



Our Industry. Our Passion. Our Voice.

Update on AFIA Activity 2023

Louise Calderwood, Director of Regulatory Affairs
lcalderwood@afia.org



VOICE



REPRESENTATION



EXPERTISE



ENGAGEMENT

AFIA's 4 Promises of Membership



VOICE

- We are one powerful, unified voice that serves every segment of the animal food industry
- We listen to all of our members - large and small - and are determined to have their interests heard on Capitol Hill and around the globe
- We execute communication strategies that convey consistent, positive messages whether in times of prosperity or crisis



REPRESENTATION

- We support our members and drive their positions on critical legislative and regulatory developments that affect their businesses
- We offer access to our experienced staff who will support an issue on our members' behalf
- We give members the opportunity to participate on committees, task forces and member interest groups



EXPERTISE

- We extend confidential, individualized technical support services to help our members comply with industry regulations, interpret new legislation and stay current on import and export policies
- We refer members to our network of expert technical and legal services when needed
- We offer feed and pet food-specific certification programs that exceed federal regulatory standards for animal food safety



ENGAGEMENT

- We lead training and education seminars and conferences to keep members informed on the latest industry developments
- We facilitate industry networking programs for members to share ideas and build relationships

Our Industry. Our Passion. Our Voice.



2022-23 Policy Priorities

**Improvement
of the Business
Climate**



**Sustainability &
Climate Policy**



**Availability &
Cost Effectiveness
of Ingredients**



**Feed &
Food Safety**



**Health,
Safety & the
Environment**



**Global Market
Access &
Competitiveness**



Our Industry. Our Passion. Our Voice.





The White House

Biden Administration Priorities

- Preserving legislative gains
- Sustaining support for Ukraine
- Climate Change
- Anti-Trust Enforcement
- “Kitchen table” issues



Biden has said the election has not changed his agenda

Climate



COP28
UAE

- COP 27
 - Conference of the Parties on Climate
 - Positioning on ag issues in preparation for COP 28
 - AFIA has requested “Observer” status: provide a voice for the feed industry
- AIM for Climate
- Sustainable Productivity Growth Coalition
- Partnership for Climate Smart Commodities

FDA Activities



- “Food” leadership and response
- CVM Director
- Anticipated rulemakings:
 - Revise FDA definition of “farm”
 - Remove certain customer written assurance provisions in FSMA requirements
 - Ease electronic recordkeeping requirements for medicated feed and VFDs (Part 11)

Label Claims

- AFIA's ask to CVM in Sept. 2020
 - Modification of the CVM Guide 1240.3605
 - Establishment of a policy for products that act in the digestive tract to be regulated as food
 - Alignment with the regulation of structure/function and health claims in developed countries

Animal production

Human food safety

Animal well-being
(FDA=microbiome)

