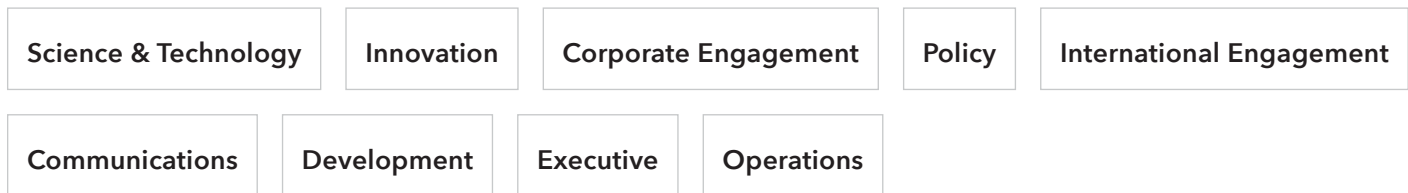


Engaging Corporations

We transform the food industry from the inside out by helping food processing, restaurant, grocery, and distribution companies improve their plant-based and future clean meat offerings.



OUR DEDICATED TEAMS



GFI is funded entirely by gifts and grants from our family of supporters. All the progress highlighted in this report is only possible thanks to friends like you. *Thank you!*



Lewis Bollard

Farm Animal Welfare Program Officer
The Open Philanthropy Project



"I view GFI as the most effective group advancing the field of animal product alternatives. GFI fits well with our 'hits-based' approach to giving. It's focused on speeding up the day when clean and plant-based meats displace factory farming."

Ashley Angela Toh

Humanist Society (Singapore)

"GFI's programs are guided by reason, informed by evidence, and driven by compassion. This is all a perfect fit for our group's values, and that's why we are proud to support GFI with a fundraiser we co-organized with Effective Altruism Singapore. We especially love championing scientific solutions to global problems and are confident that GFI is turning our funds into progress toward a healthier, kinder world."



David Bronner

Cosmic Engagement Officer (CEO)
Dr. Bronner's Magic Soaps



"Social justice and environmental sustainability have formed the core of Dr. Bronner's ethos for five generations. We strive to not just preach—but practice. That is why we're thrilled to support The Good Food Institute's groundbreaking work to create a healthy, humane, sustainable food system—better for the planet, animals, and our fellow humans. United, we will create a better world for all. ALL-ONE!"



Rachel Atcheson

"Making the greatest possible impact with my giving is extremely important to me, so GFI's strategic approach and focus on results made the decision to become a monthly giver an easy one! GFI is transforming the food system from the inside out, and I am energized to be part of it. It's great to know I am sustaining their work throughout the year."



ACCELERATING THE SCIENCE OF PLANT-BASED AND CLEAN MEAT

GFI's science and technology team members are global experts in the science and technology of plant-based and clean meat. They are investigating the best scientific opportunities and helping to solve the most critical challenges of these incredibly promising food technologies.

Our SciTech team's key accomplishments in 2017:

Launching the **world's first university course on plant-based meat**, as well as a competition to research new plant-based seafood solutions, both in partnership with the University of California at Berkeley. The courses were so successful that UC Berkeley later launched a **permanent "Program for Meat Alternatives"** that GFI co-designed and will launch nationwide.



▲ GFI Senior Scientist Liz Specht, Future Meat Conference.

Presenting a poster on the applicability of medical cell therapies to food at the "Scale-up and Manufacturing of Cell Based Therapies" conference. GFI's entry was selected as the second-best poster out of all 74 that were presented, despite being the only non-medical poster.

Bringing together **every clean meat company in the world** (currently four based in the U.S., three in Israel, and one each in Europe and Japan) for quarterly meetings to explore collaborative research opportunities, identify research questions to pitch to academics or established companies, and discuss IP pool or patent pledge opportunities.



Releasing the first-ever open-source white papers outlining the **path to commercialization for plant-based meat and clean meat** and presenting multiple webinars to investors and key scientific and food media representatives.

