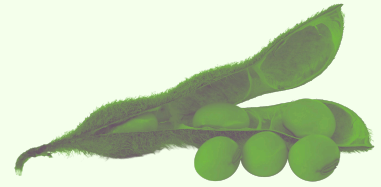




2025



Plant Based
Products Council

Annual Report

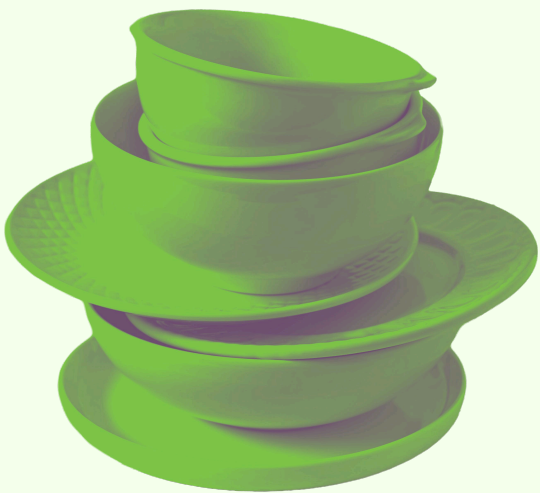


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Industry Statement

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, benefiting communities, enhancing competitiveness, and diversifying supply chains.



Executive Summary

The events of 2025 proved that the mission of the Plant Based Products Council, an organization dedicated to the future of the growing American ag bioeconomy, is increasingly vital. New Administration leadership and Members of Congress offered opportunities for engagement and advocacy throughout the year. PBPC delivered meaningful policy wins, strengthened member engagement, reaffirmed our strategic priorities and plans, and elevated the visibility of plant-based innovation across federal, industry, and global platforms.

A central achievement of the year was securing near-term certainty for USDA's BioPreferred Program following months of targeted advocacy with congressional leadership, USDA officials, and the Trump Administration.

PBPC also strengthened its national and global profile through major convenings and thought leadership. PBPC's first-ever Member Meeting and Capitol Hill Fly-In in May connected members with policymakers across 18 congressional offices and senior USDA officials, enhancing visibility of biobased manufacturing, the need for uniform biobased product terminology and data, as well as U.S. investment in supply-chain innovation and infrastructure.

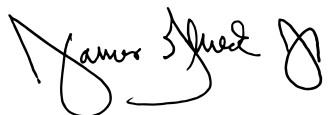
In July, a Speaker Series webinar highlighted the strategic role of biomanufacturing in U.S.

competitiveness and national security. PBPC staff were also sought-after speakers at events convened across the U.S. and around the world, further demonstrating the value industry leaders place in the organization's expertise.

PBPC's global leadership was highlighted by its presence at COP30, engagement in global plastic treaty negotiations, and participation in an India trade mission with the National Association of State Departments of Agriculture. Throughout the year, PBPC team members participated in multiple panels and policy discussions to spotlight U.S. innovation and the importance of scaling the ag bioeconomy.

Together, these accomplishments reflect an organization growing in influence, delivering tangible value to members, and shaping the future of plant-based products across policy, industry, and global arenas. It is a pleasure to work on behalf of PBPC's members on a daily basis, and I hope you find this report to be an illustration of the past, present, and future of the policy landscape that will shape the American ag bioeconomy.

Sincerely,



James Glueck, Jr.

PBPC's 2025 Accomplishments

Securing Certainty for the BioPreferred Program

Throughout 2025, PBPC led a high-impact advocacy campaign to secure both near-term and long-term certainty for USDA's BioPreferred Program—a cornerstone of the U.S. ag bioeconomy. Facing a government shutdown and stalled Farm Bill negotiations, PBPC's leadership was visible and effective: PBPC activated grassroots supporters and industry allies, preparing coalition letters and calls to action urging Congress to reauthorize and fund the program.

PBPC's policy team engaged directly with USDA, the Trump Administration, and bipartisan congressional leaders, emphasizing the program's critical role in supporting rural economies, driving innovation, and creating new markets for American farmers and manufacturers. This advocacy contributed to the extension of the BioPreferred Program's authority through September 2026 as part of the bill ending the government shutdown. While the extension was a positive step, PBPC continues to press for dedicated funding and program modernization, working with USDA as it reallocates resources to maintain operations.

