

2017–18 ANNUAL REPORT





LETTER FROM CHAIR

Dear Supporters of IFEEDER,

I am thankful for the many individuals who care so deeply about the Institute for Feed Education and Research (IFEEDER). Reflecting on this past year, IFEEDER has continued to take on exciting new projects that are aligned with both the needs of the industry and the mission of

the Institute. Our base of support continues to grow and I am thankful to each of you for your continued investment in IFEEDER.

I am pleased to share with you – our donors, friends, thought leaders, decisionmakers – our annual report. It is an opportunity to report to you on what YOU have accomplished this past year. Your financial support, creative ideas and thoughtful insights are what keep us focused on IFEEDER's vision and priorities and allows us to be the champion for safe and sustainable feed and food production.

Your involvement in IFEEDER is paying dividends. We have taken what you have told us is important and remained focused on work that supports the American Feed Industry Association's (AFIA) legislative and regulatory positions, helps inform policymakers and consumer influencers on our key messages and continues to tell the industry's positive sustainability story. We have also focused a significant amount of time and energy into enhancing our consumer communications, which ultimately focus on preserving consumer choice and protecting the animal food industry's image and license to operate.

I am proud of the work that we have accomplished together and I look forward to your feedback on the accomplishments highlighted in the pages ahead. Thank you for being a continued supporter of your industry charity. You make all our good work possible.

Sincerely,

Paul Phillips
2017–18 Chairman
IFEEDER Board of Trustees

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CELEBRATING 10 YEARS IN 2019

Started in 2009 by a group of visionaries who saw the need for an organization that could provide much needed research and education for the feed industry, the Institute has truly grown into its role as the champion of safe and sustainable feed and food production. Because of you, IFEEDER has accomplished many projects on behalf of the industry and brought forward new ideas for how to continue being a force for good in the coming years. Look for IFEEDER to share its story with you throughout 2019 as it commemorates this 10-year milestone.

INSTITUTE FOR FEED EDUCATION AND RESEARCH

For the period ending April 30, 2018
(in thousand dollars)

FINANCIAL HIGHLIGHTS



SUPPORT AND REVENUE

\$332 In Pledges

\$19 EMC Scholarship Fund

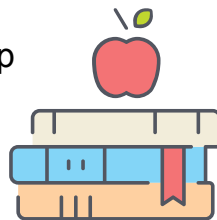
\$18 Kenny Berg Research and Education Fund



PROGRAM EXPENSES

\$12.5 EMC Scholarship

\$268 Grants



\$7 Kenny Berg Research and Education

100% OF FUNDING
SUPPORTS IFEEDER'S
RESEARCH AND
EDUCATION INITIATIVES

FOR EVERY
\$1 INVESTED
IN IFEEDER PROJECTS,
\$5 IS LEVERAGED
FROM OTHER SOURCES

TO DATE,
80% OF IFEEDER PROJECTS
LEVERAGE ADDITIONAL
FUNDS FROM OTHER
ORGANIZATIONS



2017–18 ACCOMPLISHMENTS

CONDUCTED PUBLIC OUTREACH TRAINING WITH MEMBERS

IFEEDER worked with the Center for Food Integrity (CFI) to develop a series of three webinars for AFIA members to become more comfortable talking with consumers about agricultural issues and topics related to animal feed. As industry workers are often involved in one-on-one discussions with community leaders and members, these webinars gave them the talking points they needed to speak more eloquently about the use of genetically modified organisms in feed, greenhouse gases and antibiotics.

In the future, AFIA will continue to update and add to these talking points on other subjects of interest.

LAUNCHED A NEW RESEARCH PROJECT TO ANALYZE SALMONELLA RISKS IN FEED PRODUCTION

IFEEDER made a grant to the University of Arkansas to research whether animal feed contains any of the eight serotypes from the bacteria *Salmonella* that could pose a health threat to livestock. The research project, made possible by IFEEDER, AFIA and several partners – including the National Pork Board (NPB), National Renderers Association, Poultry Protein and Fat Council, U.S. Poultry and Egg Association (USPOULTRY) and the U.S. Soybean Board – will help the animal feed industry better understand if the bacteria is prevalent at feed manufacturing facilities so that it can make more informed decisions on what additional safety measures, if any, should be taken to promote feed safety and protect animal health. IFEEDER anticipates sharing the results of this study in 2019. AFIA plans to use this in its work with the Food and Drug Administration on risks reasonably likely to occur in feed.

