



# Bridging the corporate start-up divide

## Policy and Investment Recommendations for Scaling Resilient Agriculture in Europe

Outcomes of a high-level, multi-stakeholder workshop at **Tech Tour Resilient Ag 2026**

Monheim am Rhein, 4–5 March 2026

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**Core Insight:** Scaling AgTech is not limited by innovation, but by market knowledge, access and farmer adoption.

**Why Scaling is Difficult?**

- Innovation is often **technology-driven, not market-driven**
- No **clear pilot-to-scale pathways:** (financial, commercial, operational)
- Corporate-startup collaboration is complex, slow, and non-standardised
- Limited and late exit opportunities and lack of patient capital
- **Misaligned incentives** across actors (corporates optimise risk, startups optimise growth, capital seeks returns at different timelines)

**What are the main barriers?**

- Market access and insights are concentrated with corporates
- Weak integration of innovation into **real value chains**
- Capital is not aligned with development timelines of AgTech: **lack of patient capital**
- **Start-up/corporate collaboration outcomes are unclear, inconsistent, and rarely scalable**

**Where the Opportunity Lies**

- Corporates evolve from gatekeepers → **enablers of scale and adoption**
- Develop comprehensive understanding of needs, limitations and intentions of all players
- Build end-end innovation ecosystems designed to address key challenges of financing, market adoption and scaling.

**Priority Actions**

- **Improve transparency on corporate priorities:** Enable targeted capital and market-driven innovation
- **Integrate the full value chain** (Farmers, distributors, off-takers, and financial partners)
- **Standardise structured, outcome-driven collaboration models**  
→ Clear pathways from pilot → scale → commercial deployment
- **Mobilise aligned capital across financing types**  
→ Equity, debt, and blended finance



**Final Takeaway**  
 Corporates must evolve from market gatekeepers to enablers of scale. Beyond capital provision, corporates have a critical role in enabling the growth of breakthrough external innovation creating value for all parties.

## Traditional Model

Startup → VC → Exit (IPO / Trade Sale)



## System Breakdown

IPO pathway weakened  
(~97% decline in public valuations)

Acquisitions are limited and concentrated buyer pool

Capital alone cannot scale innovation

VC model not aligned with ag developmental timelines



## Reality

**Scaling is the bottleneck:** market access & adoption gaps, ideovelopment cycles, weak value chain integration, misaligned capital



## Ecosystem Model

**Startup ↔ Corporate**

→ Early farm & market validation

**Startup ↔ Corporate & Ecosystem**

→ Capital + market access → value chain integration → EXIT

# A commercial imperative

## The Scaling Gap

“Europe can produce excellent science but turning that science into scalable companies is much harder because the right capital and integrated ecosystem needed for scale are still limited.”

“A corporate-startup partnership combined with aligned capital structures is key. Corporates need to adapt and to enable market access, validation and scale to deliver innovation to farmers”



**Karl Collins**

*Director Innovation Ecosystem, Europe*

**Bayer**

- Startups cannot scale without **market access and validation**
- Corporates control **infrastructure, distribution, and demand**
- Scaling depends on **real-world deployment, not just technology readiness**

**Market Builder**

Creates demand and enables market entry

- Distribution channels
- Customer access
- Market signals

**Enabler**

Provides infrastructure and validation

- Field trials and testing environments
- Data and technical expertise
- Regulatory navigation

**Scaling Platform**

Integrates innovation into value chains

- Deployment at scale
- Integration into existing systems
- Risk-sharing mechanisms





**Tommy Alexander Schmid**  
Senior Open Innovation  
Manager  
Südzucker Group

“Multinational corporates should play an active role enabling innovation from the startup sector to scale on the market.”

“Corporates need to move beyond gatekeepers and become solution enablers. Integration capability beats technological novelty.”



