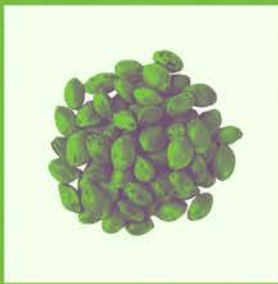




# Annual Report

Plant Based  
Products Council  
2024



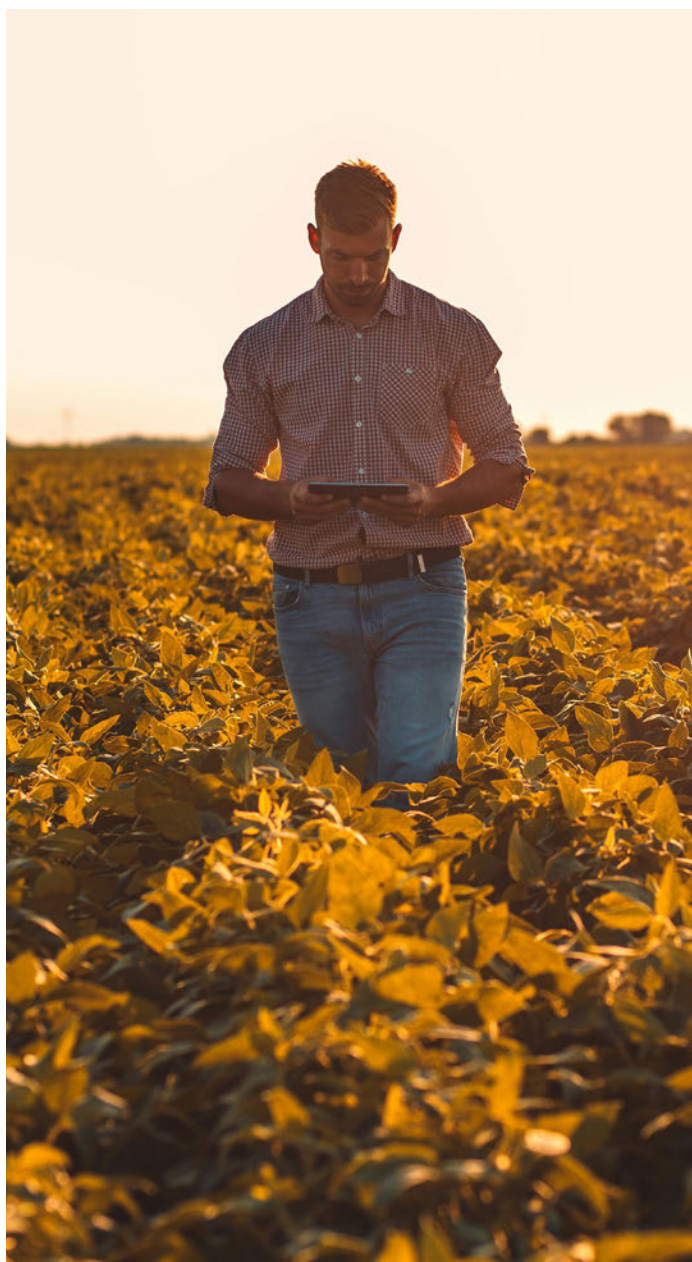




# Industry Statement

PBPC is an association of like-minded organizations advocating for a shift toward a more circular bioeconomy through the greater adoption of renewable, plant-based materials supported by appropriate end-of-life infrastructure.

We educate stakeholders, support growers, and champion programs and policies that will improve the value chain and support the growth of the plant-based products industry, helping to harness its economic potential to deliver a more sustainable future.



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# Welcome Letter



Agriculture and biomanufacturing are shaped by a sense of opportunity and a focus on the future, including changes in consumer demand, advances in innovation, and a shift in policy priorities. These factors continue to inform the landscape for plant-based products, materials, and chemicals.

In 2024, the Plant Based Products Council observed its 5th anniversary and highlighted the role that ag-based bioproducts play in America's economic success and the future of rural communities. The year brought exciting opportunities for increased awareness of the plant-based products industry, but also highlighted the need for a heightened understanding of the impact our sector can have on rural economic development and national security.