10 Presenting at **ten conferences and seminars**, including keynotes at the 3rd International Conference on Clean Meat and the first ever clean meat conference in Israel, a session on clean meat at the Institute of Food Technologists conference, and two deep-dive technical seminars presented to investors and entrepreneurs at Impact.tech.

Meeting with dozens of venture funds and investors about the **commercial viability of clean meat**—from Bill and Melinda Gates' Investment Group to DFJ—to help secure a \$17 million investment round into Memphis Meats and seed the ground for future clean meat investments.



"GFI's scientific consultation and financial support have been outstanding and absolutely invaluable to me. Thanks to GFI, I'm exploring the next steps in large-scale muscle cell production so we can achieve scale-up for clean meat production as swiftly as possible."

Marie Gibbons, M.S. | GFI Clean Meat Research Fellow
Visiting Graduate Student, Genetics, Harvard Medical School

SCITECH MEDIA

San Francisco Chronicle

Meat substitutes are on the curriculum at UC Berkeley

By Jonathan Kauffman

nature biotechnology

Engineering the animal out of animal products

By Amber Dance

MEAT+POULTRY

The future of clean meat continues to grow

By Josh Sosland



[Clean] Meat May Save a Lot More than Farm Animals' Lives

By Bahar Gholipour

GROWING THE MARKETS FOR PLANT-BASED AND CLEAN MEAT

GFI's innovation department is building an ecosystem where plant-based and clean meat companies thrive. We create new good food companies from scratch and help existing startups become more successful, thereby generating direct competition with conventional animal products.

INNOVATION MEDIA

The Washington Post

Is this the beginning of the end of meat?

By Caitlin Dewey

Shared with 9.49M

Shared with 5.3M

Newsweek

The Future of the Veggie Burger is Juicy

By Nathan Dicamillo

“Bruce Friedrich, executive director of The Good Food Institute ... explains, ‘What [these plant-based meat companies] did was say, ‘Look, meat is made up of lipids and amino acids and minerals and water. There is nothing in meat that we cannot make from plants.’”



Bruce Friedrich is Innovating the Future of Food

Rich Roll Podcast Episode 286

Our innovation team's key accomplishments in 2017:

Providing technical and strategic **support to more than 100 plant-based and clean meat startups** ranging from entrepreneurs in the process of selecting a business idea to teams with existing products who seek to expand their reach.

Examples include:

- Providing fundraising strategy, reviewing pitch decks, and making connections with potential investors.
- Lending communications expertise, including conducting a pilot survey for naming a clean meat company, helping a plant-based meat company with digital marketing strategy, and helping multiple plant-based meat companies design their packaging for maximum consumer acceptance.
- Assisting more than a dozen entrepreneurial teams with product development advice related to production scale up and formulations for extending shelf life.
- Helping multiple startups navigate regulatory topics such as K-12 foodservice and clean meat regulations abroad.

Compiling **mission-critical resources** from a global map of incubators and accelerators to databases of ingredient suppliers, distributors, food scientists and other industry players.



“Launching a startup is exhilarating and intense. Alpine Roads wouldn't exist but for GFI's scientific guidance and willingness to speak with investors about our ambitious approach. I'm thrilled by how far we've progressed over the last year thanks to GFI's strategic and technical support.”

Magi Richani | Co-founder and CEO | Alpine Roads

Growing our **GFIdeas community to more than 350 plant-based and clean meat entrepreneurs** who gather via video conference monthly and trade ideas on a GFI-generated Slack channel. Multiple new companies have been launched by GFIdeas attendees, including a plant-based meat brokerage that is focused on K-12 schools, a U.S. clean meat company, and Dao Foods International, a company formed to bring plant-based and clean meat to China.

Connecting with the **next generation of leading entrepreneurs** through speaking events at **top business and management schools around the country** including Harvard, Yale, MIT, Stanford, and the University of Pennsylvania.



