

# OUR INDUSTRY, OUR PROMISE



**Blazing a Trail of Progress for the Animal Food Industry**



2023–24 State of the U.S. Animal Food Industry Report

# ABOUT AFIA



## OUR MISSION

To be the voice of the U.S. animal food industry, influencing policy and connecting people.



## OUR VALUES

- We value providing America's domestic livestock, poultry, aquaculture and pets with safe and nutritious food so they stay healthy throughout their lives and reach their genetic potential.
- We value responsible, voluntary programs and science-based regulations that enhance the care of animals, improve the quality, safety and sustainability of the animal food products we manufacture, promote safer workplaces and more efficient business practices.
- We value being transparent about how animal food is manufactured and providing key influencers with more information to make better informed decisions.
- We value scientific research that fosters innovation in agriculture, so more people have access to affordable and healthy meat, milk, egg and seafood products.
- We value fair global trade and mutual respect between trading partners.
- We value working with reliable partners to adopt practices that enhance our sustainability in order to help us protect the environment for our families, neighbors and future generations.
- We value quality training and education for a skilled and knowledgeable workforce.



## OUR VISION

A healthier world through advanced animal nutrition.

## Our Four Promises

At the American Feed Industry Association (AFIA), we are dedicated to fulfilling our promises to members. Learn more about them at [afia.org/4Promises](https://afia.org/4Promises).



You will have a **VOICE** as part of the total animal food industry association.



We will provide expert legislative and regulatory leadership and **REPRESENTATION**.



We offer confidential individual staff **EXPERTISE** on demand.



We will provide **ENGAGEMENT** opportunities for specialized training, professional education and networking.



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Interested in membership?  
Join now!

## Message from the AFIA President & CEO



What if you could see the future and prepare for challenges before they appear on the horizon? At the AFIA, we are doing just that – anticipating what is ahead and positioning ourselves to swiftly adapt to new opportunities and challenges.

Having a strong voice means that when we need to be heard, we come across loud and clear. Our communications efforts have been blazing, increasing AFIA's visibility across trade and policy media. We tackled false claims about the industry head-on and effectively countered misguided attacks on efforts to update antiquated feed regulations.

Modernizing the regulatory process for new animal food ingredients is essential for innovation. This past year, the AFIA successfully advocated for the introduction of the Innovative Feed Enhancement and Economic Development (Innovative FEED) Act in Congress and encouraged the Food and Drug Administration to rescind its outdated policy guide that wrongly regulates some animal feed ingredients as drugs versus feed additives. Both efforts will help the United States regain its competitive edge in animal production.

Supply chain disruptions continue to place us in uncharted waters. Recognizing the need for resiliency, the AFIA formed a task force to develop strategies for reducing risks in our supply chain and launched initiatives to expand industry's presence in new markets. Through member

visits to Congress and representation on Cabinet-level task forces, the AFIA is raising awareness of the need to diversify input supplies and markets for U.S. food and animal food security.

Whether it is called conservation, sustainability, regenerative agriculture or smart resource use, the need to do more with less is part of our industry's culture and future. The AFIA's work on sustainability continues to gain momentum with the development of policy priorities that emphasize animal nutrition in environmental solutions, while balancing food security needs. The association is leading efforts to shape sustainability agendas and dialogues at international fora on climate change and through international standard-setting, all while supporting members on their sustainability journeys.

The AFIA continues proactively peering around the corner and preparing for emerging issues while amplifying our voice, advancing crucial legislation, showcasing industry expertise and engaging with members. Together, we will forge new pathways for future success.

A handwritten signature in black ink that reads "Constance Cullman". The signature is written in a cursive, flowing style.

**Constance Cullman**  
President & Chief Executive Officer  
American Feed Industry Association

## Message from the 2023-24 AFIA Board Chair



The AFIA shares this report as an annual reminder of our critical role as members and, more importantly, as partners in manufacturing the safest, highest quality animal food in the world. This is a significant responsibility, and I am proud of our members' expertise and dedication in ensuring their products are among the best on the market.

Since joining the Board, I understand more clearly how AFIA's Four Promises of Voice, Representation, Expertise and Engagement drive AFIA's work and improve our individual and collective success. The AFIA delivers on those promises, as highlighted throughout this report, and they are central to the association's strategic plan.

Our members' voice within the AFIA shapes and guides our efforts. Over the last few years, the AFIA increased our representation, becoming a trusted expert with government agencies, on Capitol Hill and internationally. The staff continues to provide valuable expertise to members in regulatory compliance and inspections and through the recently approved pet food label changes. The association also provides many opportunities for engagement, via committee meetings, networking conferences and educational programs.

One area of interest to me touches on all Four Promises: developing and supporting our next generation of industry leaders. As chair, I led the 2023 Executive Leadership Summit (ELS) planning committee. In addition

to planning an outstanding program, "Leadership Agility and Navigating the Changing Workforce," the event featured the first-ever Rising Leaders Program, providing AFIA members an opportunity to send emerging leaders to learn from senior industry executives and attend the ELS.