Every day, PBPC members bring innovation to the marketplace and work to satisfy consumer demand for more plant-based products, a point illustrated by our annual consumer research. Tools like the PBPC Speaker Series and Plant Based Leaders Blog helped highlight our members' expertise and innovation as well as offer perspectives across the value chain. What's more, hosting our conference in the nation's heartland brought the impact to rural communities into the spotlight.

On the policy front, PBPC built on its role as a leading voice for plant-based products and advanced legislative priorities with bipartisan champions in the Farm Bill debates on Capitol Hill. The ag bioeconomy also received top-

tier recognition in a day-long event hosted at the U.S. Department of Agriculture. On the international stage, PBPC advocated with global plastics policymakers and highlighted the range of benefits across the plant-based products value chain during important conversations among government leaders, farmers, and industry partners at COP29 in Baku, Azerbaijan.

As 2024 came to a close, we gained a better understanding of the policy conversations that lie ahead. The election of President Donald Trump and Republican majorities in the U.S. House and Senate create opportunities for PBPC to engage with policymakers and share the innovation, consumer demand, economic development, and national security benefits from a growing domestic biomanufacturing sector.

Our successes in 2024 illustrate the valuable contributions of our committees, Board of Directors, partners, stakeholders, and our dedicated staff. The last five years have been marked by tireless PBPC efforts to drive policy certainty and consumer awareness for plant-based products. As we look toward the next five years and beyond, we can continue planning for a better and greener future.

Thank you,

James Glueck, Jr.  
PBPC Executive Director



# Staff & Leadership

## Staff

**James Glueck**  
Executive Director

**Robin J. Bowen**  
Senior Vice President, External Affairs

**Kristy Goodfellow**  
Vice President, Economics

**Shawna Newsome**  
Vice President, Food Policy

**Spencer Chase**  
Senior Director, Communications

**Jamaica Gayle**  
Senior Director, Sustainability and  
Environmental Affairs

**Keniece Barbee**  
Director, Board and Member Services

**Kent Roberson**  
Director, Government Relations

**Max Camateros-Mann**  
Manager, Sustainability

## Board

**Paul Bloom**  
Gevo

**John Bode**  
Corn Refiners Association (by Roquette proxy)

**Alex Buck**  
Iowa Corn Promotion Board

**Angie Eads**  
Grain Processing Corporation

**Chris Forgey**  
Archer Daniels Midland

**Chris Guild**  
Primient (Treasurer)

**Ian Jacobson**  
Eco-Products (Chair)

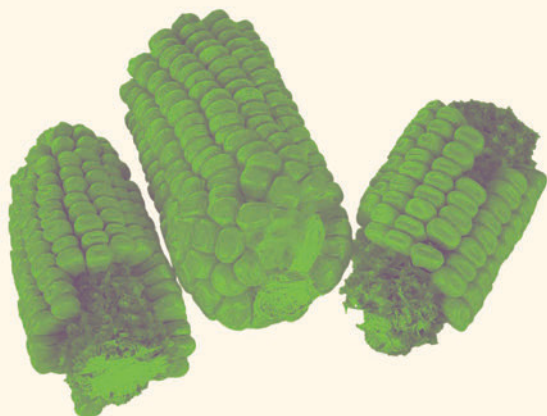
**Sarah Jelken**  
Cargill (Vice Chair)

