RISE EUROPE

European Startup & Scaleup Landscape 2026

Spotlight on the most promising companies from the Rise Europe network, across eight technology clusters driving Europe's competitiveness

Main Partner

UniCredit

One connected network building the next generation of Europe's deep tech champions

The startups and scaleups[1] on the following pages are among the most promising deep tech ventures from the Rise Europe network: early proof of what Europe can achieve when it's best ideas find the ecosystem they need to grow, and a preview of the champions it will produce.

Rise Europe brings together 17 of Europe's leading startup hubs, each with its own specialty, programs, and community, from AI, deep quantum research to synthetic biology & bioengineering to space. By sharing talent, know-how, and market access across borders, this network helps a team founded in one country grow across the whole continent. That is the promise of Rise Europe: **turning a fragmented Europe into a single ecosystem** strong enough to build global leaders, and an open doors for any founder ready to grow beyond their home market.

The world's leading innovation regions are not lucky, they are dense: they concentrate talent, capital, and knowledge in one place, so ideas grow bigger and companies scale faster. Europe's strength is scattered across a continent of different countries, languages, and markets, and a connected network like Rise Europe changes that.

A breakthrough in a lab is not yet a company. Turning into one takes patient capital, specialized talent, research infrastructure, industrial partners, and customers willing to adopt something new, more than most founders can assemble alone.

Talent, market opportunity, and capital are aligning for Europe's deep tech decade.

30%

OF THE WORLD'S TOP DEEP TECH UNIVERSITIES ARE EUROPEAN

32%

OF ALL EUROPEAN VC FUNDING GOES TO DEEP TECH, UP FROM 15% A DECADE AGO

70%

OF LATE-STAGE DEEP TECH FUNDING IN EUROPE STILL COMES FROM OUTSIDE EUROPE

1 Scaleup = startup with a Series A round above €10 million, used as a practical proxy for the OECD definition (≥20% average annual growth in revenue or employment over three years, ≥10 employees at the start) and Startup Genome's tech-scaleup definition. Source: Eurostat–OECD (2007), Manual on Business Demography Statistics, oecd.org/sdd/39974460.pdf; Startup Genome, Scaleup Report: Defining a Tech Scaleup, startupgenome.com/report/scaleup-report/defining-a-tech-scaleup (accessed 6 October 2026).

Source: The 2026 European Deep Tech Report (Lakestar, Walden Catalyst Ventures & Dealroom)

Deep Tech: Hard to build, hard to copy, decisive for Europe

1 in 3

EUROPEAN DEEP TECH STARTUPS FOUNDED SINCE 2015 ARE RESEARCH SPINOUTS

Europe has the ingredients to compete in the technologies now deciding who leads in AI, energy, quantum, and health: world-class universities, exceptional researchers, and a deep bench of scientific and industrial talent. The science is there. What is missing is commercialization. For much of the past decade, the research has scaled elsewhere, and Europe has too often exported its best ideas along with the value they create.

Closing that gap is about more than economics. Ownership of critical technologies, from chips and AI models to energy systems, increasingly decides how sovereign, secure, and prosperous a continent can be. Deep tech is where Europe's strengths in science, engineering, and industry meet those technologies, and where the opportunity to lead is greatest.

Seizing that opportunity takes more than strong science. It takes a flywheel: successful founders reinvest their time, capital, and networks in the next generation, and each cycle builds more momentum than the last. Silicon Valley needed decades to build one. Europe's flywheel is still gaining speed, and accelerating it starts with knowing who is already moving.

That is what this landscape is built to do. It profiles the startups and scaleups of the Rise Europe network that are furthest along that cycle, organized by eight technology clusters, for investors scouting deal flow, corporates seeking innovation partners, and policymakers deciding where to direct support.

Source: The 2026 European Deep Tech Report (Lakestar, Walden Catalyst Ventures & Dealroom)

RISE EUROPE

Rise Europe brings together Europe's leading entrepreneurship hub into **one connected ecosystem**. Our institutions train founders, help them build ventures and scale them into the next generation of **European tech champions**.

