

2021 Annual Report



A green textured wallet with a tassel, two avocados, and green leaves on a light green background.

PBPC is an association of like-minded organizations who are advocating for a shift toward a more circular bioeconomy through greater adoption of renewable, plant-based materials supported by appropriate end-of-life infrastructure. We educate stakeholders and advocate for programs and policies that will support growth of the plant-based products industry, helping to harness its environmental and economic potential to deliver a more sustainable future.

Staff

Jessica Bowman
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Senior Vice President of External Affairs

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Vice President of Economics

Allison Cooke
Vice President of Food Policy

Eamon Monahan
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Justin Maroccia
Senior Manager of Sustainability

Kent Roberson
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Archer Daniels Midland Company

Justine Li
Archer Daniels Midland Company

Marty Muenzmaier
Cargill

Michael J. Wagner
Cargill

John Bode
Corn Refiners Association

Ian Jacobson
Eco-Products

Kevin Schilling
Chair, Grain Processing Corporation

Daniel Sasu
Ingredion, Incorporated

Alex Buck
Iowa Corn Promotion Board

Doug Kunnemann
NatureWorks

Phil Rozenski
Novolex

Frankie Schuster
Smile Beverage Werks, PBC

Chris Guild
Tate & Lyle

Darrin Peterson
Treasurer, Tate & Lyle

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Laboratory (IBRL), University of Illinois,
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Department of Chemical Engineering and
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Brent Shanks
Iowa State University

Carolyn Weis
International Conservation Caucus
Foundation

Ron Buckhalt
formerly with USDA's BioPreferred Program

Glenda Humiston
University of California, Department of
Agriculture & Natural Resources

Welcome Letter

After two years at the helm of PBPC, I'm proud of the major strides we've taken to become the premier advocacy organization representing the plant-based products industry.

We are the go-to experts for policymakers and industry leaders, advocating for a more sustainable future and increased economic opportunity for America's farmers and innovators. PBPC has been a key leader on behalf of the industry, testifying before Congress and advocating for key federal legislation and policy. Now, PBPC is known as the industry's voice, working to ensure plant-based products are viewed by lawmakers and regulators as a necessary part of a more circular economy.

PBPC has also increased public awareness of plant-based products, including our members' own innovations, and the many environmental and economic benefits these products and this industry provide. Not only have we invested in educational content that shares more information about the plant-based products industry, but we empower our members to do the same within their own networks.

Crucial to our success are our members. Large and small, urban and rural, our members bring varied perspectives from across the entire value chain yet unite around a shared vision. PBPC's members provide critical forward-looking feedback that put into practice our emphasis on supporting collaboration and industry growth.

We feel fortunate to have seen such growth and success in unprecedented times of public health, environmental, and social challenges. Our progress has only been possible with the strategic guidance of our committees and Board of Directors, thoughtful perspective of our Advisory Board, collaborative engagement of our partners and stakeholders, and dedication of our staff.

While 2021 was a year of great accomplishment, there's much more work to be done. I see the potential this industry holds, and we can unlock it by bringing stakeholders together to forge a path to advance our common goals.

I invite you to take a moment to review and celebrate PBPC's 2021 progress and join us in our continued commitment to a more circular, more renewable, and more sustainable, plant-based future.

Thank you,

Jessica Bowman
PBPC Executive Director





PBPC Membership

PBPC is home to members large and small across the value chain who are committed to advancing the bioeconomy. PBPC members come from all links in the plant-based product supply chain, including suppliers of renewable feedstocks, renewable chemical companies, bioplastic resin manufacturers, packaging converters, and consumer-facing companies. All members are dedicated to PBPC's mission of promoting the use of plant-based products.

In 2021, PBPC launched a paid membership model to better serve our members and provide benefits that assist their businesses in being up to date on the latest policy news, communicating with their audiences, accessing valuable resources, and more. With several different membership tiers available, PBPC's structure meets the various needs of stakeholders in the plant-based industry.



