

Opportunities in the European Bioeconomy

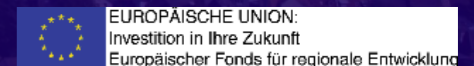
Michael Brandkamp, ECBF European Circular Bioeconomy Fund
15/2/2022



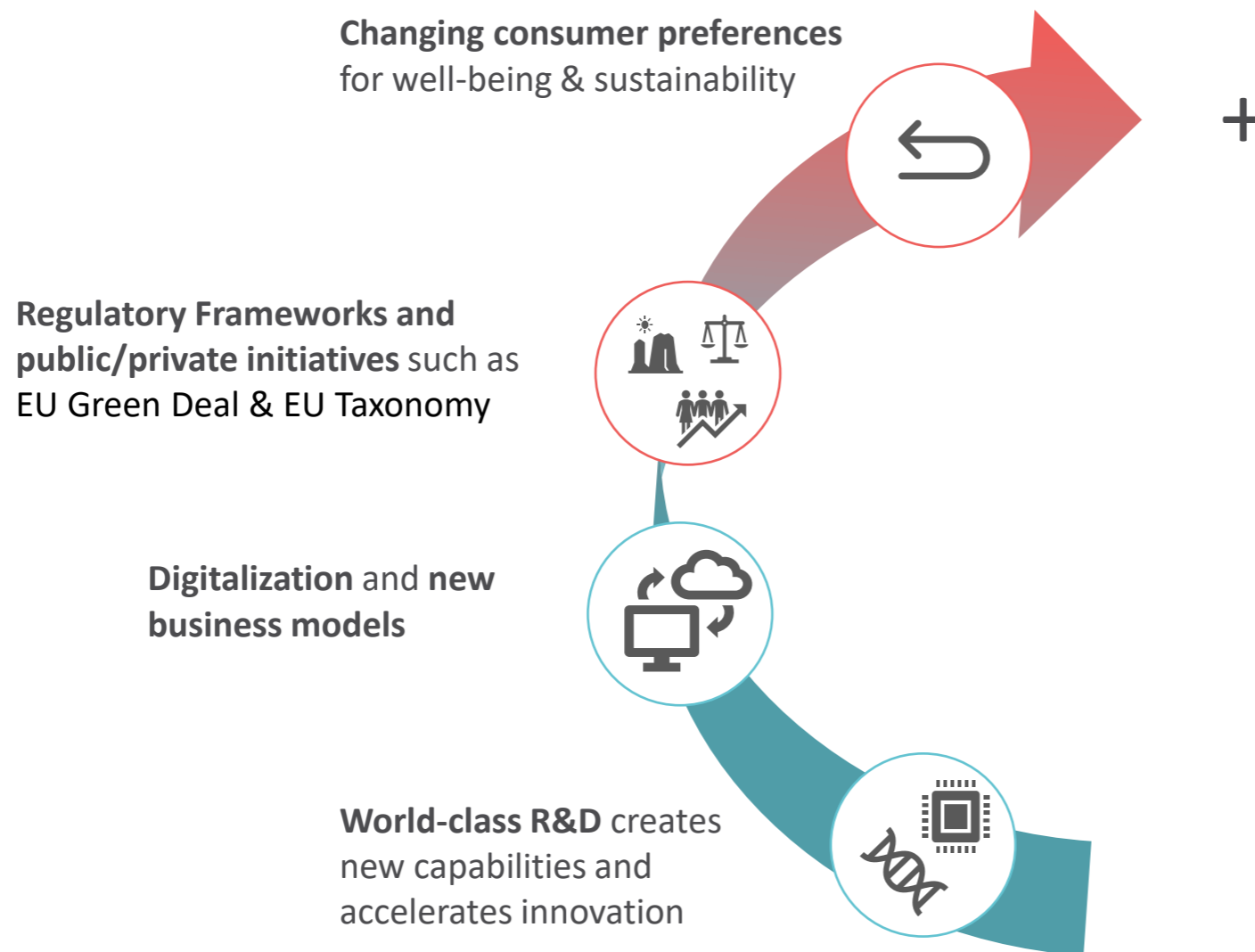
**Process⁴
Sustainability**

**Cluster for climate-neutral
process industries in Hesse**

Supported by:



