

2023

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**Annual  
Report**

The background of the slide is a close-up photograph of several green leaves. The leaves are arranged in a way that creates a sense of depth, with some in the foreground and others in the background. The veins of the leaves are clearly visible, creating a complex, organic pattern. The color of the leaves is a vibrant green, with some areas appearing slightly darker due to shadows. A white rectangular text box is centered on the slide, containing the main text.

**PBPC is an association of like-minded organizations that are 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.**

## STAFF

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**Keniece Barbee**

Director of Board and Member Services

**Jacqueline Boggess**

Director of Communications

**Robin Bowen**

Senior Vice President of External Affairs

**Max Camateros-Mann**

Manager of Sustainability

**Allison Cooke**

Vice President of Food Policy

**Jamaica Gayle**

Director of Sustainability  
and Environmental Affairs

**James Glueck**

Executive Director

**Kristy Goodfellow**

Vice President of Economics

**Kent Roberson**

Director of Government Relations

## PBPC BOARD MEMBERS

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**John Bode**

Corn Refiners Association, Roquette Proxy

**Alex Buck**

Iowa Corn Promotion Board

**Chris Cuddy**

Archer Daniels Midland Company

**Angela Eads**

Grain Processing Corporation

**Chris Guild**

Treasurer, Primient

**Ian Jacobson**

Novolex/Eco-Products

**Sarah Jelken**

Cargill

**Doug Kunnemann**

NatureWorks

**Justine Li**

Chair, Archer Daniels Midland Company

**Phil Rozenski**

Novolex/Eco-Products

**Daniel Sasu**

Ingredion, Incorporated  
Vice Chair, January-March, 2023  
Chair, March-December, 2023

**Frankie Schuster**

Smile Beverage Werks, PBC

**Michael J. Wagner**

Cargill

## ADVISORY BOARD

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**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**

Dept of Chemical Engineering and  
Materials Science, Michigan State University

**Brent Shanks**

Iowa State University

**Carolyn Weis**

International Conservation  
Caucus Foundation

## Welcome Letter

As we embark on a new chapter of growth and progress within the plant-based products landscape, I take pride in reflecting on PBPC and our members' achievements throughout 2023. These accomplishments not only made a significant impact within our industry, but also paved the way for advancements across numerous sectors and spurred plant-based innovation.

Throughout 2023, PBPC strengthened its position as a leading advocate and voice for the plant-based products industry by spearheading legislative efforts to advance the U.S. bioeconomy. PBPC engaged directly and played a central role in shaping conversations on the Farm Bill. The organization worked to recruit support for key policy positions from both leaders on Capitol Hill and valued stakeholders in the agriculture sector. Advocating for key legislation, including the *Agricultural Biorefinery Innovation and Opportunity (Ag BIO Act)* and the *Biomanufacturing and Jobs Act*, PBPC's strategic efforts and grassroots campaigns helped build awareness, momentum, and congressional support for valuable policy improvements.

PBPC's work stretches beyond Capitol Hill as we continue to increase corporate and consumer awareness of plant-based products and the industry's wide-reaching economic impact. The organization held its first ever conference in Washington, D.C. to bring together PBPC members, policymakers, and other industry leaders to exchange ideas and highlight efforts throughout the plant-based product value chain and circular economy.

Through events like the PBPC Speaker Series, we convened leaders and experts from all backgrounds and perspectives on the supply chain to tackle the most pressing challenges facing the industry. From rural development to mapping out the future of the bioeconomy, our Speaker Series showcased some of the brightest minds and forces for change in the bioeconomy. PBPC also released the 2023 Consumer Research study, exploring key insights into growing consumer awareness and favorability toward plant-based products. PBPC's research equipped policymakers, industry stakeholders, and business leaders with data-driven insights to inform their approach and understanding of biomanufacturing and sustainable solutions.

Our members played a principal role in PBPC's success throughout the year. Each PBPC member brings a unique and important perspective, putting into practice our values of supporting industry-wide collaboration and growth. We look forward to our continued member partnerships throughout 2024, united by our shared mission of charting a more sustainable and circular economy.