### Systems architects

Build market-driven ecosystems and integrate startups into value chains

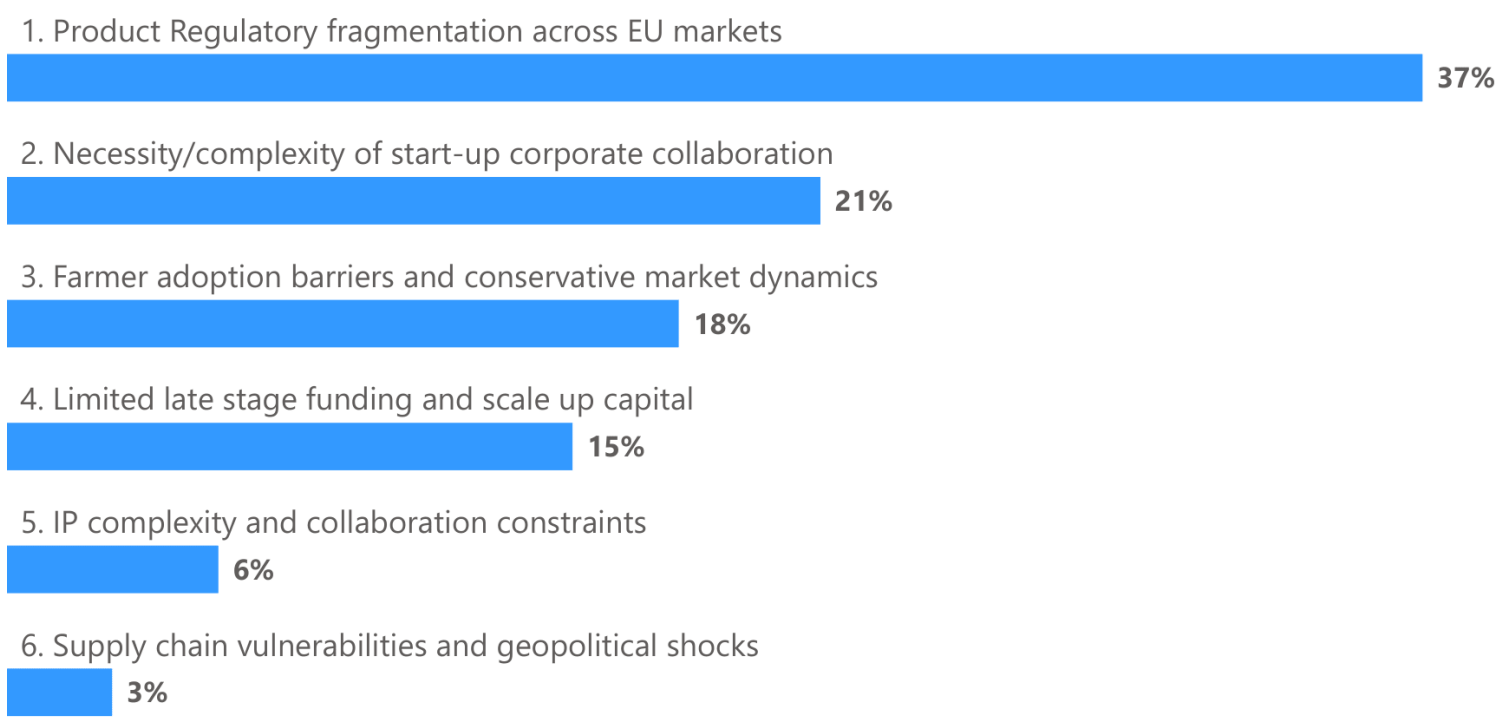
### Beyond capital

Provide infrastructure, validation, and derisking, not just funding

### Market catalysts

Drive adoption, enable offtake, and create shared value

# Which barriers most significantly slow down the emergence and commercialization of breakthrough agriscience technologies in Europe?



The key bottlenecks to scaling AgTech in Europe lie in fragmented regulatory frameworks, complex yet essential corporate partnerships, and insufficient economic incentives for on farm adoption.