17 / 12

INSTITUTIONS / COUNTRIES

59.000

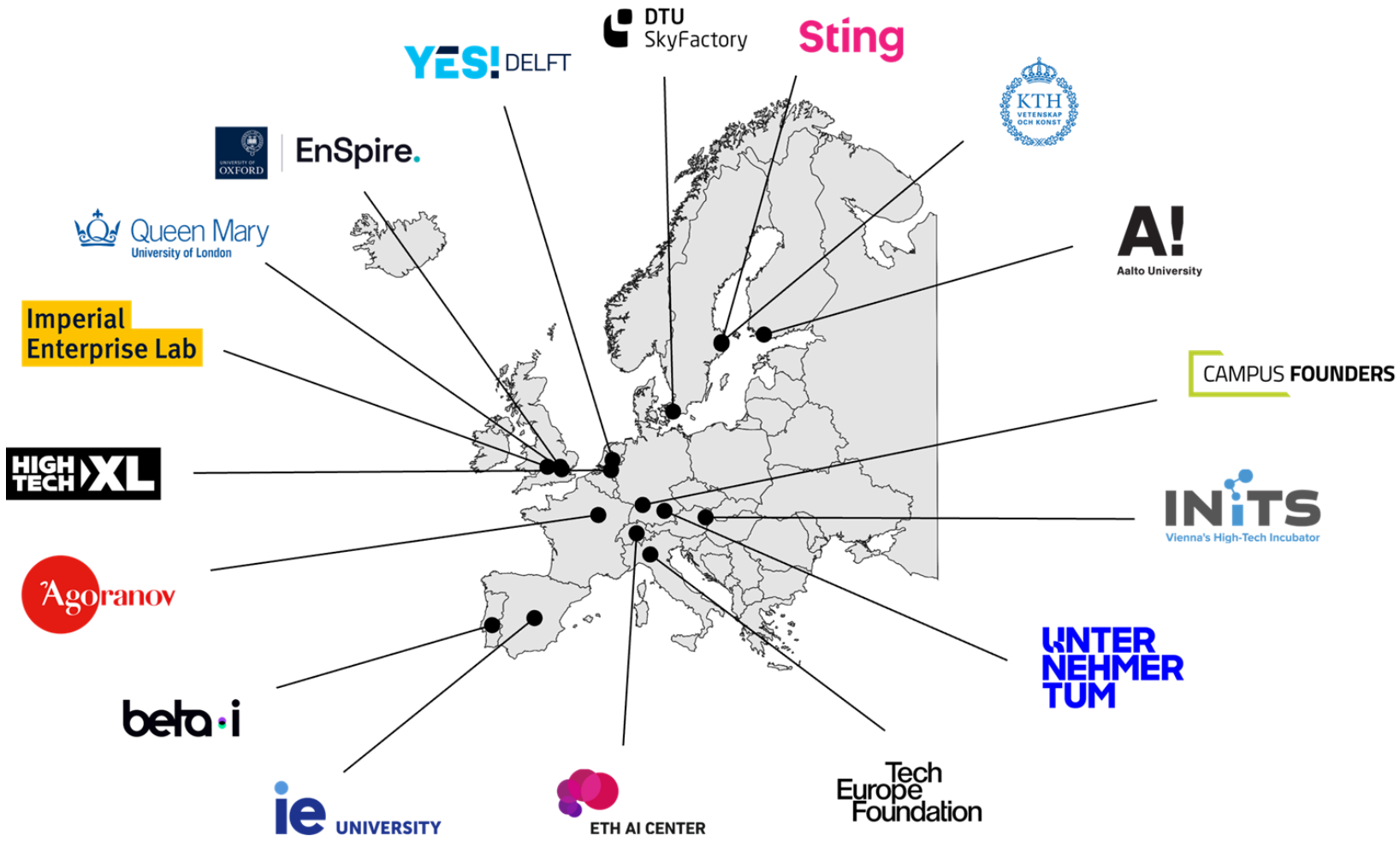
TALENTS REACHED IN 2025

7.500

STARTUPS SUPPORTED IN 2025

€40 bn

COMBINED VC FUNDING IN THE NETWORK



RISE EUROPE

European Startup & Scaleup Landscape **2026**

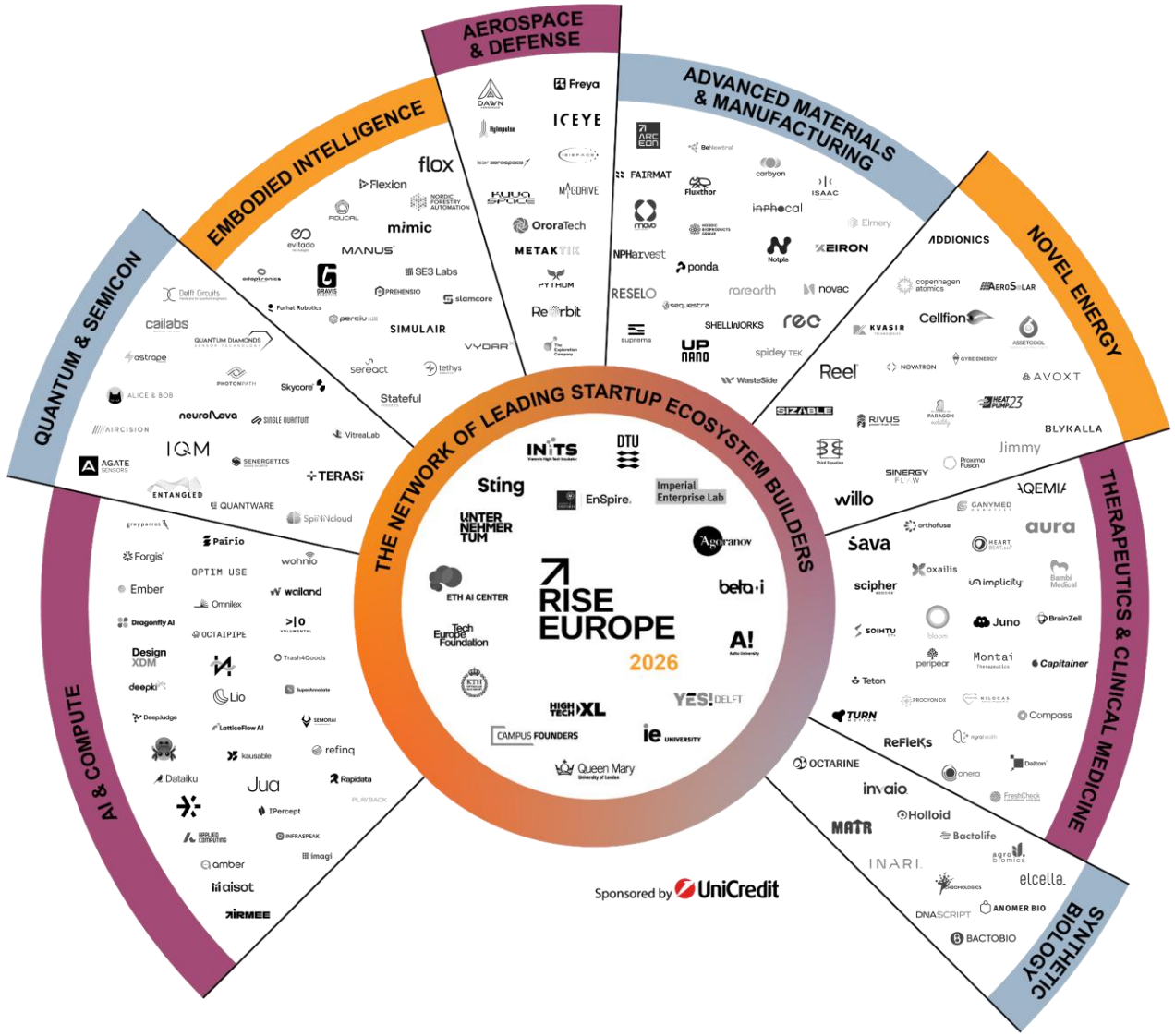
Each year, we feature most promising startups and scaleups coming out of our network.
This year's Landscape includes:

168
FEATURED VENTURES

65
FEATURED SCALEUPS

€10bn
VC FUNDING IN 2025 BY ALL STARTUPS IN THE HUBS

±15%
OF ALL EUROPEAN TECH INVESTMENT IN 2025



Startups were selected on five criteria: Funding, Team, Market, Press Visibility and Network & Partnerships

Deep Tech spans eight technology clusters

We group startups by their core technology; the scientific or engineering breakthrough that gives each venture its edge.

AI & Compute

AI that moves from predicting outcomes to running real workflows.

Quantum & Semicon

Quantum computers, photonic chips and sensors that rebuild computing.

Embodied Intelligence

Robots and machines that sense, move and handle the physical world.

Aerospace & Defense

Launch, satellites and dual-use tech for Europe's independence in space.

Advanced Materials & Manufacturing

New materials and processes that for specialized use and low emissions.

Novel Energy

Fusion, fission, storage and grid tech for clean, reliable power.

Therapeutics & Clinical Medicine

Diagnostics, digital therapies and drug discovery for better care.

Synthetic Biology & Bioengineering

Living systems engineered to make food, materials and medicines.

DEEP DIVE

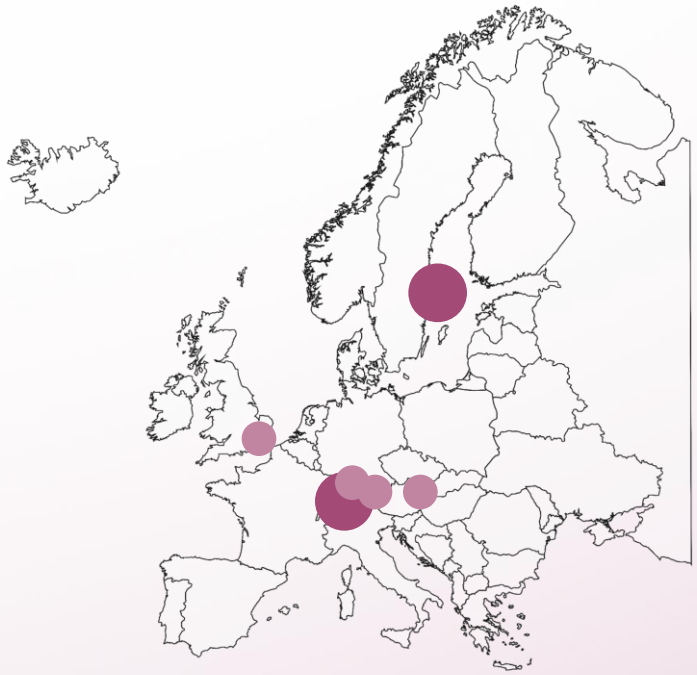
AI & COMPUTE

ECOSYSTEM ACCESS

AI & Compute

THE TECHNOLOGY

Artificial intelligence is moving from software that predicts to systems that act inside real workflows. The startups in this cluster put AI on factory floors, into agents that complete legal and procurement work, into weather and climate-risk models and into creative production, alongside the data, evaluation and governance tools that make it trustworthy at scale.



Hub raised over €50m Hub raised under €50m

Funding raised since July 2025 by the startups featured in this report.

SELECTED HUBS

ETH Zürich / ETH AI Center

Zurich, Switzerland

ETH AI CENTER

LatticeFlow AI · DeepJudge · Forgis · Rapidata · Omnilex · aisot

Imperial Enterprise Lab

London, UK

Imperial Enterprise Lab

APPLIED COMPUTING

KTH Innovation

Stockholm, Sweden

KTH VETENSKAP OCH KONST

SuperAnnotate · >|0 VOLUMENTAL · IPercept

Campus Founders

Heilbronn, Germany

CAMPUS FOUNDERS

amber · SEMORAI · Pairío · wailand

UnternehmerTUM

Munich, Germany

UNTERNEHMER TUM

Lio · kausable

INiTS

Vienna, Austria

INiTS Vienna's High-Tech Incubator

refinq · OPTIM USE · wohnio

TECH TRENDS

AI & Compute

1

Industrial AI for manufacturing

AI is moving onto the factory floor and into the engineering office. Causal models, edge agents and copilots read technical specifications, predict machine failures and optimise plants, turning decades of industrial data and know-how into uptime, quality and lower emissions.

2

Agentic AI & vertical copilots

AI is shifting from answering questions to completing work. Agents run procurement end to end, draft construction-safety paperwork or search decades of legal files, each tuned to one profession's data, rules and liability.

3

AI trust, data & evaluation

Before AI can run in high-stakes settings, it has to be trained on reliable data and proven safe. Labelling platforms, human feedback at scale and evaluation software provide the evidence that customers and regulators increasingly demand.

4

Climate & physical-risk analytics

Data and AI are becoming instruments of the climate transition. Weather models, physical-risk pricing and building and recycling analytics help energy traders, investors and asset owners measure exposure and act on decarbonisation.

5

Creative & media AI

Generative and predictive models are entering creative production: forecasting what viewers will notice, synthesising sound from code and turning a phone recording into sports highlights, so small teams can produce and test content at scale.

STARTUP AND SCALEUP PROFILES

AI & Compute

STARTUPS AND SCALEUPS IN THIS CLUSTER

- Airmee
- Aisot Technologies
- Amber
- Applied Computing
- Bloom Future
- Dataiku
- Deep Interactions
- DeepJudge
- Deepki
- DesignXDM
- DragonflyAi
- Ember
- Forgis
- Greyparrot
- imagi
- Infraspeak
- IPercept
- Jua
- Kausable
- Latticeflow
- Lio
- Nemisindo
- OctaiPipe
- Omnilex
- Optimuse
- Pairio
- Playback
- Rapidata
- refinq
- SemorAI
- SuperAnnotate
- Trash4Goods
- Volumental
- Wailand
- Wohnio

FEATURED COMPANIES

35

companies tracked in this cluster, of which

13

are scaleups. Together, all featured companies raised

€211m

in equity, grants and debt since July 2025.

