FOODTECH IN THE UK

FOODTECH INVESTMENTS FROM 2014 TO 2018

DigitalFoodLab with

CCI PARIS ILE-DE-FRANCE

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FOODTECH IN THE UK

“What is not measured does not exist”. We introduced last year report on the French FoodTech startup ecosystem with this quote of Niels Bohr. This report's goal was simple: give investors, entrepreneurs and corporates the much-needed data and insights to accelerate development of the FoodTech ecosystem.

With more than 10,000 downloads, the renewed confidence of our sponsors - Sopexa and Vitagora - and new partners - CCI Paris Île-De-France and Eutopia - we are now able to provide you a new report on the European FoodTech investments and three focus reports on British, French and German ecosystems.

In a few words, the UK has the most balanced FoodTech ecosystem in Europe with many startups at each stage of the investment funnel. You can find there many entrepreneurs working on innovative food products and delivery startups.

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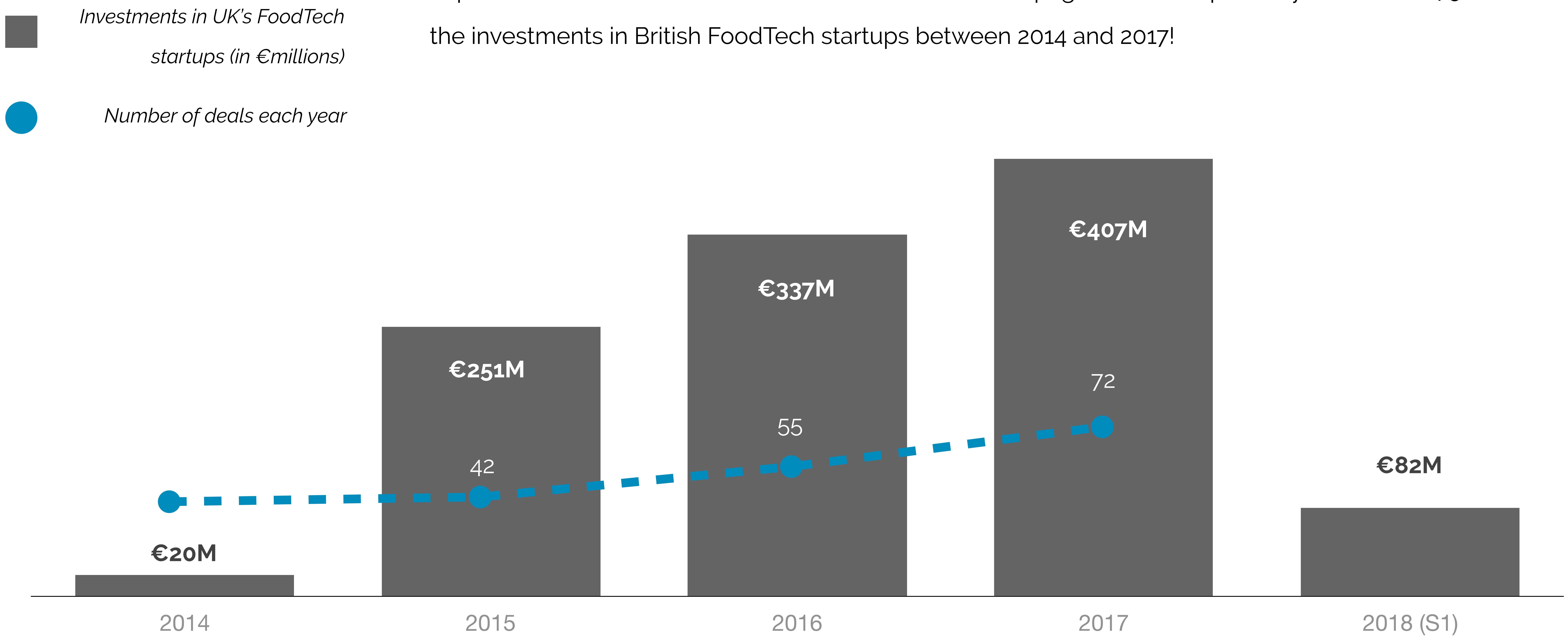
INVESTMENTS

INVESTMENTS IN BRITISH FOODTECH STARTUPS BETWEEN 2014 AND 2018 (H1)

While the growth of investments in British startups seems impressive, it is important to highlight the importance of its leader, Deliveroo. As seen in the next page, this startup has by itself taken 75% of all the investments in British FoodTech startups between 2014 and 2017!

