

FOODTECH IN FRANCE

STARTUP & INVESTMENT ACTIVITY - JANUARY 2019



EXTRACT

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WANT TO MASTER FOODTECH?

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Pricing

- Report only: €2500
- Report and updates*: €3500

All prices are ex-VAT

*Report updates include new startups, closed ones and updating investments
Updates will be available in April 2019, August 2019 and November 2019

[GET THE FULL REPORT HERE](#)

EXECUTIVE SUMMARY

FRENCH FOODTECH MATURITY

French FoodTech startups have seen an **increase in investments in 2018** (€227M, from €136M in 2017) while the **number of deals** is decreasing (66 in 2018, from 94 in 2017). After a kick off in 2015, the French FoodTech ecosystem is entering in a phase of maturity. Indeed, more money is poured into advanced startups with the growth of series A and series B (and beyond) deals.

The **€227M invested in French FoodTech startups in 2018** could be enough to put France as the leader in the European market even if its share in global investments is only 2.6%. Paris is becoming the place to be for European FoodTech startups.

PARIS

There is now **627 active startups**, more and more evenly spread in France. Though, the capital's region was home of **57% of deals in 2018** and **81% of amount invested** in startups.

AGTECH

While Delivery&Retail was clearly leading French FoodTech deals for the last 2 years, **it is now AgTech who leads French FoodTech** (with InnoVaFeed who raised €55M in two deals this year). AgTech is followed by Foodservice, where French startups are traditionally strong.

METHOD & SOURCES

WHERE DOES THE DATA COME FROM?

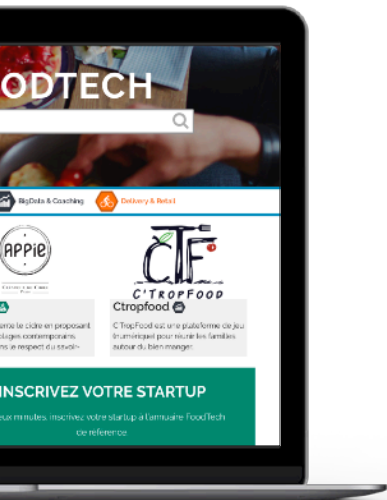
The information used to make this report comes from data collected directly from startups, investors and also from the media (such as press releases, articles). Some of the information is available in the DigitalFoodLab FoodTech database available [here](#).

HOW CAN YOU USE THIS REPORT'S DATA AND INSIGHTS?

This report data and insights may not be used in public communication.

HOW WAS THE DATA USED FOR THIS REPORT?

The data was aggregated to preserve the confidentiality of individual deals information. The top deals reveal only the data publicly available.



METHOD & SOURCES

WHAT TIME FRAME IS THIS REPORT FOCUSING ON?

This report covers the period between 2014 and the end of 2018. This five-years comparison aims to measure FoodTech developments and future trends.

WHAT IS YOUR CLASSIFICATION OF FOODTECH AND FUNDING DEALS?

To make FoodTech more accessible, we have divided it into six domains and thirty-four subdomains (defined in part IV). This report doesn't take into account public grants and IPOs.

UNDISCLOSED DEALS

Of the deals identified for this report, 20 are undisclosed, thus we have not been able to find data about the amount of money invested or the information is confidential.

AUTHORS



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- co-founders  **DigitalFoodLab**
- startup coaches for Paris&Co and Euralimentaire
- co-founders of WeCook (founded in 2010 and acquired in 2016)
- M.Eng Telecom SudParis (Paris) / DCU (Dublin)



What is DigitalFoodLab?

DigitalFoodLab is the FoodTech's intelligence platform. We gather data on FoodTech startups and investments at a global level. This data and our insights help our clients, corporates and investors, to detect and act on opportunities.