Our achievements are a testament to the invaluable contributions of our committees, Board of Directors, Advisory Board, partners, stakeholders, and the unwavering dedication of our hardworking staff. In 2023, PBPC welcomed exceptional leaders, such as Kristy Goodfellow, Vice President of Economics, and Max Camateros-Mann, Manager of Sustainability, whose expertise significantly advances our industry affairs, analysis, and policy initiatives. Joining PBPC as Executive Director this past year has been an honor, and it is a privilege to collaborate with PBPC's dedicated and accomplished team to work towards a more sustainable future.

As we reflect on our progress over the past year, we reaffirm our commitment to working with our partners, members, and stakeholders to advance the plant-based products industry. We are excited to build upon the milestones achieved in 2023, both for our organization and the wider industry. We look forward to continuing our work in 2024 and beyond to educate and advocate for solutions that expand the industry's economic and sustainability impacts.

Thank you,

**James Glueck, Jr.**

PBPC Executive Director





## 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 suppliers to bioplastic resin manufacturers and consumer-facing brands, PBPC 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 Neste, CJ Biomaterials, Gevo, Beta Analytic, and BiologiQ as new members in 2023. We are excited to continue to collaborate with and grow our list of partners in the year ahead to promote the widespread use of plant-based products.



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

- ADM
- Agri-Tech Producers, LLC
- Allen Field Company Inc.
- Beta Analytic
- BioLogiQ, Inc.
- BioProducts, LLC
- Braskem
- CJ Biomaterials
- Cargill
- 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
- Good Natured Products Inc.
- Ingredion
- Interfacial Consultants LLC
- Iowa Corn Promotion Board
- LOLIWARE INC.
- National Corn Growers Association
- Neste
- Next Wave Energy Partners, LP
- Novamont North America Inc.
- PepsiCo
- PlantSwitch
- Primient
- PSI
- Roquette
- Rosiro Group BV
- SmartSolve
- Smile Compostable Solutions
- Storopack
- Sway
- Virent, Inc.



## Advocacy + 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 Farm Bill, reauthorized every five years by Congress, is a critical piece of legislation that shapes our nation's agriculture and food policies. As the leading advocate for the plant-based products industry, PBPC takes proactive measures to champion policy priorities for inclusion in the Farm Bill. Establishing uniform definitions for common biobased product terminology; modernizing the Department of Agriculture's (USDA) BioPreferred Program; creating North American Industry Classification System (NAICS) codes for biobased product manufacturing; establishing grants for pre-commercial

phase biorefinery development; and enhancing USDA funding for composting infrastructure are among PBPC's policy priorities. Adoption and implementation of these recommendations will create better clarity around the plant-based products industry, help the industry adapt effectively to modern challenges and developments, and invest in the future and benefits of a more robust circular economy.

### **Leading Domestic and International Bioplastic Policy Engagement**

PBPC serves as an educational and policy resource as the U.S. navigates international regulations concerning biobased plastics, including the potential U.N.-led global plastic pollution treaty. PBPC advocates for the interests of biobased plastics within initiatives such as the U.S. Plastics Pact, a voluntary collaboration that brings together major companies, NGOs, governments, and stakeholders with a shared commitment to advancing a more circular economy for plastics.

## **Advancing Key Ag Legislation on Capitol Hill: *Ag BIO Act* and the *Biomanufacturing and Jobs Act***

Throughout 2023, PBPC launched grassroots campaigns to mobilize key industry stakeholders and policymakers to garner support for the *Agricultural Biorefinery Innovation and Opportunity (Ag BIO) Act* and the *Biomanufacturing and Jobs Act*.

The *Ag BIO Act* establishes a grant program for the development of pilot and demonstration scale biorefineries in the U.S. under 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 maintain operations domestically, enhancing U.S. competitiveness in the global biomanufacturing marketplace.

The *Biomanufacturing and Jobs Act* aims to augment the USDA's promotion of the expanding ag-based bioproducts market to public and private sector buyers by enhancing the agency's long-standing BioPreferred Program. With increased support and investment, BioPreferred can benefit America's heartland while contributing to a more circular economy, fortifying the U.S.' position as a global leader in sustainable solutions. PBPC's advocacy efforts played a pivotal role in accumulating bipartisan congressional support for both bills.