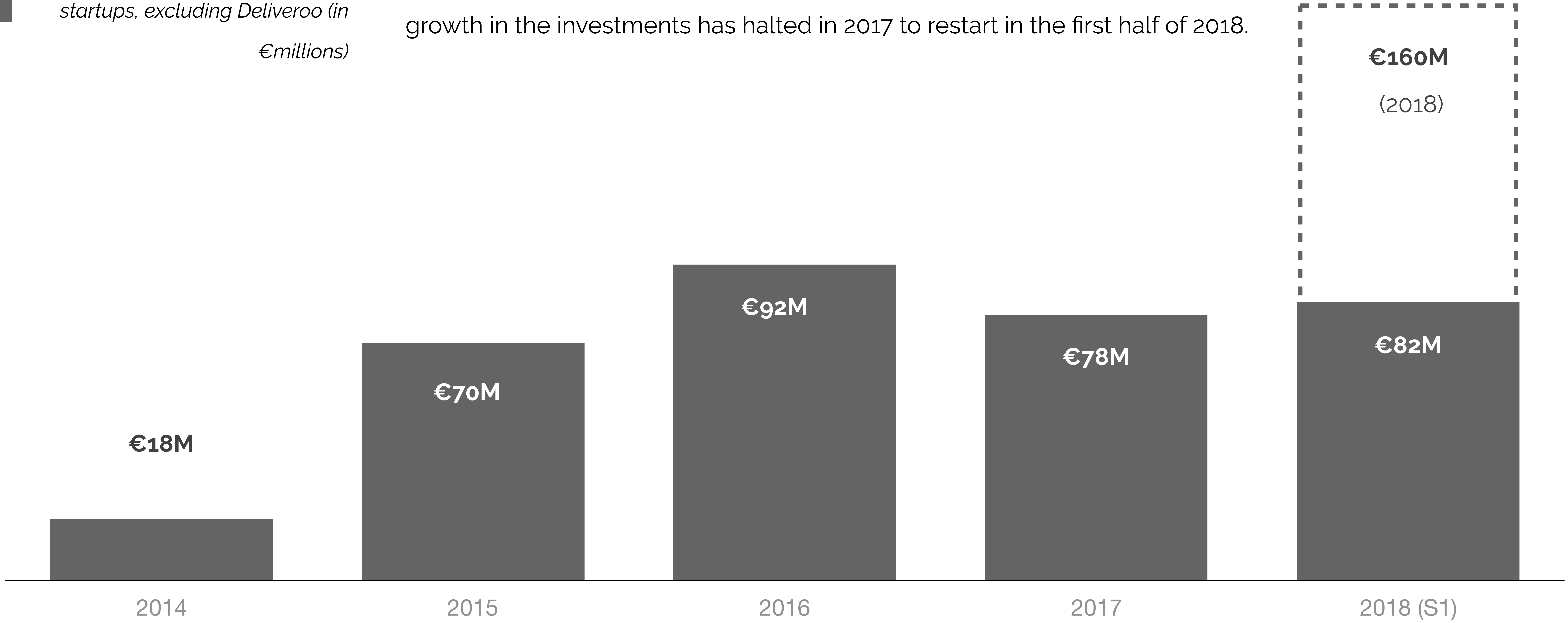


INVESTMENTS

INVESTMENTS EXCLUDING DELIVEROO IN BRITISH FOODTECH STARTUPS BETWEEN 2014 AND 2018 (H1)

Investments in UK's FoodTech startups, excluding Deliveroo (in €millions)

Excluding Deliveroo gives a new perspective to this chart. Indeed, as for the British ecosystem, the growth in the investments has halted in 2017 to restart in the first half of 2018.