INVESTOR ACTIVITY

€595M

Investments in the French FoodTech
between 2014 and 2018

326

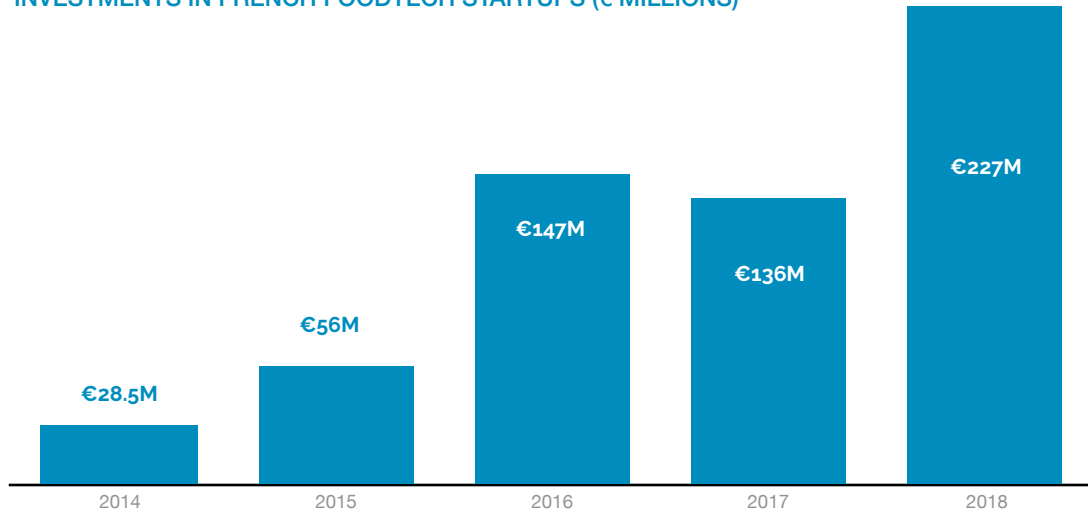
Deals in French FoodTech
between 2014 and 2018

1

INVESTOR ACTIVITY

FOODTECH INVESTMENTS IN FRANCE SINCE 2014

INVESTMENTS IN FRENCH FOODTECH STARTUPS (€ MILLIONS)



*Some investments in late 2018 could
make this ranking change*

1

INVESTOR ACTIVITY

You will find in the full report:

Charts:

- Number of deals since 2014
- Deal stage distribution (by number of deals)
- Deal stage distribution (by amount invested)
- Average and mean deal by stage between 2014 & 2018
- Investments in France vs main European countries
- France's in Europe and France's FoodTech in the world
- Geographical Breakdown
- Top deals in 2014-2018

Analysis:

- Is the ecosystem "already" mature?
- Cash is Coming
- France's FoodTech is becoming the European leader while the continent share stagnates

1

INVESTOR ACTIVITY

FRENCH INVESTMENTS IN FOODTECH: KEY INSIGHTS

Less deals in French FoodTech since 2017 and an amount of investments which is growing.

French FoodTech is still a little ecosystem compared to the global market but it could take the first place in Europe.

€595 M

Investments in the French FoodTech between 2014 and 2018

326

Deals in French FoodTech between 2014 and 2018

13

Deals bigger than €10M between 2014 and 2018

2.6%

France's share among global investments in FoodTech



ENTREPRENEUR ACTIVITY

557

FoodTech startups created in France
between 2014 and 2017

46%

Share of startups creations in Île-de-France in 2017

2

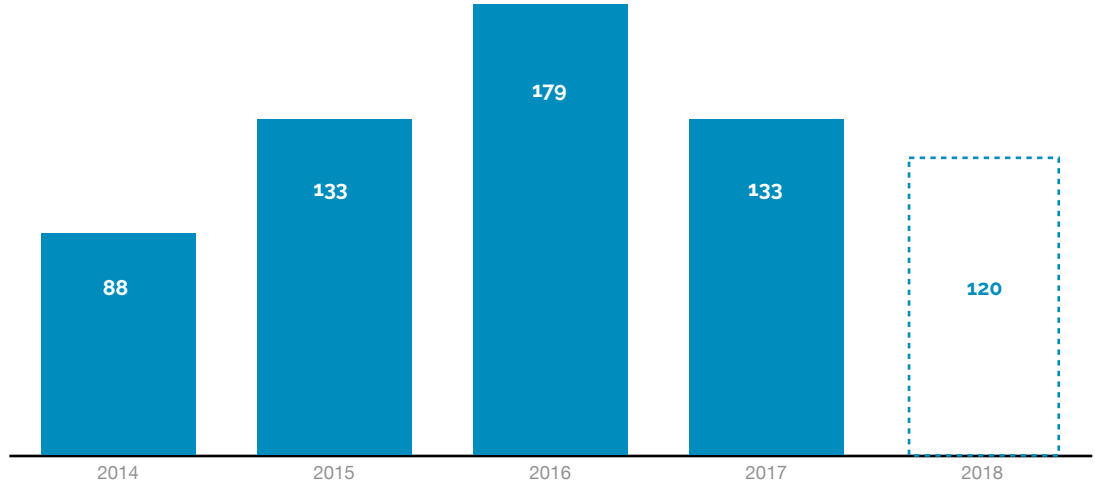
ENTREPRENEUR ACTIVITY

627

active startups in France

FRENCH FOODTECH ECOSYSTEM

2016 was the most prolific year in FoodTech startups creation. Since, the number of new project is declining. Our estimate (we take into account only launched startups - and not projects - with a product, investment or having been selected by an incubator) for 2018 is about 120 startups to be founded.



