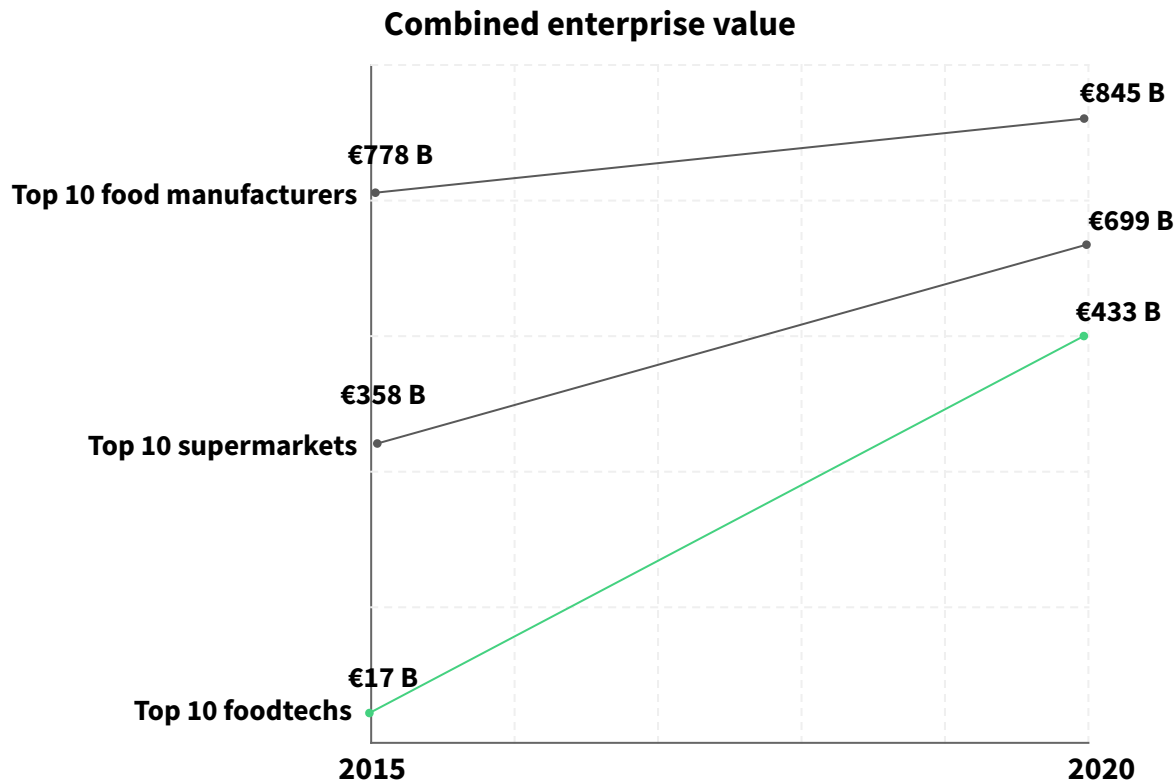




# Digitization of Agriculture.

AgroTech trends in the world and in Russia.

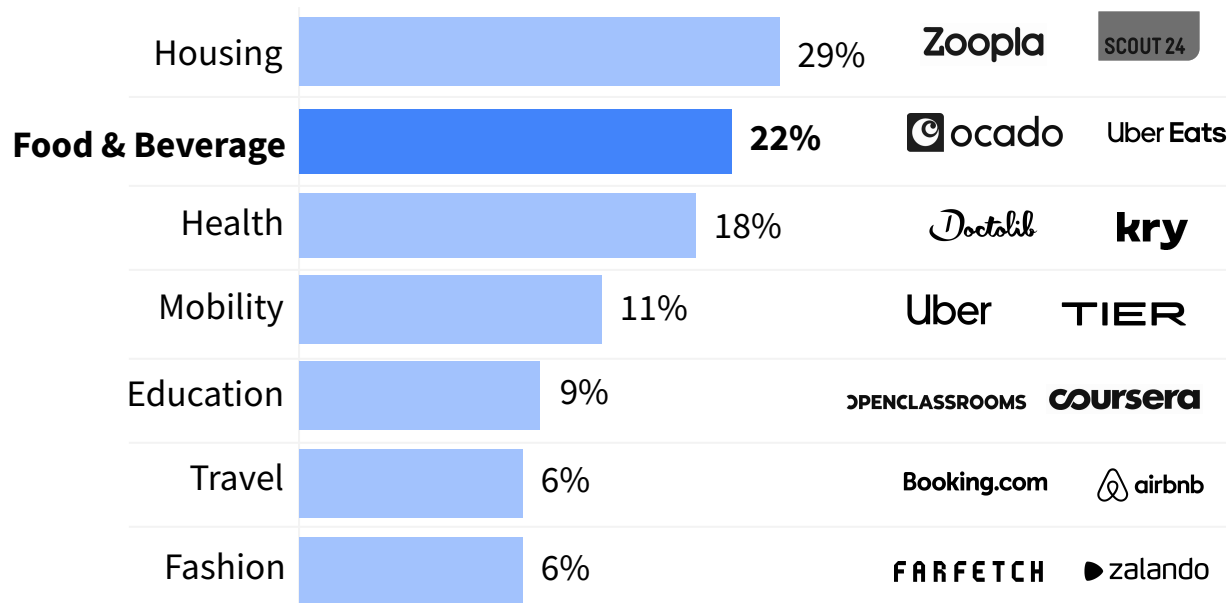
# Foodtech companies have been growing faster than food incumbents, and still have a lot of enterprise value to eat into.