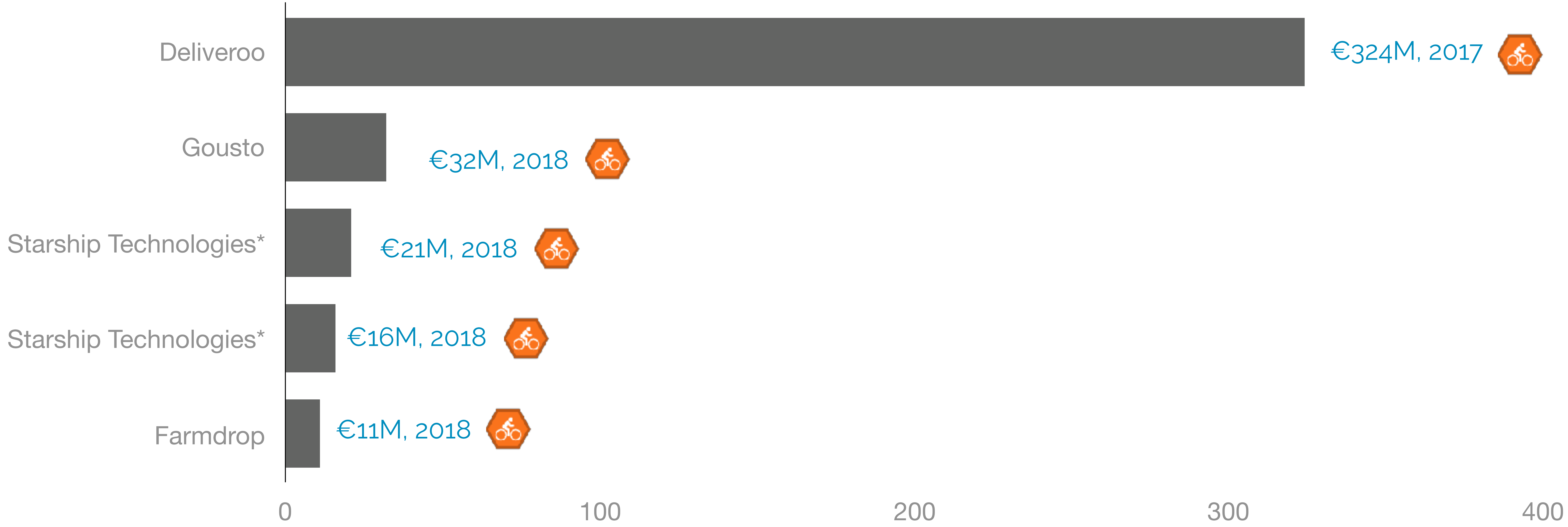


TOP DEALS

2017-2018 (H1)

DELIVERY AT THE TOP (TOP DEALS IN THE UK BETWEEN 2017 AND 2018 (H1))

When we analysed the distribution of active British startups and even the deals by domains (from AgTech to Delivery), it was quite evenly distributed. However, the story is quite different in terms of money invested. Indeed, 86% of the investments goes to Delivery&Retail startups. A domination of this domain can be seen below in the top deals.



** although the first office of Starship Technologies was in Tallinn, Estonia, we consider the current headquarter in London and register it as an English startup*