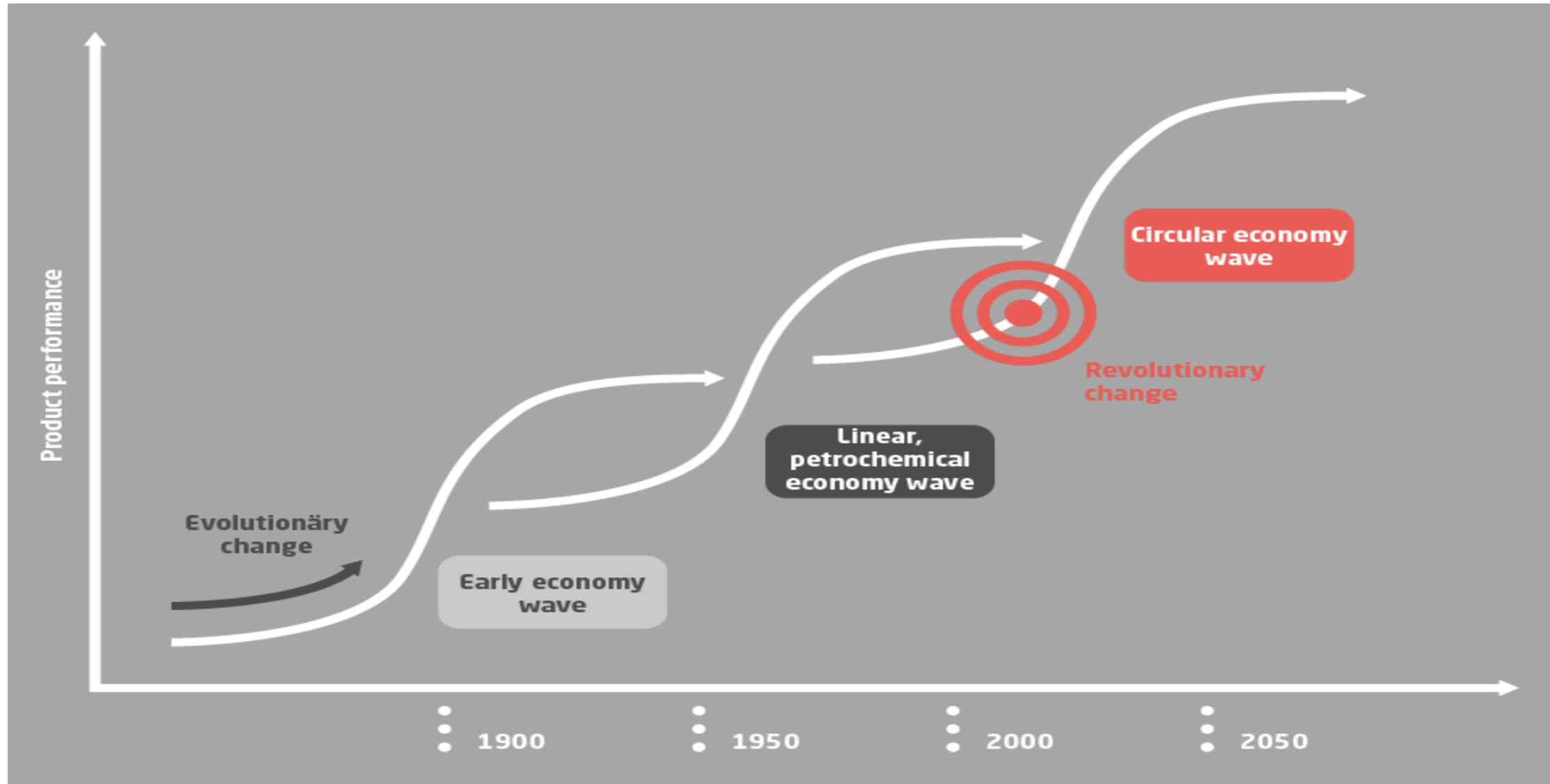
Key factors driving the European Bioeconomy



