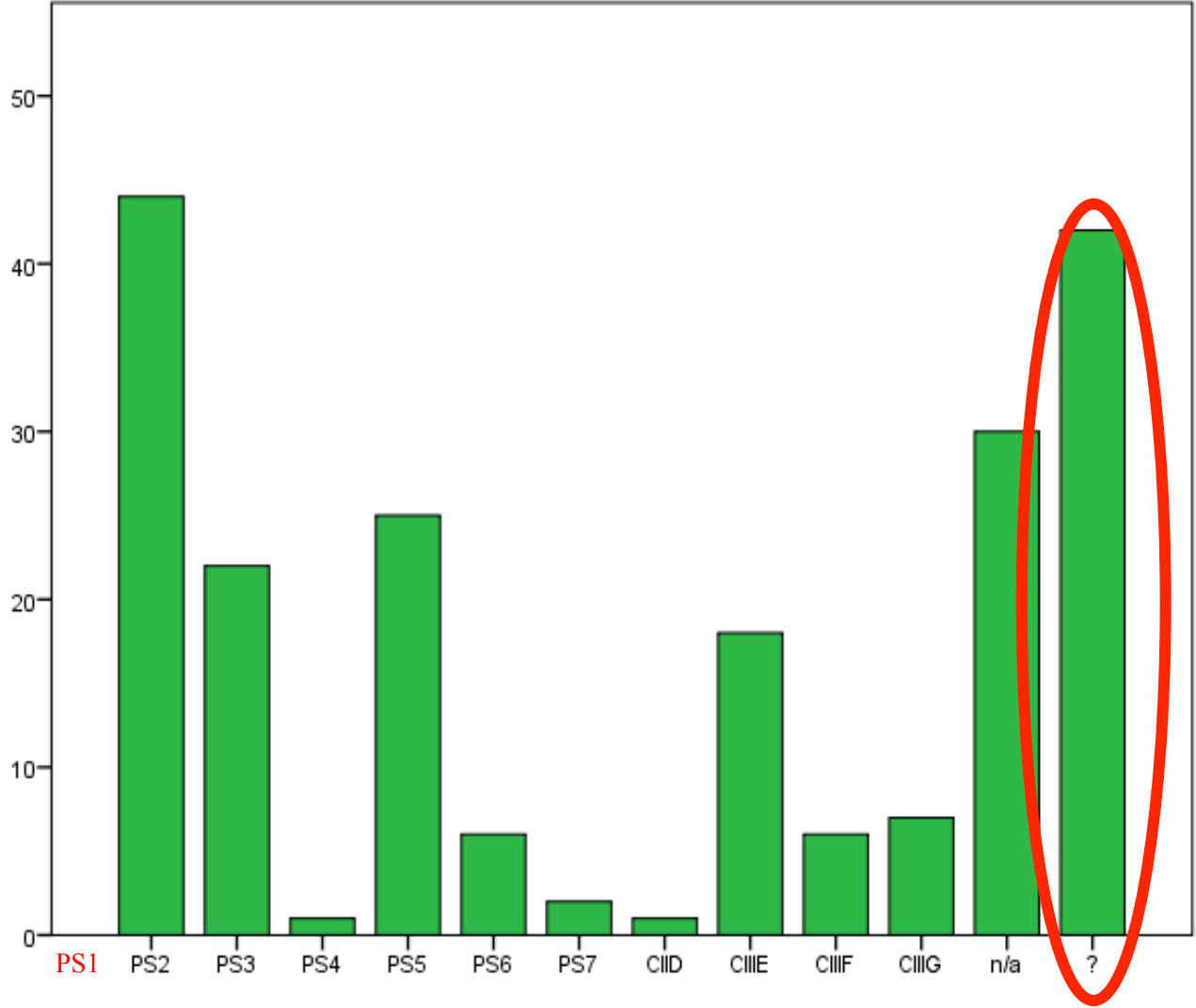


SEARCH AND SELECT Analysis (December 2018)

- ▶ Innovators identification
- ▶ Estimation of our stakeholder's coverage on the total of the stakeholder-landscape in the field
- ▶ Identification and description of pipeline partners
- ▶ Survey for Innovators