Environmental impact

118th Congress



Activities in 118th Legislative Session

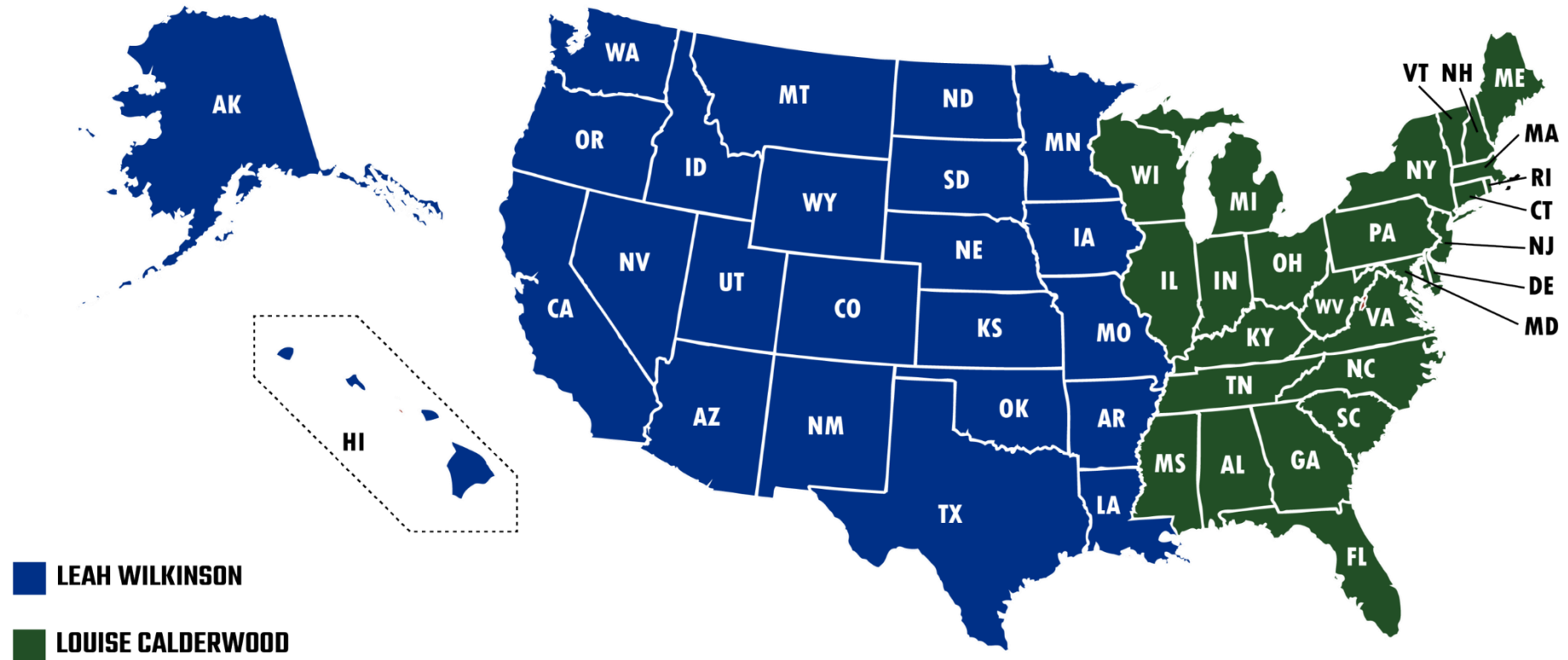


- Debt Ceiling
- Farm Bill
- Animal Drug User Fee Act (ADUFA)
- Appropriations

Our Industry. Our Passion. Our Voice.



State Affairs



Our Industry. Our Passion. Our Voice.





Trade

Trade Leaders

- USTR Trade Ambassador – Katherine Tai
- USTR Ag Trade Ambassador Nominee – Doug McKalip
- USDA Under Secretary for Trade – Alexis Taylor



Katherine Tai



Doug McKalip



Alexis Taylor

Looking Back

- 2022- First sign of a trade “agenda” from administration
 - Launched economic initiative in the Indo-Pacific
 - Tightened export controls on Chinese entities
 - Embraced industrial subsidies that angered key trade partners
 - Finally confirmed Under Secretary of Agriculture for Trade and Foreign Agricultural Affairs and USTR Chief Agricultural Negotiator

Mexico GMO Corn Ban

- MX proposed 2024 (2025) ban on GMO corn imports
- Not be able to fully ban GM yellow corn imports from the U.S.
- GMO corn for livestock feed?
- Challenging USMCA



2023 Possible Trade Developments

Trade challenge from Congress?

Growing Trade Tensions with China?

Trade Tensions with EU- b/c IRA

Push for More Market Access, Congressional Authority Over Tariffs, WTO Reform?