STARTUP AND SCALEUP PROFILES

AI & Compute

Airmee

SWEDEN

Machine learning route optimisation behind same-day and evening delivery, with cargo bikes and electric vehicles handling the last mile in city centres.

airmee.com

Aisot Technologies

SWITZERLAND

An AI investment platform that turns market and alternative data into quantitative signals, supporting portfolio decisions for asset managers and banks.

aisot.com

Amber

GERMANY

AI-powered enterprise search and chat platform that unifies company knowledge into one assistant.

amber.de

Applied Computing

UNITED KINGDOM

The Orbital platform, which lets engineers interrogate refinery and plant data directly, cutting the time spent hunting through disconnected systems.

appliedcomputing.com

Bloom Future

GERMANY

Career-matching app that connects students with apprenticeships and employers using AI-driven fit scoring.

bloom-future.de

Dataiku

FRANCE

An enterprise platform for data science and AI, giving analysts and engineers a shared workspace to build, deploy, and govern models.

dataiku.com

Deep Interactions

UNITED KINGDOM

A collaborative AI builder that works inside a team's existing tools, turning natural-language requests into working software.

deepinteractions.ai

DeepJudge

SWITZERLAND

An AI search and document layer for law firms that surfaces precedent and clauses across case files in seconds.

deepjudge.ai

Deepki

FRANCE

A sustainability data platform for real estate, centralising energy and carbon data to guide retrofit and compliance decisions.

deepki.com

DesignXDM

UNITED KINGDOM

A research agent that curates images, colours, materials, and trends into ready-to-use design moodboards.

designxdm.com

AI & Compute

DragonflyAi

UNITED KINGDOM

Predictive attention AI that shows what people will notice in an image or layout before it is published, letting brands test creative work in advance.

dragonflyai.co

Ember

UNITED KINGDOM

Agentic AI that drafts and checks the safety paperwork a construction site runs on, from risk assessments to permits, with every point signed off by a person.

ember-info.com

Forgis

SWITZERLAND

An AI-native industrial orchestration platform whose edge agents configure production lines, predict failures, and cut downtime on the factory floor.

forgis.com

Greyparrot

UNITED KINGDOM

Computer vision analytics for recycling facilities, identifying and measuring the material passing over sorting lines so operators can lift recovery rates and prove composition.

greyparrot.ai

imagi

SWEDEN

A coding platform and wearable device built to get teenage girls writing their first lines of code, closing the gender gap before it forms.

imagilabs.com

Infraspeak

PORTUGAL

An intelligent maintenance management platform that connects facilities teams, contractors, and assets in one system, automating work orders and showing where to intervene first.

infraspeak.com

IPercept

SWEDEN

AI condition monitoring for machine tools that detects wear and drift before parts fall out of tolerance, keeping precision manufacturing running.

ipercept.io

Jua

SWITZERLAND

An AI weather model producing fast, high-resolution forecasts of the physical environment, built for energy traders and grid operators who price and dispatch against the weather.

jua.ai

Kausable

GERMANY

Causal AI that adapts to changing contexts without costly retraining, giving industrial AI systems a reusable understanding of how their environment behaves.

kausable.ai

Latticeflow

SWITZERLAND

Governance and evaluation software that tests, certifies, and monitors AI systems, giving organisations the evidence they need for safety, reliability, and regulatory compliance.

latticeflow.ai

AI & Compute

Lio

GERMANY

An agentic AI platform for enterprise procurement that runs sourcing end to end, from initial request through supplier analysis and negotiation to order placement.

lio.ai

Nemisindo

UNITED KINGDOM

Procedural audio that generates sound effects from code rather than recordings, giving games and film infinite variation without a sample library.

nemisindo.com

OctaiPipe

UNITED KINGDOM

Federated machine learning infrastructure that trains and runs models directly on edge devices, keeping data local while improving performance across whole fleets of equipment.

octaipipe.ai

Omnilex

SWITZERLAND

An AI legal assistant built for Swiss law, streamlining research and case analysis against national jurisprudence for jurists and in-house teams.

omnilex.ai

Optimuse

AUSTRIA

AI that analyses existing buildings in the pre-design phase, giving architects and owners fast, data-driven answers on how to renovate and decarbonise.

optimuse.com

Pairio

GERMANY

AI assistant for industrial maintenance teams that surfaces documentation, generates reports, and analyzes machine data.

pairio.com

Playback

UNITED KINGDOM

AI video analysis for grassroots and youth sport, turning a phone recording into highlights and performance data without a production crew.

playbacksports.ai

Rapidata

SWITZERLAND

An API and platform for human-verified data labelling and validation at scale, giving AI teams fast, reliable feedback for model training and evaluation.

rapidata.ai

refinq

AUSTRIA

Climate and nature risk analytics that price physical risk across real assets, helping companies and investors report on and plan for a warming world.

refinq.com

SemorAI

GERMANY

Engineering intelligence platform that reads and assesses technical specifications and standards at engineering-grade detail.

semor.ai

AI & Compute

SuperAnnotate

SWEDEN

An end-to-end platform for building AI training data, combining annotation tooling, quality management, and access to specialist labelling teams.

superannotate.com

Trash4Goods

PORTUGAL

A rewards-based recycling platform that turns everyday sorting and returns into discounts and vouchers, giving consumers a direct incentive to recycle more.

trash4goods.com

Volumental

SWEDEN

3D foot scanning and fit recommendation used in shops worldwide, matching customers to the right shoe and cutting returns for footwear brands.

volumental.com

Wailand

GERMANY

AI and knowledge-graph platform that automates variant engineering for industrial manufacturers.

wailand.io

Wohnio

AUSTRIA

A digital platform that brings the residential property process into one place, from search through financing to completion.

wohnio.com

DEEP DIVE

Quantum & Semicon

ECOSYSTEM ACCESS

Quantum & Semicon

THE TECHNOLOGY

Quantum technologies and new chip architectures are rebuilding the foundations of computation, sensing and communication. The startups in this cluster range from fault-tolerant quantum computers and the cryogenic hardware around them to photonic chips, free-space optical links, single-chip spectral sensors and neuromorphic silicon that brings AI to low-power devices.

Hub raised over €50m Hub raised under €50m

Funding raised since July 2025 by the startups featured in this report.

SELECTED HUBS

Aalto University

Espoo, Finland

IQM AGATE SENSORS

Agoranov

Paris, France

ALICE & BOB cailabs

YES!Delft

Delft, Netherlands

QUANTWARE Delft Circuits SINGLE QUANTUM

KTH Innovation

Stockholm, Sweden

TERASi

UnternehmerTUM

Munich, Germany

QUANTUM DIAMONDS SpiNNcloud

HighTech XL

Eindhoven, Netherlands

astrape AIRCISION SENERGETICS

TECH TRENDS

Quantum & Semicon

1

Quantum full stack

Europe is building quantum computing across the full stack: processors based on superconducting and cat qubits, plus the enabling layer of cryogenic cabling, single-photon detectors and circuit software needed to scale towards fault-tolerant machines.

2

Integrated photonics

Photonic chips replace electrical links and bulky optics. Integrated photonic modules move data across racks and data centres at lower energy per bit, while thin glass light chips bring bright, precisely directed light to displays, AR and sensing.

3

Next-generation sensing

New sensing physics detects what conventional instruments miss. Diamond quantum sensors image nanoscale magnetic fields in chips, photonic systems spot corrosion and leaks in industrial assets, and single-chip hyperspectral imagers shrink full-spectrum sensing to fingertip size.

4

Energy-efficient AI hardware

AI's energy appetite is driving new hardware. Brain-inspired neuromorphic processors run AI as events rather than clock cycles, from supercomputers to battery-powered sensors, while integrated power converters cut losses and board space in AI data centres.

5

Communication chips & links

Data has to travel faster, across crowded spectrum and to places fibre cannot reach. Terahertz and millimetre-wave components open new frequency bands, while free-space optical links and laser ground stations carry high-capacity data through the air and to satellites.

STARTUP AND SCALEUP PROFILES

Quantum & Semicon

STARTUPS AND SCALEUPS IN THIS CLUSTER

- Agate Sensors
- Aircision
- Alice & Bob
- Astrape Networks
- Cailabs
- Delft Circuits
- Entangled Quantum
- IQM
- Neuronova
- Photon Path
- Quantum Diamonds
- Quantware
- Senergetics
- Single Quantum
- Skycore Semiconductors
- Spinncloud
- TeraSi
- Vitrealab

FEATURED COMPANIES

18

companies tracked in this cluster, of which

9

are scaleups. Together, all featured companies raised

€617m

in equity, grants and debt since July 2025.

Quantum & Semicon

Agate Sensors

FINLAND

Full-spectrum imaging on a single semiconductor chip, shrinking hyperspectral sensing to fingertip size for wearables, drones, industrial inspection, and defence.

agatesensors.com

Aircision

THE NETHERLANDS

Free-space optical communication that sends secure, high-capacity data through the air without fibre, for defence, enterprise, and telecom networks.

aircision.com

Alice & Bob

FRANCE

Fault-tolerant quantum computers built on cat qubits, a superconducting architecture that corrects errors by design and cuts the hardware needed to reach useful scale.

alice-bob.com

Astrape Networks

THE NETHERLANDS

Photonics-based optical networking that unifies high-speed data transmission across racks and data centres, built for the bandwidth demands of AI, HPC, and storage.

astrape.net

Cailabs

FRANCE

Light-shaping photonics based on Multi-Plane Light Conversion, powering optical ground stations for satellite laser links, resilient telecom networks, and precision industrial lasers.

cailabs.com

Delft Circuits

THE NETHERLANDS

Superconducting cryogenic cabling that removes the wiring bottleneck limiting how many qubits a quantum computer can scale to.

delft-circuits.com

Entangled Quantum

UNITED KINGDOM

Software built on patented University of Oxford technology that restructures quantum circuits to entangle qubits that aren't directly connected, cutting gate count, execution time, and errors on today's quantum computers.

entangledqu.com

IQM

FINLAND

Superconducting quantum computers built through hardware-software co-design, delivering on-premises systems and quantum advantage for research centres and enterprises.