When allocating capital **Institutional investors** increasingly focus on ESG

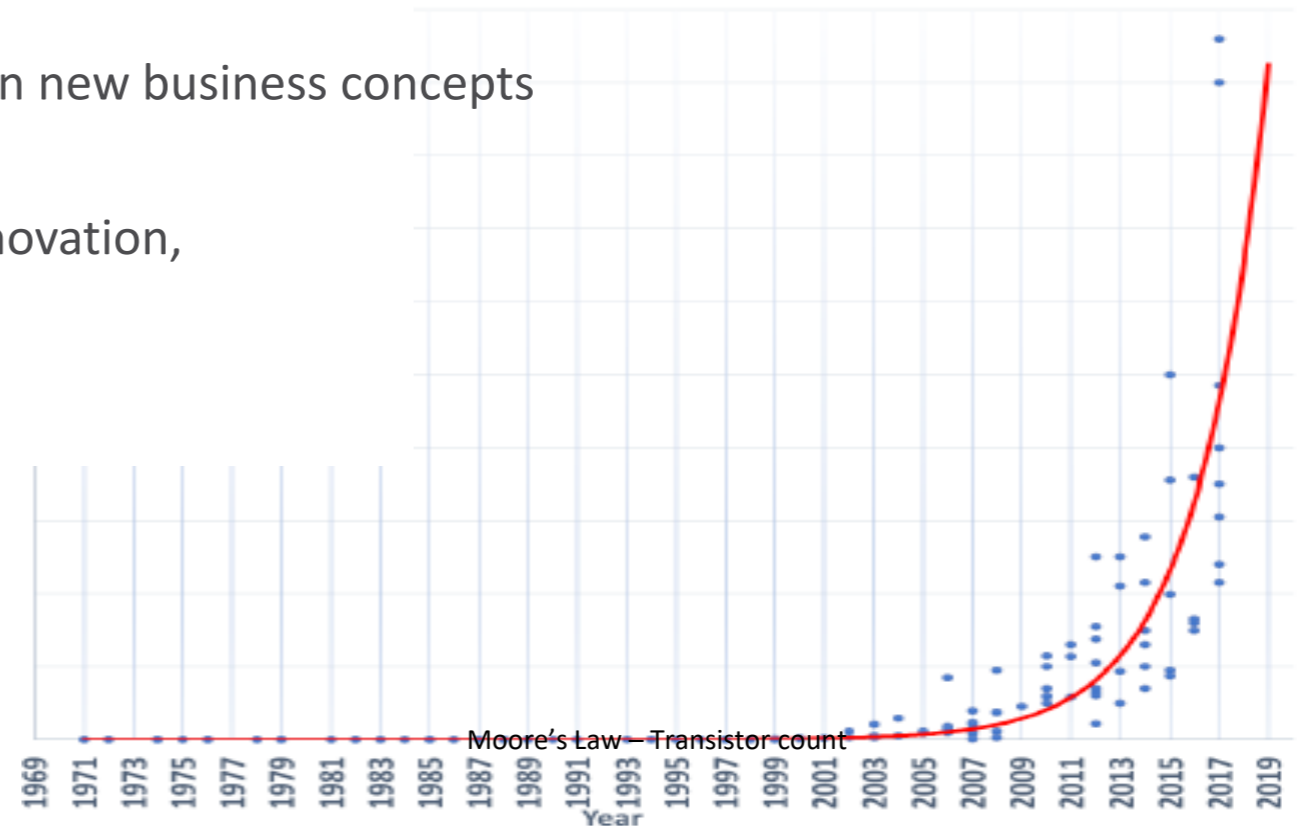


The 3rd wave of development - Sustainable Circular Biobased Economy



R&D and Innovation will lead to disruptive changes more and more rapidly

- To cope with the disruptive nature of the acceleration new business concepts need to be defined and developed
- Large companies rely more and more on external innovation, since internal innovation speed is limited
- Great opportunities for start-ups and “scale-ups!”