**Shannon Pinc**  
NatureWorks

**Jason Robinson**  
Evoco

**Phil Rozenski**  
Novolex

**Daniel Sasu**  
Ingredion





## Advisory Board

**Ron Buckhalt**

Retired from USDA BioPreferred Program

**Beth Conerty**

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

**Glenda Humiston**

University of California, Department of  
Agriculture & Natural Resources

**Olga Kachook**

GreenBlue

**Nick Lapis**

Californians Against Waste

**Ramani Narayan**

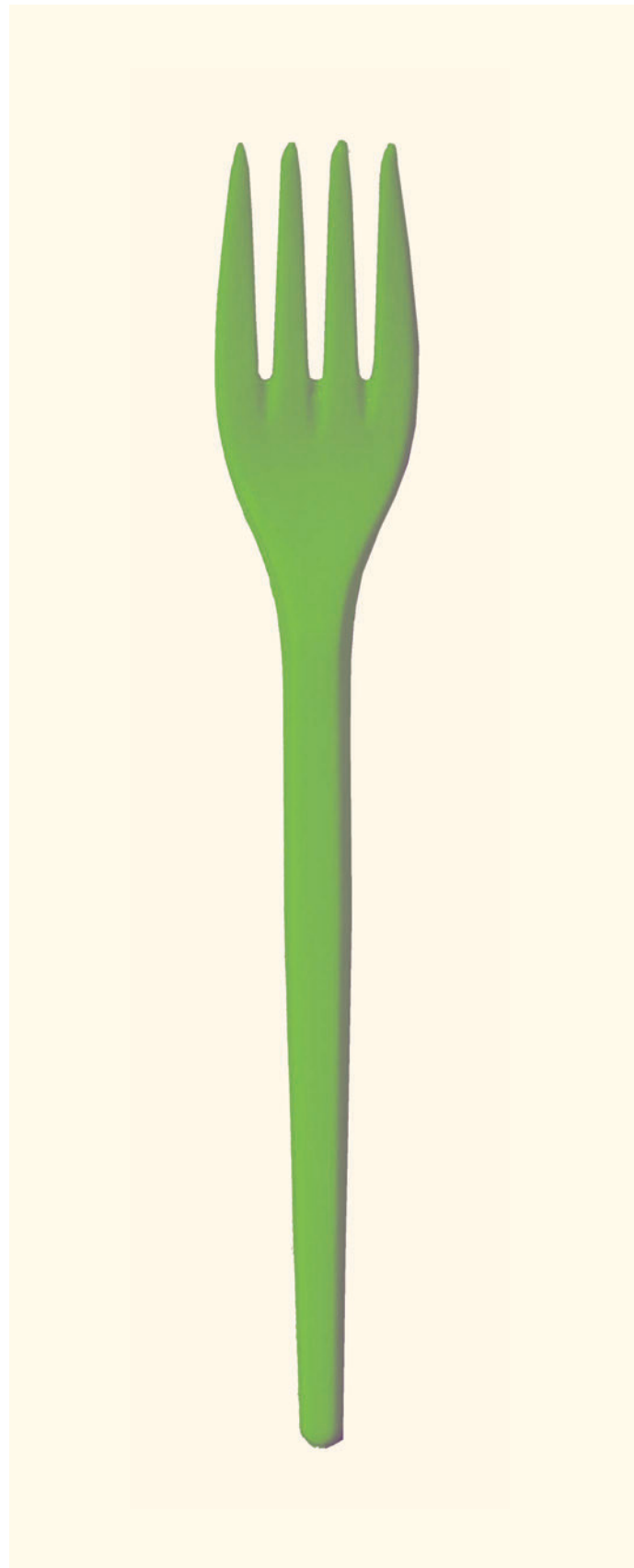
Department of Chemical Engineering and  
Materials Science, Michigan State University

**Brent Shanks**

Iowa State University

**Carolyn Weis**

International Conservation Caucus Foundation





# PBPC Membership

PBPC's membership spans the entire plant-based product supply chain, uniting companies and organizations of all sizes and backgrounds with a shared goal of promoting the expanded use of plant-based products. From renewable feedstock growers and suppliers to bioplastic resin manufacturers and consumer-facing brands, PBPC's members are driving the industry forward.

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 flexible membership tiers available, PBPC's structure meets the various needs of stakeholders in the plant-based industry.

We were pleased to welcome Citroniq Chemicals, Corumat Inc., Greenprint, and Repurpose Inc. as new members in 2024. We are excited to continue to collaborate with and grow our list of partners to promote the widespread use of plant-based products in the year ahead.

We're thrilled to bring together the following organizations and individuals for collaborative advocacy through PBPC membership:

- Archer Daniels Midland
- Agri-Tech Producers, LLC
- Allen Field Company Inc.
- Beta Analytic
- BioLogiQ, Inc.
- Bio Nebraska
- BioProducts, LLC
- Braskem
- CJ Biomaterials
- Cargill
- Citroniq Chemicals
- Corumat, Inc.
- Danimer Scientific
- Earth Brands
- Eco-Products, PBC
- Evanesce Inc.
- Evoco Ltd.
- Evolve Golf
- Foresight USA
- Footprint
- Genpak LLC
- Gevo
- Grain Processing Corporation
- Green Dot Bioplastics
- Greenprint
- Good Natured Products Inc.
- Ingredion
- Iowa Corn Promotion Board
- LOLIWARE INC.
- National Corn Growers Association
- Neste
- Next Wave Energy Partners, LP
- Novamont North America Inc.
- PlantSwitch
- Primient
- PSI
- Repurpose
- Roquette
- Rosiro Group BV