meetiqm.com

Neuronova

ITALY

A fully analog neuromorphic processor that runs event-driven edge AI at ultra-low power, keeping always-on sensing alive on a battery budget.

neuronovatech.com

Photon Path

ITALY

Integrated photonic chips and modules with proprietary control algorithms, built for telecom networks, AI and data centre interconnects, and industrial sensing.

photon-path.com

Quantum & Semicon

Quantum Diamonds

GERMANY

Diamond-based quantum sensors that image magnetic fields at the nanoscale, enabling non-destructive failure analysis and quality control for semiconductor manufacturers.

qd-st.com

Quantware

THE NETHERLANDS

Industrial-scale quantum processors built on a 3D scaling architecture designed to reach thousands of qubits.

quantware.com

Senergetics

THE NETHERLANDS

Photonic sensing systems that detect corrosion, leaks, and energy losses across industrial assets, combining in-field sensors with a cloud platform for continuous monitoring.

senergetics.ai

Single Quantum

THE NETHERLANDS

Superconducting nanowire single-photon detectors for quantum computing, communication, and sensing applications.

singlequantum.com

Skycore Semiconductors

DENMARK

Switched-capacitor power converter integrated circuits that deliver high power density in a fraction of the board space, for AI data centres, laptops, and battery storage.

skycore-semi.com

Spinncloud

GERMANY

Neuromorphic supercomputers based on brain-inspired SpiNNaker architecture, delivering energy-efficient compute for large-scale AI workloads and real-time simulation.

spinncloud.com

TeraSi

SWEDEN

Terahertz and millimetre-wave components built with a proprietary silicon micromachining process, enabling higher-frequency communications and sensing.

terasi.io

Vitrealab

AUSTRIA

Photonic light chips that replace bulky optics with a thin glass layer, delivering bright, precisely directed illumination for displays, AR, and sensing.

vitrealab.com

DEEP DIVE

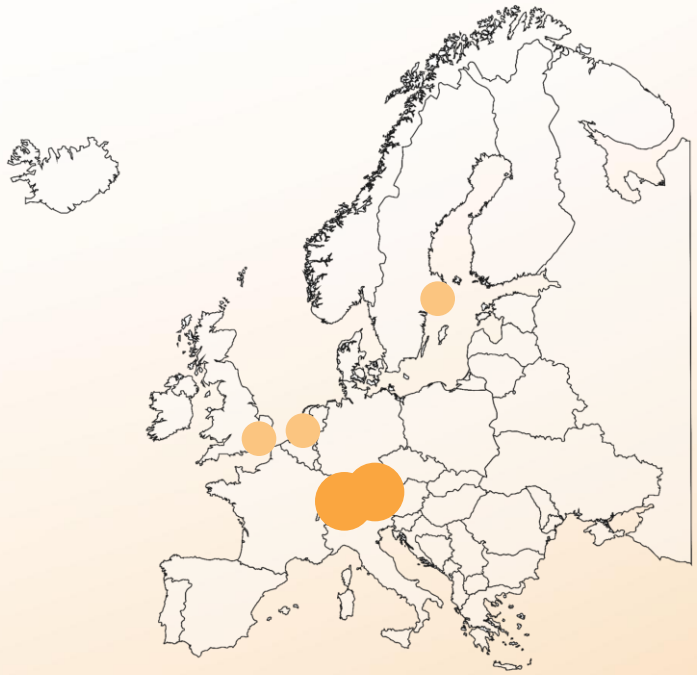
Embodied Intelligence

ECOSYSTEM ACCESS

Embodied Intelligence

THE TECHNOLOGY

Embodied intelligence puts learning systems into machines that sense, move and handle the physical world. The startups in this cluster build robot foundation models, dexterous grippers and hands, spatial AI that navigates without GPS, and autonomous machines for construction, forestry and subsea work, drawing on Europe's strength in precision engineering and university robotics labs.



Hub raised over €50m Hub raised under €50m

Funding raised since July 2025 by the startups featured in this report.

SELECTED HUBS

ETH Zürich / ETH AI Center

Zurich, Switzerland

ETH AI CENTER

Gravis Robotics · Flexion · mimic · tethys Robotics

Sting

Stockholm, Sweden

Sting

flox · SIMULAIR

UnternehmerTUM

Munich, Germany

UNTERNEHMER TUM

sereact · SE3 Labs

KTH Innovation

Stockholm, Sweden

KTH Vetenskap och Konst

Nordic Forestry Automation · Furhat Robotics

Imperial Enterprise Lab

London, UK

Imperial Enterprise Lab

slamcore

YES!Delft

Delft, Netherlands

YES! DELFT

perciv AI for Radar · Fiducial · VYDAR

TECH TRENDS

Embodied Intelligence

1

Robot manipulation & learning

Robots are learning to handle objects they have never seen, without task-specific programming. Vision-language models, dexterous hands and tactile grippers bring adaptive automation to new tasks, trained with simulation and human-motion data that transfer skills to real hardware.

2

Spatial AI, GNSS-free & dual-use navigation

Machines need to know where they are and what surrounds them. Spatial AI turns cheap cameras and radar into LiDAR-like understanding and keeps drones and robots navigating where GPS fails, cutting the cost of autonomy. The same navigation modules serve counter-drone defence and civilian drone operations, which makes them strategic for Europe in contested, GPS-denied environments.

3

Autonomy for heavy machinery

Instead of building new robots, start-ups make existing machines autonomous. Retrofitted excavators and forestry cranes, and compact subsea robots, take over repetitive or dangerous work in construction, forestry and offshore infrastructure.

STARTUP AND SCALEUP PROFILES

Embodied Intelligence

STARTUPS AND SCALEUPS IN THIS CLUSTER

- Adaptronics
- Evitado Technologies
- Fiducial
- Flexion Robotics
- Flox Intelligence
- Furhat Robotics
- Gravis Robotics
- MANUS
- Mimic Robotics
- Nordic Forestry Automation (NF)
- PercivAI
- Prehensio
- SE3Labs
- Sereact
- Simulair
- Slamcore
- Stateful Robotics
- Tethys Robotics
- Vydar

FEATURED COMPANIES

19

companies tracked in this cluster, of which

6

are scaleups. Together, all featured companies raised

€391m

in equity, grants and debt since July 2025.

Embodied Intelligence

Adaptronics

ITALY

Electro-adhesive interfaces with integrated tactile sensing, giving robotic grippers a grip on delicate and irregular objects for industrial automation and space applications.

adaptronics.it

Evitado Technologies

GERMANY

Portable LiDAR collision avoidance that maps surroundings in real time to prevent costly damage when aircraft and other large assets are towed or manoeuvred.

evitado.io

Fiducial

THE NETHERLANDS

Autonomous computer-vision software for counter-drone detection, GNSS-free navigation, and terminal guidance in contested environments.

fdcl.nl

Flexion Robotics

SWITZERLAND

An autonomy platform that trains humanoid robots in simulation with reinforcement learning, transferring manipulation, locomotion, and complex whole-body skills to real hardware.

flexion.ai

Flox Intelligence

SWEDEN

Computer vision and AI for poultry farming that watches flock behaviour continuously, catching welfare and health problems days before a human would.

floxintelligence.com

Furhat Robotics

SWEDEN

A social robot with a projected, expressive face that holds spoken conversations, used for training, research, and customer interaction.

furhatrobotics.com

Gravis Robotics

SWITZERLAND

Autonomous earthmoving technology that retrofits existing construction machines with AI, sensors, and teleoperation, turning excavators into self-operating equipment for digging and material handling.

gravisrobotics.com

MANUS

THE NETHERLANDS

Data gloves that capture human hand motion with millimetre precision, generating the training data behind dexterous robotics and AI manipulation models.

manus-meta.com

Mimic Robotics

SWITZERLAND

Industrial robotic hands paired with AI models that give robots human-like dexterity, bringing adaptive automation to manufacturing, logistics, and retail tasks that resisted it.

mimicrobotics.com

Nordic Forestry Automation (NF)

SWEDEN

Automation for forestry machinery that takes over repetitive crane and harvesting work, raising productivity while reducing operator strain.

nordicforestryautomation.com

STARTUP AND SCALEUP PROFILES

Embodied Intelligence

PercivAI

THE NETHERLANDS

AI-driven radar perception software that gives autonomous vehicles and robots LiDAR-like environmental understanding at a fraction of the cost.

perciv.ai

Prehensio

GERMANY

Adaptive robotic automation software for machine tending and line feeding in high-mix production environments.

prehensio.ai

SE3Labs

GERMANY

Spatial AI that turns images, video, and map data into 3D models machines can reason over, enabling drones and ground robots to navigate and act autonomously.

se3.ai

Sereact

GERMANY

Vision-language AI software that lets warehouse and industrial robots grasp, sort, and handle objects they have never seen before, without task-specific programming.

sereact.ai

Simulair

SWEDEN

A machine that simulates human presence to lure, trap, and track bed bugs, removing the need for human bait or pesticides in hotels and homes.

simulair.com

Slamcore

UNITED KINGDOM

Spatial intelligence software that tells robots and autonomous machines where they are and what surrounds them, using low-cost cameras rather than expensive sensors.

slamcore.com

Stateful Robotics

UNITED KINGDOM

Long-horizon decision intelligence that gives mobile robots a persistent memory of their environment, so they adapt to disruption and finish missions unsupervised.

statefulrobotics.com

Tethys Robotics

SWITZERLAND

Compact autonomous underwater robots that inspect, monitor, and secure subsea infrastructure in currents, cold, and near-zero visibility where divers cannot work.