Very high level of complexity in the companies!

- Availability of feedstock and prices (biomass vs. fossil based resources)
- R&D often for both new products and processes
- Production: outsourcing vs. Setting-up own facilities
(fossil based production technologies are highly optimized, economics of scale market entry barrier)
- Organization of the company and logistics
- Uncertainty regulatory frameworks (e.g. carbon taxes...)
- Sales of sometimes a number of different products in new, very dynamic and uncertain markets
- Lack of expertise alongside the value chain
- Growth Financing Gap

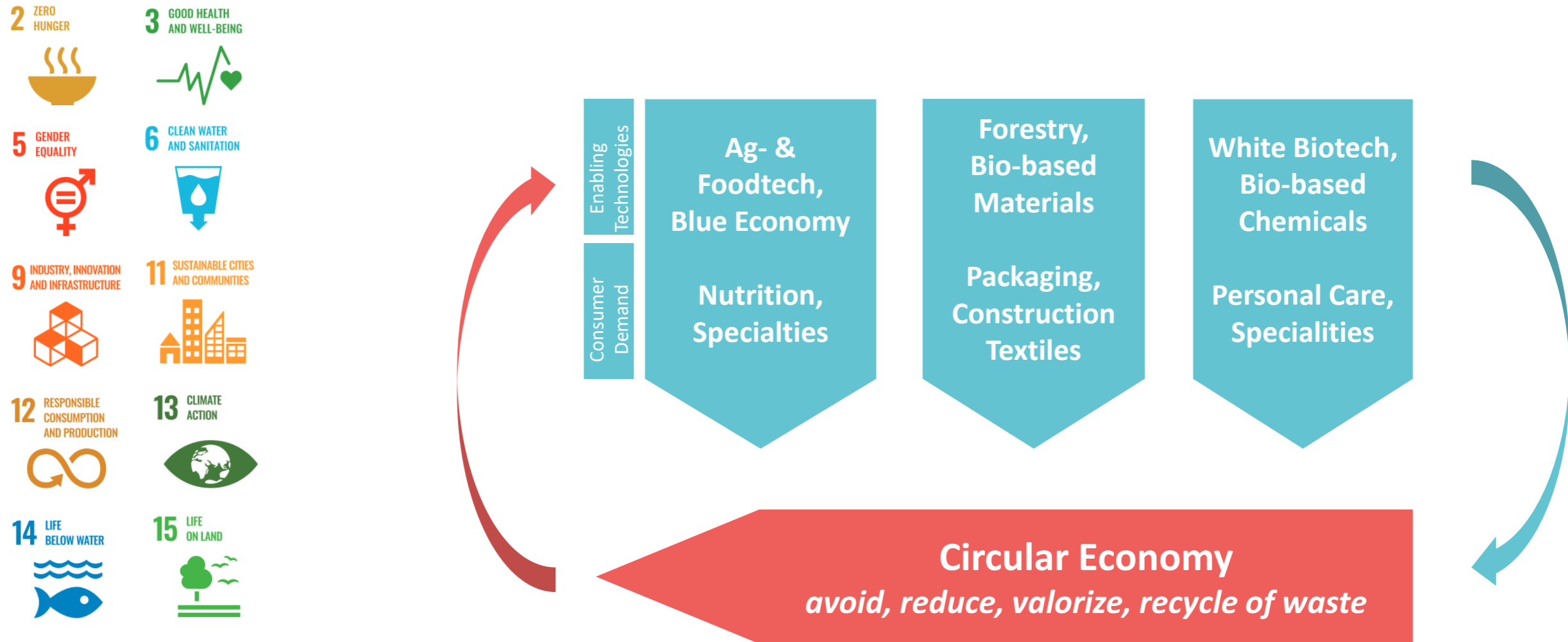


However, huge opportunities in the Bioeconomy Sector



- + Market-size: 2,4 trillion EURO
- + Traction from the market
- + Impact and ESG
- + Great Opportunities by Innovation, changing consumer demand and regulatory framework
- + Increasing quality of the management teams