Source: Dealroom.co. For private companies without publicly disclosed valuation we used multiples analysis to estimate enterprise value.

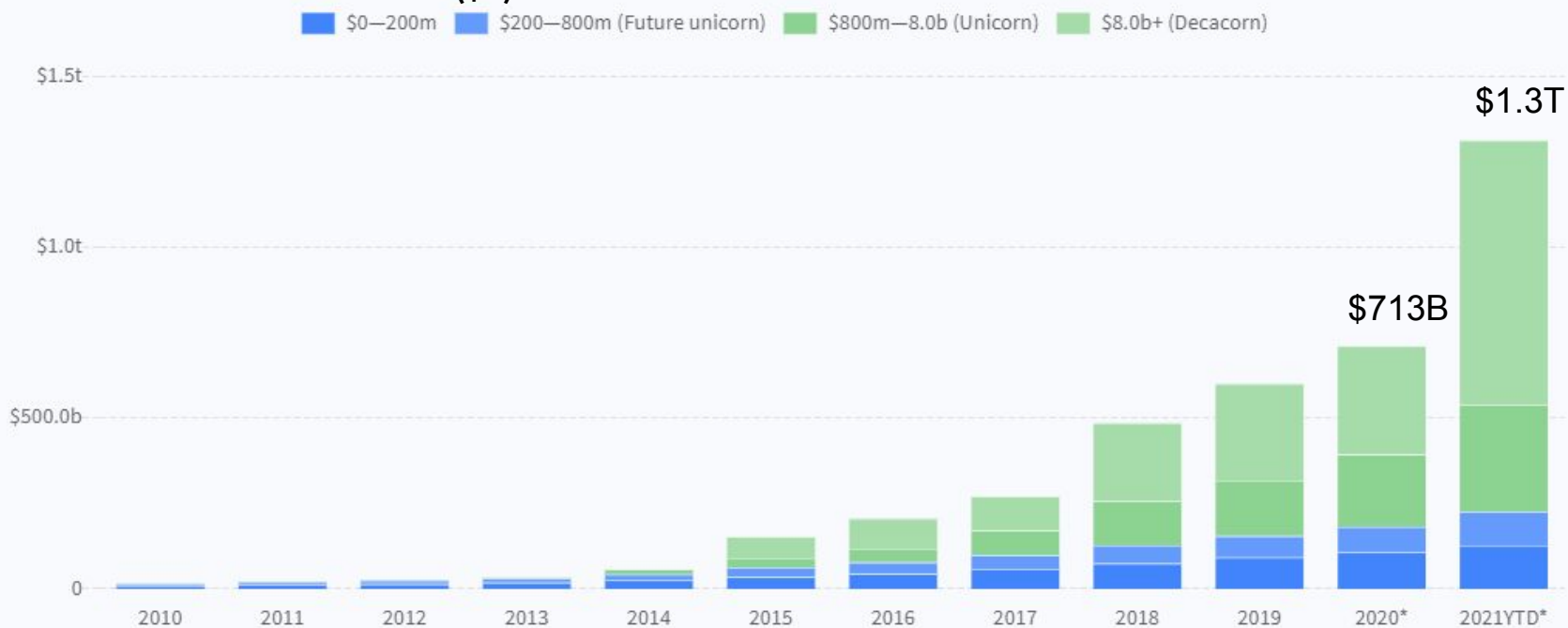
# Food is the second largest consumer spending category.