tethys-robotics.ch

Vydar

THE NETHERLANDS

Drone navigation modules that enable stable flight in GPS-denied environments.

vydar.eu

DEEP DIVE

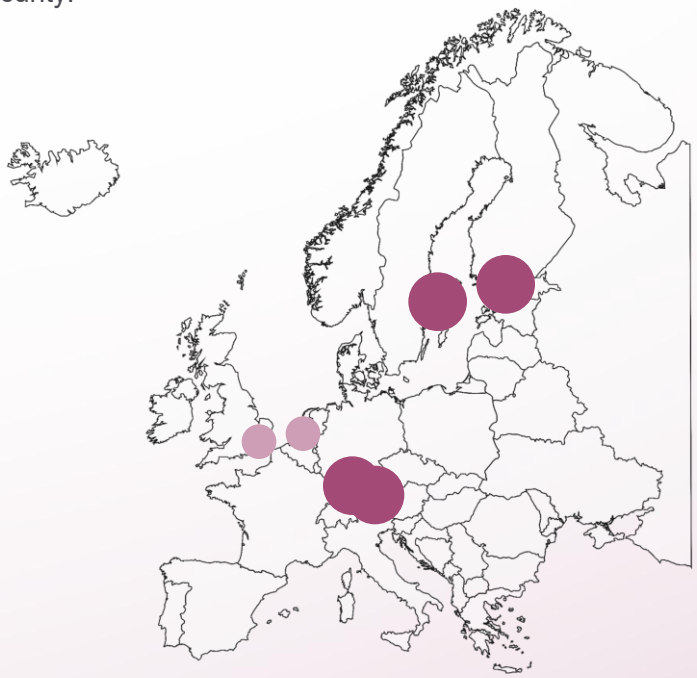
AEROSPACE & DEFENSE

ECOSYSTEM ACCESS

Aerospace & Defense

THE TECHNOLOGY

Aerospace and defense are being transformed by cheaper access to space, autonomy and a renewed focus on European sovereignty. The startups in this cluster build launch vehicles and reusable spaceplanes, Earth-observation satellites for radar, hyperspectral and thermal imaging, software-defined spacecraft and in-space propulsion, and sensing and autonomy for defense and security.



Hub raised over €50m Hub raised under €50m

Funding raised since July 2025 by the startups featured in this report.

SELECTED HUBS

UnternehmerTUM

Munich, Germany

isar aerospace · The Exploration Company · OroraTech

Sting

Stockholm, Sweden

PYTHOM · Rearbit · Freya

Aalto University

Espoo, Finland

ICEYE · KUVA SPACE · METAKTIK

YES!Delft

Delft, Netherlands

DAWN · ISISPACE

Campus Founders

Heilbronn, Germany

HyImpulse

Imperial Enterprise Lab

London, UK

MAGDRIVE

TECH TRENDS

Aerospace & Defense

1

Reusable & low-cost launch

Europe is rebuilding independent access to space around reusability and lower cost. New launchers, hybrid propulsion, spaceplanes and refuelable capsules aim to make launch frequent and affordable for constellations and cargo missions.

2

Earth observation as intelligence

Satellite operators increasingly sell answers, not images. Radar, hyperspectral and thermal constellations combined with AI deliver near-real-time intelligence on wildfires, crops, disasters and security.

3

Software-defined small satellites

Satellites are becoming reconfigurable products rather than one-off builds. Software-defined platforms, standard subsystems, membrane antennas and compact propulsion shorten development and let operators change missions in orbit.

4

Next-generation propulsion

Propulsion decides how cheaply rockets reach orbit and how freely spacecraft move once there. Hybrid rocket engines, refuelable propulsion systems and high-thrust electric thrusters with solid metal propellant enable more agile satellites, servicing and logistics.

5

Defense & security applications

Space and sensing technologies are increasingly dual-use. Low-cost drone detection, all-weather radar imagery and lightweight antennas help protect people, critical infrastructure and defense platforms.

STARTUP AND SCALEUP PROFILES

Aerospace & Defense

STARTUPS AND SCALEUPS IN THIS CLUSTER

- Dawn Aerospace
- Freya Industries
- HyImpulse
- ICEYE
- Isar Aerospace
- ISIS Aerospace
- Kuva Space
- Magdrive
- Metaktik
- OroraTech
- Pythom Space
- ReOrbit
- The Exploration Company

FEATURED COMPANIES

13

companies tracked in this cluster, of which

9

are scaleups. Together, all featured companies raised

€1.4bn

in equity, grants and debt since July 2025.

Aerospace & Defense

Dawn Aerospace

THE NETHERLANDS

Reusable spaceplane and refuelable in-space propulsion systems built for daily, aircraft-like access to space.

dawnaerospace.com

Freya Industries

SWEDEN

Affordable connected sensors with the intelligence in the software, detecting drones and their pilots and protecting people and critical infrastructure.

freyaindustries.com

HyImpulse

GERMANY

Hybrid rocket propulsion technology for affordable, sustainable access to low-Earth orbit.

hyimpulse.de

ICEYE

FINLAND

A constellation of small SAR satellites delivering radar imagery of any location on Earth, day or night and through cloud, for disaster response, insurance, and defence.

iceye.com

Isar Aerospace

GERMANY

Flexible, cost-efficient access to space for small and medium satellite constellations, powered by the in-house Spectrum launch vehicle.

isaraerospace.com

ISIS Aerospace

THE NETHERLANDS

Small satellite platforms and subsystems for commercial and institutional space missions.

isispace.nl

Kuva Space

FINLAND

Hyperspectral microsatellites paired with AI data services, providing frequent Earth observation insights for agriculture, forestry, and environmental monitoring.

kuvaspace.com

Magdrive

UNITED KINGDOM

High-thrust electric propulsion using solid metal propellant, giving satellites the manoeuvrability that conventional thrusters cannot deliver at the same size.

magdrive.space

Metaktik

FINLAND

Ultralight, flexible metasurface antennas built on a thin-membrane architecture, delivering high-gain multi-band communications for small satellites, drones, and defense platforms.

metaktik.com

OroraTech

GERMANY

Thermal-infrared satellites and an intelligence platform that detects and tracks wildfires from orbit in near real time, giving first responders and governments an earlier, clearer picture of fire risk.

ororatech.com

Aerospace & Defense

Pythom Space

SWEDEN

Compact reusable rockets and landers built in low-infrastructure microfactories, taking a light, fast approach to launching satellites and in-space manufacturing.

pythomspace.com

ReOrbit

SWEDEN

Software-defined satellites built on a flexible platform, letting operators reconfigure missions in orbit instead of designing each spacecraft from scratch.

reorbit.space

The Exploration Company

GERMANY

Nyx, a reusable and refuelable orbital capsule designed to carry cargo to space stations and, in later versions, beyond low Earth orbit.

exploration.space

DEEP DIVE

ADVANCED MATERIALS & MANUFACTURING

ECOSYSTEM ACCESS

Advanced Materials & Manufacturing

THE TECHNOLOGY

Advanced materials and manufacturing underpin every physical industry, from packaging to aerospace. The startups in this cluster replace plastics with bio-based alternatives, recover critical metals and nutrients from waste, lock carbon into construction materials, engineer composites and superconductors for extreme conditions, and develop laser and 3D-printing processes for high-precision production.

Hub raised over €50m Hub raised under €50m

Funding raised since July 2025 by the startups featured in this report.

SELECTED HUBS

TEF – Tech Europe Foundation

Milan, Italy

suprema · rarearth · ISAAC · BeNewtral · novac

Agoranov

Paris, France

FAIRMAT

HighTech XL

Eindhoven, Netherlands

carbyon · KEIRON · inphocal

INiTS

Vienna, Austria

UP NANO · sequestra

Imperial Enterprise Lab

London, UK

Notpla · SHELLWORKS · ponda

Aalto University

Espoo, Finland

Elmery · NPHarvest · NORDIC BIOPRODUCTS GROUP

TECH TRENDS

Advanced Materials & Manufacturing

1

Bio-based plastic alternatives

Seaweed, birch bark, cellulose, microbes and peatland plants are replacing plastic and fossil-based inputs. Start-ups produce packaging, rubber, insulation and high-performance fibres that break down naturally, at increasingly industrial scale.

2

Circular recovery of resources

Europe depends on imports for many critical raw materials. Recovery processes extract rare earths from old magnets, precious metals from process water, nutrients from waste streams and intact carbon fibre from composites.

3

Low-CO_2 building materials

Construction materials carry a large share of embodied emissions. Mineralisation locks CO_2 permanently into steel slag and demolition waste, by-product binders replace conventional cement, and natural insulation grown on rewetted peatland stores carbon rather than releasing it.

4

Materials for specialised use

Demanding applications need materials engineered for one hard job: superconducting tapes for fusion magnets and grids, carbon-ceramic composites for heat shields above 1500 °C, coil-free actuators for cryogenic motion and mouldable solid-state supercapacitors for vehicles.

5

Laser in additive manufacturing

Light is becoming a precision manufacturing tool. Two-photon 3D printing, laser-based solder deposition and direct laser marking build and label structures from the nanometre scale upward, without stencils, moulds or stickers.