PBPC's efforts ensured continued market access for biobased products, protected rural jobs, and kept the U.S. competitive as global investments in biomanufacturing grow.



Reintroduction of Key Legislation

The 119th Congress marked a pivotal moment for the U.S. ag bioeconomy with the bipartisan, bicameral reintroduction of two cornerstone PBPC-supported bills: the *Biomanufacturing and Jobs Act* and the *Agricultural Biorefinery Innovation and Opportunity (Ag BIO) Act*. Together, these bills form the policy backbone of PBPC's Farm Bill agenda and reflect a growing, bipartisan recognition of the bioeconomy's strategic importance for national security, rural competitiveness, and U.S. manufacturing leadership.

The *Biomanufacturing and Jobs Act* – led in the Senate by Sens. Joni Ernst (R-IA), Elissa Slotkin (D-MI), Amy Klobuchar (D-MN), and Pete Ricketts (R-NE), and in the House by Reps. Mark Alford (R-MO), Angie Craig (D-MN), Mark Messmer (R-IN), Kristen McDonald Rivet (D-MI), Brad Finstad (R-MN), Ashley Hinson (R-IA), James Baird (R-IN), and Mike Flood (R-NE) – modernizes USDA's longstanding BioPreferred Program, strengthens federal procurement of biobased products, establishes nationally uniform terminology, and directs USDA to conduct a comprehensive economic impact study of the biobased products industry.

The *Ag BIO Act* – championed by Sens. Amy Klobuchar (D-MN) and Jerry Moran (R-KS) and House sponsors Reps. Zach Nunn (R-IA), Nikki Budzinski (D-IL), and Sharice Davids (D-KS) – updates and expands USDA's Biorefinery, Renewable Chemical, and Biobased Product Manufacturing Assistance Program, creating a new cost-share grant program to build and retrofit pilot- and demonstration-scale biorefineries, critical infrastructure for scaling next-generation biomanufacturing.

These bills collectively support both sides of the commercialization pathway: creating market pull through BioPreferred modernization and uniform labeling and driving innovation push through biorefinery development and financing.

PBPC’s active policy engagement ensures these bills remain central to Farm Bill deliberations and the broader national conversation around the future of American biomanufacturing.



PBPC members and staff visited the offices of *Ag BIO Act* House champions Zach Nunn (R-IA) and Nikki Budzinski (D-IL) shortly after the bill was introduced in May 2025.

May Member Meeting & Capitol Hill Fly-In

PBPC’s May 2025 Member Meeting and Capitol Hill Fly-in in Washington, D.C., offered the organization’s members direct engagement with policymakers and industry leaders.

The event began with a tour of Veterans Compost, where members learned about composting infrastructure and its role in the circular bioeconomy. Attendees participated in sessions with key USDA and National Security Commission on Emerging Biotechnology (NSCEB) leadership, gaining insights into federal priorities and opportunities for the

sector. The agenda featured a fireside chat on the development of the largest Bio-MEG facility in the country, a panel on market opportunities across the plant-based value chain, and a strategic planning exercise to guide PBPC’s future priorities.

On Capitol Hill, PBPC members conducted meetings with 18 congressional offices across eight states, advocating for harmonized bioproduct terminology, modernization of the BioPreferred Program, and expanded support for biomanufacturing infrastructure.

The Member Meeting and Fly-In advanced PBPC’s policy agenda and strengthened member engagement, providing valuable networking opportunities, and reinforcing PBPC’s reputation as a leading advocate for the bioeconomy across the value chain.



PBPC members and staff visit with Rep. Mark Messmer (R-IN) during the Capitol Hill Fly-in.



PBPC Board Chair Sarah Jelkin addresses PBPC Member Meeting Attendees.



The PBPC Member Meeting included remarks from policymakers and panels from industry leaders about topics critical to the success of the ag bioeconomy.

Speaker Series Illuminates National Security Issues

PBPC was active in promoting the national security importance of the ag bioeconomy in 2025 as a bipartisan government report offered fresh rationale for the connection.