Attractive Subsectors of the Biobased Circular Economy



Success Stories

Great Companies show the Potential of the Bioeconomy



OAT DRINK WITH CARBON DIOXIDE EQUIVALENTS.

NEW!



Recycling clothes finally works.



High Potential Companies



High Potential Companies

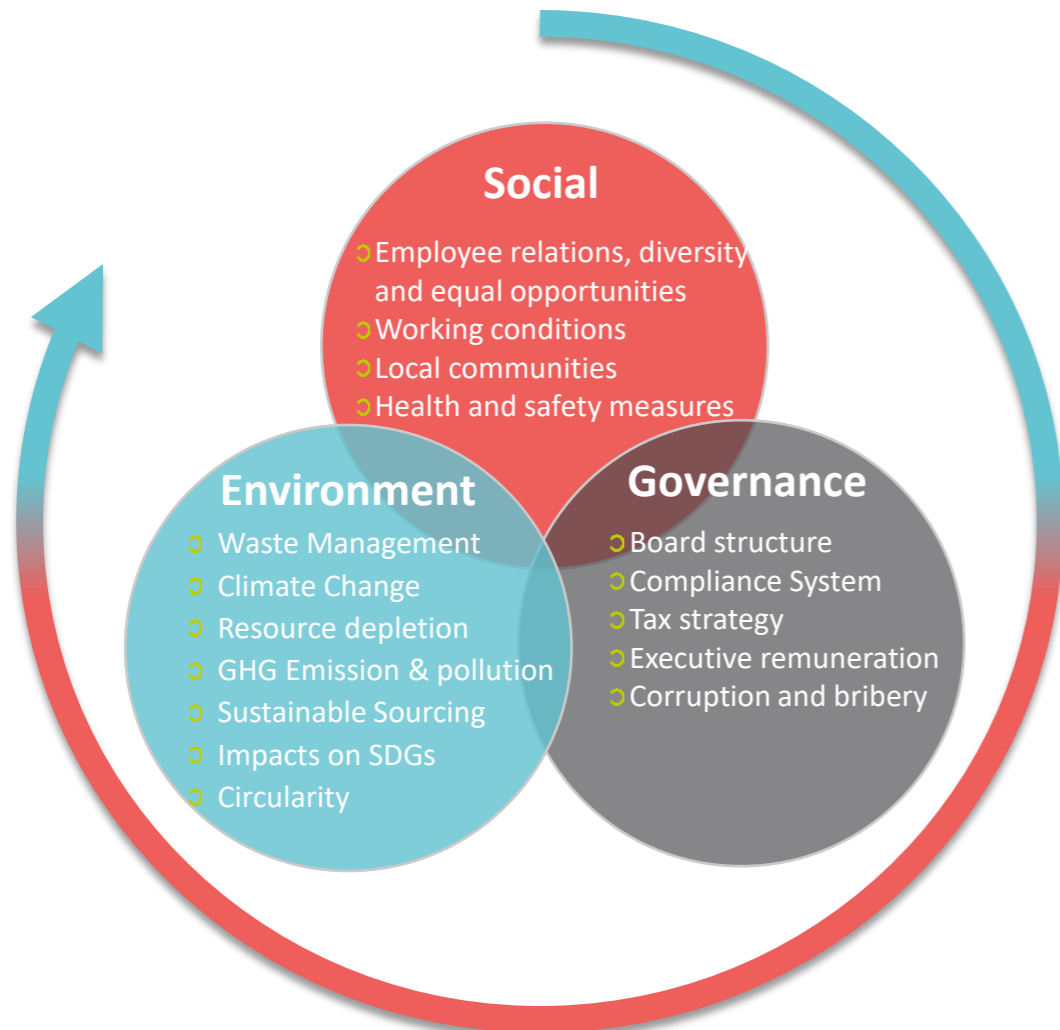




Responsible Investments

Contributions to sustainability are core for making a difference!

