

A photograph of the Washington Monument at night, illuminated and reflected in the water of the Tidal Basin. The sky is dark blue with some clouds.

Washington, DC... Current State of Play

Constance Cullman
American Feed Industry Association
President & CEO
June 2022



Biden Administration Priorities

- COVID-19 Pandemic
- Filling the Cabinet
- Climate Change
- The Economy
 - Inflation
 - Supply Chain
 - Energy Price Spikes
- Racial Equity & Underserved Communities
- Workforce Development Overhaul
- Foreign Policy



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Joe Biden has picked 526 nominees to fill key roles in his administration so far

We are tracking **801** government positions among about 1,200 that require Senate confirmation.

101

positions have no Biden nominee.

2

picks are awaiting formal nomination.

137

nominees are being considered by the Senate.

387

have been confirmed by the Senate.

Additionally, we have identified **174** appointees so far who are serving in termed positions or who were held over from previous administrations.

Biden Political Appointee Tracker

In collaboration with



PARTNERSHIP
FOR PUBLIC SERVICE



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Ag Nominations...Finally!



Alexis Taylor

USDA undersecretary for trade
and foreign agricultural affairs



Doug McKalip

USTR chief agricultural negotiator



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Climate

- Re-entered Paris Climate Accord
- COP 26
 - Pledged to reduce methane emissions by one third by 2030
 - End deforestation completely by 2030
 - Requires Congressional Approval
 - Russia and China did not participate
- AIM for Climate
- Build Back Better - \$555B for Climate



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The Economy!

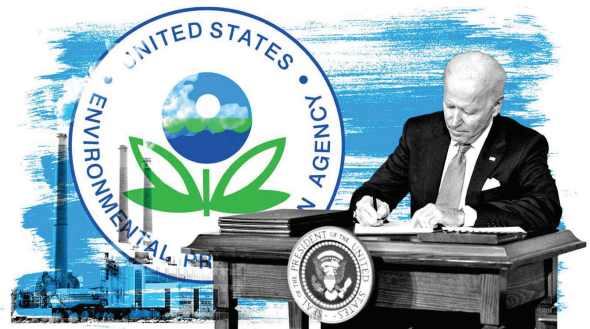
- The Federal Reserve has rolled out aggressive interest rate hikes to fight inflation, and the central bank has indicated that summer may bring even more increases.
- As high gas prices continue to break records, inflation has also caused the price of natural gas to spike.
- President Biden proposed to “Tax away inflation”



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Regulatory Priorities

- Climate will be part of numerous departments
- Worker safety – OSHA
- Environment – Water, PFAS/PFOS
- Food safety – Continue FSMA implementation, antimicrobial resistance
- Attention on antitrust actions



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Tracking Biden's environmental actions

As Biden unwinds dozens of Trump's energy and environmental policies, he's forging his own.

Biden's policies

50
Added

42
Proposed

Status of Trump administration's environmental policies

80
Overturned

91
Targeted

60
Not targeted



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Biden Trade Agenda



- **No Trade Promotion Authority**
- **Worker-Centric Trade Approach**
- **Initiatives**
 - Latin America
 - Indo-Pacific Economic Framework
 - Taiwan
 - UK



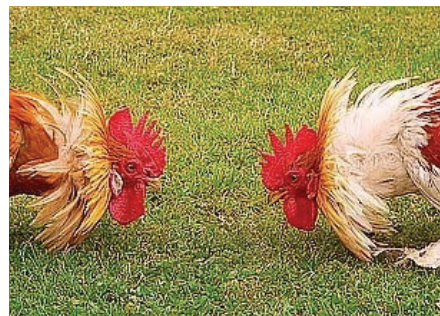
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117th Congress



Activities in 117th

- Budget
- Workforce development
- BBB - \$1.75T BBB Reconciliation Bill – will they keep trying?
- Competes Act & U.S. Innovation and Competition Act
- Hearings
 - Labor, supply chain, nutrition, concentration