## Consumer spending in Europe by category



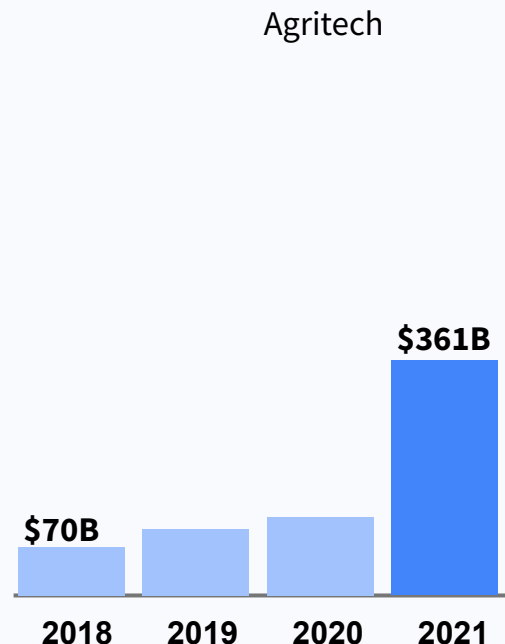
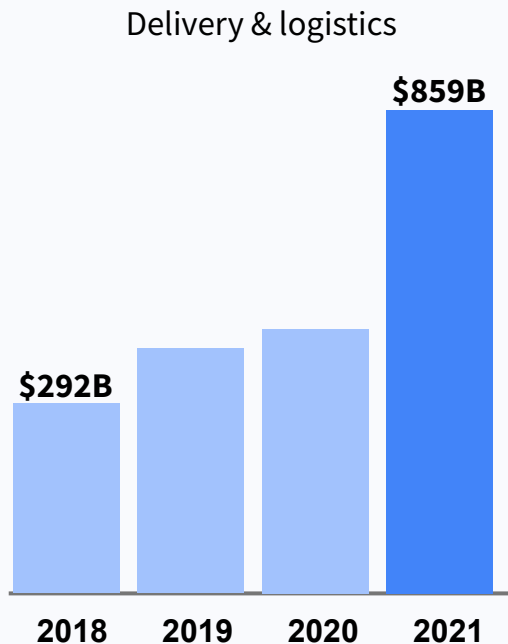
# The value of the global foodtech ecosystem ballooned to \$1.3 trillion.

**Cumulative enterprise value of foodtech startups & scaleups  
(\$B)**



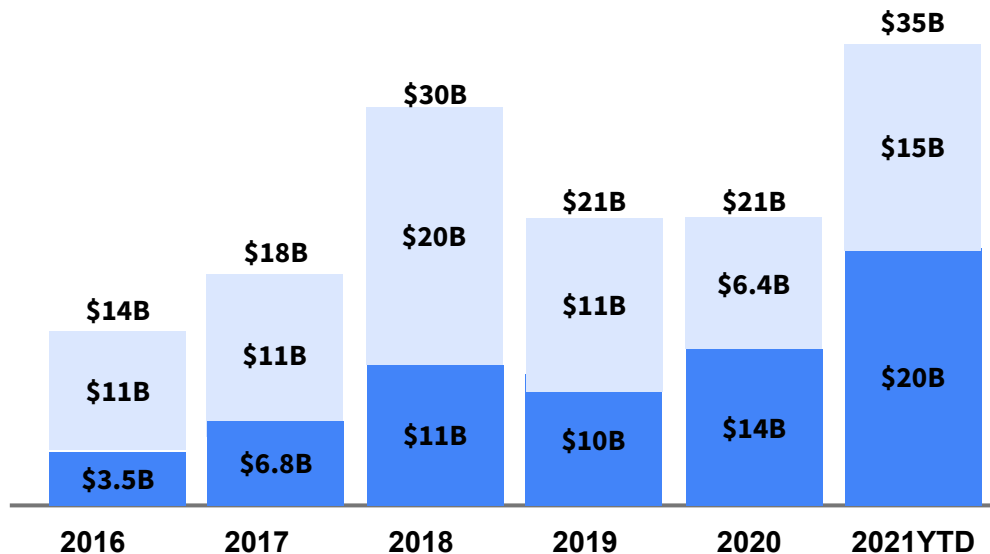
# The value driver is still food distribution and consumption.

Cumulative enterprise value by category (\$B)



