



# 2022 annual report

ACTIVITIES AND ACCOMPLISHMENTS









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# A Letter From Our CEO



**When I reflect on 2022, it was a year of building a foundation for the future of our industry.**

Amid continued uncertainty with supply chain issues, labor shortages, inflation, regulatory bottlenecks and impactful legislation, the Pet Food Institute (PFI) team and I worked hard to advocate for the pet food sector and support measures to provide security today—and transform tomorrow.

Speaking of staff, three new team members joined PFI in 2022. In January, Betsy Flores joined as PFI's Senior Vice President of Public Policy, Kelly Kanaras joined in May as the Director of Communications, and Dana Waters came on board in October as a Policy Analyst. They complement an already

outstanding PFI team that serves as an extension of your own staff and is ready to serve our members and the entire pet food industry.

I am thankful for PFI's members and team, who work tirelessly to support and strengthen the industry. I am especially grateful to our volunteer leaders – from our committee chairs to our Board – who commit countless hours to serve and lead.



## Some highlights from 2022 are:

**Renewable diesel mandates and incentives continued to be a challenge in 2022.** PFI launched an advocacy and social media campaign to educate consumers and mobilize support for congressional and administrative action to delay additional renewable diesel production.

**The Association of American Feed Control Officials (AAFCO) finally agreed to some clarity and corrections for certain ingredients and claims that were considered incorrect or misleading for consumers:** the word “gluten” was removed from a certain pet food ingredient that does not contain gluten, an expert panel recommended that MSBC (Vit. K) is appropriate for use in pet foods, draft regulatory language for Pet Food Label Modernization is nearing completion, a pet food human grade standard was established, and AAFCO now clearly recognizes that vitamin common names are appropriate for use on package.

**PFI worked to notify pet food makers and associates of the implementation of state packaging regulations and pending legislation.** PFI tracked and analyzed 127 packaging and plastics bills in 23 states, covering extended producer responsibility (EPR), labeling restrictions, and recycled content standards.

**After a hiatus earlier this year, the Sustainability Working Group (SWG) began the process of updating the PFI Sustainability Statement to better reflect sustainability activities of PFI members,** with the objective of having a new statement posted to the website in 2023.

**Facilitated prioritization for more than 50 separate company issues with U.S. Department of Agriculture (USDA) Animal and Plant Health Inspection Service (APHIS)** to gain export approvals or resolve issues at the port of entry.

We resolve in 2023 to continue advocating for PFI members and the pet food industry.



**DANA BROOKS**

**President &  
CEO**

# Federal Government Affairs

PFI maintained a presence in Congress and with the Biden administration this year, supporting the policies beneficial to pet food makers, raising PFI's profile and reinforcing the value of our industry. PFI's federal government relations team worked with federal officials on several issues

impacting pet food makers such as supply chain challenges caused by disruptions in the shipping sector, increasing funding for the Food and Drug Administration (FDA) for ingredient approvals, and supporting the passage of legislation benefiting the pet care community.

## Achievements

**Partnered successfully with other D.C. based associations** to request additional FDA Center for Veterinary Medicine (CVM) funding, resulting in \$8 million that will allow the agency to hire additional staff, improve infrastructure and update IT capabilities that facilitate animal food ingredient reviews.

**Actively lobbied Congress and joined coalitions** encouraging lawmakers to pass the Ocean Shipping Reform Act of 2022 (OSRA), which was signed into law on June 16, 2022, and aims to end bottlenecks at our nation's ports and reduce shipping rates. PFI successfully advocated, along with coalition members, for full funding of the Federal Maritime Commission in the FY23 budget to fully fund OSRA.

**Worked with two coalitions** to urge Congress and the Administration to avoid a rail strike that would have crippled the U.S. supply chain, which resulted in President Biden signing a bipartisan resolution passed by Congress enforcing the September agreement between rail companies and eight of 12 rail unions. PFI signed four coalition letters and participated in coalition visits to Capitol Hill to urge lawmakers to take action to avert a rail strike or lockout that would lead to shutdowns or slowdowns of rail-dependent facilities resulting in devastating consequences to our national and global food security.