As leaders, we must continue to focus on attracting, training and retaining our next-generation workforce who will be critical to carrying on the success of our industry. We must also encourage these individuals to get involved with the AFIA, where they can develop as leaders and shape the future of our association, through member interest groups, committees and task forces. These efforts keep the Board and AFIA leadership informed as they develop policy positions and strategies and advocate for the industry.

We owe the AFIA members and staff a debt of gratitude for their dedication to our industry and for encouraging us to continue improving and innovating. Our future is bright, and it will be brighter with your participation. I'll see you at the next AFIA meeting!

A handwritten signature in black ink, appearing to read 'Carlos González'.

**Carlos González, Ph.D.**

Vice President, Global Regulatory Affairs, Hill's Pet Nutrition, Inc.  
2023-24 AFIA Board Chair

# IMPACT

## BY THE NUMBERS

In 2023, **nearly 5,650** U.S. animal food manufacturers generated<sup>1</sup> an estimated:



**\$267.1B** in total sales, including



**\$98.4B** in value-added contributions



**\$18.5B** in local, state & national taxes

The industry directly paid



**\$6.9B** in wages

to over



**80,300** employees



<sup>1</sup> Based on projections from a 2023 economic contribution report. [afia.org/economicimpact](https://www.afia.org/economicimpact)

# Update on Business Climate

## Animal Food Ingredient Approvals

The industry is on the verge of several “wins” necessary for advancing regulations for animal food. In 2023, the AFIA pushed for the introduction of the Innovative FEED Act, which would create and review a new class of feed ingredients that act solely in an animal’s gut to enhance health and productivity and address food safety and environmental concerns. In February 2024, the FDA Center for Veterinary Medicine (CVM) withdrew its restrictive policy guide that for decades unjustly regulated these novel feed ingredients as animal drugs. Now, the AFIA is advocating for passage of the legislation to give animal food companies confidence that the U.S. regulatory system is modernizing to facilitate future innovation and U.S. competitiveness.

The AFIA continues to urge the CVM to speed up its ingredient review processes and is asking the agency questions about its onerous requirements for the Generally Recognized as Safe (GRAS) notification program for animal food. The association also supports maintenance of the efficient and predictable ingredient review processes between the CVM and Association of American Feed Control Officials (AAFCO).



## Domestic Supply Chain Challenges

From the Mississippi River drought snarling barge traffic to labor skirmishes at rail border crossings and the unexpected bridge collapse in Baltimore, the past year has created challenges for companies shipping essential feed, pet food and ingredients. With the Agriculture Transportation Working Group, the AFIA called on U.S., Canadian and Mexican leaders to intervene in union disputes to maintain rail traffic and avoid devastating economic, food security or animal welfare repercussions. The working group also supported the Developing Responsible Individuals for a Vibrant Economy (DRIVE) Safe Integrity Act (H.R. 3408), which would add qualified truck drivers on U.S. highways through an apprenticeship program for commercial drivers under age 21. Moving forward, the AFIA continues to voice members’ concerns to federal agencies when supply chain bottlenecks occur and look for opportunities to support building the nation’s transportation workforce.

### DID YOU KNOW?

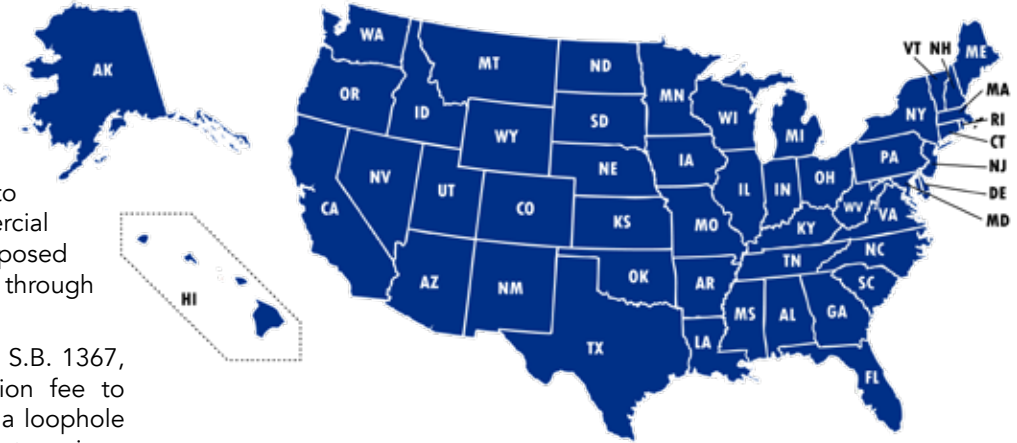
The Union Pacific Railway estimated that \$200 million in economic activity was lost daily when the international rail crossings at Texas’ El Paso and Eagle Pass closed in December 2023.<sup>2</sup>

<sup>2</sup> [afia.org/MexicoRailCorridorsLetter](https://afia.org/MexicoRailCorridorsLetter)

## State Legislative Issues

The AFIA worked to defeat several state bills proposing the misuse and diversion of fees collected from commercial animal food manufacturers. It helped defeat Maryland H.B. 85 and S.B. 641, which proposed raising the spay and neuter tax on pet food; amend Vermont H.B. 624, which originally proposed to fund a director of animal welfare through increased commercial feed registration fees; and tabled Virginia S.B. 31, which proposed the creation of a sterilization program for companion animals through increased pet food registration taxes.