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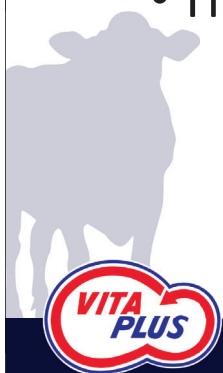
***What does it all
mean for
Elections?***



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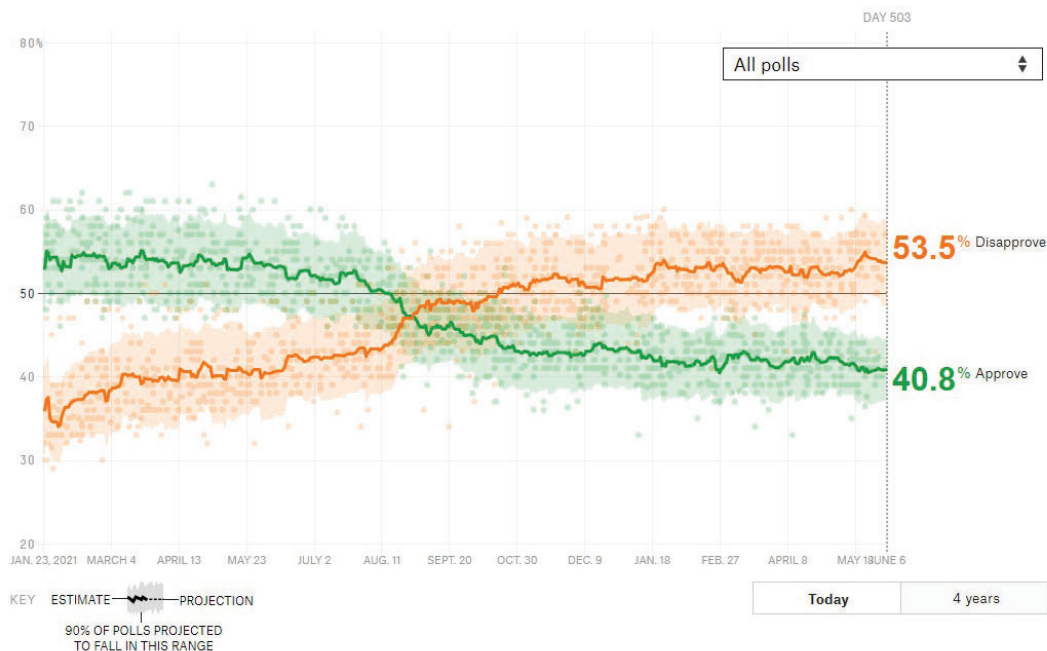
June 7 Primaries - what did we learn?

- Crime is important – even in blue cities
- Jan 6 Commission had an impact
- Incumbents will have more difficulty than usual
- The Trump Factor is still mixed



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Biden's Popularity Rating by FiveThirtyEight



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The next 2.5 years

- Will continue to be an incredibly divided Washington
- Republican Party will face a critical decision on its future...and so will the Democrats
- Republicans will take Congress in 2022
 - Currently Democrats hold a 221 to 213 edge in House and the U.S. Senate is split 50-50
- Biden will not be the Democratic nominee in 2024



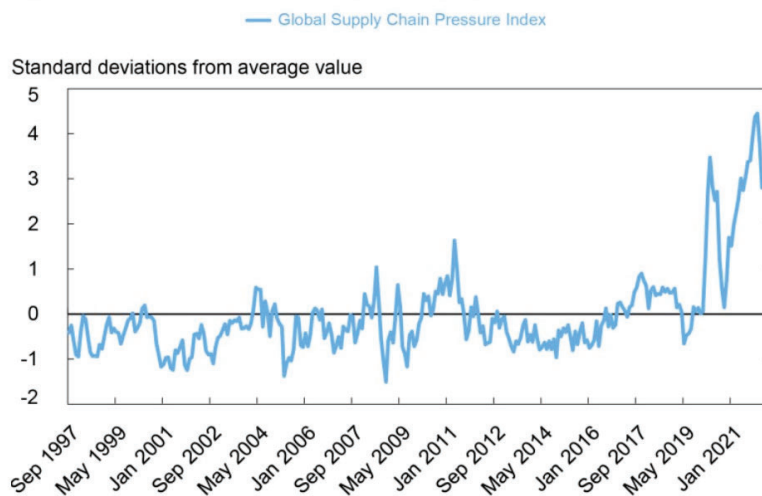
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The Supply Chain