Sustainability considerations



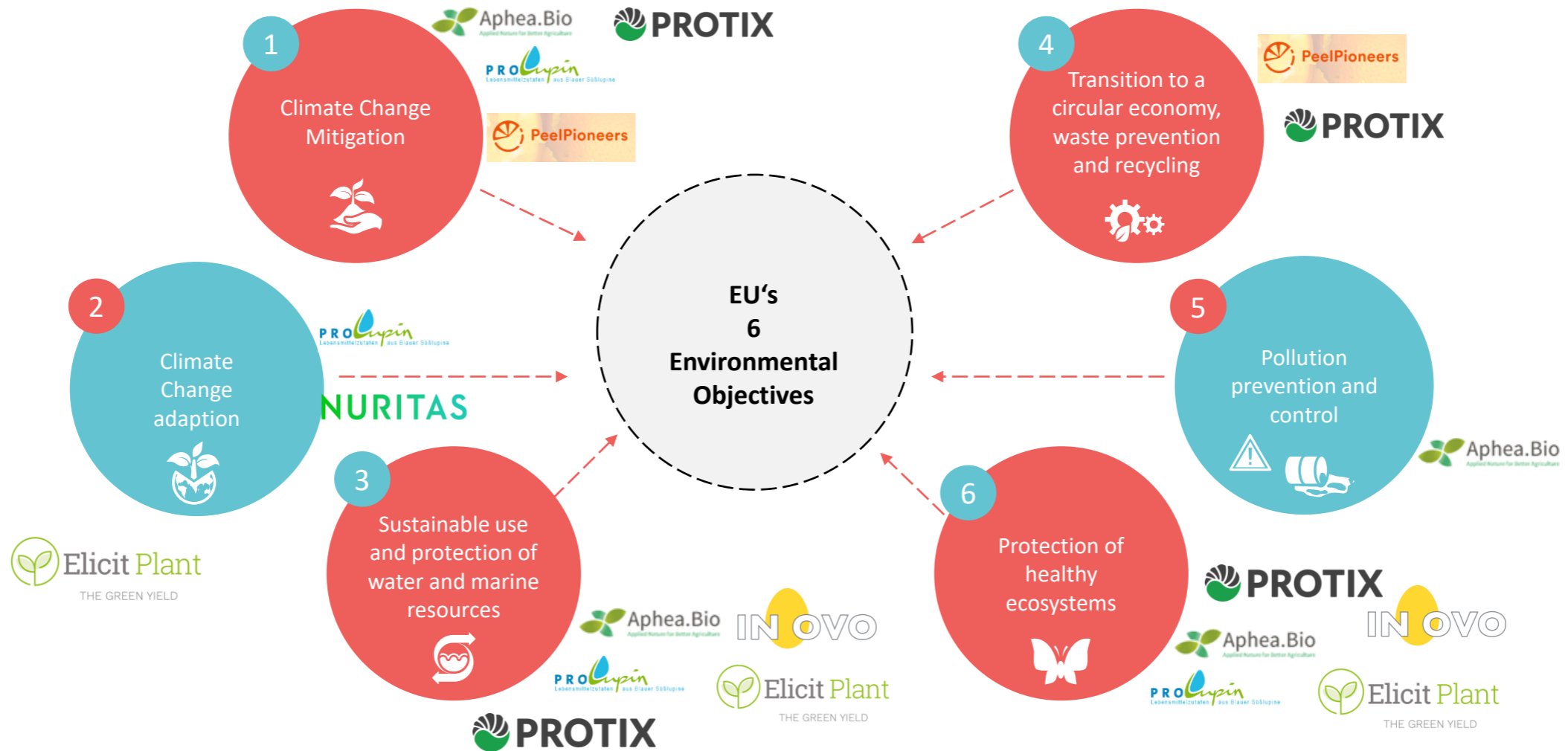
Frameworks & guidelines

- SFDR directive - Art. 9
- EU Taxonomy
- EIB Environmental and Social Handbook
- EIB Guide to Procurement
- ECBF ESG Handbook
- Principles of Responsible Investment
- Mitigation Hierarchy Concept: avoid, minimize, restore, compensate Economic impact