The association also supported legislation including California S.B. 1367, which would extend the existing commercial feed inspection fee to 2031; and an amendment to Kansas H.B. 2168, which closed a loophole permitting hemp product use in animal food before federal safety reviews are completed. The AFIA continues to monitor state legislative activity that encourages the free flow of interstate commerce.



## Pet Food Label Modernization

Since 2015, AAFCO has been working on modernizing pet food labels to improve pet owners' understanding of the information on packaging, a multiyear effort in which the AFIA has been engaged alongside state and federal regulators. Now, pet food manufacturers are moving into the implementation phase, where they must comply with the changes to the AAFCO Model Regulations for Pet Food Label Modernization before February 2029. To support members in the multi-billion-dollar effort of implementing the required changes, the AFIA has held webinars, shared member communications and presented at various industry and state association meetings. The association surveyed state regulators on their intentions to adopt the new model regulations and, in coordination with other trade associations, sent letters to state agencies and agriculture departments, urging them to implement the model regulations. Moving forward, the AFIA continues to monitor state actions toward adoption and support members as they make the necessary changes.



## Regulatory Engagement

As part of its Feed 101 Program, the AFIA took USDA Foreign Agricultural Service staff on a tour of the Kent Nutrition feed mill in Hagerstown, Md., to explain the feed manufacturing process and add context to global trade issues impacting AFIA members.



# FEATURE

## AFIA Supports Key Legislation on Capitol Hill

The AFIA is advocating for several bills in the 118th Congress.

The **Innovative FEED Act (S. 1842/H.R. 6687)** would modernize the FDA's regulation of animal feed additives with non-nutritive benefits, reviewing them more appropriately as animal foods versus drugs.

The **Securing American Agriculture Act (H.R. 8003)** would require the U.S. Department of Agriculture to annually review global supply chains for risks to U.S. agriculture inputs, such as vitamins and amino acids used in animal food production.

The **EMIT LESS Act (S. 4056/H.R. 8676)** would expand the USDA's research on enteric methane emissions and provide cost-share dollars to farmers to deploy emissions-reducing practices.

The **Sound Science for Farmers Act (S. 3719)** would promote better accountability and scientific quality in the Environmental Protection Agency's risk evaluations and regulatory actions for chemistries used in the food and agriculture sectors.

The **Farm Bill**, not yet introduced, will be critical for ensuring the industry remains globally competitive in the future by increasing research and trade promotion funding and boosting programs to mitigate or control animal disease threats.



*"Animal feed additives improve both the health and productivity of livestock. Therefore, in order to remain competitive in the farming industry, it is critical that our nation's farmers have access to these feed additives in a timely and affordable manner."*

— Rep. Greg Pence, R-Ind.-6, said upon introduction of the Innovative FEED Act



AFIA members meet with Rep. Mary Miller, R-Ill.-15, (pictured top) and staff from the office of Rep. Randy Feenstra, R-Iowa-4 (pictured below).



# SAFETY

## BY THE NUMBERS

**~900** = facilities certified in one of AFIA's Safe Feed/Safe Food certification programs

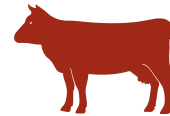


**284M tons** = amount of food consumed by domestic livestock, poultry, fish & pets<sup>3</sup>

**75%** = appx. amount that key staple ingredients (i.e., corn, soybean meal & dried distillers' grains with solubles) make up in compound feed

### Top U.S. Animal Food Consumers

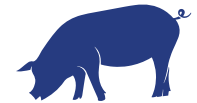
**Beef Cattle**



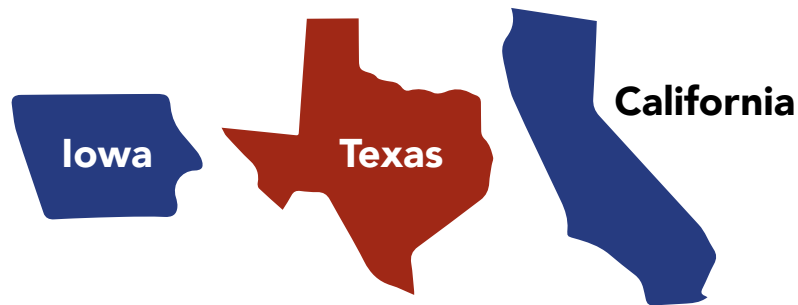
**Broilers**



**Hogs**



### Top Animal Food-Consuming States



<sup>3</sup> Based on 2020 data for six categories of domestic livestock production. [afia.org/consumptionreport](https://afia.org/consumptionreport)





## Update on Feed & Food Safety

### **FDA Inspections & Regulatory Compliance**

Routine animal food safety inspections continued in full force in 2023. The FDA continued its comprehensive inspection program, where state and federal inspectors combine multiple inspections into single site visits, improving the efficiency of routine regulatory inspections and reducing downtime at manufacturing facilities. The AFIA provided expert guidance to member companies to help them more effectively respond to the FDA after receiving a Form 483 for inspectional observations. The association continues to offer education opportunities for members to help their employees better understand how to comply with changing regulations, including offering the annual Food Safety Preventive Controls Alliance Preventive Controls for Animal Food training course and on-site preventive controls qualified individual training upon member request.