# Advocacy and Policy Accomplishments

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# Advocacy and Policy Accomplishments

PBPC provides its members with an influential voice on Capitol Hill and beyond. From activating grassroots campaigns across the country to advancing federal legislation, the impact of our award-winning advocacy and legislative affairs team has led to numerous policy accomplishments and catalyzed innovation, research, investment, and growth across the bioeconomy. Some of our most meaningful accomplishments include:

## Farm Bill Priorities

The year was marked by great success in building awareness for PBPC's Farm Bill priorities. The "marker bills" championed by PBPC – the *Biomanufacturing and Jobs Act* and the *Agricultural Biorefinery Innovation and Opportunity (Ag BIO) Act* – garnered bipartisan cosponsors in both the House and Senate. The bills include provisions that would provide nationally uniform terminology and a modernized BioPreferred Program at the U.S. Department of Agriculture, financial support to expand ag bioeconomy infrastructure, and language to establish North American Industry Classification System (NAICS) codes for biobased product manufacturing. The House Farm Bill text addressed many of these priorities. During the House Agriculture Committee markup in May, several lawmakers spoke in support of the ag bioeconomy, demonstrating their willingness to work on a bipartisan basis to achieve PBPC's policy priorities.

On top of the support demonstrated during the House Agriculture Committee process, legislative frameworks offered by both

Republicans and Democrats in the Senate included language based on PBPC's Farm Bill priorities, underscoring the bipartisan, bicameral support for the American ag bioeconomy on Capitol Hill.

The Farm Bill was not completed by the end of 2024, so PBPC will be working with legislative champions to continue to advance the industry's priorities in the new Congress.

## Advancing Key Ag Legislation on Capitol Hill

Throughout 2024, PBPC worked to raise awareness of key ag bioeconomy issues and garner support among lawmakers and the general public for the *Biomanufacturing and Jobs Act* and the *Ag BIO Act*.

The *Biomanufacturing and Jobs Act* aims to meet growing private and public sector demand in the bioproducts marketplace and enhance USDA's longstanding BioPreferred Program. With increased focus and investment, BioPreferred can benefit America's heartland while contributing to a more circular economy, fortifying the country's position as a global leader in plant-based solutions. PBPC's advocacy efforts also played a pivotal role in building bipartisan congressional support for providing nationally uniform terminology for biobased products across the value chain. The bill also directs federal agencies to finalize distinct North American Industrial Classification System (NAICS) codes to help clearly demonstrate the growth of the industry to policymakers and investors.

The *Ag BIO Act* reestablishes a grant program for the development of pilot and demonstration scale biorefineries in the U.S. within USDA's existing Biorefinery, Renewable Chemical, and Biobased Products Manufacturing Assistance Program authority. These investments are expected to stimulate further research and development, foster sustainable innovation, and introduce new bioproducts to the market. This critical infrastructure will enable American entrepreneurs to grow operations domestically, enhancing U.S. competitiveness in the global biomanufacturing marketplace.

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*With increased investment, USDA's BioPreferred program can fortify the U.S. as a global leader in plant-based solutions.*

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## Giving the Industry a Voice in Federal Rulemaking

PBPC takes a leadership role in plant-based product advocacy, pursuing all options to ensure sound, sensible policy shapes the future of the industry. In addition to the organization's work on important legislation, PBPC also utilizes opportunities to offer thoughts on regulatory efforts, primarily at the federal level. In 2024, that work included offering comments on the implementation of changes to the U.S. Department of Agriculture's Biobased Products Program, EPA's labeling policy, Department of Energy's strategy for sustainable products and materials, perspective on domestic agriculture feedstocks utilized in biobased product production, and state-level issues such as the California regulation to begin the transition to more renewable packaging and single-use food ware products.

## Building Awareness and Demand

PBPC partners with like-minded stakeholders to help grow demand for the products our members produce. PBPC was instrumental in many celebrations of the ag bioeconomy in 2024. The organization partnered with other industry champions to celebrate National Biobased Products Day on March 8, 2024. PBPC worked to highlight the sector on social media and through stakeholder engagement, including preparing a social media toolkit for use by PBPC members, elected officials, and value chain partners. The USDA BioPreferred program was created to increase the adoption of biobased products. Throughout 2024, PBPC actively highlighted and supported the enhancement of the two-decade-old USDA program, which is dedicated to promoting the adoption of biobased products through legislative advocacy, industry education, and robust grassroots efforts.