The July 2025 Speaker Series brought together industry and national security leaders to unpack the findings of the National Security Commission on Emerging Biotechnology (NSCEB) and their implications for the plant-based products sector. The event featured NSCEB Commissioner Dawn Meyerriecks and Eric Lee, Director of Business Development for Primient, with Executive Director James Glueck moderating.

Meyerriecks emphasized that biomanufacturing is projected to account for one-third of U.S. manufacturing output within a decade, reinforcing the strategic importance of domestic production for both economic and national security. She highlighted the risks of relying on foreign suppliers for critical biomanufacturing inputs and called for robust U.S. leadership in the sector.

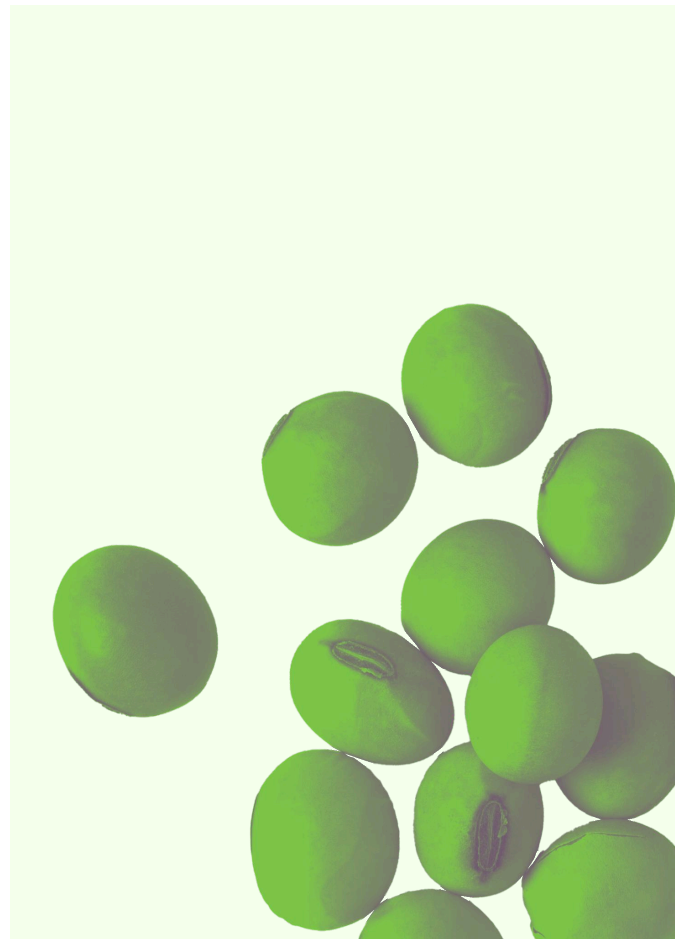
Lee spotlighted Primient's investments in fermentation-based manufacturing and the expansion of domestic capacity, including the portions of the iFAB Tech Hub in Decatur, Illinois, and a \$400 million co-location partnership with Sustainea in Lafayette, Indiana.

The event's focus on national security and supply chain resilience highlighted PBPC's advocacy for policies that support American innovation and rural economic opportunity. On Capitol Hill, the *Fiscal Year 2026 National Defense Authorization Act* included recommendations from the NSCEB report to focus national security resources on strengthening the U.S. biomanufacturing capacity. Continued engagement with the new

bipartisan House BIOTech Caucus will provide an opportunity for continued success and focus on U.S. leadership in the bioeconomy.



PBPC's James Glueck, NSCEB Commissions Dawn Meyerriecks, and Primient's Eric Lee discuss national security and the bioeconomy.



Consumer Research Illustrates America's Growing Demand for Plant-Based Products

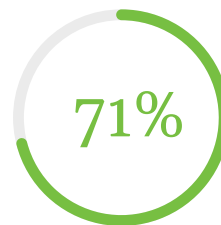
PBPC's 2025 Consumer Trends Research continued a six-year tradition of providing the industry's most comprehensive, data-driven view of how Americans perceive and use plant-based products. Conducted annually since 2020, the research has become a flagship asset for PBPC—informing advocacy, guiding member strategy, and shaping the broader policy narrative around the U.S. ag bioeconomy.