2

ENTREPRENEUR ACTIVITY

You will find in the full report:

Charts:

- Paris: The place to be?
- Evolution in Paris' share in France
- Incubators list

Analysis:

- More incubators than startups?



EXITS

6

number of French
FoodTech exits in 2018

3

EXITS

FRENCH FOODTECH EXITS

In full report: 6 notable exits in the French FoodTech ecosystem in 2018



CATEGORY BREAKDOWN

30%

Share of active startups in the Delivery&Retail category in 2018

54%

Share of the money invested in Foodservice startups in 2018

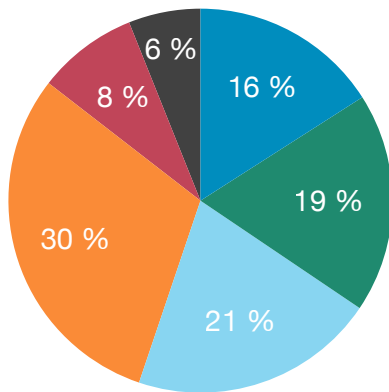
4

CATEGORY BREAKDOWN

CATEGORY BREAKDOWN

ACTIVE STARTUPS BY CATEGORY (IN 2018)

A third of the FoodTech startups are on the Delivery & Retail category, followed by Foodservice, FoodScience and AgTech.



This breakdown makes possible to assess the relative attractiveness of each FoodTech category.



4

CATEGORY BREAKDOWN

You will find in the full report:

Charts:

- Deals and investments between 2014 and 2018 by category
- Investments between 2014 and 2018: Comparison with European countries
- Evolution of investments between 2014 and 2018 by category

Analysis:

- FoodScience and data: future of FoodTech?

For each six categories:

- Definitions of sub-domains
- Investments and number of deals
- Top deals



COMPANY LIST

627

active FoodTech startups in France



5

COMPANY LIST

COMPANY LIST

This list includes all active French FoodTech startups at the end of 2018, excluding startups which did an IPO or was acquired.










We take into account only launched startups (and not projects), with a product, investment or having been selected by an incubator.

To make FoodTech more accessible, we have divided it into six domains and thirty-four subdomains (defined in part IV). Company list is available by domains.

For each startup we present:

- Name (and website link)
- Logo
- Creation date
- Description
- Total fundings (and year of the last round)
- Subdomains



Company		Description	Fundings (last round)	Subdomains
AgriAgree (website)		2012 Agricultural marketplace to buy and sell agricultural supplies and productions	-	Agriculture marketplaces
Agriconomie (website)		2013 Agriconomie enables farmers to buy at the same place all they need at the best price.	undisclosed (2018)	Agriculture marketplaces
Agricool (website)		2015 Agricool is a farm in the heart of the city	EUR 37M (2018)	Farms of the Future & Urban Farms
AGRIFIND (website)		2017 Agrifind: the farming skills' platform for farmers to get practical and technical advice.	-	Agriculture marketplaces
Agriflux (website)		2016 Agriflux is a marketplace connecting the best regional producers to local shops in Toulouse	-	Agriculture marketplaces
Agrilend (website)		2016 AgriLend, a crowdlending platform dedicated to the agricultural sector	-	Agriculture marketplaces
Agriloops (website)		2016 Agriloops is reinventing aquaculture with healthier and more eco-friendly shrimps for consumers.	-	Farms of the Future & Urban Farms
Agripolis (website)		2014 Agripolis transforms unused surfaces into urban agriculture spaces	EUR 630k (2017)	Farms of the Future & Urban Farms
AgriViti Occasions (website)		2017 AgriViti Occasions is a classified ads platform dedicated to agriculture	-	Agriculture marketplaces



PREDICT THE FUTURE OF FOOD

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Contact us: contact@digitalfoodlab.com



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DigitalFoodLab transforms traditional agri-food businesses with FoodTech

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WANT TO KNOW MORE ?
HAVE A QUESTION ?
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