### **Biosecurity Readiness Amid Animal Disease Outbreaks**

With African swine fever (ASF) lurking offshore, the agricultural community and federal regulators are preparing for and working to prevent a potential U.S. outbreak. The AFIA has provided input to the USDA's ASF response plans and on the safe feed distribution to the U.S. Swine Health Improvement Program – a voluntary program for pork producers intended to facilitate the trade and movement of swine across the supply chain during an outbreak. With the International Feed Industry Federation (IFIF), the AFIA is drafting biosecurity practices to aid feed manufacturers worldwide in preventing the introduction or transmission of foreign animal diseases.

In March 2024, lactating dairy cows tested positive for highly pathogenic avian influenza (HPAI), presenting new challenges for the agricultural community, given the virus's movement beyond poultry flocks. The AFIA continues to reinforce strong biosecurity practices with members and relay scientific information on the safety of milk-based animal feed ingredients.

The AFIA supports the **Safe American Food Exports (SAFE) Act (H.R. 3748)**, which directs the USDA to proactively renegotiate trade agreements or requirements to keep export markets open for animal-based feed and pet foods in the event of a U.S. animal disease outbreak.

## Protecting Formaldehyde Use

The continued use of formaldehyde, an antimicrobial safely applied to feed for over 40 years to control pathogens and prevent harmful viruses and bacteria from entering the food chain, is under regulatory scrutiny. Recently, the EPA has been on a path that may effectively ban the manufacture and use of formaldehyde. As part of an animal agriculture coalition working to protect formaldehyde's use, the AFIA continues to push back against the EPA's subjective and unscientific review of the scientific literature and urges the agency to engage in meaningful discussions with the FDA and USDA on the importance of formaldehyde's use across the food and agriculture sector and its potential for disease mitigation should there be an ASF outbreak. The association is also supporting inclusion of the Sound Science for Farmers Act in the upcoming farm bill, which would hold the EPA accountable in its risk evaluations and regulatory actions.

## Safe Feed/Safe Food Certification

AFIA's Safe Feed/Safe Food (SF/SF) certification programs have supported manufacturing excellence by going beyond existing regulations to bolster feed and food safety since 2004. Now, with nearly 900 facilities certified in at least one of four programs, it is evident that the benefits of these voluntary programs are recognized and valued by companies and customers alike. In surveys, SF/SF participants cite certification benefits as a great tool for complying with regulations, differentiating themselves in the marketplace, speeding B2B transactions and spotlighting their firms' dedication to food safety. Over the past year, participation in the SF/SF programs have remained steady, despite challenges and changes, thanks to features in trade publications and an increased staff focus on food safety both stateside and internationally.



<sup>4</sup>[afia.org/SFSF-Blog-April2024](http://afia.org/SFSF-Blog-April2024)

### DID YOU KNOW?

Feed additives containing formaldehyde are safely applied in feed mills with accurate, automated equipment intended to minimize employee exposure.

## Update on Worker Health & Safety

### Promoting Safer Workplaces

The Occupational Safety and Health Administration continued work on its Heat Injury and Illness Prevention in Outdoor and Indoor Work Settings rule, with publication for comment anticipated sometime in late 2024. Through member company Belstra Milling Co., the AFIA participated in a Small Business Regulatory Enforcement Fairness Act session to assist OSHA in its rulemaking process and continues to monitor actions and keep members apprised of new requirements. The AFIA is also monitoring OSHA's progress on updating its lockout/tagout rule, which protects workers from hazardous energy sources on machines and equipment during service and maintenance, as well as other rulemaking efforts affecting animal food manufacturers and providing member information via industry newsletters and the annual Feed Education Program.

