

2022 Annual Report

PBPC 
Plant Based
Products Council





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
Executive Director

Allison Cooke
Vice President of Food Policy

Jacqueline Boggess
Director of Communications

Robin Bowen
Senior Vice President of External Affairs

Michael Anderson
Vice President of Economics

Jamaica Gayle
Senior Manager of Sustainability

Eamon Monahan
Vice President of Environmental Affairs

Keniece Barbee
Director of Board and Member Services

Kent Roberson
Senior Manager of Government Relations

PBPC Board Members

Justine Li
Chair, Archer Daniels Midland Company

Chris Cuddy
Archer Daniels Midland Company

Sarah Jelken
Cargill

Michael J. Wagner
Cargill

John Bode
Corn Refiners Association, Roquette Proxy

Daniel Sasu
Vice-Chair, Ingredion, Incorporated

Ian Jacobson
Novolex/Eco-Products

Angela Eads
Grain Processing Corporation

Alex Buck
Iowa Corn Promotion Board

Doug Kunnemann
NatureWorks

Chris Guild
Treasurer, Primient

Phil Rozenski
Novolex/Eco-Products

Frankie Schuster
Smile Beverage Werks, PBC

Advisory Board

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Integrated Bioprocessing Research
Laboratory (IBRL), University of Illinois,
Urbana-Champaign

Olga Kachook
GreenBlue

Nick Lapis
Californians Against Waste

Ramani Narayan
Department of Chemical Engineering and
Materials Science, Michigan State University

Brent Shanks
Iowa State University

Carolyn Weis
International Conservation Caucus
Foundation

Ron Buckhalt
Retired from USDA BioPreferred Program

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

Welcome Letter

With another year behind us, I look back with pride and excitement for PBPC's work and achievements throughout 2022 to drive the growth of the plant-based products industry and achieve a more circular economy.

In 2022, PBPC further solidified its reputation as the go-to resource for policymakers and industry leaders and played a key role in advocating for plant-based products and American agriculture. We maintained close partnerships with leaders on Capitol Hill and participated in White House Listening Sessions related to President Biden's Executive Order on Advancing Biotechnology and Biomanufacturing Innovation for a Sustainable, Safe, and Secure American Bioeconomy. Early in the year, PBPC hosted its first-ever salon dinner at the National Press Club, convening Hill and Administration staff, media influencers, PBPC's Board of Directors, and other industry leaders to discuss the state of the bioeconomy and what lies ahead. Thanks in part to PBPC's efforts, biobased products are receiving unprecedented attention from federal policy leaders.

PBPC's work extends far beyond Washington, D.C. Throughout 2022, we increased corporate and consumer awareness of plant-based products. We launched our PBPC Speaker Series, bringing expert insights straight to stakeholders and providing resources for brands looking to improve the circularity of their business models. As Executive Director of PBPC, I also joined the Fast Company Executive Board to convene with business leaders and share our industry's story and opportunities – I published my first column breaking down the business paths to circularity and have my next column in the works.

As always, our members played a key role in PBPC's success. Regardless of size or location, each PBPC member brings a unique and important perspective to our organization and drives us toward a more united mission. Our members provide forward-looking feedback that puts into practice our values of supporting industry-wide collaboration and growth.

Our milestone 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. PBPC was thrilled to welcome two new members to our team last year. The additions of Jacqueline Boggess, Director of Communications, and Jamaica Gayle, Senior Manager of Sustainability, have allowed us to improve our messaging and outreach strategies to drive momentum behind our members and our advocacy efforts.

While 2022 was a year of growth and achievement, there's still important work to be done in 2023. The plant-based products industry holds the potential to change our economy, our society, and our planet for the better. I invite you to take a moment to review and celebrate PBPC's 2022 milestones and join us in 2023 as we continue to advocate for a more sustainable, plant-based future.

Thank you,

Jessica Bowman
PBPC Executive Director





PBPC Membership

PBPC's membership is represented across the value chain and has the shared commitment of advancing the bioeconomy. Our members are large and small, urban and rural, established and new. They include suppliers of renewable feedstocks, renewable chemical companies, bioplastic resin manufacturers, packaging converters, and consumer-facing brands. All members are dedicated to PBPC's mission of promoting the expanded use of plant-based products.

PBPC follows a paid membership model to provide benefits that assist members, such as updates on the latest policy news, communications with member audiences, valuable education 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 bring together the following organizations and individuals for collaborative advocacy through PBPC membership:

- ADM
- Agri-Tech Producers, LLC*
- Allen Field Co.*
- Cargill
- Danimer Scientific
- Delta Agriculture
- Earth Brands*
- Eco-Products, PBC
- Erthos inc.*
- Evanesce Inc.*
- Footprint LLC
- Foresight USA*
- Genpak LLC
- Grain Processing Corporation
- Green Dot Bioplastics
- Ingredion
- Interfacial Consultants LLC*
- Iowa Corn Promotion Board
- Loliware
- National Corn Growers Association
- NatureWorks
- Next Wave Energy Partners, LP*
- Novamont North America Inc.
- P2 Science
- PepsiCo
- PlantSwitch
- Primient
- PSI
- Roquette
- Rosiro Group BV
- SmartSolve
- Smile Compostable Solutions
- Sway*
- Virent, Inc.