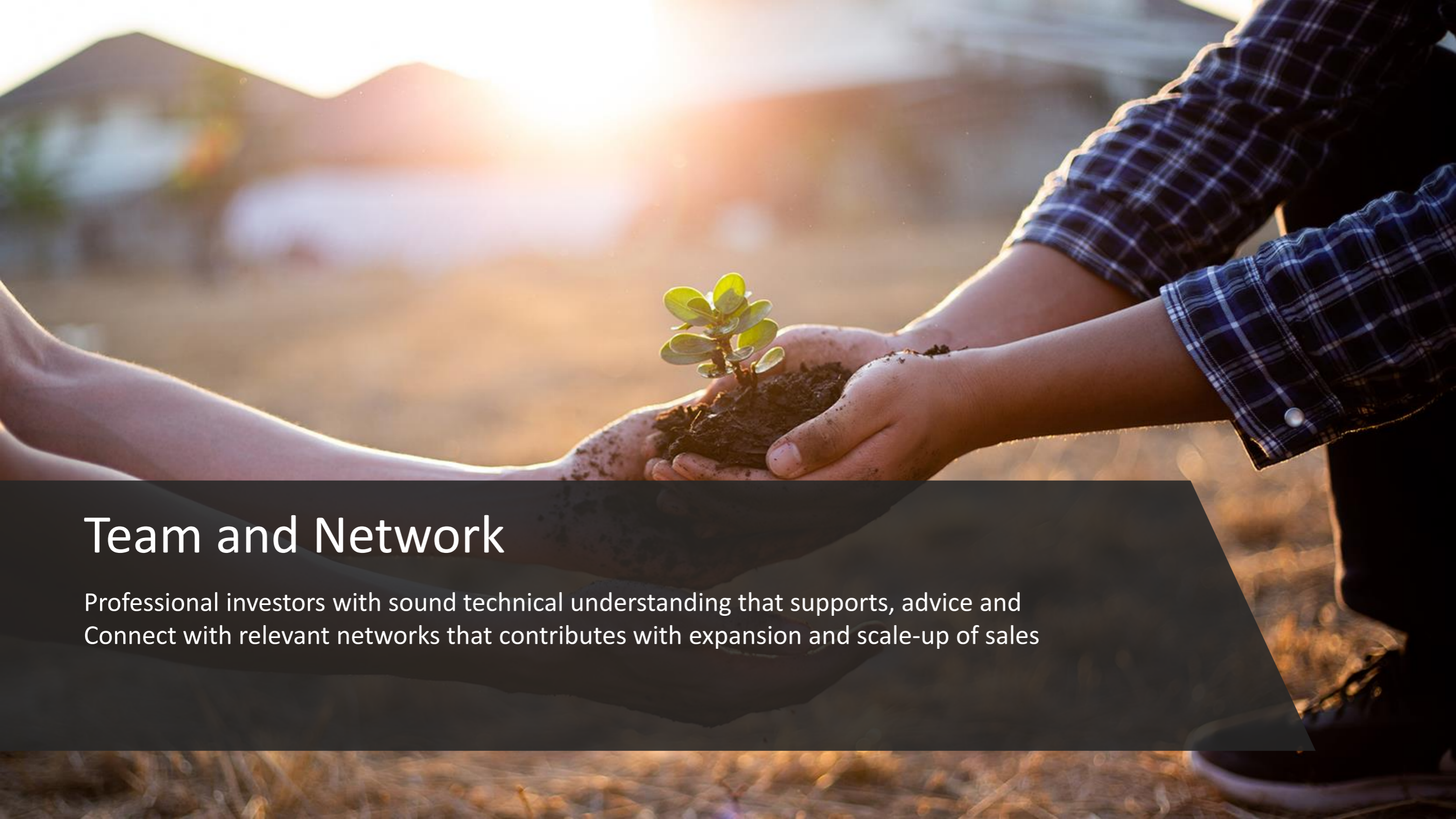
Instruments

- ESG Due Diligence Check List
- Side Letter to Portfolio Companies
- ECBF ESG Report
- ESG Report from Portfolio Companies

Considering contributions to the six environmental objectives as defined by the EU Taxonomy



¹The EU Taxonomy (Regulation (EU) 2020/853) encompasses a standard set of definitions for sustainable activities centred around six environmental objectives.



Team and Network

Professional investors with sound technical understanding that supports, advice and
Connect with relevant networks that contributes with expansion and scale-up of sales

Team with corporate and VC experience High level of diversity



- 14 Nationalities
- 12 Languages
- 7 Locations
(Spain, France, Netherlands, Israel, Finland, Germany, Switzerland)

Backgrounds

Industry, Commercial, Science, Financial & Policy

+2,000 transactions

Sourcing, executing, board memberships, M&A, IPO

Professional record

Managing and operational roles
30 IPOs & +100 exits



Marie Asano
Principal



Michael Brandkamp
Founding Partner



Udi Cottan
Venture Partner



Vivek Dogra
Venture Partner



Dahai Yu
Senior Advisor



Cornelia Frentz
Manager Corporate Governance



Hakan Karan
Analyst



Eugen Kaprov
Associate



Rob Kirschbaum
Independent IAC Member



Michael Nettersheim
Founding Partner



Peter Nieuwenhuizen
Founding Partner



Ananya Manna