We're thrilled to welcome the following organizations and individuals into PBPC membership:

- **Founding members:**
 - Archer Daniels Midland Company
 - Cargill
 - Grain Processing Corporation
 - Ingredion Incorporated
 - Roquette America, Inc.
 - Tate & Lyle Americas
- **Executive members:**
 - Novolex/Eco-Products
- **General members**
 - Danimer Scientific
 - Genpak
 - Iowa Corn Promotion Board
 - NatureWorks
 - National Corn Growers Association
 - Novamont
 - PepsiCo
- **Start-up/Small Business members**
 - Delta Ag
 - Footprint
- **Futamura**
- **Gevo**
- **Green Dot Bioplastics**
- **Hexas Biomass**
- **Loliware**
- **P2 Science**
- **PlantSwitch**
- **PSI**
- **Repurpose**
- **SmartSolve**
- **Smile Beverage Werks**
- **TIPA**
- **Virent**
- **Supporting individuals**
 - Jeff Beegle (mobius)
 - Debra Darby (Tetra Tech)
 - Tom Fitzgerald (Access Creative Group)
 - Joe James (Agri-Tech Producers)
 - Sandeep Kulkarni (KoolEarth Solutions)
 - Kimberly Truog (Snap Cutlery)
 - Jeff Veden (Cutting Board Resurfacing)



Advocacy + Policy Accomplishments

PBPC provides its members with an influential voice in Washington, DC. The efforts of our advocacy and government relations team have led to a number of important policy achievements that help spur innovation, research, and growth of the plant-based products industry. Some of our biggest accomplishments include:

Fighting for Recognition of Bio-Based Product Manufacturing

PBPC has been working with key Administration, Congressional, and industry stakeholders to find a pathway to establish unique North American Industry Classification System (NAICS) codes for bio-based product manufacturing. NAICS codes would support more effective and accurate measurement of the economic impact of the growing plant-based products industry.

Testifying Before U.S. House Agriculture Subcommittee

PBPC's Executive Director Jessica Bowman testified before the U.S. House Agriculture Subcommittee on Commodity Exchanges, Energy, and Credit in a hearing titled "A Look at the Renewable Economy in Rural America," emphasizing the important role of the plant-based products industry in empowering American agriculture to provide technology, innovations, and

solutions to help reduce greenhouse gas emissions and provide economic opportunity for rural communities.

Supporting the Introduction of the COMPOST ACT

PBPC coordinates the US Composting Infrastructure Coalition (USCIC), which includes a range of stakeholders supporting expanded composting infrastructure. With PBPC's federal advocacy support, USCIC developed the "Cultivating Organic Matter through the Promotion of Sustainable Techniques" (COMPOST) Act, which would establish a USDA-led funding program for composting infrastructure, helping provide a circular path for compostable plant-based materials. The bill was introduced in the U.S. House of Representatives by Rep. Julia Brownley (CA-26) and currently is supported by 18 cosponsors. In the U.S. Senate, the bill was introduced by Sen. Cory Booker (NJ), with the support of one cosponsor.

Elevating the Role of Plant-Based Products at the International Level

PBPC represented the plant-based products industry at the UN Climate Change Conference (COP26) as nations and other stakeholders identify global solutions to addressing our climate crisis. PBPC aimed to raise the profile of plant-based products and the role they can play in a net zero future.

Pressing for Fair Policy Treatment of Bio-Based Plastics

As the U.S. engages in international and foreign regulations that could impact bio-based plastics, including a potential UN-led global plastic pollution treaty, PBPC has been serving as an educational and policy resource. For example, PBPC briefed over 75 staff members of USDA's Foreign Agricultural Service, the Commerce Department, and others on bio-based plastics to help inform U.S. positioning on the treaty.

Representing the Interests of Bio-based Plastics within the US Plastics Pact

The US Plastics Pact is a voluntary effort of major companies, NGOs, universities, governments, and other stakeholders aimed at advancing a more circular economy for plastics. PBPC joined the Pact as a founding activator and has since fought to ensure bio-based plastics are incorporated as a circular solution.

Creating a More Level Playing Field for Plant-Based Products

PBPC engages on a number of fronts aimed at ensuring plant-based products are put on an equal footing with more traditional products. Over the past year, efforts have included advocating for federal research, tax legislation like the Renewable Chemicals Act, and policies and programs that help create a more level playing field for plant-based products and drive overall demand.