## DID YOU KNOW?

In 2022, PFI engaged with over 100 congressional offices and several key government agencies on a number of challenges impacting the pet food industry and joined numerous industry coalition efforts to address topics such as the shipping crisis, unprecedented transportation and infrastructure challenges, and the need for tariff reform by offering possible solutions to lawmakers.



## Federal Legislative Tracking

PFI tracked over 40 federal bills in the U.S. House and Senate. Below are several that PFI actively monitored in 2022.

### 01.

#### HEALTHY DOG IMPORTATION ACT

([H.R. 4239](#) / [S.3597](#)) - prohibits the importation of a live dog into the United States unless the USDA determines it to be healthy.

### 02.

#### PAWS OFF ACT OF 2021

([H.R. 5261](#)) - deems foods containing xylitol as misbranded unless the label of such foods contains a warning specifying the toxic effects of xylitol for dogs.

### 03.

#### BRING ANIMALS RELIEF AND KIBBLE ACT OF 2021 OR BARK ACT

([H.R. 5684](#)) - provides protection for the good faith donation of pet products.

### 04.

#### BEAGLE BRIGADE ACT OF 2022

([H.R. 8432](#) / [S.3678](#)) - authorizes the National Detector Dog Training Center, which trains dogs to inspect passenger baggage, cargo, mailed packages, and vehicles to detect foreign pests and diseases that threaten domestic agriculture and natural resources.

### 05.

#### FREIGHT RAIL SHIPPING FAIR MARKET ACT

([H.R. 8649](#)) - creates a fair market in freight rail and reauthorizes the Surface Transportation Board.

# State Government Relations

PFI's state government relations team covers legislative and regulatory activity in all 50 states and U.S. territories. PFI continues to raise its profile with state officials, working with state lawmakers, state departments of agriculture, and environmental regulatory departments on issues impacting pet food makers, including pet food licensing and registration fees, pet food spay and neuter fees, and packaging and plastics legislation.

## Achievements

**Successfully lobbied** for two victories against pet food tax increases during the 2022 state sessions. The Maryland Spay and Neuter Fund 10-year extension and report legislation was enacted without fee increases and with a PFI amendment requiring the study of "additional funding sources" beyond raising pet food taxes. The Maine Animal Welfare Program Funding bill originally raised registration fees by \$20 per-product, but the final bill signed by the Governor did not include the tax increase. As part of PFI's advocacy work, staff created a comprehensive chart on state registration/licensing fees and spay and neuter fees for PFI members.

**Implemented a new legislative monitoring system**, delivering biweekly State Priority Legislation and Packaging/Plastics Legislation tracking reports to PFI Government Relations Committee members during the 2022 state sessions and providing updates for members to prepare for state-level implementation of new laws covering extended producer responsibility (EPR), recyclability labeling limitations, packaging ingredient restrictions, and recycled content standards.

With the introduction of state bills establishing human grade pet food standards, and allowing industrial hemp in animal feed, PFI **engaged state lawmakers** to communicate AAFCO positions during the 2022 state legislation sessions.



## DID YOU KNOW?

PFI analyzed over **10,000 bills** and **5,000 state regulatory rules** and notices in all states that were in session, tracking nearly 375 bills and monitoring 124 priority bills and 127 packaging and plastics bills.

## Notable 2022 State Legislation

- CALIFORNIA SB 54 – EXTENDED PRODUCER RESPONSIBILITY
- COLORADO HB 22-1355 - EXTENDED PRODUCER RESPONSIBILITY
- MARYLAND HB 191 AND SB 206 – SPAY AND NEUTER FUND
- MAINE LD 1744 – ANIMAL WELFARE PROGRAM FUNDING



# Renewable Diesel Advocacy Campaign



For the first time, PFI launched an advocacy campaign intended to unite pet food makers and pet owners on an issue that impacted the lives of pet companions. PFI shared its concerns regarding the impact that government mandates and incentives promoting renewable diesel growth were having on supply and demand for animal- and plant-based oils and fats. Such incentives are creating distortions in the marketplace, and PFI advocated for solutions to address the negative impacts pet food makers are facing in accessing certain fats and oils.