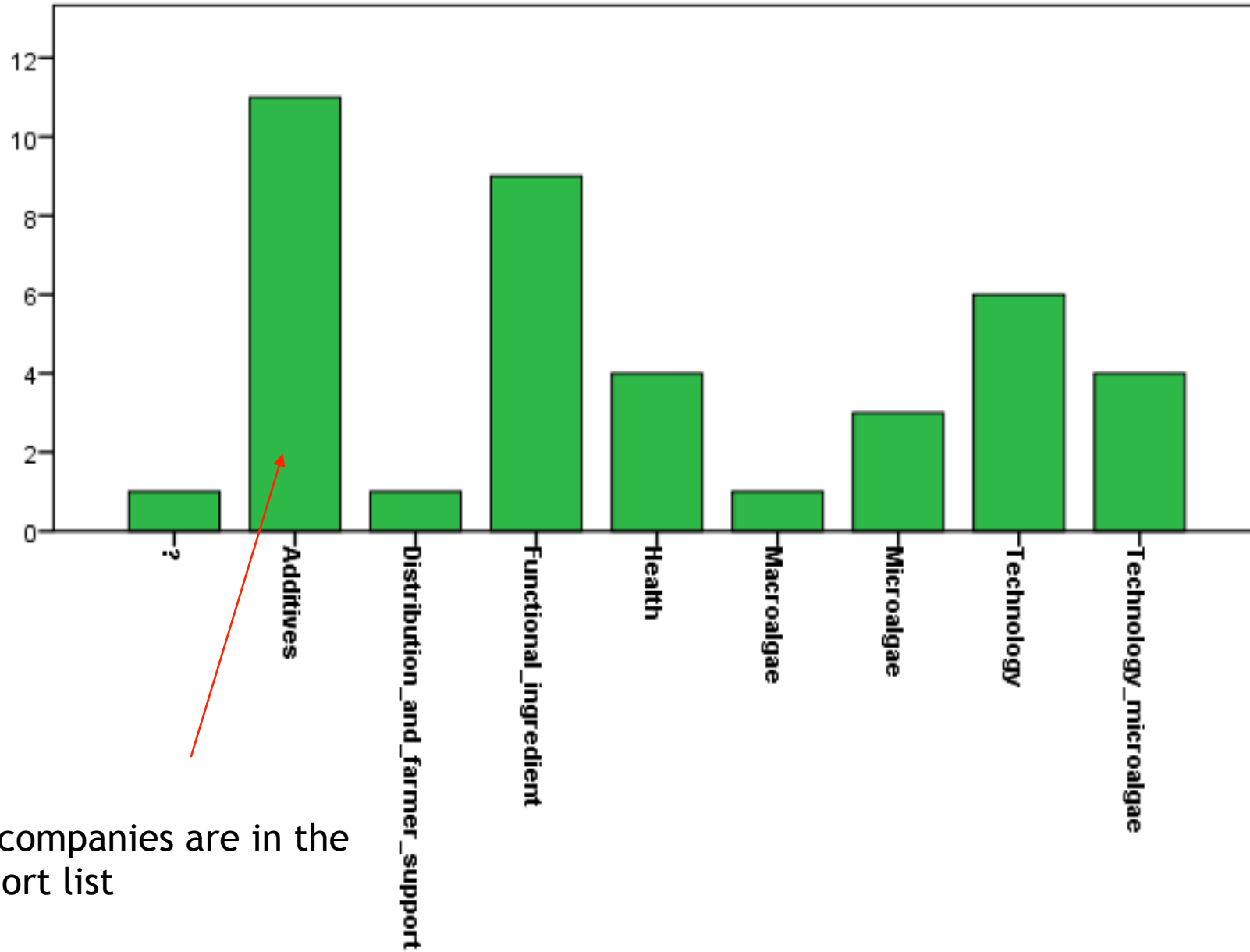


Innovator identification



N = 189 companies

Category: ?



4 companies are in the short list

INNOVATORS IDENTIFICATION

- ▶ Many companies do not match with any category
- ▶ “Technology solutions/ digital systems” are missing and often do not match any category
- ▶ Companies are concentrated in Europe, North America and Asia

Estimation of our stakeholder's coverage on the total of the stakeholder-landscape in the field

▶ Insects

International Platform for Insects as Food and Feed (IPIFF)

THE NORTH AMERICAN COALITION FOR INSECT

Asia the Asian food and feed insects association (AFFIA)

44 companies (our list N = 41)

▶ Microalgae

Algaeurope 2017 International Conference

Algae Biomass Summit 2018

280 companies (our list N = 28)