## Leading Domestic Policy Engagement and Thought Leadership

PBPC Executive Director James Glueck spoke at several events about the promise of the ag bioeconomy and plant-based products, including the USDA Agricultural Outlook Forum, Agri-Pulse Ag and Food Policy Summit, and the inaugural Bio Innovations Midwest Summit. PBPC Senior Director of Sustainability & Environmental Affairs Jamaica Gayle participated in events hosted in New York City for Climate Week 2024. PBPC staff also participated in the 2024 Commodity Classic in Houston as well as the BPI Summit in Berkeley, California.

## Representing the Plant-Based Products Industry on the Global Stage

Throughout 2024, PBPC members and staff championed the global impact of plant-based products in diverse forums and on prominent stages around the world. A United Nations process to reduce the production and utilization of single-use plastics – the Intergovernmental Negotiating Committee on Plastic Pollution – presented valuable opportunities to share the story of bioplastics. PBPC staff and members seized on that opportunity to educate policymakers from the U.S. and other countries. The negotiations were unable to produce a treaty to address the issue, and PBPC plans to remain engaged in the conversation in 2025.

PBPC joined the UN Climate Change Conference of the Parties in 2024 (COP29) to highlight the role of the ag bioeconomy in addressing the future of global climate policy. PBPC partnered with like-minded organizations,

including the Biotechnology Innovation Organization, Corn Refiners Association, CropLife Brazil, Inter-American Institute for Cooperation on Agriculture, International Council for Sustainable Energy, International Fresh Produce Association, and the Alliance to Save Energy to convene conversations across the value chain in Baku, Azerbaijan, featuring PBPC Executive Director James Glueck and Senior Director of Sustainability & Environmental Affairs Jamaica Gayle. The event once again featured a day celebrating the contributions of agriculture, and PBPC shared information highlighting the critical importance of plant-based products on the global stage in a pavilion dedicated to food and agriculture throughout the event.

## Celebrating the Potential of the Bioeconomy at the Federal Level

When PBPC Board members traveled to Washington in September 2024, it wasn't just to engage with policymakers on the organization's policy priorities. Several PBPC members also gathered at the USDA's Washington headquarters for an opportunity to participate in the first stakeholder dialogue about how the federal government can work to shape the future of bioplastics.

USDA hosted the National Policy Summit on the Future of Bioplastics, which featured commentary from PBPC members on the need for bioplastics research and development, federal support for the industry, and how farmers and consumers can benefit from the growth of the bioeconomy. PBPC partnered with aligned trade associations in hosting a networking reception for summit participants to foster relationships and facilitate additional idea exchange.