PFI lobbied at the state and federal level on this top priority for our industry and worked with interested stakeholders to share our industry's concerns. Our ask was two-fold: (1) for the exclusion of mandates and incentives that use or include the fats and oils that are historically used in human and pet food; and (2) removal or reduction of tariffs for any plant and animal fats or oils imported into the United States to support human and pet food.



## Achievements

**Invested in a new advocacy engagement tool**, VoterVoice, to help PFI further advance our public policy efforts. The system has enabled 321 advocates to send over 950 messages to their Representatives and Senators.

**Submitted written comments** regarding the Renewable Fuel Standard RFS Program and RFS Annual Rules on two separate occasions to the Environmental Protection Agency (EPA), stressing the impact renewable diesel mandates are having on the pet food supply chain. The second set of public comments focused on [canola oil](#) being considered as a pathway to renewable diesel.

**Engaged with state agriculture legislators, state agriculture commissioners and their staffs** on supply chain and renewable diesel challenges at National Association of State Departments of Agriculture (NASDA) Winter Policy Conference and Annual Meeting, the four NASDA regional meetings, and the State Ag and Rural Leaders (SARL) Summit.

**Reached out to lawmakers** to oppose renewable diesel mandates/incentive legislation in five states: Hawaii, Iowa, Illinois, Missouri, and New York.

**Designed advocacy infographics and background materials**, created a target list, and laid the groundwork for the advocacy campaign with key Congressional offices.

**Convened stakeholder meetings with three key audiences** – agriculture groups, pet industry allies, and food companies – and produced a Renewable Diesel Campaign Toolkit for PFI's members, consumers, and pet industry allies.

Incoming media inquiries in 2022 were significantly focused on the supply chain issues/pet food shortages; renewable diesel; and the EPA RFS proposal.

## Communications by the Numbers

2

BLOG/ THOUGHT-LEADER ARTICLES

18

MEDIA INTERVIEWS

49

SOCIAL MEDIA POSTS ON RD

77,040

LINK CLICKS ON RENEWABLE DIESEL WEBPAGE

3

CONVENTIONS ATTENDED  
(GLOBAL PET, PET FOOD FORUM, SUPERZOO)

## DID YOU KNOW?

PFI used digital advertising buys to increase awareness among consumers, resulting in **500+ link clicks** and a reach of over **51,000 people**.

# Regulatory Affairs

PFI's regulatory staff works to ensure that the regulatory landscape for pet food provides a comprehensive, fair, and transparent framework that is based on sound science and best practices, mutually benefiting the industry, PFI member companies, our customers, and pets. Activities are centered around AAFCO, ingredients, product safety, nutrition, and international trade. This year, PFI continued to foster continuous improvements in areas of food safety within the pet food industry, to serve as a resource to

agencies in the areas of food safety, conducted food safety research and technology/innovation, shared industry best practices in areas of food safety among PFI members, and looked for ways to improve the safe manufacture of pet foods for all manufacturers and across the supply chain. It also proactively drove initiatives with AAFCO and FDA CVM for more consumer transparency, pet food specific ingredient definitions, consumer-friendly ingredient statements, and streamlined ingredient approval processes.

## Achievements

**Formed a PFI working group** after FDA instructed member companies to voluntarily recall product based on an elevated zearalenone level, although no regulatory limit exists for that mycotoxin. The group worked with an academic researcher to perform a literature review and drafted a white paper that recommended to FDA officials 200ppb zearalenone as a safe-upper-limit for finished pet food products.