EXAMINED ANIMAL HEALTH AND WELFARE IMPACTS OF RAISING ANIMALS WITHOUT ANTIBIOTICS

Sparked by consumer demand, U.S. producers, restaurants and grocers have begun prioritizing providing protein from animals that have not received antibiotics, while concerns within the animal health industry have grown that these practices might be negatively impacting animal health and welfare. In 2017, IFEEDER underwrote a study with the Animal Agriculture Alliance (AAA), Health for Animals, National Corn Growers Association, American Association of Bovine Practitioners, NPB, National Pork Producers Council and Richard Sellers, AFIA's senior vice president of public policy and education, to explore the impacts that removing antibiotics from animal production would have on animal health and welfare, food safety, consumer demand and the cost of food production.

The project surveyed more than 550 veterinarians, producers and others directly involved in raising animals and found that “Raised Without Antibiotics” programs can negatively impact animal welfare and increase production costs.

IFEEDER is partnering with the AAA and Health for Animals to reach out to influencers in grocery retail, food manufacturing and food service, restaurant chains, and other companies throughout the food supply chain as well as producer groups to educate them on the results and help them take a more balanced view to policy decisions impacting animal health and welfare.



TESTED CONSUMERS' KNOWLEDGE AND WILLINGNESS-TO-PAY FOR CERTAIN POULTRY PRODUCTION PRACTICES

New research, funded in part by IFEEDER, suggests that the jury may still be out on the benefits of cage-free egg and slow-growth chicken production as consumers have little knowledge about them and are unwilling to pay a hefty premium for these products in comparison to those products with “organic” and “GMO-free” labels.

Purdue University's Jayson Lusk, Ph.D., surveyed over 2,000 chicken and egg consumers with a variety of information for and against the production techniques and then asked them to select between cartons of eggs or packages of chicken – with a variety of labels and price points – to determine the labels that most impacted their purchasing decisions. It also gauged the amount of additional money they were willing to pay for them. After being presented with information for and against cage-free egg production, respondents' willingness to pay a little more for cage-free eggs increased, however, brand name still dominated for chicken purchases.

In the coming months, IFEEDER will be working with the Food Marketing Institute, Foundation for Food and Agriculture Research and AAA, as well as the other project sponsors – Smithfield, USPOULTRY, the Indiana Soybean Alliance and the Iowa Egg Council – to discuss the results with food retailers so the agriculture industry can start to hold more meaningful conversations about animal welfare and sustainability with customers.

“For the past few decades, the animal food industry has spoken about the value and service it provides to its customers in producing some of the safest, highest quality animal food on the planet. Now, we have the data to prove to our nation’s leaders that this industry is an integral part of the agricultural economy, providing hundreds of thousands of jobs and generating billions of dollars in taxes and revenue to support local and state communities.”

– PAUL PHILLIPS, IFEEDER’S 2017–18 CHAIRMAN OF THE BOARD OF TRUSTEES

COMPLETED FIRST-EVER ECONOMIC CONTRIBUTION STUDY OF THE U.S. FEED INDUSTRY

In January, IFEEDER released the results of a study that quantified the animal food manufacturing industry’s contribution to the local, state and national economies and U.S. agriculture.

Overall, the study found that in 2016, the U.S. animal food manufacturing industry contributed \$297.1 billion in total U.S. sales, including roughly \$102 billion in value-added contributions; over \$22.5 billion in local, state and national taxes; and over 944,000 jobs. It listed a number of factors that play a role in the animal food industry’s ongoing economic output and said the odds are good the industry will adapt and grow stronger.

To amplify AFIA’s message to policymakers, the staff: developed a comprehensive communications toolkit for members (available on the AFIA member section of the website) to use, including an interactive web-based map linking to 535 state and congressional district fact sheets and a number of graphics, videos and social media tools; held three member webinars with over 160 attendees from across the AFIA membership, the Association of American Feed Control Officials and state feed associations; and launched an advertising campaign in PoliticoPro’s Morning Agriculture. As of early September 2018, the maps had over 4,000 views from web visitors. In addition to AFIA’s staff use, AFIA is encouraging all members to share this data with their local, state and federal officials when meeting with them.