Investment Director



Clara Martinez
Relationship Manager



Cornelia Mann
Marketing Manager



Janne Mielck
Venture Partner



Mridul Pareek
Junior Analyst



Stéphane Roussel
Partner



Jowita Sewerska
Senior Associate



Dirk Saßmannshausen
Founding Partner / CFO



Ellen Roßner
Office Manager



Jisk de Vries
Junior Analyst





**The leading investment fund
dedicated to growth-stage
companies and projects within the
European Circular Bioeconomy**

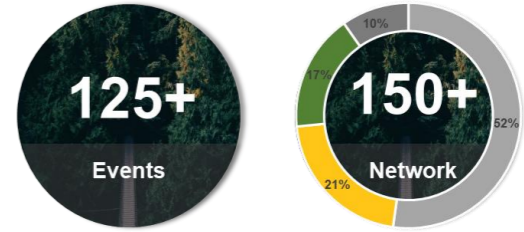
Exceptionally strong investor base



- ❖ **Strong network of 25 LPs from 9 different countries** can provide market access and expertise, business collaboration opportunities to our **portfolio companies**




Well connected with the European ecosystem to facilitate market entrance, know-how exchange & introduce syndication partners



+ hundreds of personal connections with VCs!

1) This map is informative about the organizations ECBF is in contact with. Not all of them approve public use/distribution of logos and we keep different levels of collaborations with each organization.





**WE CATALYZE THE TRANSITION TOWARDS A SUSTAINABLE FUTURE
BY INVESTING IN INNOVATIVE, BIOBASED AND CIRCULAR VENTURES!**



European Circular
Bioeconomy Fund



Thank You!

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[Michael Brandkamp](#)
Founding Partner



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