Supply Chain Stress

April Data Indicate Worsening of Supply Chain Pressures



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Supply Chain Sequence of Events

- Aging infrastructure
- Lean manufacturing models
- Growing labor shortage
- Tariffs
- Global pandemic
- U.S. government intervention stimulated crisis
- U.S. government intervention provided some relief
- Russia's invasion of Ukraine



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What can WE do?

- Explore latest technology & software
- Streamline supply chain
- Manage data
- 3rd party logistics
- Inventory management
- Workflow optimization



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What government actions will it take?

- Address labor issues
- Reduce bottlenecks
- Help businesses
- Improve the long-term outlook for U.S. supply chains



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Global Focus on Sustainability



Food Systems Summit 2021



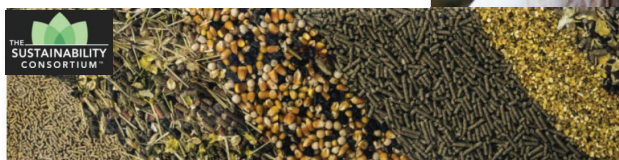
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Growing Attention to Feed

THE MARKETS INSTITUTE AT WWF | BUSINESS CASE



An Environmental and Economic Path Toward Net Zero Dairy Farm Emissions



RESOURCE GUIDE ON SUSTAINABLE ANIMAL FEED

by TSC | Jun 22, 2021

RESOURCE GUIDE ON SUSTAINABLE ANIMAL FEED ORGANIZATION TOOLS REPORTS AND CASE STUDIES RESEARCH COMPANIES' FEED SUSTAINABILITY EFFORTS DISCUSSION CONTACT REFERENCES SCOPE The global demand for animal protein products is increasing rapidly due to population...



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Looking Ahead



UN Special Envoy calls for a focus on food at next climate talks to limit global heating and pre future famines



Sustainable Productivity Growth Coalition



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GFLI DATABASE

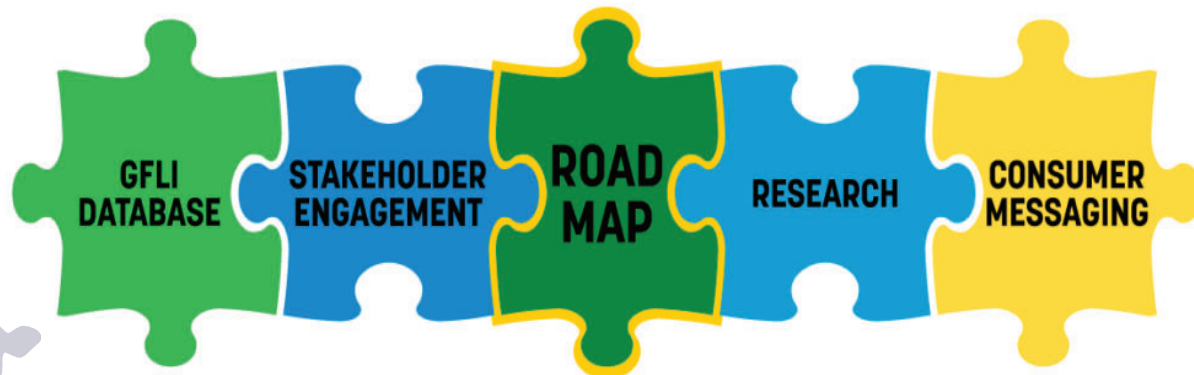
Enable Benchmarking &
Data Transparency

SUSTAINABILITY ROAD MAP

Inventory & Assess Needs to
Develop Strategy & Resources

CONSUMER MESSAGING

Promote Transparency &
Ensure Consumer Choice



STAKEHOLDER ENGAGEMENT

Listen to & Collaborate with
Diverse Perspectives

RESEARCH

Lead with Science to
Advance Solutions



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27

- Clearly understand sustainability risks & needs of AFIA's members by feed sector
- Develop tools AFIA's members can use in developing or enhancing their own sustainability programs
- Consistently & clearly communicate sustainability messages for the American animal feed sector
- Identify specific sustainability research topics to fill gaps in understanding.
- Develop a roadmap that helps IFEEDER & AFIA connect the American feed industry to stakeholders