ANIMAL FOOD MANUFACTURING INDUSTRY IS STIMULATING THE ECONOMY



Total Sales
\$297.1 billion



Value-Added
\$102 billion



Labor Income
\$55.9 billion



Jobs
944,227



Taxes
\$22.5 billion



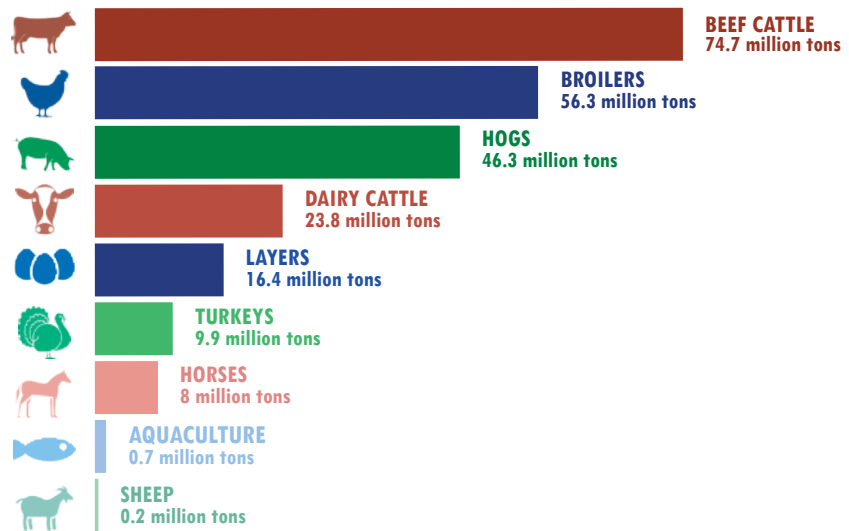
THANK YOU RICHARD SELLERS

Richard Sellers, AFIA’s senior vice president of public policy and education, is retiring from the association at the end of 2018. Sellers was one of IFEEDER’s visionaries who saw the need for creating a public charity to support AFIA’s legislative and regulatory work and the overall feed industry. It is because of his vision and hard work, along with that of many other industry leaders, that IFEEDER exists today. IFEEDER is quickly becoming a leader in addressing industry needs through research and education. IFEEDER thanks Sellers for his many contributions.

Did You Know?

The U.S. poultry and livestock industry has one of the lowest carbon footprints in the world, accounting for 3.8 percent of the United States' total greenhouse gas emissions.

THE DEMAND FOR ANIMAL FOOD IS STRONG



In 2016, over 236 million tons of animal food were consumed by nine animal species.

PROVIDED CONTEXT TO HOW MUCH FOOD U.S. ANIMALS CONSUME

IFEEDER commissioned a novel study to quantify the amount of food consumed by the top nine livestock, poultry and aquaculture species throughout the various stages of their lives. Working with roughly 25 industry and university subject matter experts, IFEEDER determined the specific diets fed to animals at various stages of their lives and adjusted them for regional dietary differences, due to the availability of ingredients and best management practices.

Overall, the study found that in 2016, approximately 236.3 million tons of animal food were fed to nine animal species. This is the first comprehensive source of U.S. animal feed production that has ever been completed.

Since the report's launch, the AFIA staff has met with roughly 125 congressional offices and spoken with roughly 90 regulators to educate them on the industry's impact in producing high-quality animal feed and stimulating the local, state and national economies. In addition, many state and allied associations have amplified this message in fly-ins and other meetings with members of Congress and state departments of agriculture.

MOVED FORWARD WITH THE GLOBAL FEED LCA INSTITUTE PROJECT

In 2016, AFIA, in partnership with the European Feed Manufacturers' Federation, the Animal Nutrition Association of Canada, and the International Feed Industry Federation, launched the Global Feed LCA Institute (GFLI) to provide a more practical approach to the Livestock Environmental Assessment Performance (LEAP) Project methodology. GFLI is working to develop a feed-specific, life-cycle analysis database for international companies and associations to use as the "gold-standard" tool of assessing and benchmarking reductions in environmental impact, leading to the adoption of more sustainable practices.

This work, which would not have been possible without continued financial support from those such as IFEEDER, is essential in supporting AFIA's efforts of providing scientific expertise to policymakers. For instance, thanks to the LEAP methodology and data gathered by the Environmental Protection Agency, we now know that the U.S. poultry and livestock industry has one of the lowest carbon footprints in the world, accounting for 3.8 percent of the United States' total greenhouse gas emissions, compared to the transportation sector, which stands at roughly 27 percent of the country's total emissions. AFIA has been able to use this scientifically sound data to correct misinformation from non-scientific studies and share this information with the White House and U.S. Department of Agriculture for consideration in policymaking.



GIVING BACK

KENNY BERG RESEARCH AND EDUCATION FUND

Working alongside AFIA's Liquid Feed Committee, IFEEDER is pleased to continue building a positive image for the use of liquid feed to deliver nutrient supplements in the beef and dairy industries through the administration of the Kenny Berg Research and Education Fund.