# The next generation of foodtech innovators are gaining momentum, as food delivery startups reach maturity.

## VC investment in Global Food Tech



### Food delivery

\$72 billion investment since 2016



### Next generation

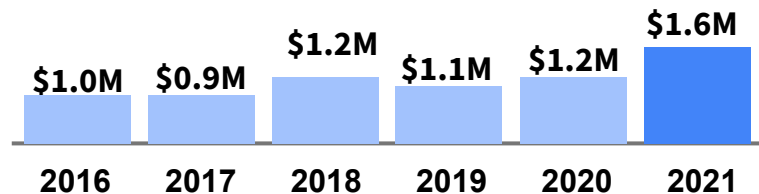
\$65 billion investment since 2016



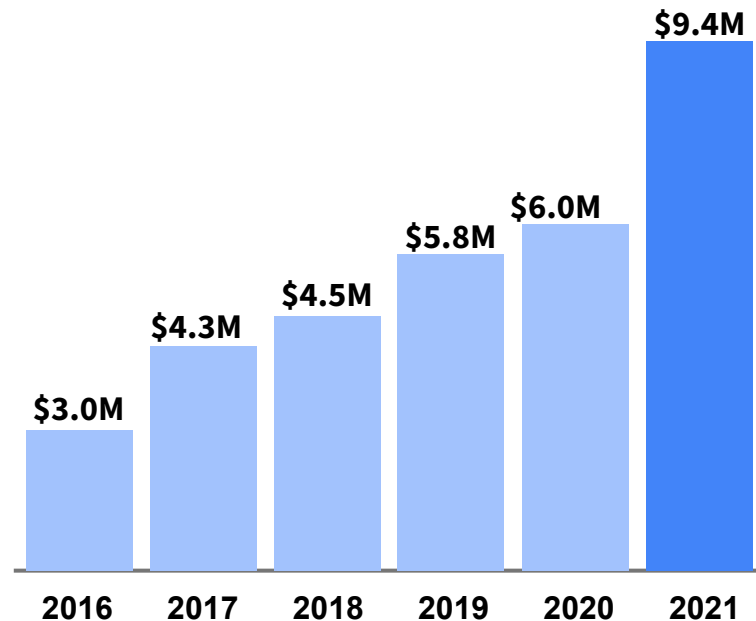
# Larger bets on early-stage next-generation foodtech ventures.