### **Enhancing USDA's BioPreferred Program**

Strengthening the U.S. Department of Agriculture's BioPreferred Program, a federal program dedicated to promoting the adoption of biobased products, remains a top policy priority for PBPC. Originating from the 2002 Farm Bill and improved in the *Agriculture Improvement Act of 2018*, the program seeks to drive economic development, job creation, and new markets for agricultural commodities. PBPC actively supports the enhancement of USDA's BioPreferred program through legislative advocacy and robust grassroots efforts. Notably, PBPC participated and launched an organic awareness campaign around USDA's inaugural National Biobased Products Day on March 8, 2023, targeting key stakeholder audiences and bolstering education and favorability around biobased products.

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

Throughout 2023, PBPC, our members, and our staff championed the global impact of plant-based products in diverse forums and on prominent stages around the world. In May 2023, former PBPC Executive Director, Jessica

Bowman, attended the Rethinking Materials Summit in London alongside global leaders, including retailers, suppliers, manufacturers, government officials, and more. During the summit, attendees learned about new and developing materials and technologies to create a more sustainable product chain that will further climate action and circular solutions. Jessica also attended a workshop led by ICCF Group focusing on the circular economy, and contributed data-driven insights on consumer behavior and how corporations can play a pivotal role in promoting a circular economy.

PBPC joined the UN Climate Change Conference of the Parties in 2023 (COP28), to highlight the role of the ag economy in addressing the adverse impacts of climate change, facilitating the transition toward renewable energy sources, integrating solutions for sustainable agriculture, and protecting, conserving, and restoring nature and ecosystems. COP28 was the first time that "Food & Ag" had a dedicated day in the thematic program, and the conference facilitated a series of outcomes at the intersection of climate change, food and agricultural production systems, and food and nutrition security. Jamaica Gayle, PBPC's Director of Sustainability & Environmental Affairs, collaborated with industry leaders for an event co-hosted by PBPC, Alliance to Save Energy, the International Council for Sustainable Energy, and the Corn Refiners Association, highlighting sustainability progress in the renewables industry. This collective effort aimed to underscore the importance of sustainable agriculture and environmental conservation in the face of climate change challenges.

### **Educating Government Stakeholders on the Bioeconomy**

Former PBPC Executive Director, Jessica Bowman, testified before the House Agriculture Committee's Subcommittee on Commodity Markets, Digital Assets, and Rural Development for a hearing titled "Stakeholder Perspectives on USDA's Rural Development Programs." Jessica shared PBPC's perspective on the Farm Bill's Energy Title and provided policymakers with insights on the opportunities to enhance key rural development programs.

PBPC also provided government agencies with collateral to inform their implementation of bioeconomy-friendly approaches to the nation's food and agricultural systems. Formed in 2023, the Interagency Technical Working Group (ITWG) conducts formal review, recommends bioeconomy-related revisions to the North American Industry Classification System (NAICS) and the North American Product Classification System (NAPCS), and aims to strengthen how the U.S. bioeconomy is measured and to assess its contributions to the U.S. economy. In response to the White House Office of Management and Budget issuing a Request for Information to shape the ITWG's revisions to the NAICS





and NAPCS, PBPC collected expert insights to improve the system's approach to regulation across the bioeconomy by emphasizing the need to establish NAICS codes for biobased product manufacturing.

### **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 sustainable solutions.

Robin Bowen, PBPC's Senior Vice President of External Affairs, emerged as a finalist for the Leading Association Lobbyist Award, an honor presented by Association TRENDS and CEO Update. The Salute to Excellence Awards, recognizing those who excel in the association industry, applauded Robin for her integral leadership, establishing PBPC as the go-to resource for the biobased products industry amongst agencies and key states on Capitol Hill.