*"By utilizing the SF/SF guidelines to aid in our regulatory compliance, I feel like CPC Commodities' family of businesses can stay at or above the required level of compliance with all regulatory bodies."*

— Michelle Estes, CPC Commodities' regulatory compliance manager on the value of the SF/SF program<sup>4</sup>

# COMPETITIVENESS

## BY THE NUMBERS



**\$13.4B** = total value of U.S. animal food exports<sup>5</sup>

**19.8MMT\*** = total export volume

### Top 5 Exports (by Value)



**Corn co-products = \$4B**



**Pet food = \$2.4B**



**Animal feed preparations = \$2.2B**



**Alfalfa/hay = \$1.6B**



**Enzymes = \$1.5B**

**79%** = Total value increase of U.S. animal food exports from 2022 to 2023

**120%** = Total export volume increase from 2022 to 2023

### Top 5 Export Destinations (by Value)

Canada



Mexico



China



Japan



South Korea



<sup>5</sup> Based on 2023 data. Dollars represented in U.S. billions. [afia.org/tradedata](https://afia.org/tradedata)

\* MMT=million metric tons

# Meeting Customer Demands

## Supply Chain Resiliency

In 2023, the AFIA launched a supply chain resiliency task force to address the overreliance on a single or few suppliers for critical inputs (e.g., vitamins and amino acids) used in animal food production. This dependency threatens supply chain stability, potentially impacting AFIA members' ability to produce goods affordably. To combat this, AFIA's task force is developing strategies to diversify and de-risk the vitamin and amino acid supply chain and prevent future dependencies on other critical inputs. In 2024, the Department of Commerce tapped AFIA's Gina Tumbarello to serve on its advisory committee to enhance U.S. supply chain competitiveness, ensuring industry's concerns are addressed. The AFIA has also been advocating for the Securing American Agriculture Act, which would bolster agricultural supply chains. Moving forward, the AFIA will continue to seek input from its member task force and provide policymakers with feedback on minimizing future supply chain disruptions for U.S. manufacturers.

## U.S. Agricultural Trade Policy

The farm bill impacts virtually every aspect of the animal food industry, including production, conservation practices adoption, regulatory compliance and access to international markets, making it a fundamental piece of legislation for the U.S. agriculture industry. It also allows USDA cooperators to access funds for Market Access Programs (MAP), allowing smaller agricultural industries, such as the animal food industry, the ability to promote access and development in key foreign markets. Unfortunately, while more trade associations, such as the AFIA, have joined as cooperators, MAP funding has remained stagnant since 2006, limiting the ability to make an impact internationally. The AFIA is urging Congress to pass a farm bill with increased MAP funding that supports key programs to ensure the industry remains globally competitive in the future and facilitates agricultural research and the use of safe tools.



## Hosting International Delegations

One way the AFIA expands members' presence abroad is through international delegations, such as hosting this group from Vietnam, providing insights to Vietnamese buyers on the U.S. animal food manufacturing and regulatory process and opportunities for members to discuss their products and services.

## International Standard Setting at Codex

To preserve the science-based standards and processes that are the foundation for a productive trading relationship among countries, the AFIA is actively involved with the U.S. and IFIF delegations to the Codex Alimentarius. The association is actively engaged on the Codex committees on contaminants in food, veterinary drug residues in food, and food import and export inspection and certification systems. Each committee has specific work on which the AFIA is engaged, such as reducing aflatoxin B1 in feedstuffs for milk-producing animals, setting action levels for products that cause unintended and unavoidable carryover in feed, and including feed in food fraud guidance. The AFIA is also monitoring broader Codex discussions on food safety for recycled packaging, sustainability and PFAS, serving a critical role in ensuring Codex's standards work for the U.S. animal food sector without hindering trade.



*"Food security is national security, which means that we need to treat its vulnerabilities to the food supply chain like any other security threat."*

— Rep. Elissa Slotkin, D-Mich.-7, upon introduction of the Securing American Agriculture Act

# FEATURE

## Countries in Focus



### Vietnam

Since 2021, the AFIA has worked to address existing trade barriers with Vietnam that have resulted in high feed costs and a lack of education among Vietnamese buyers about U.S. feed products. In October 2023, the AFIA hosted its inaugural in-person workshop on feed additives as solutions for limited antibiotic availability, demonstrating how American feed additives and ingredients are used to boost swine and poultry immunity and health. The workshop brought together over 100 importers, feed manufacturers and other participants.

Vietnam's pet ownership is increasing, bringing new opportunities for U.S. exporters, yet a lack of knowledge around proper pet care and nutrition persists. The AFIA recently collaborated with the Vietnamese Small Veterinary Association to identify education gaps among pet owners and veterinarians and discussed the importance of balanced pet diets with veterinarians and veterinary students at Nong Lam University. Through these interactions, the AFIA better understands Vietnam's educational needs and is identifying market opportunities beyond complete pet food.



### Brazil

The AFIA finalized an assessment of the Brazilian marketplace, examining the country's needs and opportunities for the U.S. feed industry. Brazil's animal production system is mature and competitive, presenting U.S. manufacturers with opportunities to differentiate and demonstrate the value of their products to Brazilian buyers. The assessment showed that most Brazilian importers base their purchasing decisions on ingredients that enhance performance or production outcomes, highlighting new opportunities AFIA members can leverage.