▲ Bruce Friedrich at TEDx Sonoma, “Market Forces and Food Technology will Save the World.”

Bringing plant-based and clean meat topics to more than a dozen **prominent tech-focused conferences** including the influential Future Food Tech annual conferences in London, San Francisco, and New York City; SxSW; the Concordia Summit; the annual “Capitalism Conference” (CapCon); and food innovation conferences at Stanford and Harvard.



FACILITATING FOOD COMPANY TRANSFORMATION

GFI's corporate engagement department increases the quality and quantity of plant-based meats that are available in the marketplace and encourages major corporations to invest R&D and M&A resources in plant-based and clean meat.

Our corporate engagement team's key accomplishments in 2017:

Establishing **cooperative relationships with 32 of the top plant-based meat, dairy, and egg companies** in the United States, to help them leverage the latest market intelligence, tailor their advertising for maximum sales, move into new export markets, and remove all animal ingredients from their products.

4 Advising four of the largest meat companies in the world on opportunities in plant-based and clean meat. For example, we presented an in-depth overview of the plant-based and clean meat sectors from business, marketing, and technical perspectives to 80 people attending a top U.S. meat company R&D symposium. The principal organizer of the event declared that "it was the best session we've ever had."



▲ GFI Director of Corporate Engagement Alison Rabschnuk and Bob Connolly of Sweet Earth Natural Foods at Expo West.

Advising seven food industry giants and creating collaborations that will divert money away from conventional meat, dairy, and egg production and toward plant-based and clean alternatives. GFI has been sought out by these companies to provide expertise on good food innovations and to help evaluate M&A and VC investment opportunities.



Compiling rankings of the top 100 U.S. restaurants' menus for plant-based options, and creating a dedicated website to showcase the results: goodfoodscorecard.org. So far, we have directly engaged with 12 of the top 100 restaurant chains—four of which are in the top 10—to increase plant-based offerings and improve the marketing of these options. We are working closely with one leading restaurant chain to demonstrate regional demand for plant-based meat and connect the company with plant-based manufacturers for product sampling.

CORPORATE ENGAGEMENT MEDIA

WALL STREET JOURNAL

Plant Protein Can Sizzle as the Nutrient of the Future

By Bruce Friedrich

FAST COMPANY

Get Ready For A Meatless Meat Explosion, As Big Food Gets On Board

By Adele Peters

The Guardian

The seven megatrends that could beat global warming: 'There is reason for hope'

By Damian Carrington

“Plant-based meat and dairy produce is not only environmentally friendly, but also healthier and avoids animal welfare concerns, but these benefits will not make them mass-market, [GFI's Rabschnuk says]... “We believe the products themselves need to be competitive on taste, price and convenience - the three attributes people use when choosing what to eat.”



"I believe that in 30 years or so we will no longer need to kill any animals and that all meat will either be clean or plant-based, taste the same and also be much healthier for everyone."

Richard Branson

LEVELING THE PLAYING FIELD FOR GOOD FOOD

GFI's policy department is focused on creating a clear pathway to market for clean meat and a level playing field for plant-based meat, eggs, and dairy. GFI's policy team works with government agencies and elected officials to achieve maximum success in a market dominated by powerful animal agriculture industries.

POLICY MEDIA

WALL STREET JOURNAL

Do You Need a Cow for Milk? Debate Churns Over Dairy Definition

By Jacob Bunge

“The Washington-based Good Food Institute, which lobbies on behalf of plant-based dairy and meat products, on Thursday filed a petition asking the FDA to affirm soybean and nut processors’ right to call their products milk. ‘This [legislation] would be the government censoring plant-based milk and cheese companies in violation of the First Amendment,’ said Bruce Friedrich, the institute’s executive director. ‘It would treat consumers like infants, suggesting that Americans can’t figure out what soy milk is.’”

🐦 Tweeted to the paper’s 13.2 million followers

📌 Shared with the paper’s 5.5 million followers.