"Agriculture innovation is still not a strategic priority in Europe. Regulatory and market fragmentation slows scaling."  
**Karl Collins**  
 Director Innovation Ecosystem, Europe  
**Bayer**



"I don't think people appreciate just how complex things are within a large organization. The corporate environment is actually much harder to navigate than the startup world."  
**Lee Rowan**  
 Senior Director  
**Mondelēz International**



"If there is no clear incentive, farmers won't change; adoption must be economically driven."  
**Ingeborg Gasser-Kriss**  
 Owner and Managing Director  
**Agent21**

**FRAGMENTED SYSTEM**

- Regulatory complexity across EU
- Fragmented markets & value chains
- Weak scale-up environment

**COLLABORATION MODEL MISALIGNMENT**

- No clear pilot → scale pathway
- Misaligned incentives & expectations
- Slow, complex corporate processes

**MARKET & FARMER ADOPTION GAP**

- Weak product-market fit
- Difficult access to farmers & distribution
- Low incentives → slow adoption

**Scaling challenges in Europe**

“Around 10% of European scale-ups relocate, and 85% of those move to the United States — a clear signal that Europe still struggles to scale its most promising companies.”



**Melanie Heroult**  
*Head of R&D pipeline  
Herbicides  
Bayer*

**Corporate–startup collaboration complexity**

“Some of the barriers we see are the misalignment of expectations. If we’re going to do a pilot or validation, we need clarity on where the partnership is going and what the next step looks like.”



**Nicola Harrison**  
*Managing Director  
StartLife*

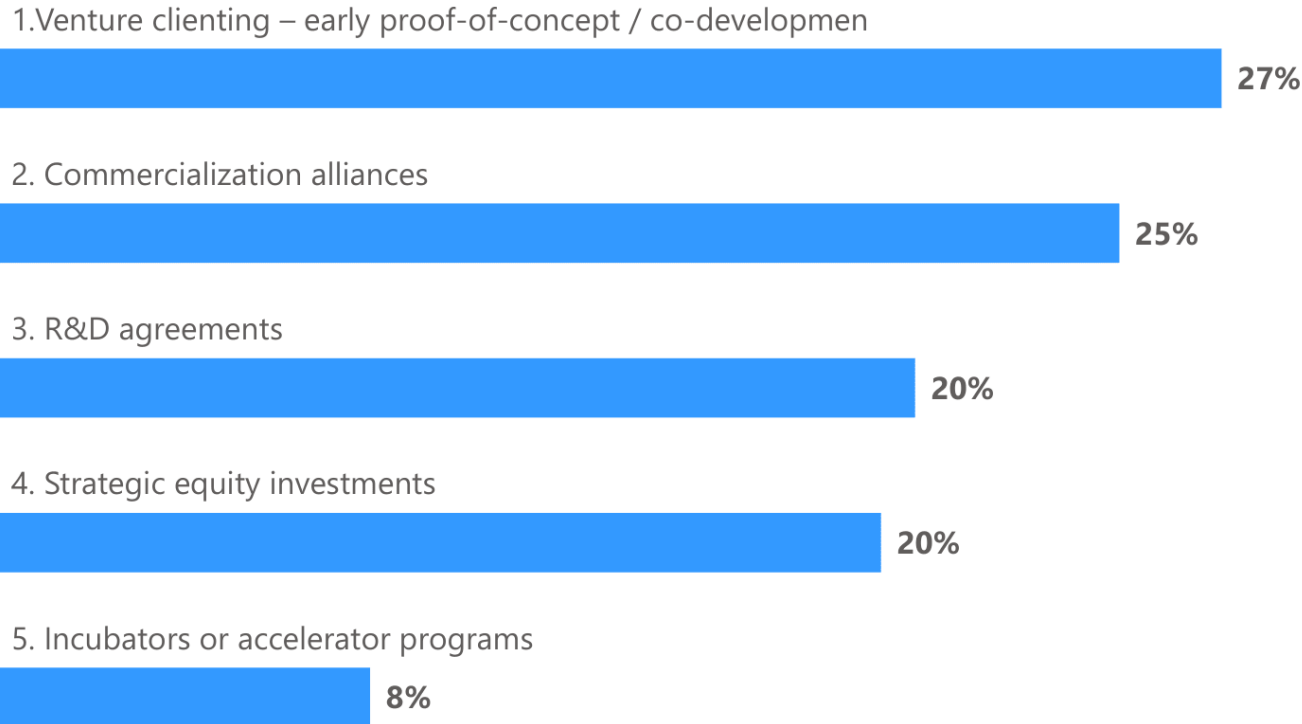
**Regulatory fragmentation**

“The regulatory landscape is one of the biggest issues in both [AgTech and FoodTech] segments without de-risk mechanisms we as a corporate have already implemented, I fear most of the innovations will just stall before they come to the farmer.”