**Resolved the Office of the Maryland State Chemist** taking regulatory action through stop sales and denial of registration on products containing Menadione Sodium Bisulfite Complex (MSBC) by asking AAFCO to form an expert working group. It concluded MSBC may be used as a safe ingredient in pet food and is now listed as such in the AAFCO Official Publication (OP).

**Drafted a revised table** for the listing of vitamins in finished pet food that provides more flexibility for pet food makers to communicate this information to their customers that was reviewed and approved by AAFCO for publication in the AAFCO OP.

**Led a coalition** that successfully petitioned to change the name of the pet food ingredient "corn gluten meal" to the much more suitable name "corn protein meal," creating a more accurate and less confusing name for this ingredient because it does not contain gluten.





## DID YOU KNOW?

AAFCO is a voluntary membership association of local, state, and federal agencies charged by their local, state, or federal laws to **regulate the sale and distribution of animal feeds**, including pet food, and animal drug remedies.

# International Trade

PFI's international trade staff supports and engages with U.S. and foreign governments to secure, maintain, and expand access to key markets around the world through the development and enforcement of science-based policies and regulations that facilitate the export of U.S. dog and cat food. This year, PFI focused on improving export services to member companies provided by USDA APHIS, tracking export trade bans due to Highly Pathogenic Avian Influenza (HPAI) in the U.S., and working with other global pet food associations through the Global Alliance of Pet Food Associations (GAPFA).

## Achievements

Worked with USDA APHIS and other impacted industry associations to **improve the APHIS export facility inspection process** by instituting monthly calls to help prioritize facility approvals and address systemic staffing issues at APHIS.

**Commented on an APHIS-proposed rule** to increase user fees for the first time in over a decade to adequately fund the import/export activities needed by industry to continue the record growth of U.S. pet food exports.

Coordinated efforts and provided leadership in GAPFA to **encourage the World Animal Health Organization (WOAH, formerly OIE) to include safe commodity language** in the HPAI Terrestrial Code chapter. The impact of HPAI on pet food exports was minimized, allowing for the continued uninterrupted trade of most pet food products.

Worked proactively with APHIS to **remove outdated and irrelevant disease-free language** on U.S. export certificates, so the form would be valid for trade if a World Organization for Animal Health (WOAH)-reportable disease is found in the U.S.

**Informed PFI members of the latest HPAI trade bans** by developing an up-to-date trade ban tracker for more than 29 countries and facilitated member company discussions with APHIS on a variety of HPAI-related trade issues.

**Worked with the Tariff Reform Coalition and the Americans for Free Trade Coalition** to add pet food's voice to those asking the U.S. government to resolve the ongoing trade dispute with China, so retaliatory tariffs can be lifted to help reduce the cost to American companies and U.S. consumers.

## DID YOU KNOW?

PFI helped member companies resolve **50+ separate export issues** with APHIS, from delayed facility inspections and approvals to products on hold in foreign ports.



## Trade Spotlight

**\$2B+**

IN PET FOOD EXPORTS  
(2021)

TOP EXPORT MARKETS:



IN 2022, CANADA WAS A

**\$1B+**

MARKET FOR U.S. PET  
FOOD



# Market Access Program

PFI is a proud cooperator in the USDA Market Access Program (MAP), receiving \$1,597,848 in 2022 to grow export markets for U.S. pet food. Funded through the USDA, the MAP enables PFI to strengthen and expand the profile of U.S. pet food products abroad by educating veterinarians and influencers about the benefits of feeding commercially prepared pet food and treats, and, more generally, pet health.

The 2022 MAP outreach is active in 10 markets, representing 17 countries – Brazil; Caribbean (Bahamas, Turks and Caicos, Jamaica, and Trinidad and Tobago); Central America (Costa Rica, El Salvador, Guatemala, and Panama); China; Colombia; Mexico; Middle East (Israel, UAE); Philippines; South Korea; and Taiwan.

## Achievements

Total exports for the last fiscal year (Oct 2021-Sep 2022) **exceed \$2.38 billion**, a more than 20% increase from 2021.