* = 2022 new member



Advocacy + Policy Accomplishments

PBPC provides its members with an influential voice in Washington, D.C. and beyond. The efforts of our advocacy and government relations team have led to several important policy milestones that help spur innovation, research, and growth of the plant-based products industry. Some of our most meaningful accomplishments include:

Advancing Biotechnology and Biomanufacturing

In September, the Biden Administration announced a new Executive Order (EO) on Advancing Biotechnology and Biomanufacturing Innovation for a Sustainable, Safe, and Secure American Bioeconomy outlining a “whole-of-government” approach to advancing the U.S. bioeconomy. The EO reflected many of PBPC’s priorities, demonstrating the impact of our outreach to the Administration.

PBPC’s Executive Director was invited to participate in a White House Listening Session focused on the EO where she highlighted opportunities to expand the plant-based products industry, including the need for scale-up infrastructure, NAICS codes, harmonized bioeconomy terminology, data to demonstrate product benefits, incentives to promote the manufacture and adoption of plant-based products, and a modernized USDA BioPreferred Program.

Bringing Plant-Based Products to the International Stage

PBPC joined the U.N. Climate Change Conference of the Parties (COP27) to elevate the role plant-based products and a circular economy can play in addressing climate change. From Nov. 6-18, in Sharm el Sheikh, Egypt, world leaders convened to take action towards the climate goals of the Paris Agreement and the U.N. Framework Convention on Climate Change. PBPC partnered with allied organizations, including the Business Council for Sustainable Energy (BCSE), to host an exhibit and side event to bring PBPC’s message to this international community. PBPC Board Member, CRA President and CEO John Bode, participated in an in-person discussion on Integrating Across Sectors: Business Leaders in Energy, Buildings, & Circular Economy.

Advocating for Federal Bioeconomy Research

The U.S. Department of Commerce and Office of the U.S. Trade Representative routinely seek advice on trade policy matters from industry and private sector entities through Industry Trade Advisory Committees (ITAC). PBPC Vice President of Economics, Michael Anderson, was selected to serve on ITAC-3, focused on Chemicals, Pharmaceuticals, Health/Science Products and Services for a four-year term commencing in 2022. In his capacity as a cleared advisor, Michael will represent the plant-based products industry and provide policymakers with advice on trade barriers, key objectives, and

bargaining positions for multilateral, bilateral, and regional trade negotiations. The selection to ITAC gives PBPC a seat at the table with government leaders and raises the visibility of PBPC and the bioeconomy.

Convening Bioproduct Thought Leaders

In May of 2022, PBPC convened a cross-section of leaders in the industry, government, and media spaces to discuss the state of the agricultural bioeconomy, along with challenges and opportunities to help the plant-based products industry reach its fullest potential. Attendees shared perspectives in an intimate setting, with remarks provided by PBPC leaders, including Brad Rodgers, Vice President of Technology at Danimer Scientific, and Dr. Justine Li, Vice President of Global Strategic Partnership, ADM Biosolutions and 2022 PBPC Board Chair.