▶ Macroalgae

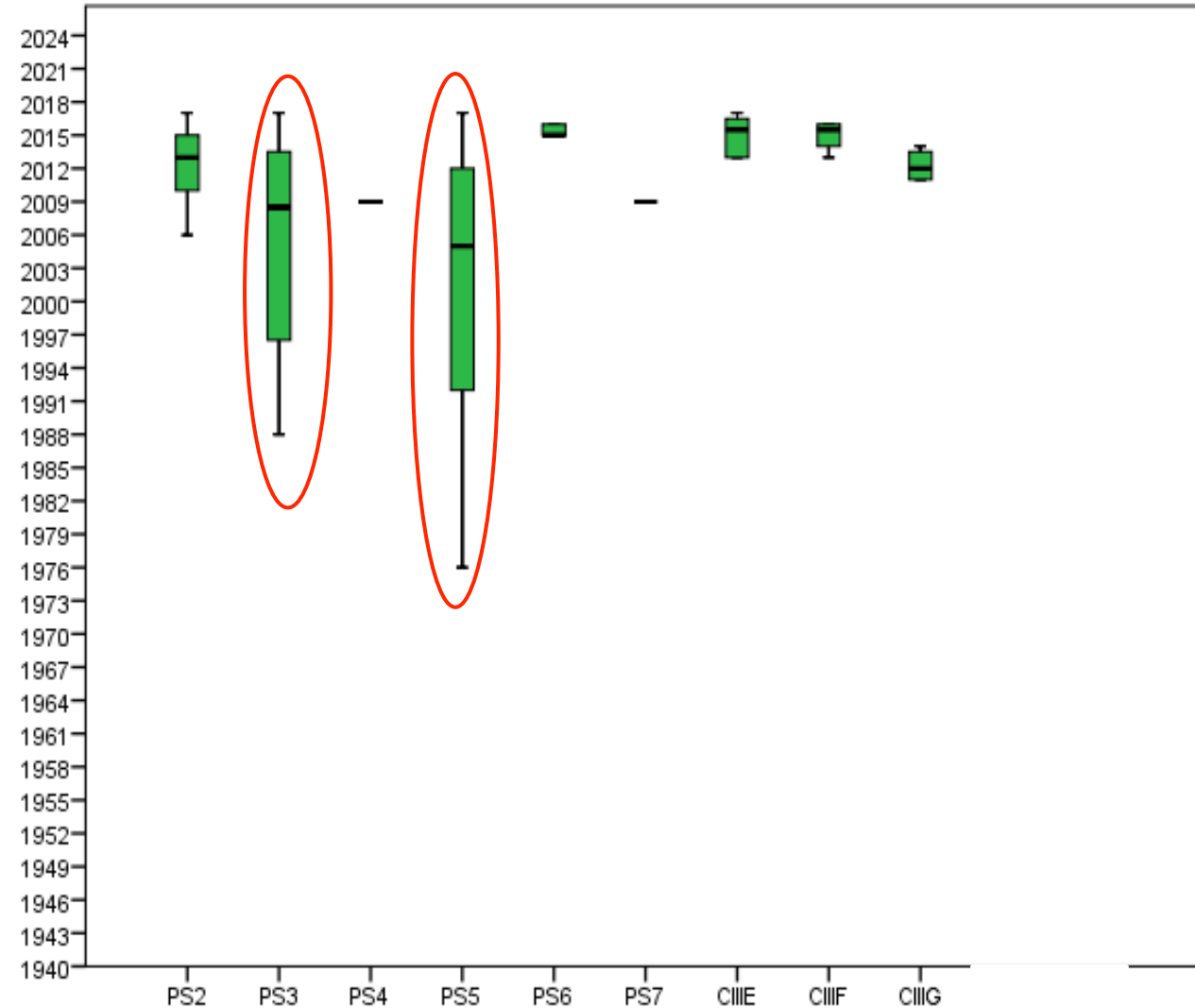
Seagriculture 2017 (international conference based in Europe)

50 companies (our list N = 6)

▶ Technologies

Fish 2.0 competition (2013-2017) (mainly, but not only, technologies)