## Median size of next-gen foodtech rounds by type

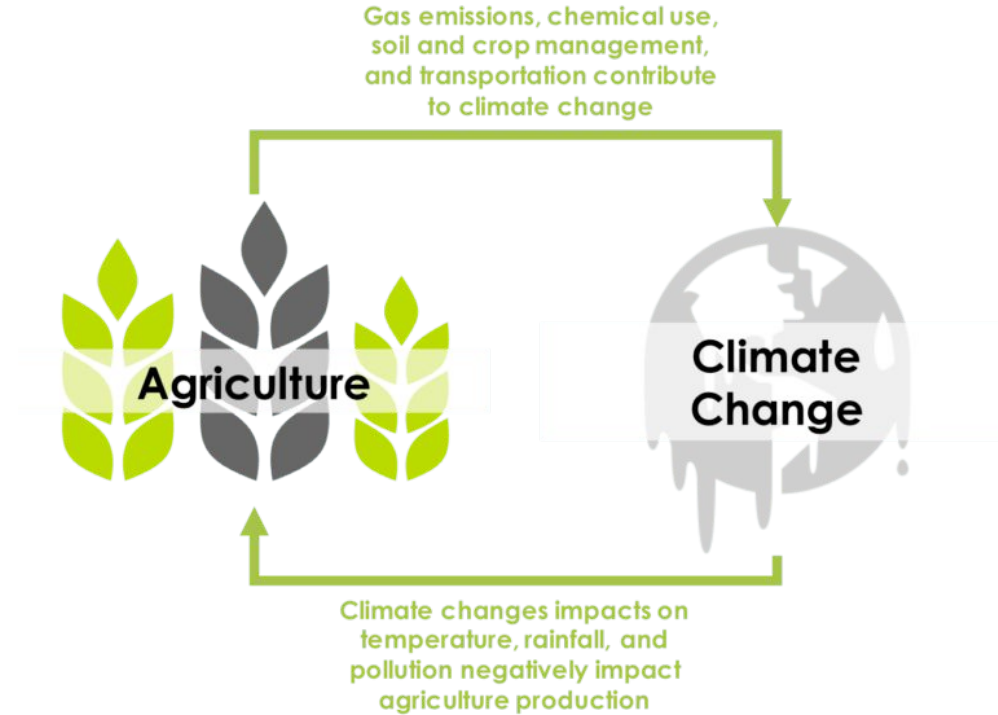
Seed rounds



Series A rounds



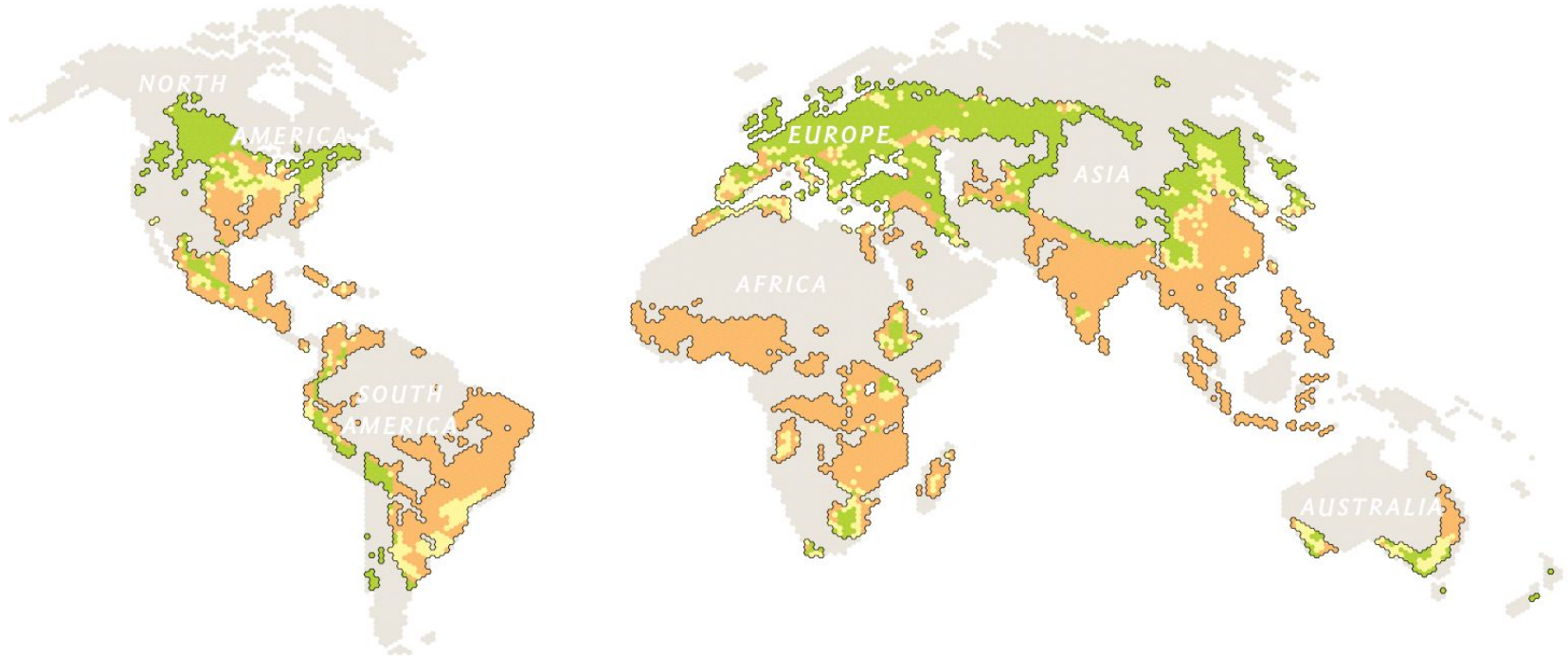
# Climate change affects agriculture, and vice versa.