Leading Domestic and International Bioplastic Policy Engagement

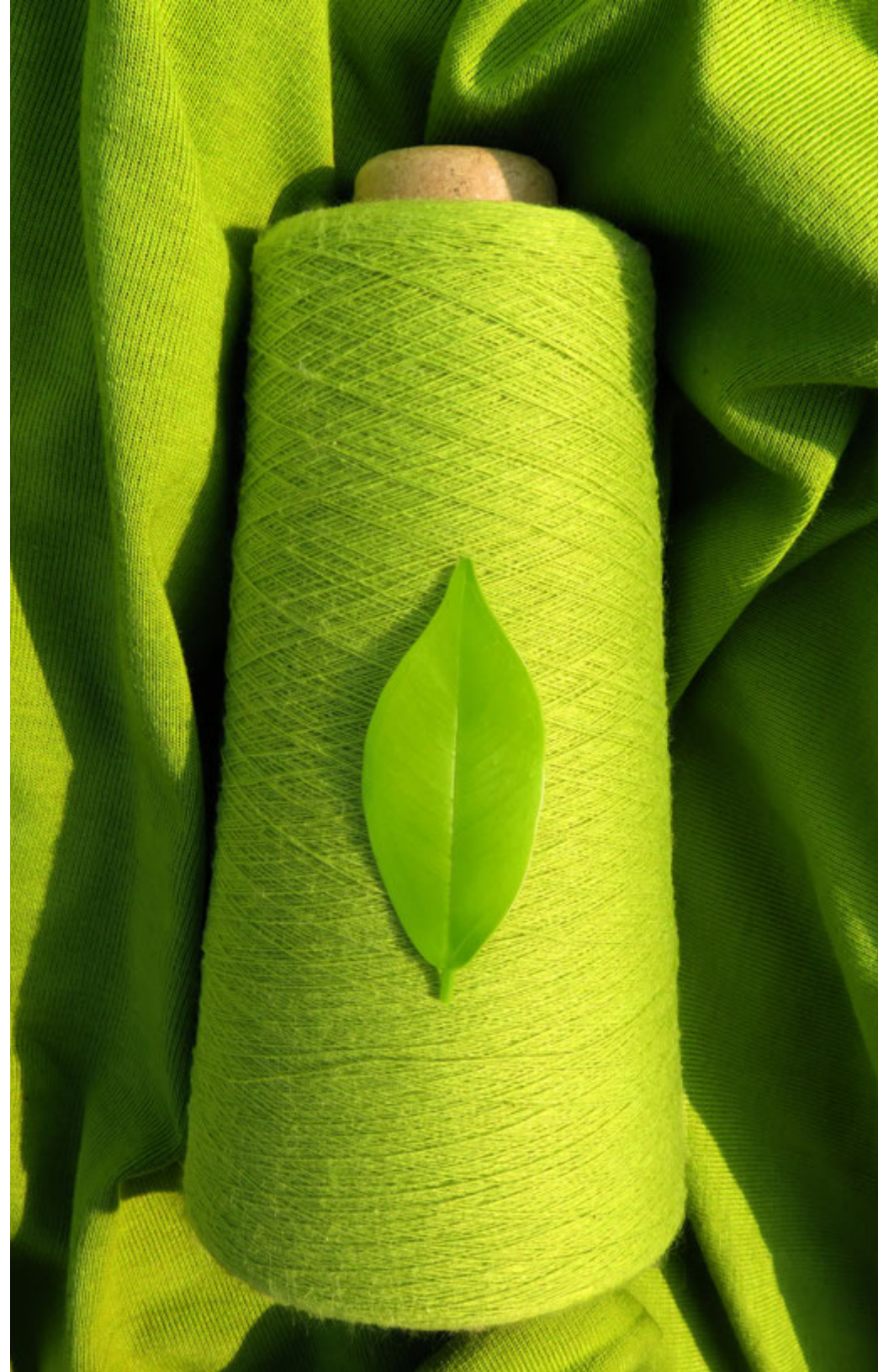
As the U.S. engaged in international and foreign regulations that could impact biobased plastics, PBPC served as an educational and policy resource. PBPC also represented the interests of biobased plastics within the U.S. Plastics Pact, a voluntary effort of major companies, NGOs, governments, and other stakeholders, to advance a more circular economy for plastics.

Supporting Plant-Based Product End-of-Life Pathways

PBPC's advocacy efforts helped advance The Recycling and Composting Accountability Act (RCAA) in the U.S. Senate. The bill, originally introduced by Senators Tom Carper (D-DE), Shelley Moore Capito (R-WV), and John Boozman (R-AR), passed the Senate and will improve recycling and composting options in communities across America.

Additionally, the U.S. Environmental Protection Agency (EPA) announced a \$100 million investment in its Solid Waste Infrastructure for Recycling (SWIFR) Grant Program for recycling infrastructure, education, and outreach that includes composting. PBPC, along with partners at the U.S. Composting Infrastructure Coalition, advocated for the inclusion of composting in the program.

In October, PBPC served as a partner on the Food Packaging Institute's CompostABLE Chicago Study, which shows how restaurants, commercial venues, and other food service locations can more successfully divert food scraps and lower customer confusion with the adoption of compostable packaging.



Representing the Plant-Based Products Industry: Jessica Bowman Selected as a 2022 Top Lobbyist

PBPC Executive Director, Jessica Bowman, for the second year in a row was recognized in The Hill's list of top lobbyists in 2022. Since she joined PBPC in 2019, Jessica has led the organization's efforts in advocating for the expanded use of renewable, plant-based materials to help guide the global economy toward a circular model. The list honors the grassroots activists, association leaders, and corporate lobbyists who leverage their expertise and connections to make a difference in the nation's capital each year.

Communications + Education Accomplishments

In 2022, PBPC began preparation for our first-ever conference, PBPC 2023: Circular Solutions, which will be held March 27-29 at the JW Marriott in Washington, D.C. During the conference, attendees will hear from and network with industry leaders, policymakers, brands, and experts through panels, keynotes, networking sessions, and more.

