Cultivated Meat Platforms

ANMD-MRS13-122 · Sustainable Food & Alternative Protein Technologies

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US$

WHY THIS REPORT

Cultivated meat platforms grow real animal protein from cells, without the animal — the cell-line, media, bioprocess, scaffolding and end-product technologies that produce beef, poultry, pork and hybrid products in bioreactors. With first regulatory approvals secured and pilot facilities running, the central challenge has shifted from biology to cost and scale. This decision-grade study sizes the global market three ways — value, volume (tonnes/kg) and products/SKUs — across product type, value-chain stage and channel, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Cultivated meat promises real meat with lower land use, no slaughter and potentially lower emissions — though footprint depends heavily on energy source and media.

Mapped Sustainable Development Goals:

SDG 2	SDG 3	SDG 12	SDG 13	SDG 15
Zero Hunger	Good Health & Well-Being	Responsible Consumption	Climate Action	Life on Land

Measurable sustainability outcomes assessed:

- Real meat with lower land use and no slaughter
- Potentially lower emissions and food-security resilience
- Hybrid cost bridges toward affordability
- Bioprocess energy intensity, LCA-claim and acceptance as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	**9** Report Parts	**7** Regions Covered	**40+** Country Markets
2025–32 Forecast Horizon	**4** Forward Scenarios	**20+** Companies Profiled	**5** SDGs Mapped

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. North America leads approvals and capital; Asia Pacific is the regulatory first-mover; Europe and Israel form the technology hub; other regions assessed on their own merits.

MARKET OVERVIEW

From approval to scale-up — where cost-of-goods, not biology, gates the path to price parity.

Cultivated meat is moving from approval to scale-up. Demand is driven by climate, animal-welfare and food-security imperatives, with the bottleneck now cost-of-goods — gated by media cost, FBS-free formulations and bioreactor scale. The market is read three ways — value, volume and products/SKUs — and forecast under four scenarios, each region reported separately.

- **North America leads approvals and capital** — United States, with regulatory clearance and pilot production
- **Israel and Europe drive technology** — the Netherlands and Israel, advancing cell lines and bioprocess
- **Asia Pacific moves on regulation** — Singapore's first-mover approvals and regional players scaling
- **Cost-of-goods is the differentiator** — media cost reduction, FBS-free formulations and bioreactor scale gate the path to price parity

REGIONAL OUTLOOK

Across seven reporting regions, the report separates leading markets from high-growth and emerging ones — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
North America	Approval & capital leader	United States — US clearances, pilot production
Asia Pacific	Regulatory first-mover	Singapore, Australia — first approvals
Europe & Israel	Technology hub	Netherlands, Israel — cell lines & bioprocess
Latin America	Frontier	Brazil — early interest & partnerships
Africa	Frontier	South Africa — research & early activity
Middle East	Innovation hub	Israel — cultivated-meat pioneers

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
• Climate & animal-welfare imperatives • First regulatory approvals & momentum • Media-cost & FBS-free advances • Food-security & supply-resilience case • Hybrid (cultivated + plant) cost bridges	• High cost-of-goods & scale-up risk • Bioreactor capacity & capex intensity • Regulatory pathway & consumer acceptance • Media & input supply constraints • Long path to price parity

SEGMENTATION SNAPSHOT

By Product Type	Cultivated beef · cultivated poultry · cultivated pork · hybrid (cultivated + plant) · scaffolding & bioprocess
By Value-Chain Stage	Cell lines & media · bioprocess / scale-up · end product
By Channel	Retail / CPG · foodservice · ingredient / B2B
By End User	Food brands · manufacturers · retail · foodservice
By Stage	Approved · pilot · pre-commercial
By Business Model	Branded products · ingredient supply · licensing

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field is a pre-commercial cohort of cultivated-meat pioneers. Deal activity — regulatory milestones, pilot-facility build-out and media/bioprocess partnerships — signals a field racing toward cost-down and scale.

Representative players profiled in the full report:

UPSIDE Foods, Inc. · Eat Just, Inc. (GOOD Meat) · Mosa Meat B.V. · Aleph Farms Ltd. · Believer Meats · Meatable B.V. · Vow Group Pty Ltd · and further profiled players across the cultivated-meat pioneer cohort.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a conditional investment view.

KEY QUESTIONS THIS REPORT ANSWERS

- How large is the global cultivated meat market, and how fast will it grow to 2032?
- Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- How does cost-of-goods reduction change the path to price parity?
- Who leads, and where is the competitive and patent white space?
- Is the investment case bankable — and under what conditions?
- How does the category align with the SDGs, emissions dependence and LCA-claim integrity?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability view in a single architecture.

- **Triangulated sizing** — every market read three ways so value, volume and the physical-unit views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, conditional investment view.

WHO SHOULD BUY THIS REPORT

Investors, food brands, manufacturers, ingredient suppliers, retailers, foodservice and policymakers, and strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at **www.anewmarketdynamics.com** · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at **www.anewmarketdynamics.com**. The full detailed table of contents will be sent directly to your registered company email address.