# SUSTAINABILITY

## BY THE NUMBERS

Over **40%** of ingredients used in feed are coproducts<sup>6</sup> from other industries,



which means roughly **113.6M tons** of materials are diverted from landfills annually, avoiding **approximately 61.3MMT** of carbon dioxide & **7.4MMT** of methane emissions, all while helping to produce billions of servings of protein annually.<sup>7</sup>

Today's dairy cows require an average of **40% less feed** to produce **100 pounds of milk** than 40 years ago, thanks in part to advanced animal nutrition and feed efficiency.<sup>8</sup>



<sup>6</sup> Based on 2019 data, [afia.org/consumptionreport](https://afia.org/consumptionreport)

<sup>7</sup> Based on rough AFIA member estimations

<sup>8</sup> [fb.org/newsroom/fast-facts](https://fb.org/newsroom/fast-facts)



# Update on Animal Food Industry's Role in Sustainability

## New AFIA Sustainability Policies

In 2023, with input from its sustainability committee, the AFIA launched new sustainability policies that emphasize the U.S. animal food industry's role as a global sustainability leader through scientific approaches, best practices and innovation. The AFIA values science-based, outcome-oriented regulations and standards that encourage sustainable practices without stifling innovation. The association promotes global collaboration and partnerships among industry stakeholders, governments and nongovernmental organizations, where the entire food and agriculture value chain can exchange knowledge and address challenges in animal production. The AFIA also supports capacity-building initiatives, including global education programs that enhance sustainability across the feed value chain. By advocating for harmonized standards for environmental footprinting of feed ingredients, the AFIA aims to promote consistency and facilitate trade, while respecting regional differences in feed production practices. Through these efforts, the AFIA is driving continuous industry improvement and inspiring global sustainability advancements.

### DID YOU KNOW?

The FAO found a decrease from 14.5% to 12% of global greenhouse gas emissions by livestock systems since its last report, noting that productivity improvements, not a reduction in meat consumption, had the highest impact on emissions reductions.<sup>9</sup>

<sup>9</sup> [bit.ly/4c6lnHW](https://bit.ly/4c6lnHW)



## On-farm Use of Emissions-reducing Feed Technologies

As the AFIA makes progress to modernize the regulatory process for novel, emissions-reducing ingredients, it is turning attention now toward getting these ingredients into the hands of farmers and ranchers. The USDA's Natural Resources Conservation Service (NRCS) maintains that livestock producers can use its feed management standard in conservation programs, yet it is woefully underutilized. The AFIA continued discussions with the NRCS to ensure it is ready when novel ingredients get reviewed through the FDA regulatory process to assist producers with receiving cost-share dollars. One key to this initiative's success will be passage of the Enteric Methane Innovation Tools for Lower Emissions and Sustainable Stock (EMIT LESS) Act, which will focus research and conservation programs for methane mitigation tools, including feed ingredients. The AFIA is advocating for this bill and calling for its potential inclusion in the farm bill.

The graphic features a winding black road with white dashed lines, flanked by three location pins: a blue one at the top left, a yellow one in the middle, and a green one at the bottom. The text 'Animal Food Industry Sustainability Toolkit' is written in a bold, green, sans-serif font, positioned to the right of the road. The entire graphic is framed by horizontal stripes in blue, yellow, and green at the top and bottom.

# Animal Food Industry Sustainability Toolkit

## Industry Sustainability Toolkit

In collaboration with the AFIA and a growing list of industry partners, the Institute for Feed Education and Research (IFEEDER) launched the Animal Food Industry Sustainability Toolkit in 2023 to help AFIA members develop and make progress on their internal sustainability programs, respond to stakeholders' information requests and communicate their sustainability stories. In 2023, AFIA members accessed the toolkit over 160 times and a recent member survey showed their desire for more information. IFEEDER's work on the next version of the toolkit is underway, with resources expected to launch in the summer of 2024 that will define existing data needs for industry customers, better quantify environmental benefits of ration innovation, support life cycle assessment (LCA) development and enhance industry communications on sustainability. The AFIA continues to partner with IFEEDER on this effort, encouraging members to use the materials and get involved with the project.

<sup>10</sup> [bit.ly/4c6lnHW](https://bit.ly/4c6lnHW)

## Global Feed LCA Institute

The AFIA continues collaborating in an international effort with the Global Feed LCA Institute (GFLI), to establish a globally accepted framework for calculating the LCA for animal feed. Animal feed production accounts for a large portion of animal agriculture's environmental impact, with global references estimating between 42% to 78% of emissions, depending on the livestock or poultry species, from feed. Through IFEEDER projects, the AFIA is collaborating with the GFLI to update ingredient datasets within the database. The AFIA is also leveraging the latest scientific approaches in environmental footprinting and other technologies to educate members and industry stakeholders on current LCA tools. These efforts will enable and accelerate feed contributions to reduce the environmental impact associated with animal-sourced food production.

A simple line-art icon of a lit lightbulb with rays emanating from the top, symbolizing an idea or knowledge.