PBPC Speaker Series

PBPC kicked off our new Speaker Series in October 2022, bringing together leaders, experts, and visionaries to explore, discuss, and advance this emerging industry. The series will address topics such as critical environmental imperatives, innovative solutions, economic opportunities, and more. The first event explored the commercialization of bioproducts and how the industry brings innovations from idea to market. Watch the recording here to learn about insights, challenges, and solutions facing the industry today or read a breakdown of the discussion's highlights in our blog here. With a follow-up event in December, PBPC met with leaders from some of the industry's most recognizable brands to discuss actionable steps that consumer-facing companies can take to incorporate plant-based materials into their products and packaging. The Speaker Series will continue in 2023.

Product Application Series

PBPC developed a series of GIFs and interactive imagery to educate consumers and other stakeholders on a wide variety of bioproducts and their origins and benefits. We amplified these graphics on our social media and website to encourage consumer interaction with different bioproducts and spark external engagement with the bioeconomy.

Setting the Record Straight Blog

Continuing throughout 2022, our Setting the Record Straight blog answered some of the most burning questions about plant-based products. Published blog posts addressed questions about whether plant-based products impact our ability to feed a growing population, how plant-based products slow the impacts of climate change, the market reach of the plant-based products industry, and more.

Plant-Based Leaders Blog

It is PBPC's privilege to feature our members' innovative work on our website, in our newsletters, and on our social media. This year, our Plant-Based Leaders blog featured the achievements of member companies and members of our Advisory Board including the Iowa Corn Promotion Board, P2 Science, Inc., PlantSwitch, Sway, and Brent H. Shanks of the Center for Biorenewable Chemicals (CBiRC) at Iowa State University.

PBPC 2022 Media Placements

Throughout 2022, Jessica Bowman, PBPC's Executive Director, promoted the advancement of the bioeconomy in articles published across multiple media outlets. In January, Jessica penned an article for Waste Dive calling for stronger investment in composting infrastructure to accommodate the growth of compostable products. Jessica also published her first column as a member of the Fast Company Executive Board. In her Fast Company article, she provided actionable advice to help business leaders start closing the loop. Jessica outlined the upstream thinking and benefits of designing for circularity, leveraging case studies from PBPC member Virent, Inc.'s partnership with Coca-Cola and PBPC member Footprint's partnership with Procter & Gamble brand Gillette.

National Ag Day and Ag on the Mall

In March, PBPC joined leading agricultural and sustainability organizations for the Association of Equipment Manufacturers' Celebration of Modern Agriculture on the National Mall. Exhibitors displayed modern equipment and technology to demonstrate how innovation enables sustainability in the agriculture industry. PBPC's exhibit aimed to educate consumers on the production process of plant-based products, their many environmental benefits, and how they contribute to a more circular economy. PBPC also showcased goods from member organizations to provide examples of plant-based products in the real world. PBPC Executive Director Jessica Bowman shared these insights and innovations with reporters from local and national broadcast stations during the event's virtual media tour.



Speaking Opportunities

PBPC's Executive Director Jessica Bowman spoke at the National Association of State Departments of Agriculture (NASDA)'s Winter Policy Conference. At the event, Jessica shared the role bioproducts play in advancing rural development and providing environmental benefits, as well as how continued industry growth, corporate sustainability efforts, and consumer demand for sustainable products have helped this sector grow. She also discussed opportunities to promote bioproducts and their role in developing a circular bioeconomy.

Additionally, Jessica joined the Advanced Bioeconomy Leadership Conference (ABLC) Bioeconomy Policy Forum, sharing insights on the policy needed to ensure plant-based products play an increasing role in creating a more circular bioeconomy.

PBPC's VP of Environmental Affairs, Eamon Monahan, presented at the Plastic Waste Free World Conference & Expo in Atlanta where he discussed the role of plant-based packaging in a circular economy, the environmental and climate benefits of these materials, and opportunities to accelerate the transition to these alternatives.

Consumer Research

Focusing on consumer attitudes toward plant-based products, the biobased industry, and general perceptions on sustainability, PBPC's 2022 consumer research provided a greater understanding of the potential of the plant-based products industry. By surveying a representative sample of Americans, PBPC uncovered new information on consumer attitudes toward plant-based products, the biobased industry, and perceptions on sustainability as a whole. Notably, after learning about the role of farmers and the agriculture industry in making products and materials from plants, 69% of consumers said they feel more favorable towards farmers and those in the industry.

Participation in Bioplastics Week

In September, PBPC participated in the eighth annual Bioplastics Week. Partnering with the Plastics Industry Association, the Biodegradable Products Institute, Sustainable Packaging Coalition, European Bioplastics, and USDA's BioPreferred Program, PBPC shared our own educational materials on the ways our members are leveraging bioplastics and their many applications.





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