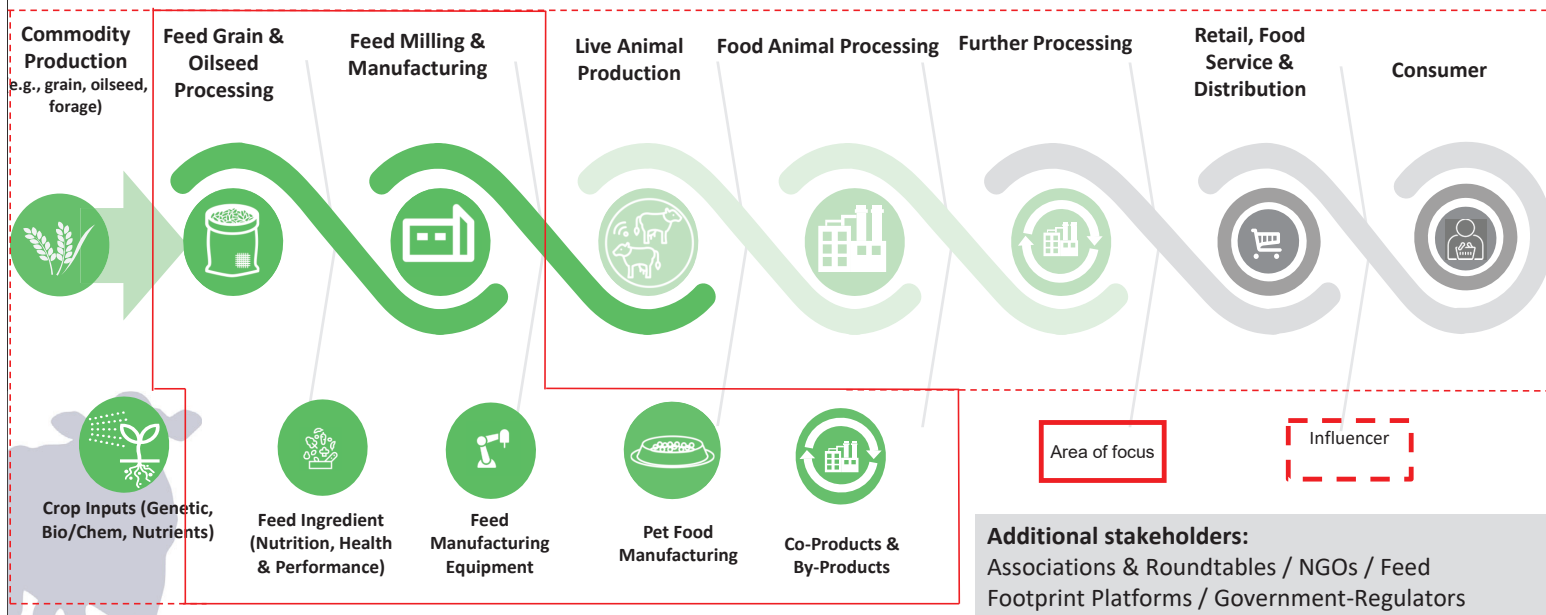
SUSTAINABILITY ROAD MAP PROJECT

Supported By:



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Feed & Pet Food Industry Sustainability Stakeholder Map



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Sustainability



- Leverage your associations' resources
- Pick YOUR sustainability story
- Connect with your customers and suppliers
 - Know what your customers want from you
 - Know what you want from your suppliers
- Communicate the **values** inherent in your products
- Talk about the **solutions** you are providing



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Thank you!

Questions?