Securing Funding Requests in Senate Appropriations Reports

PBPC successfully secured report language for the FY22 U.S. Department of Agriculture (USDA) and FY22 U.S. Department of the Interior/U.S. Environmental Protection Agency (EPA) appropriations bills approved by the Senate Appropriations Committee instructing USDA and EPA to conduct federal research that can help advance PBPC's policy agenda, including a USDA study of the U.S. biobased economy compared with other countries; a collection by USDA of life cycle analyses of the main biobased products used in chemicals, plastics, and fibrous materials; and an examination of how increased composting of organic waste and compostable bioplastics could reduce greenhouse gas emissions from landfills.

PBPC Executive Director Named as Top Lobbyist

PBPC Executive Director Jessica Bowman was recognized as a top lobbyist in the 2021 list published by The Hill. This annual list highlights the biggest experts, influencers, and advocates in Washington who have successfully delivered results in Congress and the White House.



Communications + Education Accomplishments

Educating stakeholders about the many environmental and economic benefits of plant-based products is one of PBPC's most important advocacy goals. In 2021, PBPC embarked on a number of communications and education initiatives to help raise public awareness of the industry, dispel common misconceptions on plant-based products, and elevate the organization's profile in the DC area and within the larger sustainability community. Some of our biggest achievements include:

Consumer Research

PBPC's annual research program continued in 2021, improving our members' understanding of consumer attitudes towards and knowledge of plant-based products. High-level results of the survey are made public and more detailed findings are available only to members.

'Setting the Record Straight' Blog

Launched in 2021, this blog series aims to address common misconceptions, clarify terminology, and provide easy-to-understand factual information about plant-based products.

Plant-based Leaders

Launched in 2021, this blog series highlights PBPC members to showcase the fascinating work being done across the plant-based product space and identify leaders in driving the circular economy.



Representational Opportunities

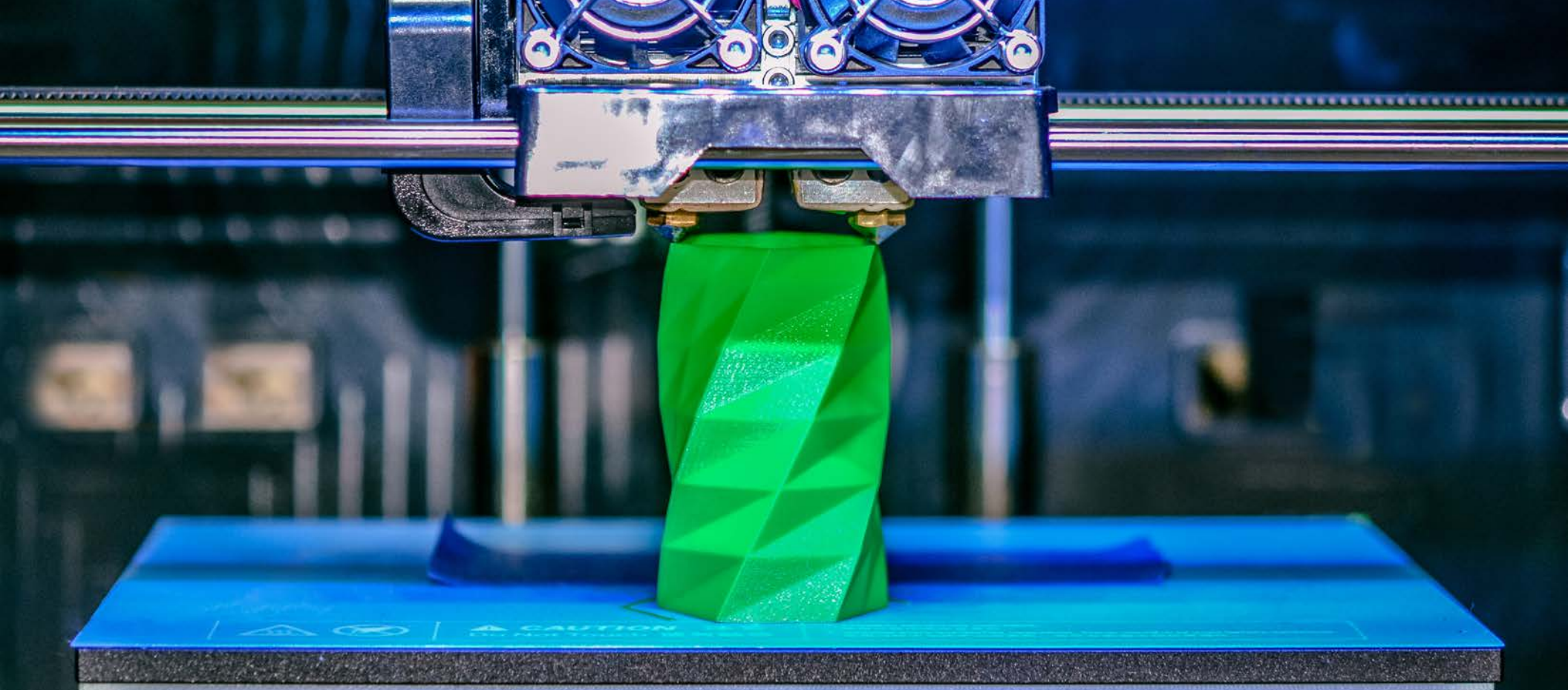
PBPC staff regularly participates in and offers to PBPC members opportunities to speak at webinars, conferences, policy meetings, and other events to elevate the profile of plant-based products.