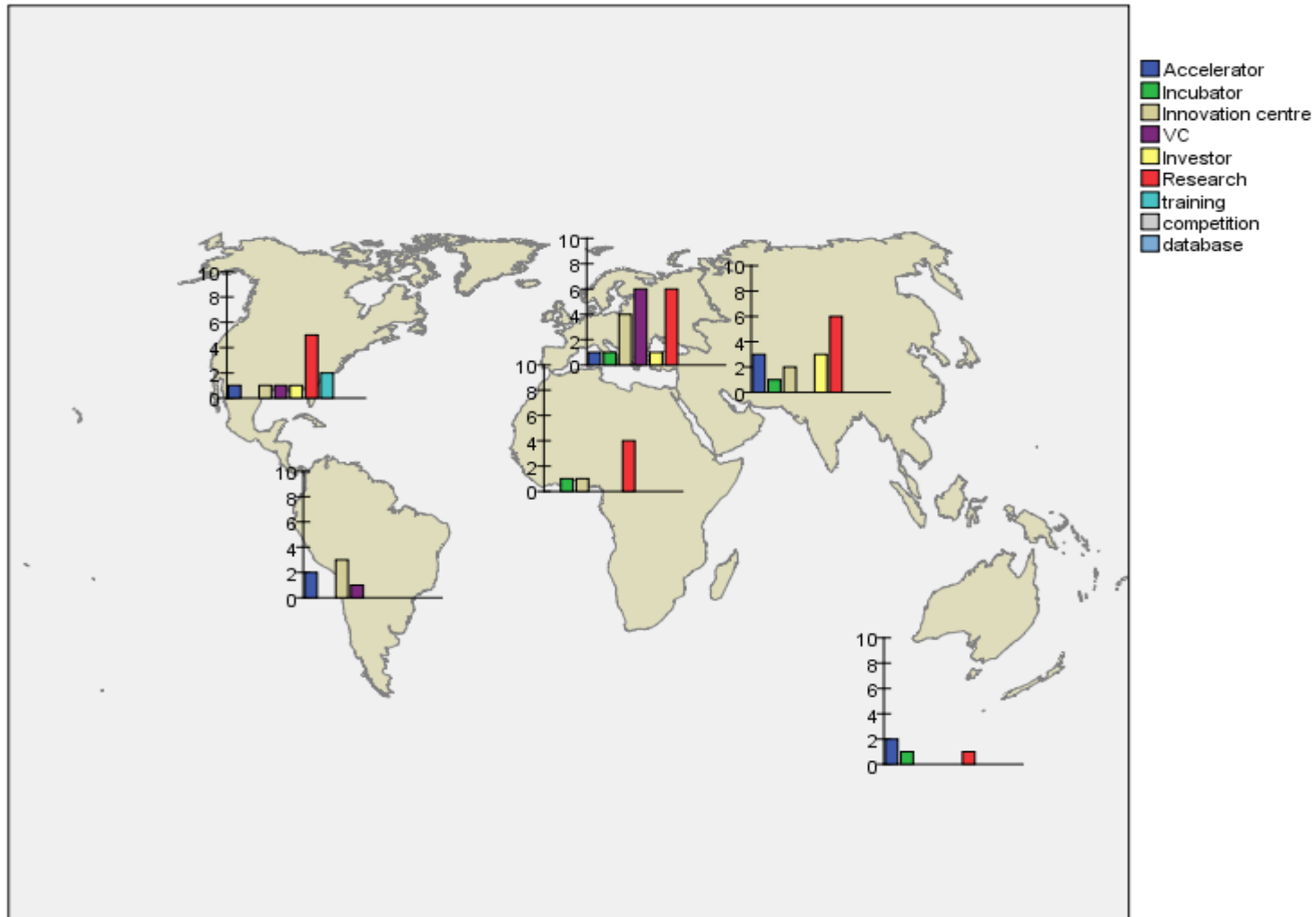
184 companies (our list N = 36)



ESTIMATION OF OUR STAKEHOLDER'S COVERAGE ON THE TOTAL OF THE STAKEHOLDER- LANDSCAPE IN THE FIELD

- ▶ Good coverage for the insects sector
- ▶ The microbial fermentation sector is not well represented
- ▶ Difficult to estimate the landscape for the solutions out of feed ingredients (CIID,CIII)

Identification and description of pipeline partners



Survey

- ▶ Survey finalised
- ▶ Draft of introductory e-mail
- ▶ How companies are pre-selected for interview (24 in the short list + 6 nice to have)

Key for the codes

Protein or starch from locally available food waste stream	PS1
Protein from insects fed on Food waste and/or food industry co-product-list below	PS2
Protein from fermentation processes a) Microbial - Sustainable CO2 source, bio-gas b) Food waste or food industry co-product (sugars) c) Waste product such as: cellulose	PS3
Protein from using energy (e.g. from the production in Skretting facilities)	PS4
Non-Marine oil sources of Omega-3 a) Microbes (incl. Micro-Algae) b) Sea-weed c) GM microbes or seaweeds or other Plants	PS5
Protein from seaweeds (process or concentrated)	PS6
Protein from insects fed on seaweeds	PS7
Solutions: · Use of solar and wave power to produce/test feed and ingredients · Use of packaging waste to reduce recycling of plastic and/ or its plastic going to waste · Creation of co-products from energy production in Skretting facilities · Systems that can map local food waste streams and the nearest processing to provide local inputs into local feed plants – ensuring local regions have logistical access to local food waste ingredients	CIID
Solutions: · Integrated technologies incorporating digital monitoring to increase the health, survival and growth performance of the fish/shrimp (i.e. including digital health control, A.I. biomass control)	CIIE
Solutions: · Systems (digital or otherwise) that use co-products including sludge water from pens or ponds	CIIF
Innovations that move the whole farm production foot print off land	CIIG



Climate-KIC

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