Jamaica Gayle, PBPC's Director of Sustainability & Environmental Affairs, earned a spot on the GreenBiz 30 Under 30 List. This prestigious recognition acknowledges young professionals who are leaving their mark in corporate sustainability, climate tech, and endeavors aimed at addressing the climate crisis. Jamaica's recognition was a result of her significant impact in managing PBPC's legislative and regulatory priorities, as well as her advocacy for plant-based alternatives.

Jamaica Gayle, doubling the accolades, was also named a member of Association Forum's Forty under 40 class of 2023. This prestigious recognition celebrates industry leaders who exhibit innovation, steadfast leadership, and meaningful contributions to their respective fields. Jamaica leads PBPC's efforts to advance industry priorities, playing a pivotal role in steering the global economy towards more sustainable solutions.



## Communications, Signature Events & Education Accomplishments

### Annual Conference

In 2023, PBPC hosted its inaugural conference, *PBPC 2023: Circular Solutions* in Washington, D.C. Running from March 27-29, 2023, the event featured keynote addresses, panels, and breakout sessions to explore the innovation, business models, and policies influencing the entire lifecycle of bioproducts in support of a more circular economy. Keynote speakers included USDA Under Secretary for Rural Development Xochitl Torres Small, Nebraska Governor Jim Pillen, and Assistant Director for Agricultural Sciences, Innovation, and Workforce at the White House Office of Science and Technology Policy, Dr. Dominique Carter. It was a pleasure to welcome leaders and representatives from PBPC member companies to *PBPC 2023: Circular Solutions*. We are grateful to Ingredion, Braskem, ADM, Sway, the Iowa Corn Promotion Board, Cargill, Eco-Products,

NatureWorks, Earth Brands, and Primient for their support and contributions to making the first annual PBPC conference a success.

### PBPC Speaker Series

PBPC continued our Speaker Series in 2023, convening industry leaders and experts to connect and discuss what is driving the plant-based products industry forward. Topics included critical environmental imperatives, innovative solutions, rural development, and more.

During our June Speaker Series panel, we engaged with three dynamic leaders at the forefront of pioneering plant-based solutions. These visionary founders shared insights into their journeys of initiating and managing sustainable companies, shedding light on the ongoing advancements within the industry.

Our November 2023 panel featured PBPC Executive Director, James Glueck, in roundtable conversations with innovative leaders representing various facets of the plant-based products industry. The focal point of the dialogue centered around the ag bioeconomy and its profound impact on rural development. Speakers delved into crucial topics such as education, policy, and advocacy to articulate the imperative role of the ag bioeconomy in fostering sustainable growth in rural areas.