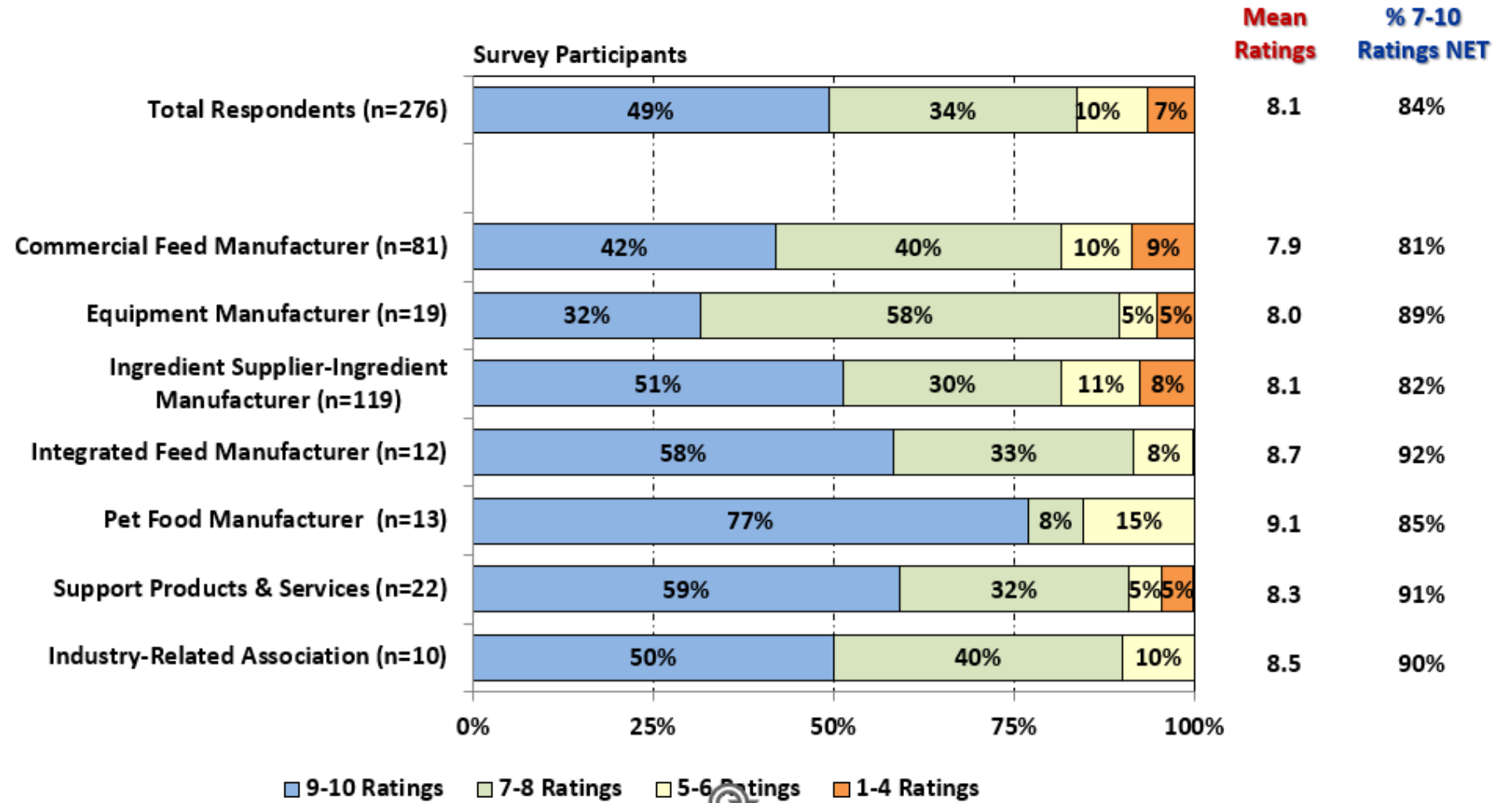


Sustainability

IFEEDER: Advancing understanding and trust in a sustainable feed and pet food supply chain through timely research and education.



Importance of Sustainability to AFIA Members



Why Focus on Feed?