## PBPC's Recognition of Leadership

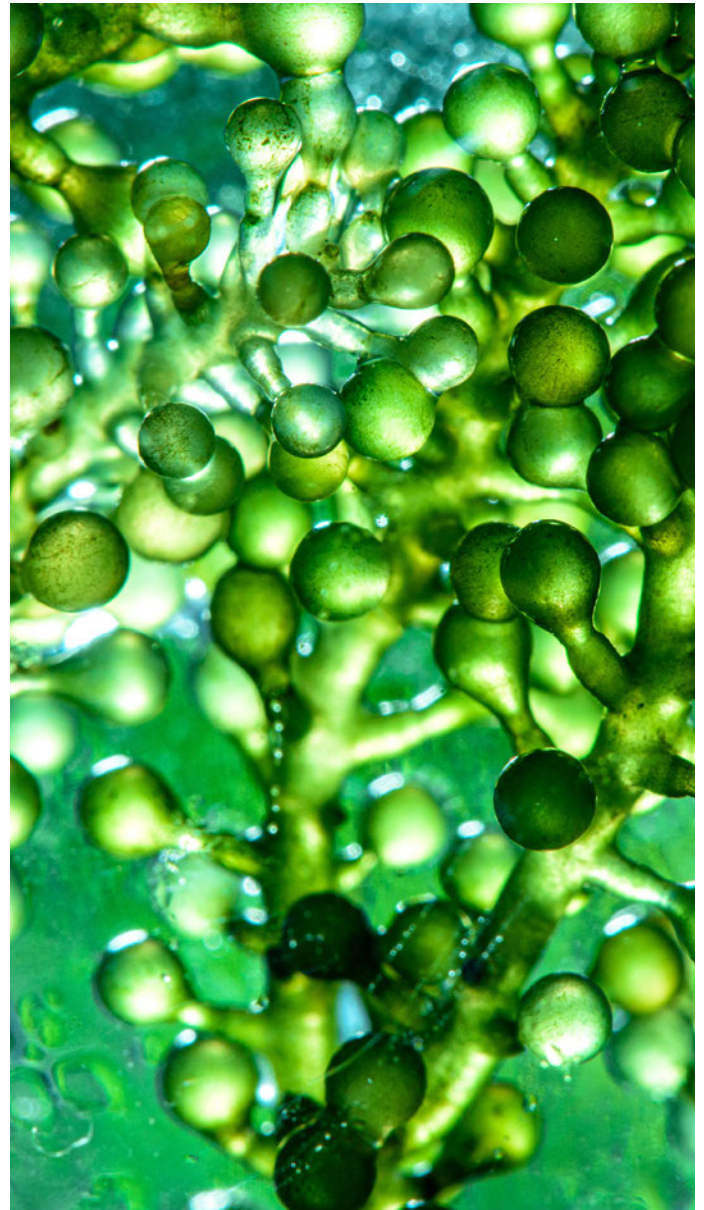
Several members of the PBPC team received well-deserved recognition for their impactful contributions to the plant-based products landscape and their dedication to the shared mission of biobased solutions.

Jamaica Gayle, PBPC's Senior Director of Sustainability & Environmental Affairs, was labeled as the "Climate Hero of the Year" and the recipient of a Gold Stevie Award by the American Business Association. The recognition was offered for Gayle's lifecycle analysis work, giving PBPC recognition for its comprehensive approach to sustainability and feedstock utilization.

PBPC was also a sponsor of the 2024 Feeding the Economy report along with 31 other food and agriculture organizations. The report explores the economic impact of the food and agriculture industry, including the critical agricultural manufacturing jobs offered by PBPC members throughout rural America. The 2024 report received numerous accolades, including a PR News Platinum Award and high-level recognition from the League of American Communications Professionals. LACP recognized the 2024 report, which it ranked the sixth-best report in the world, with a Platinum Award and a special award for technical achievement.

PBPC Executive Director James Glueck joined Penn State University's BioRenewable Systems Advisory Board in the Department of Agricultural and Biological Engineering. The committee provides input on strategic direction and industry needs to help shape Penn State's BioRenewable Systems undergraduate and graduate programs.

Also in 2024, Robin Bowen, PBPC's Senior Vice President of External Affairs, was invited to join the board of directors for the Airable Research Lab, which conducts research to develop new products utilizing soy-based feedstocks. Airable Research Lab is a business line of the Ohio Soybean Council and five other qualified state soybean boards.