STARTUP AND SCALEUP PROFILES

Advanced Materials & Manufacturing

STARTUPS AND SCALEUPS IN THIS CLUSTER

- Arceon
- BeNewtral
- Carbyon
- Cellfion
- Elmery
- Fairmat
- Fluxthor
- InPhocal
- ISAAC antisismica
- Keiron
- Movopack
- Nordic Bioproducts Group
- Notpla
- Novac
- NPHarvest
- Ponda
- Rarearth
- Reo
- Reselo
- sequestra
- Shellworks
- Spidey TEK
- Suprema
- UpNano
- Wasteside

FEATURED COMPANIES

25

companies tracked in this cluster, of which

6

are scaleups. Together, all featured companies raised

€84m

in equity, grants and debt since July 2025.

Advanced Materials & Manufacturing

Arceon

THE NETHERLANDS

Carbon-ceramic composite materials engineered for propulsion nozzles and heat shields that withstand temperatures above 1500°C.

arceon.nl

BeNewtral

ITALY

Low-CO_2 construction materials, from biodegradable insulation panels to cementitious products, made with a mineral binder derived mostly from industrial by-products and traced on blockchain.

benewtral.com

Carbyon

THE NETHERLANDS

Direct air capture technology that filters carbon dioxide out of the atmosphere at low cost, supplying the feedstock for synthetic kerosene and other alternative fuels.

carbyon.com

Cellfion

SWEDEN

Specializing in manufacturing and commercializing bio-based membranes and nanoparticle dispersions for energy storage and conversion devices.

cellfion.se

Elmery

FINLAND

Electrochemical metal recovery for refineries, extracting precious and critical metals from process waters with fewer chemicals, fewer steps, and lower emissions.

elmery.fi

Fairmat

FRANCE

Carbon fibre composite recycling using a patented cold plasma process, recovering intact fibre from aerospace and wind waste and returning it as high-performance material.

fairmat.tech

Fluxthor

THE NETHERLANDS

Coil-free actuator technology that eliminates heat dissipation for high-precision motion in cryogenic and space applications.

fluxthor.com

InPhocal

THE NETHERLANDS

High-precision laser marking that writes directly onto food, produce, and packaging without damaging the surface, removing the need for stickers and labels.

inphocal.com

ISAAC antisismica

ITALY

Patented active mass damper technology for non-invasive seismic protection, retrofitting existing buildings and infrastructure while continuously monitoring their structural health.

isaacantisismica.com

Keiron

THE NETHERLANDS

Contactless laser-induced forward transfer printing equipment that deposits solder paste with micron precision, replacing stencils in high-density electronics manufacturing.

keirontechnologies.com

Advanced Materials & Manufacturing

Movopack

ITALY

Reusable e-commerce packaging that customers return by post for cleaning and redeployment, replacing single-use boxes across many shipping cycles.

movopack.com

Nordic Bioproducts Group

FINLAND

Sustainable cellulosic materials produced with the AaltoCell process, bringing microcrystalline cellulose and other bio-based ingredients to industrial scale at competitive cost.

nordicbioproducts.fi

Notpla

UNITED KINGDOM

Packaging made from seaweed and plants that disappears naturally, replacing single-use plastic in takeaway boxes, sachets, and coatings.

notpla.com

Novac

ITALY

Mouldable all-solid-state supercapacitors that charge and discharge rapidly, adding safer, higher-performance energy storage to electric and hybrid vehicles.

novacsupercap.com

NPHarvest

FINLAND

Nutrient recovery technology that captures nitrogen and phosphorus from reject water, leachate, and other liquid waste, turning them into fertiliser instead of treatment costs.

npharvest.fi

Ponda

UNITED KINGDOM

BioPuff, a natural insulation fibre grown on rewetted peatland, replacing down and synthetic fill while restoring carbon-storing wetlands.

ponda.bio

Rarearth

ITALY

Advanced chemical processing that recovers rare earth elements from end-of-life magnets, supplying closed-loop recycled permanent magnets to industrial recyclers and manufacturers across Europe.

rarearth.it

Reo

GERMANY

Reusable packaging and deposit-return system for cosmetics, piloted with retail partners in Munich.

wearereo.com

Reselo

SWEDEN

A bio-based rubber made from birch bark left over by the forestry industry, offering a fossil-free alternative for tyres, footwear, and industrial goods.

reselo.se

sequestra

AUSTRIA

A mineralisation process that locks CO_2 permanently into steel slag, ash, and demolition waste, turning industrial residues into low-carbon construction material.

sequestra.tech

Advanced Materials & Manufacturing

Shellworks

UNITED KINGDOM

Compostable packaging grown by microbes, giving brands a plastic replacement that breaks down at home rather than only in industrial facilities.

shellworks.com

Spidey TEK

UNITED STATES

Real spider silk proteins grown in alfalfa, producing a biomaterial stronger by weight than steel for adhesives, composites, and technical textiles.

spideytek.com

Suprema

ITALY

High-temperature superconducting tapes produced in Europe, the enabling component for fusion magnets, higher-capacity grids, and electric propulsion, in a market currently concentrated in Asia.

suprematape.com

UpNano

AUSTRIA

Two-photon 3D printers that build structures from nanometre to centimetre scale on one machine, serving microfluidics, photonics, and life science research.

upnano.com

Wasteside

GERMANY

Gamified sustainability app that rewards students for adopting eco-friendly habits on campus.

wasteside.de

DEEP DIVE

NOVEL ENERGY

ECOSYSTEM ACCESS

Novel Energy

THE TECHNOLOGY

Energy systems have to deliver clean, reliable power at the scale the transition towards climate neutrality demands. The startups in this cluster work on fusion and small modular fission reactors, long-duration storage and better batteries, technology that gets more capacity out of existing grids, and clean heat for buildings and industry.

Hub raised over €50m Hub raised under €50m

Funding raised since July 2025 by the startups featured in this report.

SELECTED HUBS

UnternehmerTUM

Munich, Germany

Proxima Fusion

DTU

Lyngby, Denmark

copenhagen atomics Reel KVASIR TECHNOLOGIES

Agoranov

Paris, France

Jimmy

TEF – Tech Europe Foundation

Milan, Italy

SIZABLE SINERGY FLOW

KTH Innovation

Stockholm, Sweden

BLYKALLA NOVATRON

Beta-i

Lisbon, Portugal

Third Equation ASSETCOOL PARAGON mobility

TECH TRENDS

Novel Energy

1

Fusion energy

Fusion promises continuous, carbon-free baseload power. European start-ups pursue different magnetic confinement routes: stellarators built around high-temperature superconducting magnets, and an inherently stable magnetic-mirror concept aiming at a simpler, cheaper reactor.

2

Advanced fission

New reactor designs move fission from one-off mega-projects to factory production. Thorium molten-salt reactors built in shipping containers and lead-cooled small modular reactors sited near industrial demand target cheap, continuous carbon-free heat and power.

3

Long-duration & next-gen storage

More renewables require storage that lasts hours to days. Offshore pumped hydro, redox flow batteries from abundant materials, 3D battery current collectors and thermal storage add flexibility without relying on scarce raw materials.

4

Grid capacity without new lines

Grid connections are becoming a brake on electrification. Line coatings, power electronics and mobile charging squeeze more capacity out of existing networks, so new demand can connect without waiting for new infrastructure.

5

Clean heat for industry & buildings

Heat is a large and hard-to-electrify share of energy demand. Floor-level heat pumps for apartment buildings, nuclear process heat and smart thermal storage for cold chains target gas and coal use in buildings and industry.

STARTUP AND SCALEUP PROFILES

Novel Energy

STARTUPS AND SCALEUPS IN THIS CLUSTER

- Addionics
- AeroSolar
- Assetcool
- AVOXT
- Blykalla
- Copenhagen Atomics
- Gyre Energy
- Heatpump23
- Jimmy
- Kvasir Technologies
- Novatron Fusion Group
- Paragon Mobility
- Proxima Fusion
- Reel
- Rivus Batteries
- Sinergy Flow
- Sizable Energy
- Third Equation
- Willo

FEATURED COMPANIES

19

companies tracked in this cluster, of which

5

are scaleups. Together, all featured companies raised

€626m

in equity, grants and debt since July 2025.