Zeroing in on GHG Emissions

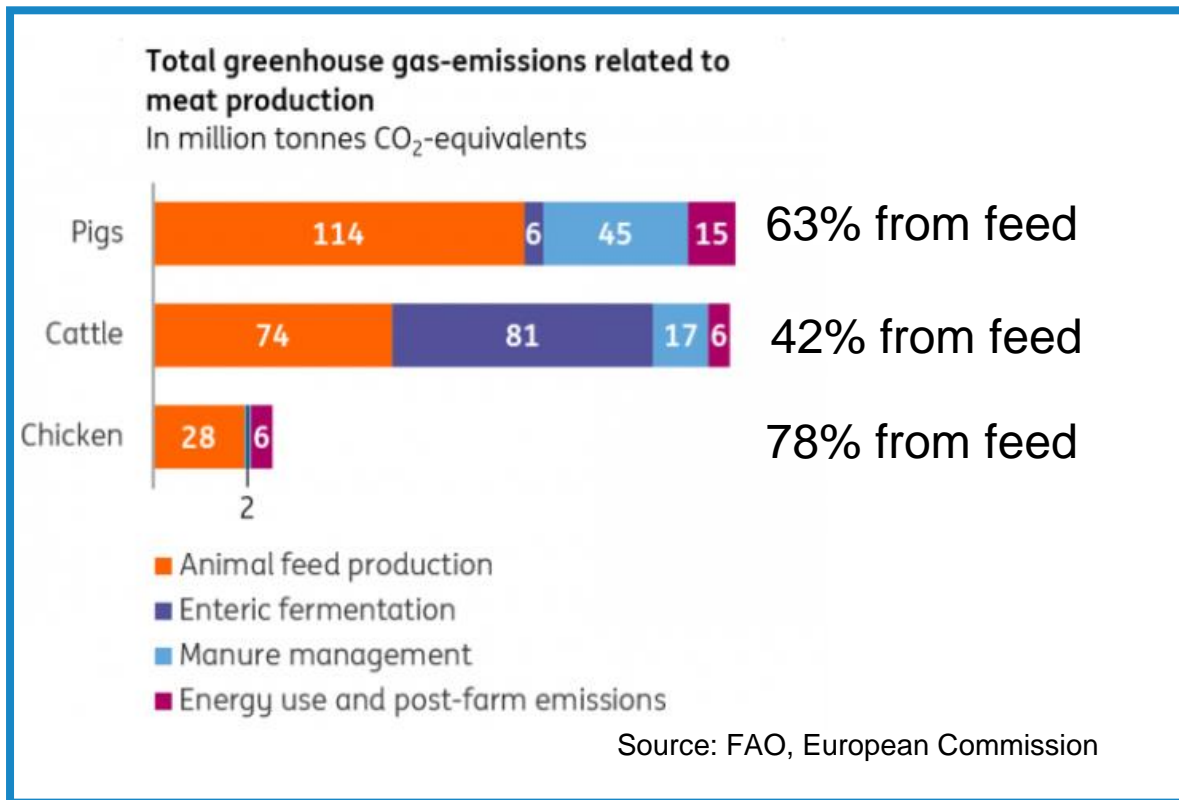
- Scope 3 emissions can account for 90-95% of a food manufacturer's emissions
- To assess and impact Scope 3, a food manufacturer must turn to its suppliers and work with the numerous ingredients, packaging, & distribution businesses in their value chains.

Scope 1: direct emissions from owned or controlled sources.

Scope 2: indirect emissions from the generation of the electricity, steam, heating and cooling bought and consumed by a reporting organization.

Scope 3: all other indirect emissions that occur in a company's value chain.

Feed Relative to the Food Supply Chain



- Consumer demand for more sustainable products & focus on Scope 3 emissions reporting means sustainability is becoming an operational issue for all parts of the feed sector.