A BALANCED ECOSYSTEM

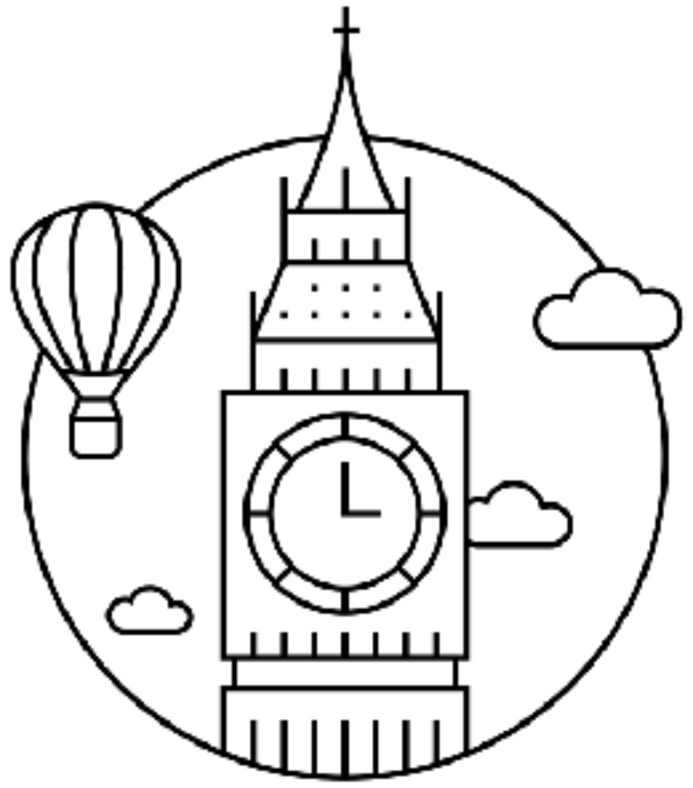
The main strength of British FoodTech ecosystem is the presence of many startups at each stage of the investment funnel from ideas to Unicorns and post-IPO startups like Just Eat and its incubator.

This diversity and the great number of investors at each stage are key for British entrepreneurs.

However, even with many foodscience startups, few have succeed internationaly. It seems that many entrepreneurs either lack the opportunity or the financing to go through the Channel.

MANY EARLY STAGE STARTUPS OUTSIDE LONDON

Only 35% of the British deals bigger than 500k€ where done in the Great London, compared to 50 to 60% for Berlin and Paris (relatively to Germany's and France's deals). However the London-based startups have taken 92% of the total investments made in the UK.



MUCH MORE IN THE EUROPEAN REPORT

The first analysis of the European FoodTech

90+ pages of data, insights and analysis

[Get the last update of our report: "FoodTech in France" (January 2019)]

Key points of the report:

- Figures and analysis: investments and startups creations
- FoodTech categories breakdown
- Top deals in France
- The full list of the 627 active FoodTech startups in France
- List of French FoodTech accelerators and incubators

RETAIL & DELIVERY STARTUPS (1/22)

Company			Description	Fundings	Subdomains
A Bicyclette (website)		2015	Traveling canteen!	<EUR 500k (2019)	Fullstack delivery
Actiwine (website)		2015	Actiwine, the marketplace for wine professionals	EUR 830k (2017)	Marketplaces
Ah la vache (website)		2012	Local meat at your home.	<EUR 500k (2017)	Marketplaces
Alkemics (website)		2011	Alkemics builds bridges between brands and retailers by empowering a new mode of collaboration viaits product data platform.	EUR 25M (2016)	Data for supply chain
Alter & Cow (website)		2016	Local flavor: Farm & dairy products	<EUR 500k (2018)	Marketplaces
Alterfood (website)		2009	Alterfood is a distributor of natural and organic food brands in the snack, beverage and delicatessen markets	EUR 3M (2018)	Marketplaces
Arthur A Table ! (website)		2018	Arthur A Table ! prepares and delivers organic, healthy and balanced meals for children from 3 to 11 years old.	-	Fullstack delivery
Artisans de la Terre (website)		2017	Les Artisans de la Terre offer premium products from small certified productions without intermediaries	-	Marketplaces
Au Bout Du Champ (website)		2013	Short circuit for fruits and vegetables in IDF, harvested the same morning and available 24/	undisclosed (2014)	Marketplaces

627

active FoodTech startups in France

€595M

Investments in the French FoodTech between 2014 and 2018

326

Deals in French FoodTech between 2014 and 2018

WANT TO KNOW MORE ?

HAVE A QUESTION ?

CONTACT-US!

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