The fight for the dairy aisle turns on the question: ‘What’s milk?’

By Adam Allington

Our policy team’s key accomplishments in 2017:

Partnering with plant-based pioneer Beyond Meat to co-host our **inaugural reception on Capitol Hill**. Three members of the United States Congress addressed the packed room, along with Beyond Meat founder Ethan Brown and GFI co-founder and executive director Bruce Friedrich.

Hiring the world’s first full-time lobbyist for the plant-based and clean meat industries.

Securing language in the U.S. Senate Agriculture Appropriations report urging USDA to invest a portion of its \$3 billion in research funding toward the investigation of plant proteins.



Filing an official **Petition for Rulemaking** under the U.S. Administrative

Procedure Act and Food Drug and Cosmetics Act to **protect plant-based food companies** from labeling censorship that would put them at a disadvantage against animal-based industries.

Putting **good food on the agenda at prominent conferences and meetings** including The Food and Drug Law Institute’s Food Advertising, Labeling, and Litigation Conference; The Dupont Summit on Science, Technology, and Environmental Policy; and an invitation-only USDA listening session focused on the 2020 Dietary Guidelines for Americans.



“My GFI internship projects included analyzing bills, drafting legal memos, and researching for and editing drafts of an amicus brief for a case before the Ninth Circuit Court of Appeals. Each project was substantive and provided me with real-world experience and insight into how policy impacts good food commercialization. Working with GFI exceeded all of my expectations and solidified my decision to continue to be involved in the food law realm.”

Nicole Manu | Class of 2018 | George Mason University School of Law

Reaching a settlement in our Freedom of Information Act (FOIA) lawsuit against the Food and Drug Administration (FDA). FDA provided nearly 1,000 pages of responsive documents and paid all of our legal fees.

Completing **fact-finding reviews** on the regulatory landscape for clean meat in the United States, Australia, New Zealand, Brazil, China, and India.



▲ GFI Director of Policy Jessica Almy, “Dairy Industry Fights Plant-Based Alternatives Use of Milk,” Market Day Report.

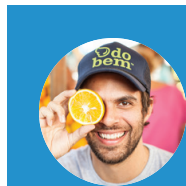


GOOD FOOD GOES GLOBAL

GFI's international engagement department works as a force multiplier, bringing the expertise of GFI to the rest of the world. Formally launched in the Fall of 2017, our international engagement team is exploring how best to tailor and implement GFI's initiatives for maximum transformation of conventional animal agriculture globally.

Our international engagement team's key accomplishments in 2017:

Mapping the landscape of meat production and consumption in Brazil, India, China, Japan, Singapore, Indonesia, Malaysia, Thailand, South Korea, Monaco, Belgium, the Czech Republic, France, Germany, Ireland, Italy, the Netherlands, Norway, Spain, Sweden, Switzerland, and the United Kingdom to determine how best to propel R&D and product development in the plant-based meat space.



"My mission is to change Brazil's industrial meat and dairy industries, from use of animals to the use of plants. GFI has given me invaluable insights and introduced me to plant-based companies in the U.S. so that I can analyse how their models could be tailored and applied in my home country. *O Brasil está pronto para uma revolução profunda baseada em plantas!*"

Marcos Leta | Founder, do bem™ | plant based investor

Connecting with government agencies in **Singapore, Brazil, India, Israel, the Czech Republic, United Arab Emirates, and France** to explore the potential for establishing and funding plant-based or clean meat research centers in these countries.

Meeting with **C-Suite executives at major European and Brazilian meat and egg companies** to discuss the multi-billion dollar market opportunity that is plant-based and clean meat. These companies are now diversifying to offer plant-based products to their customers and are funding new plant-based foods R&D programs.