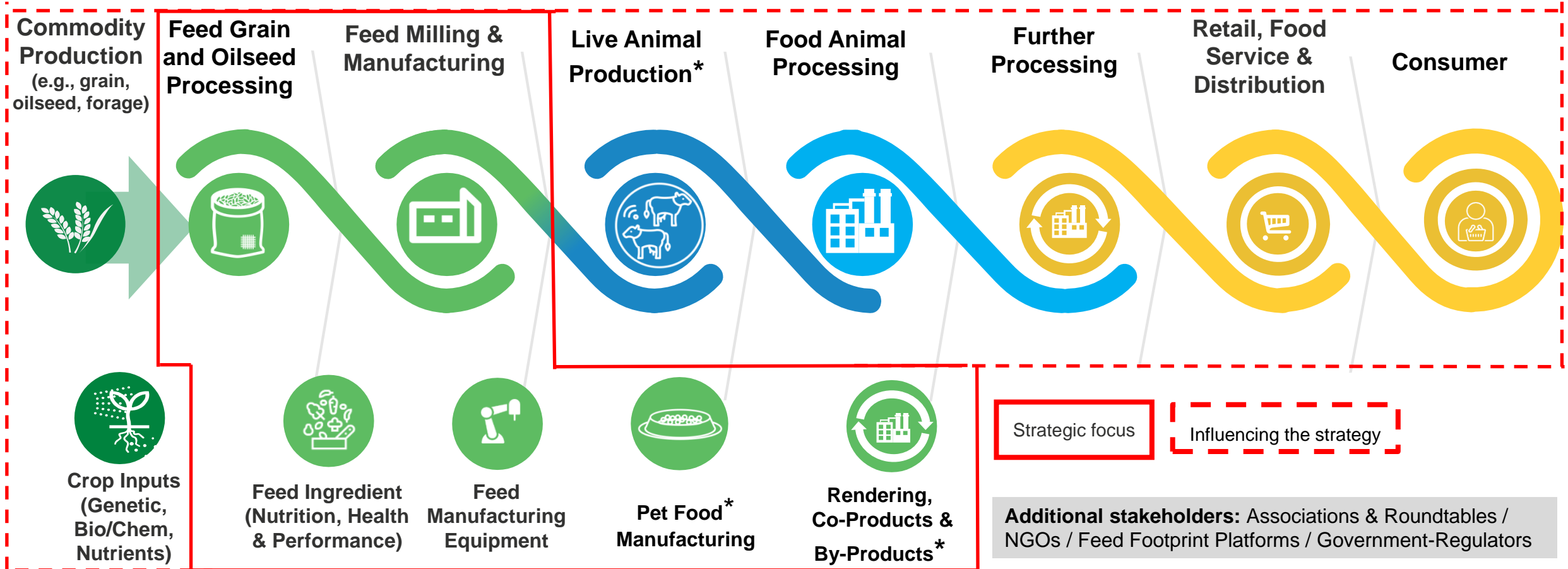
How does the U.S. feed industry define sustainability?

Sustainability in the U.S. feed industry is defined and managed by each individual organization to deliver measurable, continuous improvements on the impacts related to people, planet and governance that are most important to them and their stakeholders.

Advancing Sustainability Throughout the US Feed Industry

WE ARE ALL IN THIS TOGETHER

Key: ● Suppliers ● Feed industry ● Downstream customers



SUSTAINABILITY



ROAD MAP PROJECT

Animal Food Industry Toolkit

Sustainability Toolkit for the Animal Food Industry



Sustainability Road Map Overview

IFEEDER's Sustainability Road Map

The Institute for Feed Education & Research developed the Sustainability Road Map to support the U.S. animal feed industry as it drives and accounts for continuous improvements on impacts that are important to industry members and their customers. The Road Map effort was initiated in 2017.

- Educate and inform the U.S. animal feed industry and its partners.
- Educate and inform upstream and downstream partners on the value the feed industry places on sustainability, and
- Inform IFEEDER's ongoing research strategy and communicate the support it will provide in advancing feed supply chain sustainability efforts.