### DID YOU KNOW?

Responsible sourcing, regenerative agriculture, ingredient circularity and ration innovation provide opportunities for the feed industry to offer solutions to meet animal agriculture's climate goals.<sup>10</sup>



# Representing Industry in National, International Discussions

## SEC Climate Rule

The AFIA breathed a sigh of relief in March 2024 when the Securities and Exchange Commission (SEC) adopted a climate rule that omits the disclosure of emissions generated throughout publicly traded companies' supply chains. For years, the AFIA joined the National Grain and Feed Association and North American Millers' Association in arguing that the SEC's proposed rule to disclose scope 3 emissions would impact non-SEC-registered businesses throughout the supply chain, which are ill-equipped to comply, and threatening to put them out of business. The AFIA supported the SEC's "more commonsense" rule, given it achieves its intended goal of greater investor transparency on the actions companies are taking to avert known climate risks within their control. The rule is expected to face legal scrutiny in the years to come and the AFIA plans to continue monitoring any proposed challenges.



Staff from the AFIA and FEFANA, the specialty feed ingredients industry in the European Union, board chairs and joint members work to advance the global feed industry while meeting in Rome.

<sup>11</sup> [bit.ly/4c9A3pE](https://bit.ly/4c9A3pE)

<sup>12</sup> [bit.ly/3SwbeNE](https://bit.ly/3SwbeNE)



*"I [heard] about the important role that strategies for methane reduction could play in making the current livestock industry more sustainable ... That includes research on different feeds or feed additives for reducing methane production..."*

— U.S. Secretary of Agriculture Tom Vilsack at the COP28 meeting

## Being a Voice for Industry at COP28

Global policy makers are looking to the animal feed ingredient and additive industry for climate solutions, and expectations are high for the industry to effect change. In 2023, the AFIA attended the United Nations' climate change meeting, COP28, to represent the U.S. animal food industry and tout innovation- and science-based initiatives that support countries' climate goals. As the only observer-designated organization representing the animal food industry, the AFIA successfully advocated against efforts at COP28 that would have hindered trade and stifled technological breakthroughs.

After years of dedicated engagement with the U.N. Food and Agriculture Organization (FAO) and the U.S. government, the AFIA saw positive movement in the 2023 international dialogue. First, the United Arab Emirates, the COP28 host country, announced a declaration on sustainable agriculture, resilient food systems and climate action, which highlighted productivity growth and trade.<sup>11</sup> Then, the FAO published a global assessment on greenhouse gas emissions reduction and mitigation options from livestock agrifood systems, which acknowledged that animal agriculture's mitigation steps are making a difference in reducing emissions.<sup>12</sup> The AFIA now looks to COP29 in 2024, where it aims to hold meaningful conversations on solutions to benefit all stakeholders.

# OUR HEROES

Every year, the AFIA thanks those who have greatly impacted our industry. Below are the awards given during AFIA's 2023-24 fiscal year. Visit [afia.org/awards](https://afia.org/awards) for a complete collection of awards.



## Members of the Year 2023

Megan Fulmer (left)  
Darling Ingredients Inc.  
Wes Klett (right)  
XF Enterprises, Inc.



## Distinguished Service Award 2023

Richard Sellers  
Retired, AFIA



## Friend of Pet Food 2023

Angele Thompson, Ph.D.  
Thompson PetTech



## Liquid Feed Hall of Fame 2023

J. Randy Davis  
Quality Liquid Feeds, Inc.



## AFIA/Kansas State University Feed Manufacturing Lifetime Achievement Award 2023

Dale Presnell  
Hayes & Stolz Industrial  
Manufacturing Co.

## 2023 Nutrition Awards

- **AFIA/American Dairy Science Association's Nutrition Research Award**  
Lance Baumgard, Ph.D., Iowa State University
- **AFIA/American Society of Animal Science in Ruminant Nutrition Award**  
Todd Callaway, Ph.D., University of Georgia
- **AFIA/Equine Science Society's Nutrition Research Award**  
Burt Staniar, Ph.D., Pennsylvania State University
- **AFIA/Poultry Science Association Poultry Nutrition Award**  
Martin Zuidhof, Ph.D., University of Alberta
- **AFIA/American Society of Animal Science Award in Nonruminant Nutrition Award**  
Joel DeRouchey, Ph.D., Kansas State University
- **FASS-AFIA**  
Frank Dunshea, Ph.D., University of Leeds

## Feed Facility of the Year

In coordination with Feedstuffs, the AFIA conducted its Feed Facility of the Year program, recognizing excellence in the industry's manufacturing sector. In 2023, the AFIA presented individual awards for the top liquid, commercial dry, integrator and premix/ingredient feed manufacturing facilities.