The findings paint a clear picture of an American consumer base that views plant-based products as a mainstream expectation, not a niche preference held among a minority of shoppers.

The findings show consumers recognize that plant-based products support U.S. agriculture, domestic manufacturing, and rural economies. PBPC's research demonstrates that Americans associate plant-based materials with new markets for farmers and opportunities for U.S.-made innovation.

This multi-year trend of rising familiarity, strong usage, and broad favorability shows a marketplace moving toward growth. As PBPC highlights the ag bioeconomy's role in U.S. competitiveness and rural prosperity, the Consumer Trends Research continues to demonstrate that Americans are open to renewable, plant-based materials and look to policymakers and companies to help guide the transition.

Plant-based products are a mainstream expectation among American consumers.



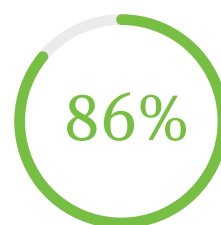
71% of consumers are familiar with plant-based products.



85% view plant-based products favorably.



68% of consumers report using plant-based products at least monthly, reaffirming that these materials have become a routine part of everyday life.



86% of consumers say they are likely to purchase or use plant-based products in the next three months, demonstrating strong demand even in an inflationary environment.

PBPC at COP30

PBPC's participation at COP30 in Belém, Brazil, represented an important opportunity to elevate biobased solutions on the global stage. For the first time, COP included the bioeconomy as a strategic objective of its official agenda, signaling growing recognition of its role in climate mitigation, economic development, and nature-based solutions.

PBPC spoke at four public-facing events and participated in private roundtables, working alongside key partners including the U.S. Grains and BioProducts Council, U.S. Farmers and Ranchers in Action, Farm Journal Foundation, Solutions from the Land, Protein PACT, the Business Council for Sustainable Energy, and member companies. PBPC's James Glueck and Jamaica Gayle participated in panels and discussions that highlighted how innovative, sustainable farming practices and biobased solutions reduce greenhouse gas emissions and drive rural economic growth. They stressed that scaling the ag bioeconomy requires strong policy foundations, expanded biomanufacturing capacity, and accelerated innovation.

COP30 marked a notable moment for agriculture, with the first-ever AgriZone elevating farming and biobased innovation as central components of global climate solutions. It reinforced that the ag bioeconomy is rapidly accelerating, and PBPC's participation helped highlight U.S. strengths and the growing role for plant-based solutions in global climate discussions.



PBPC's James Glueck and Jamaica Gayle led the organization's engagement at COP30, offering an opportunity to highlight PBPC member activities and discuss the American ag bioeconomy on a global stage.

PBPC On the Road

PBPC staff are sought-after speakers who bring key insights to discussions around the world. In 2025, many events featured PBPC members on the agenda, bolstering the organization's voice as the leader in ag bioeconomy policy. Here's a sample of the many forums where PBPC made an impact:



James Glueck joined PBPC members for a panel discussion on feedstock diversity at BioInnovations Midwest in Omaha, Nebraska.



Jamaica Gayle speaks at the International Conference of the Latin American Bioeconomy Network in Costa Rica, underscoring bipartisan support for the U.S. bioeconomy and the role of plant-based products in advancing resilient supply chains.



Sydney Van de Meulebroecke (second from left) spoke about the status of the global plastics pollution treaty and its implications for composting during a panel at the Biodegradable Products Institute's annual summit in Atlanta.



James Glueck (left) and Sydney Van de Meulebroecke (right) represented PBPC at INC-5.2 in Geneva, Switzerland, engaging in international discussions on plastic pollution and the role of renewable, plant-based materials.

PBPC staff also serve in advisory roles and as a resource for organizations across the plant-based products value chain. This includes EPA's Farm, Ranch, and Rural Communities Federal Advisory Committee, Airable Research Labs, Penn State's Biorenewable Systems, and the Council on Competitiveness's Bioeconomy Future Initiative. The team is always looking for ways to partner with state commodity organization leaders and like-minded stakeholders to advocate for policy priorities to help grow the agricultural bioeconomy.

PBPC Membership

PBPC's membership spans the plant-based product supply chain, bringing together companies and organizations 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 members are driving the industry forward.