Defining Sustainability

For IFEEDER and the American Feed Industry Association (AFIA), sustainability in the animal feed industry is defined and managed by each individual organization to deliver measurable, continuous improvements on the impacts related to people, planet and governance that are most important to them and their stakeholders.

Sustainability Road Map Process

Sustainability Road Map Supporters and Leadership

In June of 2017, IFEEDER initiated work with **The Council Members** to develop a Sustainability Road Map to support the U.S. animal feed industry. Development of the Road Map was funded by 23 animal feed industry members. Representative members from each of these industry organizations formed an advisory committee, coordinated by IFEEDER, to provide industry input into the Road Map's development. The committee met regularly to advance the discussion and assist in developing content.

Sustainability Road Map Process

- Conduct an analysis of downstream customer expectations as they relate to the animal feed supply chain.
- CONDUCT NEEDS ASSESSMENT

Why Member Toolkit Developed?

Members to guide the process and assist in level set on scope, process, timeline, etc. as they analyze to identify initial action plan for next step.

IFEEDER to support the U.S. animal feed industry, guide the process and assist in level set on scope, process, timeline, etc. as they analyze to identify initial action plan for next step.

How to use the Context Network's ability framework.

CONDUCT NEEDS ASSESSMENT

CONDUCT SUPPLY CHAIN SUSTAINABILITY

CONDUCT SUPPLY CHAIN SUSTAINABILITY

CONDUCT SUPPLY CHAIN SUSTAINABILITY

Glossary of Terms

GLOSSARY

This working document is intended to enable the U.S. animal feed industry to have common definitions regarding the Sustainability Road Map.

Definitions

- BENCHMARK** - Comparing an organization's sustainability performance to their peers to identify internal opportunities for improvement.
- BOLDSOURCE** - Defines the scope of what the metrics and targets will cover (i.e., cradle to grave, farm to plate, plate to plate).
- CARBON NEUTRAL** - Making no net release of carbon dioxide to the atmosphere, especially through offsetting emissions by planting trees.
- CIRCULARITY** - A concept meaning that a product is created with its own end-of-life considered.
- CONTINUOUS IMPROVEMENT** - The ongoing measurable improvement of performance outcomes specific to metrics associated with indicators.
- DOWNSTREAM** - Sectors and customers further down the value chain from the sector in which your organization operates (see reference 1)
- ESG** - Environmental, Social and Governance
- EUROPEAN SUSTAINABILITY REPORTING STANDARDS (ESRS)** - developed by EFSD and is an international reporting standard that will define how companies disclose their sustainability performance.
- FEED FOOTPRINT STRATEGIES** - The past and present strategies each of the partners have developed to assess the economic, environmental, and social outcomes of the footprint associated with their feed production.
- GLOBAL FEED LIFE CYCLE ASSESSMENT INSTITUTE (GLF)** - the product of an international consortium that was formed to establish a database that would serve as the leading reference for information about the environmental performance of feed ingredients.
- GREENHOUSE GASES (GHG)** - gases in the earth's atmosphere that trap heat