Novel Energy

Addionics

UNITED KINGDOM

Three-dimensional current collectors that drop into existing battery production lines, raising energy density, charging speed, and lifetime without changing the chemistry.

addionics.com

AeroSolar

UNITED KINGDOM

A new approach to capturing and converting solar energy, rethinking the design of the panel itself.

qminnovation.co.uk/project/aerosolar

Assetcool

UNITED KINGDOM

A robotically applied coating for overhead power lines that lowers conductor temperature and increases the capacity of existing grid infrastructure without rebuilding it.

assetcool.com

AVOXT

THE NETHERLANDS

Membraneless electrolyser technology and power control systems that produce green hydrogen more efficiently and at lower cost than conventional stacks.

avoxt.com

Blykalla

SWEDEN

Lead-cooled small modular reactors built from corrosion-resistant steels, designed for factory production and siting close to industrial demand.

blykalla.com

Copenhagen Atomics

DENMARK

Thorium molten salt reactors built in shipping containers and produced on an assembly line, designed to supply cheap, continuous carbon-free heat and power.

copenhagenatomics.com

Gyre Energy

UNITED KINGDOM

Physics-based AI paired with thermal storage that shifts industrial cooling to cheaper hours, cutting electricity costs across cold storage and food logistics.

gyreenergy.com

Heatpump23

GERMANY

Floor-level heat pump systems that replace gas heating in existing apartment buildings within two days.

heatpump23.de

Jimmy

FRANCE

High-temperature nuclear micro-reactors installed on industrial sites, supplying decarbonised process heat as a direct replacement for gas and coal burners.

jimmy-energy.eu

Kvasir Technologies

DENMARK

A catalytic process that converts lignin and other biomass residues into drop-in fuel oil, giving shipping and heavy industry a renewable alternative without new engines.

kvasirtechnologies.com

Novel Energy

Novatron Fusion Group

SWEDEN

A magnetic mirror fusion concept that holds plasma in an inherently stable configuration, aiming at a simpler and cheaper route to fusion power.

novatronfusion.com

Paragon Mobility

FRANCE

Mobile EV charging that brings the charger to the vehicle, letting fleet operators electrify depots without grid upgrades or fixed charging infrastructure.

paragonmobility.com

Proxima Fusion

GERMANY

Stellarator fusion power plants built around high-temperature superconducting magnets, working towards a commercial reactor that delivers continuous, carbon-free baseload electricity.

proximafusion.com

Reel

DENMARK

Corporate power purchase agreements made accessible to companies of any size, channelling their electricity spend directly into building new wind and solar capacity.

reel.energy

Rivus Batteries

SWEDEN

Battery technology developed for demanding applications where conventional cells fall short on performance or lifetime.

rivus-batteries.com

Sinergy Flow

ITALY

Low-cost redox flow batteries built from abundant materials, designed for scalable, long-duration stationary storage without critical raw material supply risk.

sinergyflow.com

Sizable Energy

ITALY

Offshore pumped hydro storage using ocean-floor and floating reservoirs with reversible pump-turbines, delivering scalable, long-duration energy storage with a minimal carbon footprint.

sizableenergy.com

Third Equation

UNITED KINGDOM

Power electronics that raise the capacity of existing transmission and distribution networks, freeing up grid headroom without laying new lines.

thirdequation.com

Willo

FINLAND

Wireless power transfer that keeps devices running without cables or alignment, letting receivers move freely anywhere within range of a transmitter.

willo.tech

DEEP DIVE

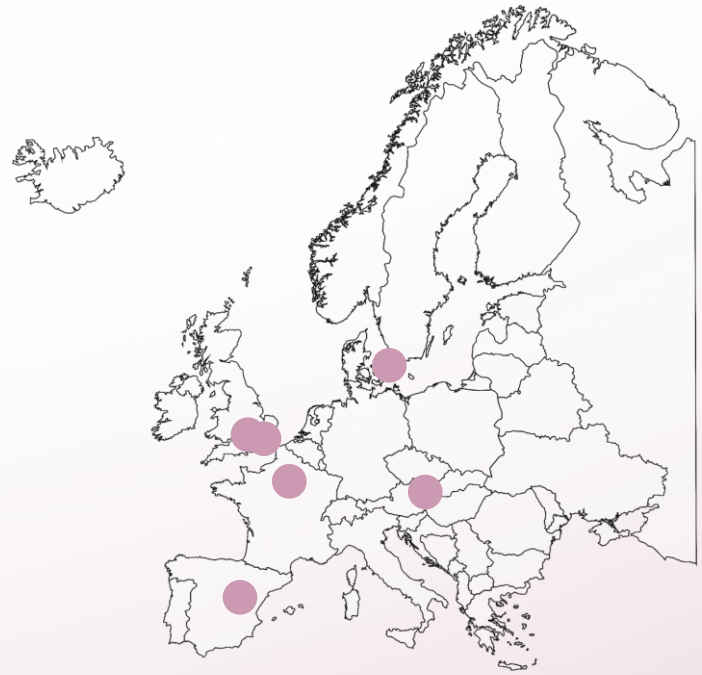
THERAPEUTICS & CLINICAL MEDICINE

ECOSYSTEM ACCESS

Therapeutics & Clinical Medicine

THE TECHNOLOGY

Medicine is being reshaped by biology, hardware and AI working together. The startups in this cluster use AI to discover new drugs, build lab-grown organ models for testing, bring diagnostics and monitoring from the hospital into the home, deliver digital therapies for brain and mental health, and develop robotic and implant technology for surgery.



Hub raised over €50m Hub raised under €50m

Funding raised since July 2025 by the startups featured in this report.

SELECTED HUBS

Agoranov

Paris, France

AQEMIA · GANYMED ROBOTICS · implicity

DTU

Lyngby, Denmark

Teton

EnSpire Oxford

Oxford, UK

oxailis · Dalton · peripear · Juno

INiTS

Vienna, Austria

HEART BEAT.bio · nyrahealth · TURN MOTION

IE University

Madrid, Spain

Compass · aura · scipher MEDICINE · Montai Therapeutics · bloom

Imperial Enterprise Lab

London, UK

Sava · orthofuse · FreshCheck CONFIRMING HYGIENE

TECH TRENDS

Therapeutics & Clinical Medicine

1

Remote diagnostics & monitoring

Diagnosis and monitoring are moving out of the lab and into the home, the pharmacy and the ward. At-home blood sampling, wireless sleep tests, contactless sensors and remote cardiac platforms catch problems earlier and free up clinical capacity.

2

Digital therapeutics & AI companions

Software is becoming part of treatment. Prescription video games for depression, digital speech therapy after stroke and AI companions for diabetes and chronic illness extend care into everyday life between appointments.

3

AI-driven drug discovery

AI and physics-based models are compressing early drug discovery, designing and prioritising candidates, learning from every experiment and mining natural chemistry humans have long consumed for new oral medicines.

4

Precision orthopaedics

Orthopaedic care is becoming patient-specific and more precise. Robot-assisted joint replacement, 3D-printed implants that can be repositioned without damaging tissue, and printed carbon-fibre orthotics and prosthetics shorten procedures and fit treatment to the individual.

5

Human cell-based testing

Human cell-based models such as cardiac organoids and stem-cell-derived brain cells let pharma test drugs on human tissue before the clinic, predicting efficacy and toxicity better while reducing reliance on animal models.

STARTUP AND SCALEUP PROFILES

Therapeutics & Clinical Medicine

STARTUPS AND SCALEUPS IN THIS CLUSTER

- Aqemia
- Aura Biosciences
- Bambi Medical
- Bloom Diagnostics
- BrainZell
- Capitainer
- COMPASS Pathways
- DaltonTX
- Freshcheck
- Ganymed Robotics
- HeartBeat.bio
- Implicity
- Juno
- Montai Therapeutics
- Nilocas
- nyra health
- Onera Health
- Orthofuse
- Oxailis
- PeriPear
- Procyon
- ReFleks
- Sava
- Scipher Medicine
- Soihtu DTx
- Teton.ai
- Turn-Motion

FEATURED COMPANIES

27

companies tracked in this cluster, of which

11

are scaleups. Together, all featured companies raised

€513m

in equity, grants and debt since July 2025.

Therapeutics & Clinical Medicine

Aqemia

FRANCE

Quantum-inspired physics combined with generative AI to design and prioritise drug candidates, compressing years of early-stage discovery into months.

aqemia.com

Aura Biosciences

UNITED STATES

A virus-like particle therapy that selectively destroys solid tumours, developed first for ocular melanoma so patients no longer choose between their sight and their life.

aurabiosciences.com

Bambi Medical

THE NETHERLANDS

A wireless monitoring belt that tracks a newborn's breathing, heart rate, and temperature without adhesive electrodes, keeping premature babies connected to their parents.

bambi-medical.com

Bloom Diagnostics

SWITZERLAND

A compact blood analyser paired with an app that delivers lab-quality results in minutes at the pharmacy counter or the point of care.

bloomdiagnostics.com

BrainZell

SWEDEN

Human brain cell models grown from stem cells, giving drug developers a physiologically relevant way to test neurological treatments before the clinic.

brainzell.com

Capitainer

SWEDEN

Microsampling devices that let patients take a precise, volume-controlled blood sample at home and post it to the lab for analysis.

capitainer.com

COMPASS Pathways

UNITED KINGDOM

COMP360, a synthetic psilocybin treatment taken with psychological support, in late-stage clinical trials for treatment-resistant depression.

compasspathways.com

DaltonTX

UNITED KINGDOM

An AI discovery platform for small molecules and biologics that learns from every experiment, giving pharma teams modern discovery without building it in-house.

daltontx.com

Freshcheck

UNITED KINGDOM

A rapid colour-change test that shows within seconds whether a surface has actually been cleaned, giving food and healthcare sites instant hygiene verification.

freshcheck.co.uk

Ganymed Robotics

FRANCE

Robotic assistance for orthopaedic surgery, combining computer vision with a compact co-manipulated arm to make joint replacement more precise, less invasive, and more affordable.

ganymedrobotics.com

Therapeutics & Clinical Medicine

HeartBeat.bio

AUSTRIA

Human cardiac organoids grown at scale as a testing platform, letting pharma screen heart drugs on real human tissue instead of animal models.

heartbeat.bio

Implicity

FRANCE

A vendor-neutral platform for remote cardiac monitoring that unifies data from all implantable devices and uses AI to filter alerts so care teams act on what matters.

implicity.com

Juno

UNITED KINGDOM

An AI health assistant for people living with chronic illness, tracking symptoms, surfacing patterns, and turning months of notes into a doctor-ready summary.

junocompanion.com

Montai Therapeutics

UNITED STATES

AI that decodes the natural chemistry humans have consumed safely for generations, turning it into oral small-molecule medicines for chronic inflammatory disease.