The AFIA congratulates the following 2023 award recipients:



### Liquid Feed Facility of the Year

Westway Feed Products  
Houston, Texas  
Plant Manager: Tommy Flowers



### Commercial Dry Feed Facility of the Year

MFA Incorporated  
Aurora, Mo.  
Plant Manager: Trevor Erwin



### Premix/Ingredient Feed Facility of the Year

ADM  
Bluffton, Ind.  
Plant Manager: Brent Weedman



### Integrator Feed Facility of the Year

Mountaire Farms  
Maxton, NC  
Plant Manager: Hector Pacheco  
*\*Offered with support from the U.S. Poultry & Egg Association*



Feed Facility  
OF THE YEAR



# EDUCATION

## BY THE NUMBERS\*

<b>FSPCA Preventive Controls Qualified Individual Training (PCQI)</b> July 2023   Nashville, TN		<b>62 attendees</b>	
<b>Liquid Feed Symposium</b> September 2023   Louisville, KY		<b>162 attendees</b> 28 sponsors	<b>RAISED \$32,000+</b> for Kenny Berg Research & Education Fund
<b>Executive Leadership Summit**</b> October 2023   Hilton Head, SC		<b>114 attendees</b> 10 sponsors	<b>RISING LEADER PROGRAM</b> included 25 attendees
<b>Equipment Manufacturers Conference</b> November 2023   Tucson, AZ		<b>58 attendees</b> 35 sponsors	<b>RAISED \$35,000+</b> for the EMC Scholarship Fund
<b>International Production &amp; Processing Expo</b> January 2024   Atlanta, GA		<b>31,000+ attendees</b> 130+ countries	<b>1,400+ exhibitors</b> 621,350 sq. ft.
<b>Feed Education Program</b> January 2024   Atlanta, GA		<b>51 attendees</b>	
<b>Animal Agriculture Sustainability Summit</b> January 2024   Atlanta, GA		<b>100+ attendees</b>	
<b>Pet Food Conference</b> January 2024   Atlanta, GA		<b>487 attendees</b> 11 sponsors	
<b>Feed Your ESG: How Feed Will Help Hit Sustainability Targets</b> January 2024   Atlanta, GA		<b>118 attendees</b>	
<b>USDA-APHIS: A Dialogue &amp; Digest</b> January 2024   Atlanta, GA		<b>78 attendees</b>	Partnered with the North American Renderers Association & Pet Food Institute
<b>Purchasing &amp; Ingredient Suppliers Conference</b> March 2024   San Antonio, TX		<b>593 attendees</b> 21 sponsors	
<b>AFIA/KSU 500 Fundamentals of Feed Manufacturing</b> Online 2023–24		<b>147 attendees</b>	
<b>AFIA/KSU 500 On-Demand Modules</b>		<b>82 modules</b> viewed in 2023	

\*Based on registered and confirmed attendees at education programs offered during AFIA's 2023-24 fiscal year.

\*\* By invitation only

## Upcoming Events

### EQUIPMENT MANUFACTURERS CONFERENCE

Nov. 6-8, 2024 | Bonita Springs, FL

### INTERNATIONAL PRODUCTION & PROCESSING EXPO

Jan. 28-30, 2025 | Atlanta, GA

### PET FOOD CONFERENCE

Jan. 28, 2025 | Atlanta, GA

### FEED EDUCATION PROGRAM

Jan. 29, 2025 | Atlanta, GA

### WHAT'S KEEPING THE FEED INDUSTRY UP AT NIGHT?

Jan. 29, 2025 | Atlanta, GA

### USDA-APHIS PROGRAM

Jan. 29, 2025 | Atlanta, GA

### PURCHASING & INGREDIENT SUPPLIERS CONFERENCE

March. 18-20, 2025 | Orlando, FL

### LIQUID FEED SYMPOSIUM

Sept. 9-11, 2025 | Fort Worth, TX

# CONNECTING

## BY THE NUMBERS



**1,326** mentions in the news<sup>12</sup>

Most reach on a news article:  
**3.8M**

“Gina Tumbarello Joins Advisory Committee to Boost US Supply Chain Competitiveness in Animal Food Industry”

## AFIA Feed Bites: Blogs You Loved the Most

1. The Benefits of Growing Alfalfa Extend Beyond Animal Feed
2. There’s Nothing “Mid” About Wheat Midds
3. Communicating About Agriculture on Social Media: Lessons from Two Communicators
4. Food Safety Requires Formaldehyde



<sup>12</sup> During AFIA's 2023-24 fiscal year.



## Defending Feed Industry on Social Media

Sensational headlines and conspiracy theories often swirl online during times of crisis and, amid HPAI's spread on dairy farms in early 2024, this year proved to be no exception. The AFIA refuted articles alleging that the use of poultry litter in dairy cattle diets spread HPAI, pointing to the lack of evidence from federal public and animal health and food safety agencies. Repeatedly, the FDA publicly stated that the use of poultry litter in animal food does not pose public or animal health risks warranting restrictions, and the USDA maintained that nothing leaves HPAI-infected poultry farms. While the AFIA continues to work with agricultural organizations on setting the record straight on this sensitive issue, it expects legislative activity for curbing poultry litter's use in feed could ramp up in 2024.

## Giving Back

The AFIA continued its support of local communities and the broader agriculture community. For the fourth year, the staff volunteered at the Arlington Food Assistance Center, where they bagged over 10,000 apples to help feed local families. In lieu of mailing printed holiday cards, the AFIA made a donation to Heifer International, an organization that supports local farmers and their communities. In addition, the AFIA raised funds at the 2024 Purchasing and Ingredient Suppliers Conference in San Antonio to support agricultural relief efforts following the devastating Texas wildfires.



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Find us on social media!



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