1 | Page

2 | Page

3 | Page

4 | Page

Animal Food Sustainability Database

Document Title	Area it relates to the feed industry & sustainability	Year Published	Author	Relevant Search Terms	Abstract	Relevance Production	Open In
Guidance on the Environmental Impact of Chemically-Produced Protein Hydrolysates from Leather-Waste-Derived Feedstocks	Feed Ingredient Sustainability	2019	IFRE	Feedstock, environmental impact	Researcher labors stress and that quality Protein hydrolysate-based feeds are most produced by chemical hydrolysis starting from animal waste, however, an innovative process developed by IFRE and Feed Tech made a part of the animal protein feed supply chain more sustainable. Unfortunately, feed made from animal waste-based protein sources causes a lot of waste that is difficult to manage. IFRE and Feed Tech are working on a sustainable solution to this problem. This document provides a framework for feed producers to consider the environmental impact of their feed ingredients.		
Guidance on the Environmental Impact of Feedstocks from Leather-Waste-Derived Feedstocks	Feed Ingredient Sustainability	2019	IFRE	Feedstock, environmental impact	Researcher labors stress and that quality Protein hydrolysate-based feeds are most produced by chemical hydrolysis starting from animal waste, however, an innovative process developed by IFRE and Feed Tech made a part of the animal protein feed supply chain more sustainable. Unfortunately, feed made from animal waste-based protein sources causes a lot of waste that is difficult to manage. IFRE and Feed Tech are working on a sustainable solution to this problem. This document provides a framework for feed producers to consider the environmental impact of their feed ingredients.		
Guidance on the Environmental Impact of Feedstocks from Leather-Waste-Derived Feedstocks	Feed Ingredient Sustainability	2019	IFRE	Feedstock, environmental impact	Researcher labors stress and that quality Protein hydrolysate-based feeds are most produced by chemical hydrolysis starting from animal waste, however, an innovative process developed by IFRE and Feed Tech made a part of the animal protein feed supply chain more sustainable. Unfortunately, feed made from animal waste-based protein sources causes a lot of waste that is difficult to manage. IFRE and Feed Tech are working on a sustainable solution to this problem. This document provides a framework for feed producers to consider the environmental impact of their feed ingredients.		
Guidance on the Environmental Impact of Feedstocks from Leather-Waste-Derived Feedstocks	Feed Ingredient Sustainability	2019	IFRE	Feedstock, environmental impact	Researcher labors stress and that quality Protein hydrolysate-based feeds are most produced by chemical hydrolysis starting from animal waste, however, an innovative process developed by IFRE and Feed Tech made a part of the animal protein feed supply chain more sustainable. Unfortunately, feed made from animal waste-based protein sources causes a lot of waste that is difficult to manage. IFRE and Feed Tech are working on a sustainable solution to this problem. This document provides a framework for feed producers to consider the environmental impact of their feed ingredients.		
Guidance on the Environmental Impact of Feedstocks from Leather-Waste-Derived Feedstocks	Feed Ingredient Sustainability	2019	IFRE	Feedstock, environmental impact	Researcher labors stress and that quality Protein hydrolysate-based feeds are most produced by chemical hydrolysis starting from animal waste, however, an innovative process developed by IFRE and Feed Tech made a part of the animal protein feed supply chain more sustainable. Unfortunately, feed made from animal waste-based protein sources causes a lot of waste that is difficult to manage. IFRE and Feed Tech are working on a sustainable solution to this problem. This document provides a framework for feed producers to consider the environmental impact of their feed ingredients.		



Sustainability Toolkit for the Animal Food Industry



CRAWL – GETTING STARTED

1

Buy-in from leadership - Time and resource commitments (internal)

2

ROI justification – defining what “success” looks like

3

Adapt sustainability framework to your organization

WALK – MAKING PROGRESS

4

Identify customer’s needs and expectations and your current state

5

Engage cross-functional teams

6

Develop project plans (e.g., objectives, budgets, accountability, timelines, etc.)

RUN – REPORTING PROGRESS. SETTING TARGETS & GOALS.

7

Communicate progress with employees

8

Tracking and measuring performance (goals, targets & reporting) across the organization

9

Engage suppliers to collaborate and share progress

**Available to
AFIA Members
as a Member
Benefit!**

<https://ifeeder.org/sustainability-road-map/>

THANK YOU

AFIA'S

4 PROMISES



— VOICE —



— REPRESENTATION —



— EXPERTISE —



— ENGAGEMENT —

Our Industry. Our Passion. Our Voice.



afia.org

2101 Wilson Blvd. | Suite 810 | Arlington, VA 22201 | 703.524.0810