Meeting with the Central Food Technologies Research Institute (CFTRI), an Indian government research and teaching institute under the Department of Science and Technology; establishing a working group that includes CFTRI, GFI, and Humane Society International to **publish a white paper on the opportunities for plant-based and clean meat products in India.**

INTERNATIONAL ENGAGEMENT MEDIA

ISRAEL21c

A clean meat revolution is cooking in Israel

By Abigail Klein Leichman

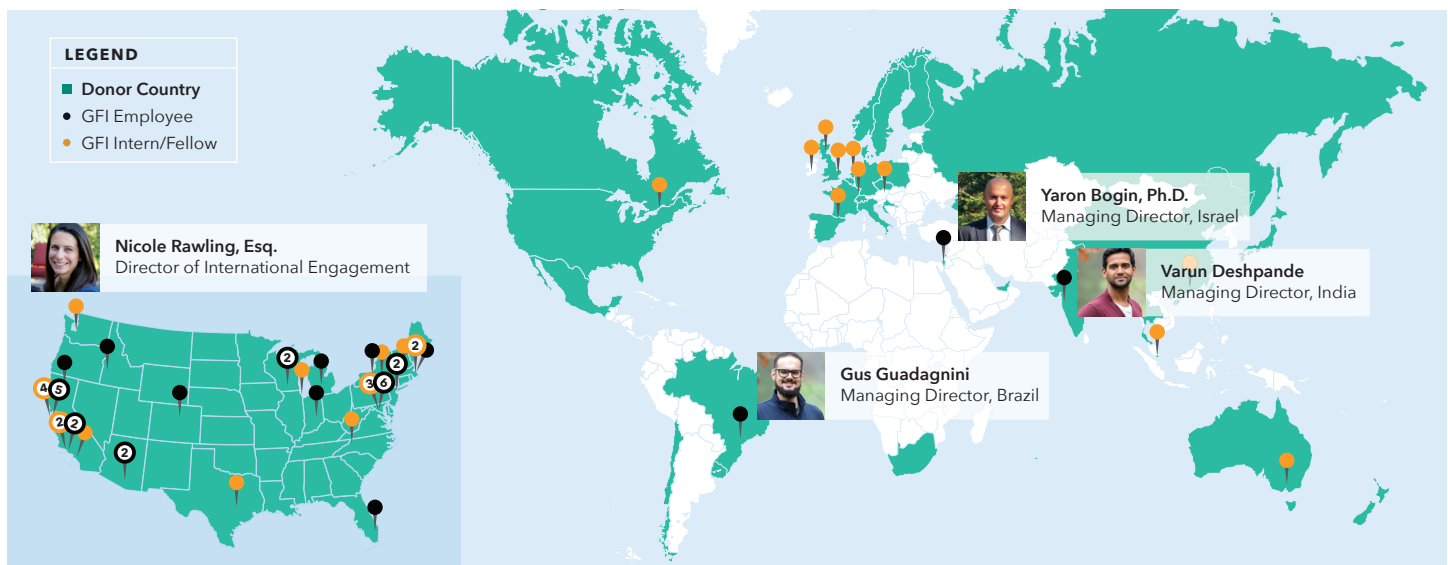
QUARTZ

"[GFI] is about to up the ante in the effort to get more people eating plant-based and [clean] meat. With a staff that will soon exceed 30, [The Good Food Institute] is expanding its attention from the United States to the entire world."

By Chase Purdy

Initiating contact with **entrepreneurs in India, Mexico, Brazil, and China** to help them launch plant-based meat companies.

GFI HAS SUPPORTERS ON SIX CONTINENTS, FROM SWEDEN TO SINGAPORE AND FROM CANADA TO CHILE!





THE DAWN OF THE NEXT AGRICULTURAL REVOLUTION IS HERE.

We're transforming our planet's broken food system by harnessing the power of food innovation and markets to create a future of food that is healthy, humane, and sustainable.

But we can't do this alone.

You can make your mark as a climate protector, animal advocate, and a pioneer in the next agricultural revolution by making a gift to GFI.



JOIN US!



www.GFI.org/donate



866.849.4457