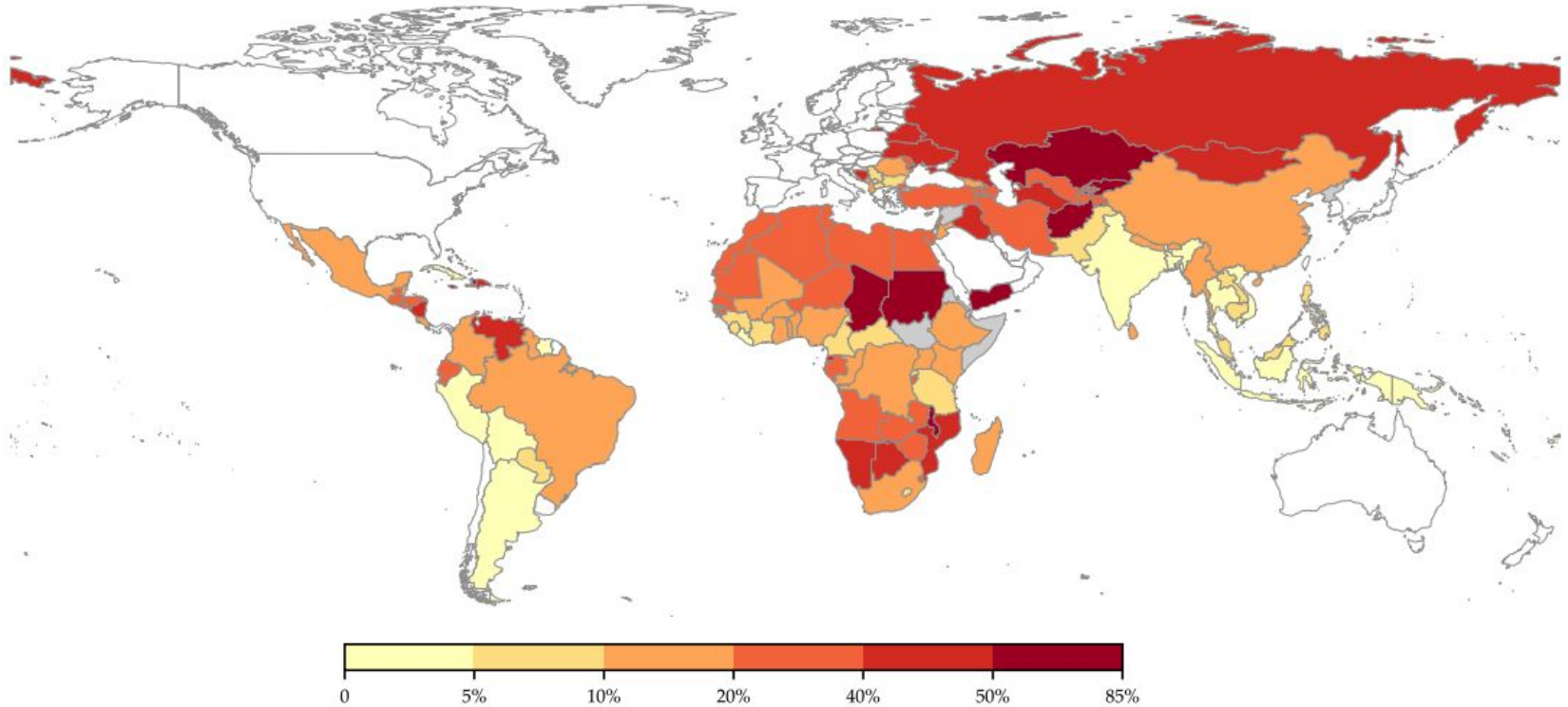


# Crop yields will change dramatically.

Change in potential average yields for corn, potatoes, rice, and wheat in 2050









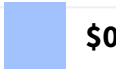
# Developing countries bear a disproportionate cost of climate change.




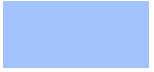




# Countries with high cost of climate change have attracted less VC money to make farming resilient and sustainable.

## VC investment since 2016 by climate change risk category

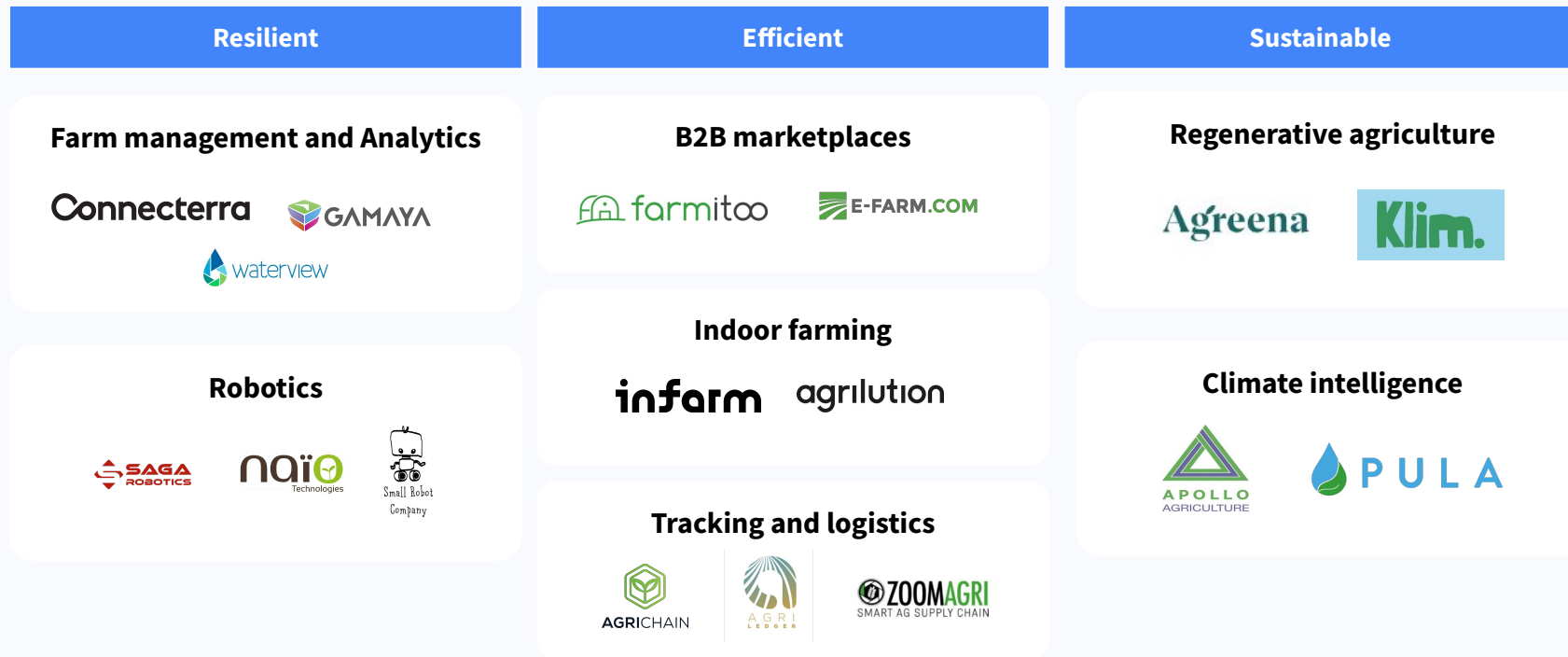
### Lower cost

United States		\$12B
France		\$0.8B
United Kingdom		\$0.6B
Canada		\$0.6B
Norway		\$0.5B
Netherlands		\$0.4B
Germany		\$0.3B