Through the Kenny Berg fund, Alfredo DiCostanzo, Ph.D., at the University of Minnesota, has completed a research study on optimizing sugar in cattle with the goal of determining the optimum sugar concentration, based on daily gain and feed conversion in high-forage diets fed to growing cattle. This will assist animal feed manufacturers in formulating and delivering more precise liquid supplement formulations to their producer customers.

EMC SCHOLARSHIP FUND

Helping young people see a future in the feed industry has been one of the Equipment Manufacturers Committee's priorities. The committee continues to award four scholarships annually to deserving students from Kansas State University, North Carolina State University, North Dakota State University and California Polytechnic State University who are pursuing degrees in related fields of study.

A golf tournament is held at the annual EMC conference to raise funds for the EMC Scholarship fund. This past year, the tournament raised more than \$2,000 in support of the EMC scholarship.

IFEEDER is proud to partner with EMC in administering these funds.



BE A CHAMPION FOR THE ANIMAL FOOD INDUSTRY

IFEEDER is a critical link in the ever-evolving food supply chain and your support is critical. Get involved or make a donation by visiting our website at ifeeder.org or calling (703) 524-0810.

DONATE

- Make a one-time donation
- Make a monthly or annual donation
- Make a multi-year pledge
- Honor a loved one with a tribute gift
- Consider a planned gift

VOLUNTEER

- Serve on the Board of Trustees
- Serve on a committee
- Assist with introductions for fundraising
- Provide a testimonial



MISSION

IFEEDER serves as a champion for the animal food industry, which is a critical link in the ever-evolving food supply chain. IFEEDER has two primary focuses:

- Fund critical animal feed and pet food research to support AFIA's legislative and regulatory positions.
- Develop appropriate messaging to policymakers, consumer influencers and stakeholders detailing the industry's very positive contributions to the availability of safe, wholesome and affordable food, and preservation of our natural resources.



WHAT'S NEXT

ENHANCING CONSUMER COMMUNICATIONS

IFEEDER takes its role in consumer education seriously. It continues to lay the groundwork on an exciting project that will help consumers better discern fact from fiction with regard to the environmental and health impacts of animal agriculture. Being the champion for safe and sustainable feed and food production requires strong partnerships, and the Institute is excited to lead the collaboration with leading research scientists, industry experts and like-minded organizations to maximize the industry's efforts to communicate with consumers and consumer influencers about the sustainable practices of the animal feed industry.

STUDYING THE IMPACT OF GM-FREE LIVESTOCK AND POULTRY FEED ON U.S. FEED INDUSTRY

The livestock, poultry and aquaculture industries have used genetically modified feed ingredients for more than 20 years. Research to date has not demonstrated any health risks to those humans who have consumed food containing GM products or from animal food products from animals fed GM ingredients in feed. However, calls to remove GM ingredients from feed in the name of greater sustainability pose a threat to the feed and food industries, particularly in continuing to provide choices in the marketplace. The results of this proposal are likely to underscore the environmental and economic impacts of going GM-free in U.S. feed production. Several other agricultural organizations will be partnering with IFEEDER to fund this important project.

The IFEEDER annual report lists gifts to IFEEDER that were made between May 1, 2017, and April 30, 2018. If your name is not included and you think it should be, there may be several reasons:

- You made your gift either before May 1, 2017, or after April 30, 2018.
- You made a pledge instead of an outright gift. This listing includes only gifts received. If you made a pledge during this time period, but elected not to begin paying it until after April 30, 2018, your name will not be listed.
- We omitted your name in error. If we've made a mistake, we'd like to hear from you.

If you have questions, please contact us at (703) 558-3577 or ifeeder@ifeeder.org.

DID YOU KNOW THAT YOU CAN INCLUDE IFEEDER IN YOUR WILL, TRUST OR OTHER ESTATE PLANS?

An estate gift will continue your support of IFEEDER and ensure the Institute's ability to conduct research and education in support of the animal food industry. If you plan to include IFEEDER through an estate gift, we would like to know so that we may personally thank you! Please call or email IFEEDER to add your name to our planned giving donor list. Your gift can remain anonymous, if desired. Contact IFEEDER for suggested bequest language and for the IFEEDER tax ID to share with your attorney. Please contact us at (703) 558-3577 or ifeeder.org.



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SILVER

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CONTACT US

PLEASE LET US KNOW HOW YOU WOULD LIKE TO ENGAGE WITH IFEEDER.



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