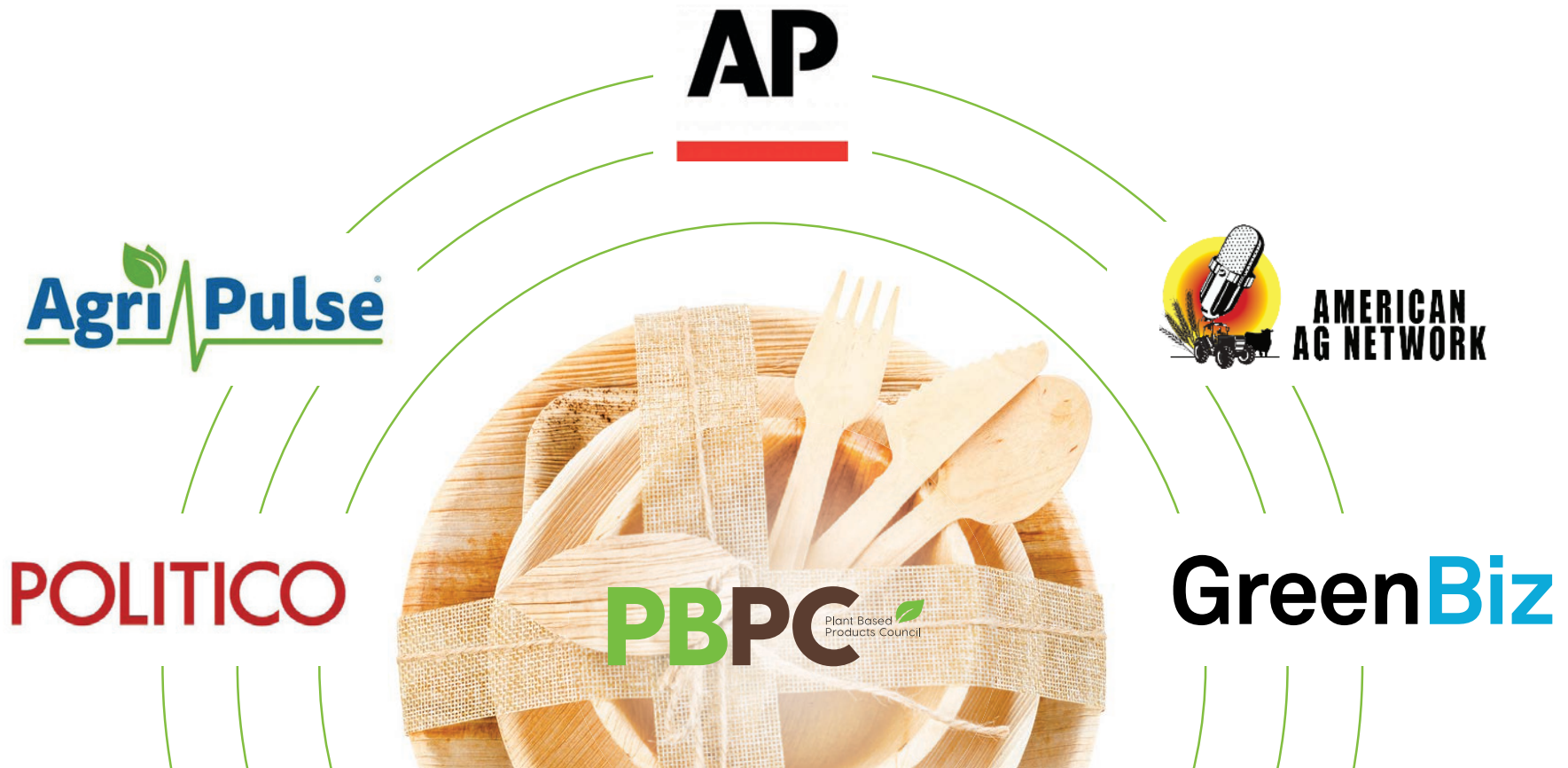
### 2023 International Compost Awareness Week sponsor

PBPC also sponsored the 2023 International Compost Awareness Week (ICAW), the largest education initiative in the composting industry. 2023's theme of "For Healthier Soil, Healthier Food...Compost!" spread awareness about the role of composting in creating healthier, more resilient food systems. PBPC's participation and sponsorship of the awareness week contributed to wide advocacy efforts for composting initiatives and investments, which will create more circular solutions and incentives for our bioeconomy's sustainability challenges.

### PBPC in the Media

Throughout 2023, PBPC continued to engage with media outlets to inform the public about the benefits of biobased 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 Associated Press Online*, *Politico*, *American Ag Network*, *Agri-Pulse*, *GreenBiz*, and more.

In July 2023, PBPC's former Executive Director, Jessica Bowman, penned an article for *Fast Company*. With recurring trends of companies making ambitious climate commitments and then falling short, Jessica's article, "Four Strategies to Achieve Climate Goals," explores the importance of making strategic changes in corporate climate habits to effectively move the needle on their sustainability goals. Jessica outlined the tangible action steps for companies to successfully invest and execute their sustainability plans; including creating clear, measurable goals to chart clear pathways forward, ensuring top-level buy-in, managing risk responsibility, and establishing strategic partnerships.





## **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 2023 consumer research report reaffirmed our confidence in plant-based products as a demand-driven and expanding industry. Notably, 82% of consumers expressed favorability toward plant-based products and 62% of those surveyed report purchasing plant-based products at least monthly. This report stands as a critical benchmark for policymakers, business leaders, and industry stakeholders in both the biobased and agriculture sectors. We continue to see the robust impact and positive public attitudes toward sustainable shopping, guiding the way for informed decision-making and strategic planning within the industry.