**Launched a Global Market Tracker** on the PFI website that provides PFI members and other stakeholders with quick and updated information on key U.S. pet food markets and export statistics.

## DID YOU KNOW?

PFI offers **informational webinars** led by outside experts to its members. Topics in 2022 included: APHIS Best Practices for Export Certificates for Pet Food, African Swine Fever, and Sustainability of Pet Food and Rendered Food ingredients, and Policy Landscape on Packaging and Plastics.



# Building the Brand

PFI continues to utilize its digital platforms (website, Twitter, Facebook, and LinkedIn) to help increase engagement with informational content, reach targeted audiences with timely news and position the organization as a thought leader. Our website partner conducted an audit in 2021 that included multiple suggestions for increasing user friendliness, ease of navigation, and search engine optimization (SEO). In 2022, website content was updated, and pages were renamed per recommendations in the audit.



## DID YOU KNOW?

The PFI website had approximately **112,550 new visitors** from January-November 2022, representing **205,339 page views**. The average user visited **1.6 pages** per session.

## Achievements

### Published six new blog posts/thought leadership articles:

- Every Pet Food Ingredient Has a Function
- Myth-Busting False Claims about Pet Food
- 2021 Export Data Shows Increased Demand for U.S. Pet Food Worldwide
- Renewable Diesel's Unintended Impact on Pet Food Production
- From Corn Gluten Meal to Corn Protein Meal: Updating the Pet Food Label to Improve Understanding
- Fall Allergies in Pets

**Launched Your Pet's Healthy Weight campaign**, promoting an infographic developed in conjunction with PFI member nutrition experts for use by pet owners and veterinarians and using social media to raise awareness to consumers on the importance of maintaining a healthy weight for their pets.

**Increased promotion of organic content on LinkedIn** to increase PFI's profile, activities and resources among member companies, stakeholders, and policy audiences.

**Created positive news stories in the media** and positioned the association as a thought leader on industry issues by publishing 14 news releases and statements.

## Key Social Media Metrics

**6.5K**  
NEW FOLLOWERS  
ON FACEBOOK  
AND TWITTER

**100K**  
LINK CLICKS  
ON FACEBOOK  
AND TWITTER

**75K**  
VIDEO VIEWS  
ON FACEBOOK  
AND TWITTER

**TWITTER:**  
5.2M POTENTIALLY  
REACHED, 1.8M  
TOTAL ORGANIC  
IMPRESSIONS,  
1M TOTAL AD  
IMPRESSIONS

# PFI Staff

**Dana Brooks**, President and CEO

**Betsy Flores**, Senior Vice President of Public Policy

**Nat Davies**, Vice President of Business Operations and Programs

**Savonne Caughey**, Senior Director of Advocacy and Government Relations

**Atalie Ebersole**, Senior Director of Government Relations

**Pat Tovey**, Senior Director of Food Safety and Regulatory Compliance

**Kelly Kanaras**, Director of Communications

**Dana Waters**, Policy Analyst





# PFI Board

## **Executive Committee**

Nina Leigh Krueger, Chair, Nestlé Purina PetCare North America

Scott Salmon, Vice Chair, Simmons Pet Food Inc.

Nicki Baty, Secretary, Hill's Pet Nutrition U.S.

Rod Troni, Treasurer, Champion Petfoods

Scott Morris, Personnel Officer, Freshpet

Tod Morgan, Immediate Past Chair, Alpha

## **Producer Members**

Alpha

Barrett Petfood Innovations

Bil-Jac Foods

Blue Buffalo Company, Ltd. (General Mills)

BrightPet Nutrition Group

Cargill

Champion Petfoods

Diamond Pet Foods

Freshpet

Hill's Pet Nutrition

The J.M. Smucker Company

Mars Petcare US

Nestle Purina PetCare Company

Primal Pet Group

Red Collar Pet Foods

Royal Canin US

Simmons Pet Food, Inc.

Sunshine Mills, Inc.

TFP Nutrition

Wellness Pet Company



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