**Tommy Alexander Schmid**  
*Senior Open Innovation  
Manager  
Südzucker Group*

Given current market and geopolitical trends, which corporate–startup models will create the most value for European agriscience in the future?



Value shifts from investment to partnerships & co-developments that enable rapid validation, market orientation and real market access.



“Early validation and subsequent co-development between start-ups and corporates ensures technologies address a clear market need and validates scalability.”

**Karl Collins**  
Director Innovation Ecosystem, Europe  
Bayer

Ecosystem collaboration

“No one can do it alone. Even if you are the largest corporation, a public programme, or a fantastic startup – collaboration across the ecosystem is essential.”



**Manuel Mendigutía**  
Senior strategy advisor and program coordinator  
EISMEA

Strategic partnerships and co-development

“Corporates can provide market access, regulatory expertise and industrial scale – things startups cannot provide themselves.”



**Tommy Alexander Schmid**  
Senior Open Innovation Manager  
Südzucker Group

# What should European startups prioritise to enable wholesale integration to the agriscience market and meet consumer needs?



"Start with a real problem: innovation must be driven by market pull, not internal ideas."

**Ingeborg Gasser-Kriss**  
Owner and Managing Director  
Agent21



"Seeing results in the field builds trust, that's what drives farmer adoption."

**Nicola Harrison**  
Managing Director  
StartLife

**Scaling starts with real problems and succeeds only when solutions fit into the realities of the farm.**

## SIMPLIFY THE SYSTEM

- Clarify IP ownership models

## BUILD FOR SCALE FROM DAY ONE

- Define pilot → scale pathways
- Design partnerships with commercial intent

## SHIFT TO FARMER-CENTRIC, MARKET-DRIVEN MODELS

- Start from real farmer problems
- Corporates act as enablers, not gatekeepers
- Provide access to market, data, and scale

### Develop structured pilot-to-scale pathways

“We need to industrialize startup-corporate collaboration. Today we are still handcrafting it. A common European rulebook for startups could be a game changer, enabling companies to scale across a market of 500 million people.”



**Björn Heinz**  
Investment Director  
Yara Growth Ventures

### Focus on farmer-centric innovation

“How many of the AgTech startups have a farmer or an agronomy consultant on their team? It goes both ways. It’s not only asking the big companies to give knowledge packages, you can hire that knowledge. Why don’t you?”



**Ingeborg Gasser-Kriss**  
Owner and Managing Director  
Agent21

### Enable market deployment

“The regulatory landscape is one of the biggest issues in both [AgTech and FoodTech] segments ... without these de-risk mechanisms we as a corporate have already implemented, I fear most of the innovations will just stall before they come to the farmer.”



**Lee Rowan**  
Senior Director  
Mondelēz International

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**Keynote Speaker**



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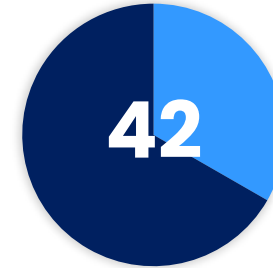




Company **nominations**



Company **applications**



Companies **selected**



Expert panel **members**



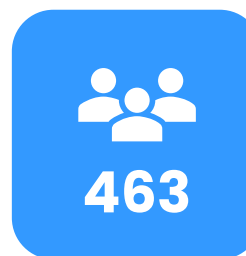
Expert panel **reviews**



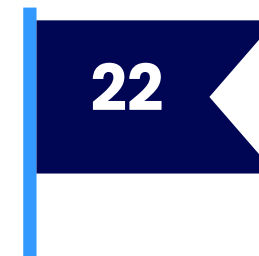
Average **reviews / company**



Total **participants**



Requested **meetings**



Number of **countries**