## **Bioplastics Week**

PBPC was proud to participate in PLASTICS Bioplastics Division's eighth annual Bioplastics Week, held from October 2-6, 2023. Bioplastics Week highlights the benefits of bioplastics and drives digital conversations around the impacts and innovative developments of these renewable materials. PBPC helped drive awareness of the role of bioplastic manufacturing in cultivating a circular bioeconomy and supporting a more sustainable future through our social media channels.

## **Proactive Messaging**

Throughout the calendar year, PBPC curated a series of engaging GIFs and educational infographics 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.

Complementing visual messaging promotion, our "Setting the Record Straight" blog series tapped into expert insights to dispel common misconceptions within the plant-based products landscape. Covering various topics, including corporate responsibility, sustainable business practices, and debunking myths surrounding

plant-based product quality, the series aimed to increase public awareness on the crucial role, impact, and benefits of advancing our circular economy.

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 included the efforts of entities such as the Integrated Bioprocessing Research Laboratory at the University of Illinois, Urbana-Champaign, Danimer Scientific, the BioPreferred Program, SmartSolve, Primient, NatureWorks, good natured Products Inc., and more.

### **Coalitions & Partnerships**

PBPC strategically collaborates with a diverse range of like-minded coalitions and organizations to bolster our advocacy initiatives and work towards 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 2023, including the Ag Bioeconomy Coalition, the U.S. Composting Infrastructure Coalition, the Agriculture Energy Coalition, the American Sustainable Business Council, the Business Council for Sustainable Energy, the Biogenic CO2 Coalition, the Ellen MacArthur Foundation New Plastics Economy Global Commitment, and the U.S. Plastics Pact.

In addition, PBPC expanded its coalition portfolio in 2023 by joining the Textile Exchange, a global non-profit dedicated to driving positive action on climate change within the textile, fashion, and apparel industries. Participation in Textile Exchange's Biosynthetics Round Table enables PBPC to engage with the textile industry and contribute insights exploring the impacts of sustainable feedstock production for biosynthetics. This expansion underscores PBPC's commitment to collaborative efforts that transcend industry boundaries for the greater cause of sustainability.



# 2024 & Beyond

## Farm Bill

The Farm Bill presents Congress a crucial opportunity to provide policy certainty and direction for the United States agriculture industry. PBPC is steadfast in its ongoing advocacy efforts aimed at influencing the Farm Bill to incorporate key industry priorities. Our goal is to shape legislation that not only strengthens the bioeconomy, but also positions the United States as a resilient global leader in the plant-based products and biomanufacturing sectors.

The passage of comprehensive legislation in 2024 is key to sending that signal. Beyond economic considerations, a comprehensive Farm Bill also serves as a strategic investment in rural communities, contributes to the country's overall economic growth, and paves the way for sustainable solutions across sectors. PBPC remains dedicated to actively participating in this legislative process, advocating for measures that align with our mission of fostering sustainability and innovation in the agriculture and plant-based products landscape.

## Annual Conference in Omaha

Building on the success of our inaugural conference in 2023, PBPC is thrilled to bring the 2024 gathering to the heart of America's bioeconomy, Omaha, Nebraska, from April 8-10, 2024. The conference offers a unique platform for industry leaders, policymakers, and stakeholders to network, participate in enlightening panel discussions, attend keynote addresses, embark on a biorefinery facility tour, and more.

In collaboration with partners, including BioLogiQ, Bio Nebraska, BioPreferred, Cargill, Corn Refiners Association, Green Plains, Iowa Corn Promotional Board, NatureWorks, Nebraska Corn Board, Primient, and Repurpose, PBPC has curated a diverse lineup of experts and leaders spanning various industry verticals such as policy, research, development, and business. These thought leaders will address and explore key themes centered around circular solutions and the bioeconomy.

We are excited to once again bring together leaders from intersecting industries across the bioeconomy and hope to see you in Omaha this April. For more information, visit: <https://pbpc.com/pbpc2024/>







**PBPC** Plant Based  
Products Council 