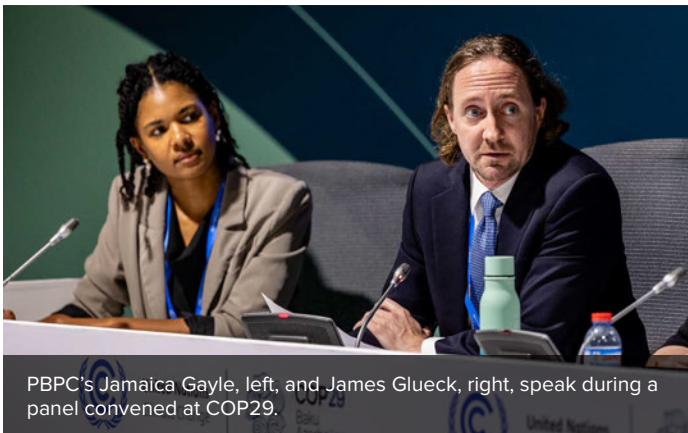




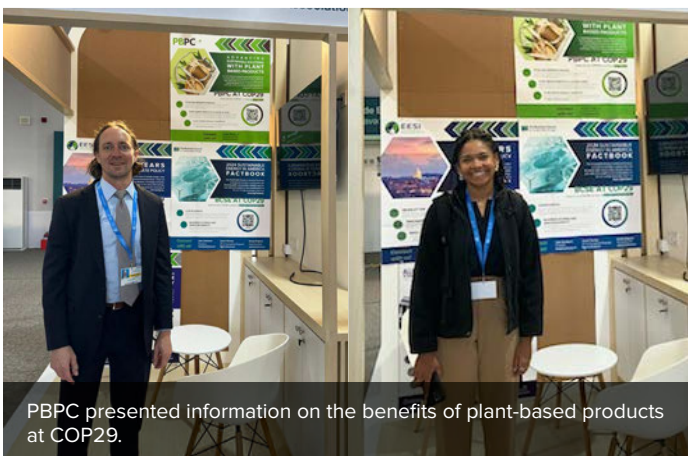
PBPC board members and staff meet with House Agriculture Committee Chair Glenn "GT" Thompson (R-PA).



PBPC Board members visited with staff in the office of Sen. Amy Klobuchar (D-MN).



PBPC's Jamaica Gayle, left, and James Glueck, right, speak during a panel convened at COP29.



PBPC presented information on the benefits of plant-based products at COP29.



Jamaica Gayle was named the "Climate Hero of the Year" and a recipient of a Gold Stevie Award from the American Business Association.



PBPC board members Shannon Pinc of NatureWorks and Chris Forgey of ADM both spoke on a panel at the USDA National Policy Summit for the Future of Bioplastics.





# Communications, Signature Events, and Education Accomplishments

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# Communications, Signature Events, and Education Accomplishments

## Circular Solutions Conference

Ag bioeconomy supporters gathered April 8-10 in Omaha, Nebraska, for *PBPC 2024: Circular Solutions*, a three-day event focused on the future of the latest innovations, business models, and policies shaping the lifecycle of plant-based products and advancing a circular economy. The event kicked off with a tour of the Cargill and NatureWorks facility near Blair, Nebraska, as well as an opening reception at the Iowa farm of corn producer Larry Buss. Over the days that followed, attendees heard from speakers across the ag bioeconomy spectrum as well as government leaders like Nebraska Governor Jim Pillen, Nebraska Senators and Representatives, and Betsy Dirksen Londrigan, Administrator of USDA's Rural Business Cooperative Service.

The event was made possible through the generous support of BioLogiQ, BioNebraska, BioPreferred, Cargill, the Corn Refiners Association, Eco Products, Green Plains, Iowa Corn, the National Corn Growers Association, NatureWorks, Nebraska Corn, Primient, and Repurpose.



Circular Solutions kicked off with a welcome reception at Buss Farm. Before heading inside for refreshments, farmer and owner Larry Buss gave a tour.



Nebraska Governor Jim Pillen was a keynote speaker at PBPC's 2024 conference.

## PBPC Speaker Series

The PBPC Speaker Series continued to demonstrate premier thought leadership in 2024, convening industry leaders and experts to connect and discuss what is driving the plant-based products industry forward. Topics focused on the domestic and international policy environment facing the ag bioeconomy, specifically Farm Bill conversations and the COP29 conference.

During our June Speaker Series panel, House legislative leaders Reps. Mark Alford (R-MO) and Angie Craig (D-MN) joined us for a conversation with PBPC's Robin Bowen and Kent Roberson about the *Biomanufacturing and Jobs Act*, PBPC-supported legislation critical to the future of the ag bioeconomy.

In October, PBPC's Jamaica Gayle led a conversation giving participants an overview of the pending U.N. COP29 conference and what could be expected from the event. Gayle was joined by USDA Foreign Agricultural Service Climate Advisor Olutayo Akingbe, Iowa farmer Ray Gaesser, and Braskem Sustainable Development Director Jorge Soto.

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*The PBPC Speaker Series continued to bring industry leaders and experts together to discuss topics including the Biomanufacturing and Jobs Act and the COP29 conference.*

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## PBPC in the Media

Throughout 2024, PBPC continued to engage with media outlets to inform the public about the benefits of plant-based products, advocate for imperative legislation and policies around the bioeconomy, and shape the narrative around key industry priorities. PBPC was featured in top national and trade outlets throughout the year, including the American Ag Network, Agri-Pulse, Brownfield Ag News, DTN, and more.