Media Placements

Jessica Bowman, PBPC's Executive Director, was tapped as an expert in the plant-based products industry and asked to comment on a number of topics relevant to the plant-based products industry. A few examples include:

- Resource Recycling: Women in Circularity: Jessica Bowman (November 30, 2021)
- The Hill: Plastic may soon trump coal as climate killer in US: study (October 21, 2021)
- Brownfield Ag News: USDA Report: Biobased Industry Benefits Economy, Jobs, And Environment (August 20, 2021)
- Milford Daily News: Help restore our Earth (April 25, 2021)



Coalitions + Partnerships

In 2021, PBPC, alongside the US Composting Council, Biodegradable Products Institute, and the Institute for Local Self-Reliance, helped lead the launch of the U.S. Composting Infrastructure Coalition (USCIC). USCIC brings together a diverse group of stakeholders from the U.S. organics recycling community, associations working on sustainable materials, and more, all dedicated to expanding compost infrastructure across the United States. Since its launch, USCIC has successfully elevated its profile through earned and digital media to become a leader in the waste management and sustainability communities.

We recognize creating change necessary to build a circular bioeconomy is a heavy lift, but one that can be achieved by working together. PBPC proudly joins these organizations and coalitions to advance our common vision of a sustainable future.

- Agriculture Energy Coalition
- American Sustainable Business Council
- Business Council for Sustainable Energy
- Biogenic CO2 Coalition
- Ellen MacArthur Foundation New Plastics Economy Global Commitment
- U.S. Plastics Pact

2022 and Beyond

In 2022, PBPC looks forward to expanding our reach to more members and stakeholders, while continuing to advocate for policies that make a difference to the plant-based industry.

In 2022, we plan to:

- **Execute our first-ever PBPC conference**, creating an event that meets the unique needs of our membership while convening industry, policy experts, and other stakeholders to discuss the next generation of plant-based innovations.
- **Advance bioeconomy priorities in the next Farm Bill**, including advocating for a more modernized BioPreferred program, standardizing terminology in the biobased space, and expanding composting infrastructure nationwide.
- **Expand our bioplastics advocacy efforts**, helping educate policymakers and government officials on the benefits of bioplastics and creating economic opportunities for their increased development.
- **Support incentives for plant-based products** to encourage research, manufacturing, production, and adoption of plant-based products across the value chain.
- **Continue to raise awareness of plant-based products and their many benefits**, helping create a more sustainable world with green economic opportunities for all.
- **Advocate for updated and appropriate lifecycle analysis models** that capture the greenhouse gas benefits of plant-based materials over existing alternatives.