We were pleased to welcome Bluestem Biosciences, Kemvera, and Sustainea Bioglycols as new members in 2025. 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:

Executive Membership

Archer Daniels Midland (ADM)
Cargill
Eco-Products, PBC
Grain Processing Corporation
Ingredion
Iowa Corn Promotion Board
Primient
Roquette

General Membership

Braskem
CJ Biomaterials
GEVO
National Corn Growers Association
NatureWorks
Novamont North America Inc.

General Membership, Start-Up/ Small Business

Allen Field Co.
Beta Analytic
BiologiQ, Inc.
Bluestem Biosciences, Inc.
Citroniq Chemicals
EVOCO
Kemvera
Next Wave Energy Partners
Repurpose Inc.
Sustainea Bioglycols

Supporter

Bio Nebraska
National Hemp Industrial Council
NC State University, College of Natural Resources



PBPC Staff



James Glueck
Executive Director



Spencer Chase
Senior Director, Communications



Keniece Barbee
Chief Operating Officer



Jamaica Gayle
Senior Director, Sustainability
and Environmental Affairs



Danielle Beck
Vice President, External Affairs



Kent Roberson
Senior Director, Government
Relations



Kristy Goodfellow
Vice President, Economics



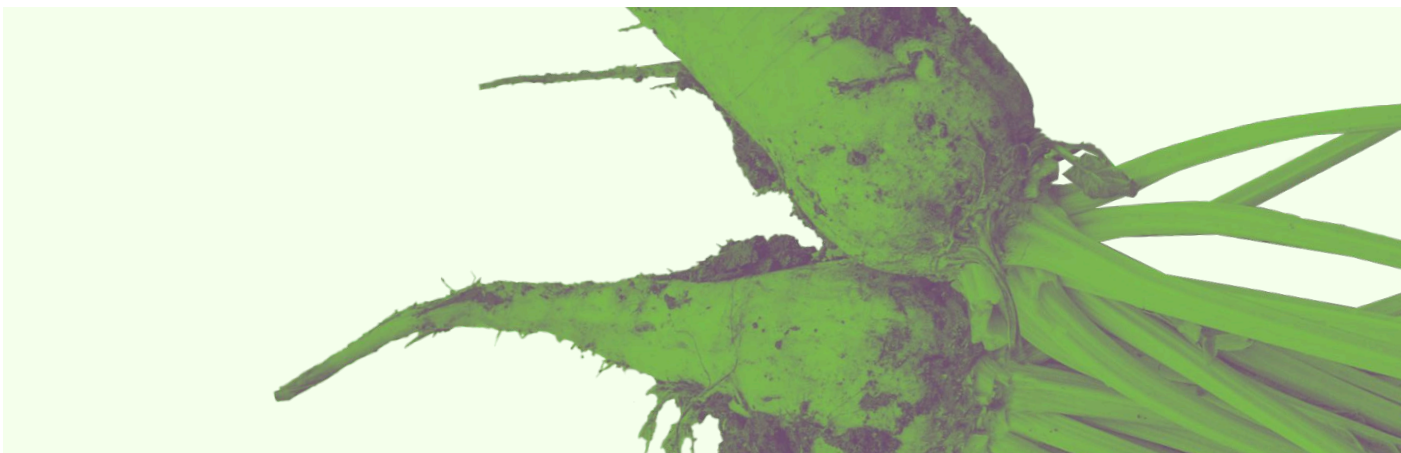
**Sydney Van de
Meulebroecke**
Manager, Bioproducts Policy



Shawna Newsome
Vice President, Food Policy



Ameya Khanapurkar
Coordinator, Projects and Policy



PBPC Board & Advisory Board

Board

Paul Bloom, Gevo

John Bode, Corn Refiners Association (by Roquette proxy)

Alex Buck, Iowa Corn Promotion Board (Vice Chair)

Angie Eads, Grain Processing Corporation

Chris Forgey, Archer Daniels Midland

Chris Guild, Primient (Treasurer)

Sarah Jelken, Cargill (Chair)

Shannon Pinc, NatureWorks

Jason Robinson, Evoco

Wendell Simonson, Eco-Products

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