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*PBPC's Jamaica Gayle penned an op-ed for Agri-Pulse outlining the incredible potential of American agriculture to achieve climate goals.*

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In June, PBPC's Jamaica Gayle penned an op-ed for Agri-Pulse outlining the incredible potential of American agriculture to achieve climate goals, including working toward the twin goals of sustainability and productivity. The piece, "Agriculture's Climate Heroics," also touched on technological achievements like plant breeding and genetics as well as precision agriculture to make feedstock production more efficient.





## Consumer Research

As the industry continues to strategically shape its advocacy and education initiatives, gaining an evidence-based understanding of public attitudes and trends in sustainable shopping is a foundational element in increasing awareness of plant-based products. PBPC's annual consumer research report plays a pivotal role in this effort by surveying a representative sample of Americans to analyze consumer attitudes toward plant-based products, the biobased industry, and perceptions of sustainability overall.

The findings from PBPC's 2024 consumer research report reaffirmed our confidence in plant-based products as a demand-driven and expanding industry. Notably, almost 85% of consumers expressed favorability toward plant-based products and nearly 90% of those surveyed say they are interested in products and materials made from plants. Meanwhile, consumer familiarity with plant-based products has increased by 20% since 2020. These year-after-year results demonstrate strong consumer demand and interest in plant-based products, offering a valuable educational tool for policymakers, business leaders, and industry stakeholders about the value of the ag bioeconomy.

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*The 2024 consumer research report reaffirmed our confidence in plant-based products as a demand-driven and expanding industry.*

---

# 85%

of consumers expressed favorability toward plant-based products.

---

# 90%

of those surveyed say they are interested in products made from plants.

---

# +20%

increase in consumer familiarity with plant-based products since 2020.



## Bioplastics Week

PBPC was proud to participate in the ninth annual Bioplastics Week, held from Oct. 7-11, 2024. Bioplastics Week highlights the benefits of bioplastics and drives digital conversations around the impacts and innovative developments of these renewable materials. PBPC Executive Director James Glueck penned a blog highlighting the consumer demand and economic and environmental benefits of bioplastics use across a wide array of product categories.

## Proactive Messaging

Throughout the calendar year, PBPC curated a series of engaging online content aimed at enlightening consumers about various bioproducts, their origins, and the associated benefits. We circulated these visuals across our social media platforms and website, fostering consumer interaction with diverse bioproducts and encouraging external engagement with the bioeconomy.

Moreover, PBPC remained dedicated to showcasing the innovative work of our members throughout the year. Across online platforms, newsletters, and social media, we highlighted the achievements of esteemed member companies and industry leaders. This year's features on our Plant-Based Leaders blog showcase the efforts of entities such as Repurpose, Roquette, CJ Biomaterials, Beta Analytic, Evoco, BioLogiQ, Bio Nebraska, Braskem, and Solinatra.



## Coalitions & Partnerships

PBPC strategically collaborates with a diverse range of like-minded coalitions and organizations to bolster our advocacy initiatives and work toward a more robust circular economy. Through these partnerships, PBPC and our allies engage with key audiences and stakeholders to champion legislative, regulatory, and economic policies that align with our shared mission of fostering a more sustainable global economy.

PBPC continued its involvement in several key coalitions throughout 2024, including the Agriculture Energy Coalition, Ag Bioeconomy Coalition, American Sustainable Business Council, Biogenic CO2 Coalition, Business Council for Sustainable Energy, Ellen MacArthur Foundation New Plastics Economy Global Commitment, Textile Exchange, U.S. Composting Infrastructure Coalition, and U.S. Plastics Pact.





# 2025 and Beyond

PBPC will dedicate attention to many opportunities to bolster the ag bioeconomy in 2025, including congressional debate on the future of farm policy through a new Farm Bill and consideration of tax legislation. A new Administration and new leadership in many congressional seats offer opportunities to educate policymakers on our policy priorities, including a PBPC Member Meeting planned for May 6-7, 2025, in Washington, DC. Staff will also focus on opportunities to grow demand for

plant-based products in the marketplace, and the organization's leaders plan to develop a new strategic plan to guide PBPC into the future. The work of PBPC, the organization's leaders, and our dedicated staff help to promote a strong, promising future for the plant-based products industry and the broader ag bioeconomy. Together, we can make America a global leader in biomanufacturing that drives economic success and growth in our rural communities.