montai.com

Nilocas

UNITED KINGDOM

A non-invasive device for detecting coronary artery disease, replacing costly imaging with a faster, lower-risk first-line test.

qminnovation.co.uk/project/nilocas

nyra health

AUSTRIA

Digital speech and cognitive therapy for stroke and neurological patients, extending rehabilitation beyond the clinic through guided daily exercises at home.

nyra.health

Onera Health

THE NETHERLANDS

A self-applied, wireless sleep diagnostics system combining patch-based sensors with a cloud platform, bringing clinical-grade polysomnography out of the lab and into the home.

onerahealth.com

Orthofuse

UNITED KINGDOM

3D-printed orthopaedic implants for trauma and spinal surgery that can be repositioned without damaging tissue, shortening procedures in difficult cases.

orthofuse.co.uk

Oxailis

UNITED KINGDOM

AI-based ultrasound that measures tissue perfusion on standard hardware without contrast agents, doubling detection of fetal growth restriction in routine scans.

oxailis.com

PeriPear

UNITED KINGDOM

A wearable that automates warm compress therapy during childbirth, delivering a proven intervention consistently to reduce perineal tearing.

peri-pear.com

STARTUP AND SCALEUP PROFILES

Therapeutics & Clinical Medicine

Procyon

UNITED KINGDOM

Light-based diagnostics for early cancer detection, catching disease at the stage where treatment still works.

procyondx.com

ReFleks

UNITED KINGDOM

A regenerative therapy that repairs joint damage and treats osteoarthritis, targeting lasting pain relief rather than symptom management.

qminnovation.co.uk/project/refleks

Sava

UNITED KINGDOM

An AI companion for people living with type 1 diabetes, learning from glucose data to anticipate swings and coach everyday decisions.

sava.health

Scipher Medicine

UNITED STATES

Blood tests that read a patient's molecular signature to predict which autoimmune therapy will work, sparing months of trial and error in rheumatoid arthritis.

sciphermedicine.com

Soihtu DTx

FINLAND

A prescription video game for major depressive disorder, combining adaptive cognitive training with immersive therapeutic content for patients who do not respond to conventional treatment.

soihtudtx.com

Teton.ai

DENMARK

Contactless AI sensors for hospitals and care homes that monitor patients around the clock, flag falls and deterioration early, and write nursing documentation automatically.

teton.ai

Turn-Motion

AUSTRIA

5D carbon fibre printing that produces patient-specific orthotics, prosthetics, and exoskeleton parts in hours instead of days of skilled manual work.

turn-motion.com

DEEP DIVE

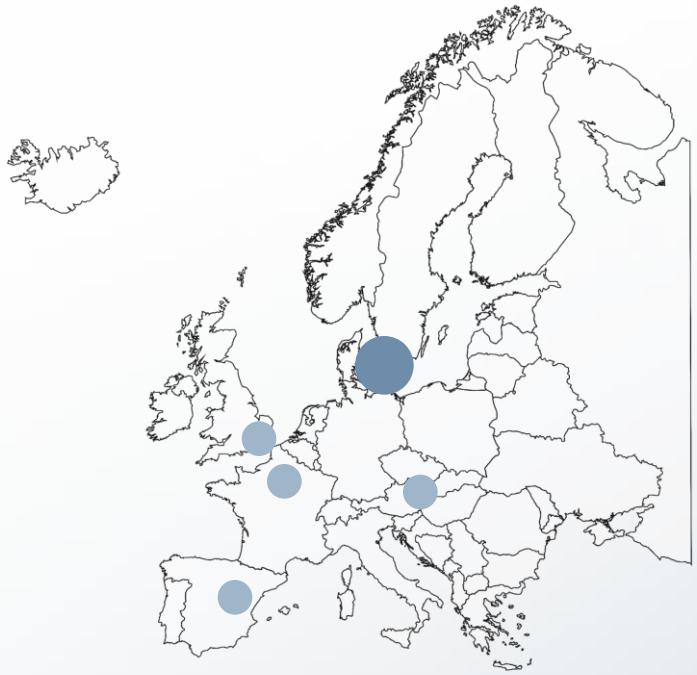
SYNTHETIC BIOLOGY & BIOENGINEERING

ECOSYSTEM ACCESS

Synthetic Biology & Bioengineering

THE TECHNOLOGY

Synthetic biology and bioengineering turn living systems into programmable production platforms. The startups in this cluster engineer microbes and plants to protect crops, use fermentation to make natural colours and food ingredients, build tools such as enzymatic DNA synthesis that speed up bio-manufacturing, and develop alternatives to antibiotics.



Hub raised over €50m Hub raised under €50m

Funding raised since July 2025 by the startups featured in this report.

SELECTED HUBS

DTU

Lyngby, Denmark

CHROMOLOGICS · OCTARINE · Bactolife · MATR · agrobiomics

INiTS

Vienna, Austria

Holloid

Agoranov

Paris, France

DNASCRIPT

Queen Mary (QMUL)

London, UK

ANOMER BIO

IE University

Madrid, Spain

INARI · BACTOBIO · invaio

TECH TRENDS

Synthetic Biology & Bioengineering

1

Agricultural biologicals & gene editing

Biology is replacing chemistry in the field. Soil-bacteria biostimulants, AI-designed gene-edited seed and precision delivery of biological treatments help crops withstand climate stress with less water, fertiliser and pesticide.

2

Fermented natural ingredients

Fermentation turns microbes and fungi into factories for natural ingredients. Fungal pigments replace synthetic dyes, enzyme platforms produce colours at commercial scale and mycelium becomes whole-cut meat alternatives.

3

Tools for bio-manufacturing

Engineering biology depends on better tools. Benchtop enzymatic DNA synthesis, scalable synthetic glycans and AI-assisted holographic microscopy for live process monitoring speed up research and make fermentation easier to control.

4

Antibiotic alternatives

Antimicrobial resistance demands new answers. Oral binding proteins neutralise harmful gut bacteria without antibiotics, while culturing previously ungrowable soil microbes opens new sources of antibiotics, enzymes and biologicals.

STARTUP AND SCALEUP PROFILES

Synthetic Biology & Bioengineering

STARTUPS AND SCALEUPS IN THIS CLUSTER

- Agrobiomics
- Anomer Bio
- Bactobio
- BactoLife
- Chromologics
- DNA Script
- elcella
- Holloid
- Inari Agriculture
- Invaio Sciences
- MATR Foods
- Octarine Bio

FEATURED COMPANIES

12

companies tracked in this cluster, of which

6

are scaleups. Together, all featured companies raised

€98m

in equity, grants and debt since July 2025.

Synthetic Biology & Bioengineering

Agrobiomics

DENMARK

Biostimulants derived from soil bacteria that strengthen crops against drought, salinity, and heat, lifting yields on land increasingly affected by climate stress.

agrobiomics.bio

Anomer Bio

UNITED KINGDOM

Synthetic carbohydrate chemistry that makes complex glycans accessible at scale for vaccines, diagnostics, and therapeutics.

anomer.bio

Bactobio

UNITED KINGDOM

A discovery platform that cultures previously ungrowable soil microbes at scale, unlocking new antibiotics, enzymes, and agricultural biologicals.

bactobio.com

BactoLife

DENMARK

Binding proteins delivered orally to neutralise harmful bacteria in the gut, protecting people and livestock from infection without antibiotics and without disrupting the microbiome.

bactolife.com

Chromologics

DENMARK

Natural red pigment produced by fungal fermentation, giving food and cosmetics brands a stable, plant-free colour that replaces synthetic and insect-derived dyes.

chromologics.com

DNA Script

FRANCE

Benchtop enzymatic DNA synthesis that lets researchers print custom DNA in their own lab in hours, replacing weeks of waiting on external suppliers.

dnascript.com

elcella

UNITED KINGDOM

A plant-based, twice-daily pill that uses a patented nutrient combination to trigger the body's own appetite-regulating gut hormones, offering a drug-free, injection-free alternative to weight-loss medication.

elcella.com

Holloid

AUSTRIA

Holographic microscopy with AI analysis that monitors living microorganisms in real time, giving fermentation and water treatment operators continuous process control.

holloid.com

Inari Agriculture

UNITED STATES

AI-designed seed using multiplex gene editing to raise yields in soybean, corn, and wheat while cutting the water and fertiliser each crop needs.

inari.com

Invaio Sciences

UNITED STATES

Precision delivery of biological crop treatments directly into the plant, protecting yields with a fraction of the chemical load normally spread across a field.

invaio.com

Synthetic Biology & Bioengineering

MATR Foods

DENMARK

Whole-cut meat alternatives made by fermenting mycelium with vegetables and grains, delivering the texture of meat from a short, unprocessed ingredient list.

matrfoods.com

Octarine Bio

DENMARK

An enzyme and synthetic biology platform that produces and upgrades natural ingredients, starting with sustainable colours made at commercial scale for the first time.

octarinebio.com

RISE EUROPE

This Startup & Scaleup Landscape is produced by **Rise Europe**, a network of startup ecosystem builders from 12 European countries working to turn Europe's research leadership into global economic, societal, and environmental impact. Our goal is to make Europe the best place to build a new economy by nurturing startups that create positive global change. By uniting the continent's top innovation hubs, we aim for Europe to contribute one-third of all global startups, scaleups, and unicorns. The expertise of our members is our greatest asset, we thank every hub for their collaboration and commitment.

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