### Higher cost

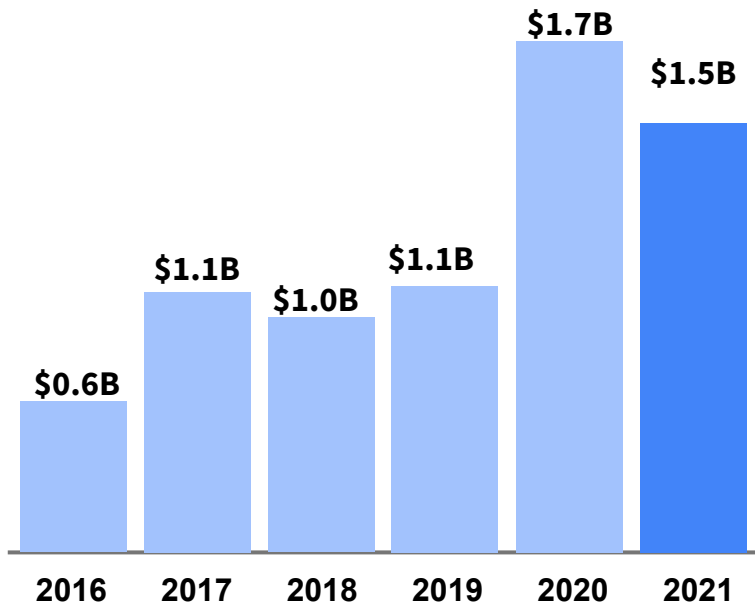
China		\$6.3B
Asia (exlc China)		\$1.9B
South America		\$0.4B
Africa		\$0.3B
Russia		\$0.3B
Eastern Europe		\$0.1B

# The farm of the future: resilient, efficient and sustainable.



# Shortage of labor is a catalyst for growth for farm management & automation.

## Global VC investment in farm management & robotics



## Select categories

### Harvesting & picking



### Crop analytics



### Farm management

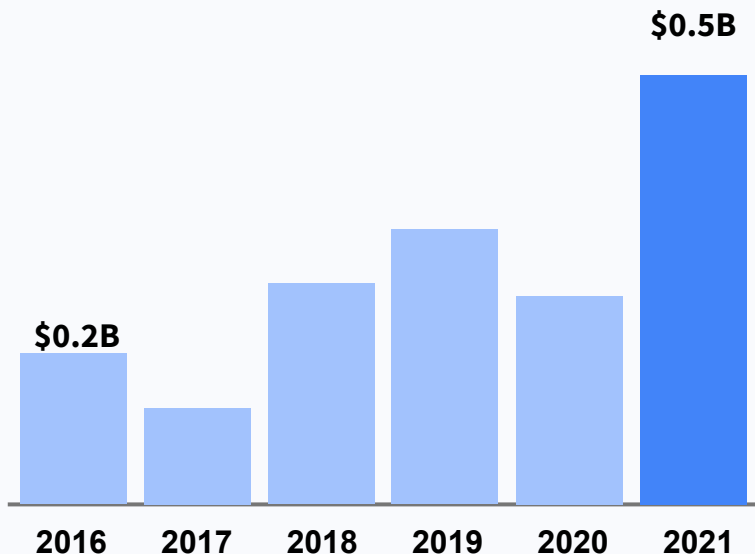


### Geospatial intelligence



# Online marketplaces enable farmers to run efficient and cost-effective business.

## Global VC investment in agri-marketplaces



## Select categories

B2B marketplaces - equipment, machinery, procurement



Farm-to-table



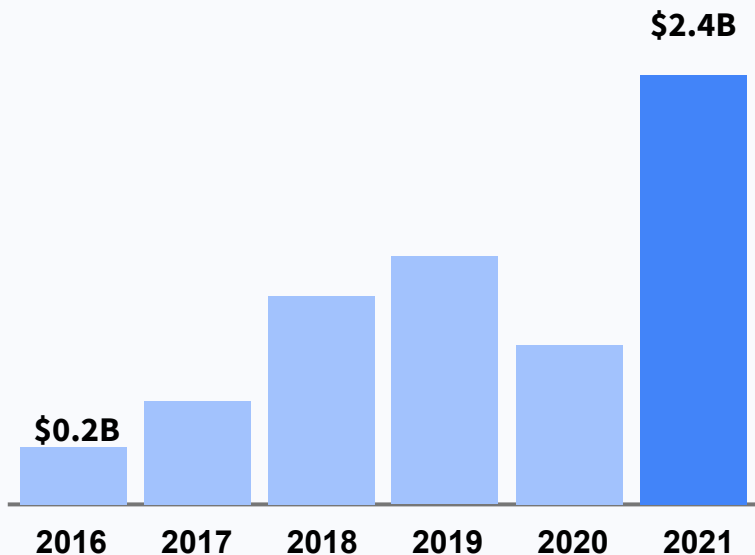
Pinduoduo

Misfits  
Market

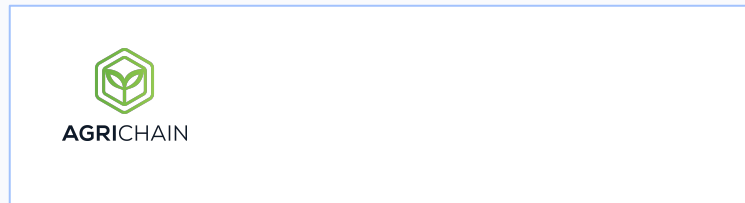
Cortilia

# No more rotten produce! Making logistics reliable and predictive.

## Global VC investment in logistics tech

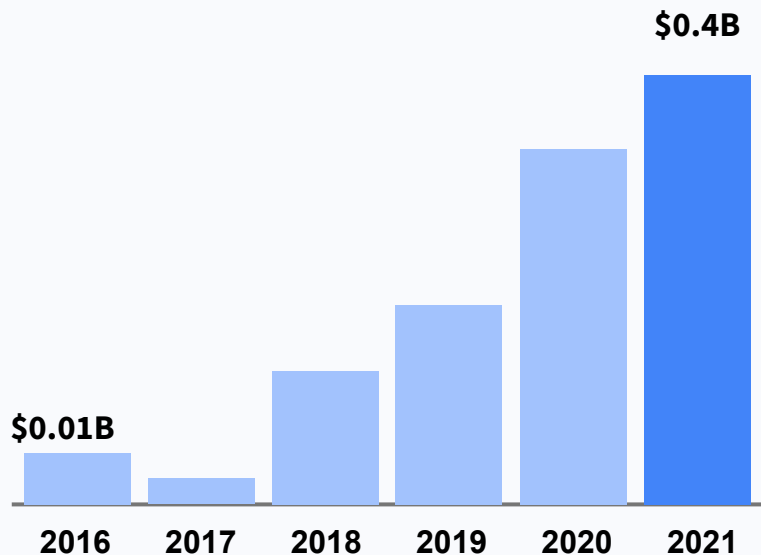


## Select categories



# Sustainable soil and water through regenerative agriculture

Global VC investment in regenerative agriculture



Select categories

Agreena

Klim.





# Think big about foodtech (Work-in-progress)

## **Farmers:**

**Remain competitive, improve unit economics**

## **Investors:**

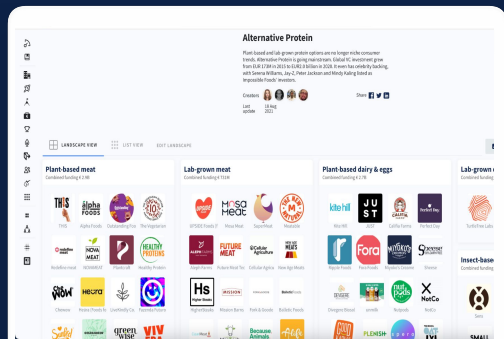
**18% of the next 1000 unicorns would be in agritech... *according to BlackRock***

## **Governments:**

**Food security, reliable supply chain**

# Many resources on foodtech in one place

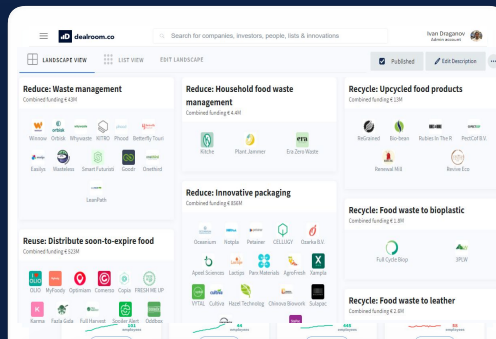
## Alternative protein landscape



» Access Now

Discover 500+ alternative protein startups

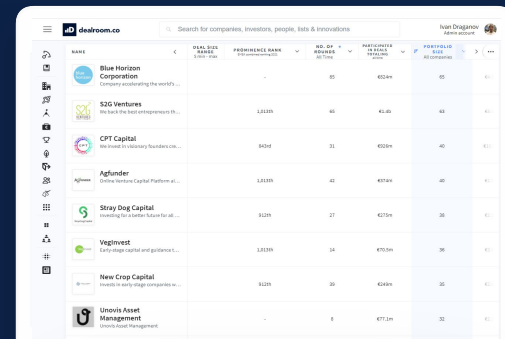
## Food waste landscape



» Access Now

Discover 100+ food waste startups

## VCs focused on alternative protein



» Access Now

Discover 36 alternative protein VC investors

**For questions or feedback about this report, or to see how Dealroom can help you,  
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