2013-2023

a decade of impact

10 years of impact | pet sustainability coalition
Global Pet Expo 2013 was, by all accounts, a record-breaking event. There were 5,327 buyers, more than 3,000 new pet product launches, 964 exhibitors, and 2,686 booths sold – the highest post-show numbers reported in Global Pet Expo’s then nine-year history. The pet industry was going gangbusters with historic sales numbers and pet ownership at an all-time high.

But there was something missing. While the outdoor and textile industries had recognized their sustainability challenges and convened to work towards solutions, the pet industry’s environmental and social impact was just ramping up.

We came together, both of us passionate about pets, the environment, and sustainability, to create Pet Sustainability Coalition (PSC). With the support of our eight founding members, we started with a toolkit, some industry contacts, and a vision. By the end of 2013, we had 17 members. Now, we work with and for nearly 200 members representing producers, suppliers, manufacturers, brands, distributors, and retailers. We have become the epicenter of collaborative solutions across the supply chain to address the pet industry’s significant climate impacts.

Our first decade has been a journey of exponential growth in our membership, our project and program offerings, our industry credibility, our reach, and our grit. Our next 10 years will be defined by our ability to scale up our critical business services, tools, and education while expanding our transformational initiatives to solve the industry’s biggest challenges. The pet industry has awoken to the state of our perilous planet, and PSC is uniquely positioned to bring the power of business to the front lines. Through a new philanthropic endeavor, we will be well-equipped to deepen our work around plastics, ingredients, and social responsibility, while expanding our influence through broader tools, education, and advocacy.

The pet industry is still going gangbusters, now a $165B industry projected to reach $236B by 2030. Today, 58% of Fortune 500 companies have formal sustainability goals and leadership, and more than 90% now publish ESG reports. 80% of young US adults (ages 18-34) are willing to pay more for sustainable products, and this is the fastest growing demographic of pet parents. 90% of Americans believe that businesses should value people and the planet as much as profit. A full 91% of individual professionals feel that the expectations of sustainability are growing and express a preference for sustainable employers.

Thanks to the strength and support of our members and collaborators, we are the established industry leader, ready to guide the sector through the pivotal decade to come, supporting business success, driving employee satisfaction, meeting consumer demand, and tackling the big issues that are best solved as the strong coalition that we have become. We thank you for all you have done to build our decade-strong foundation, and we invite you to join the momentum as we propel sustainable, profitable success across the industry. 10 years is only the beginning!

Sustainably Yours -
Caitlyn Dudas and Chris Bentley
In 2020, Earth Animal became the first Icon Member of PSC. It was important to us to be a meaningful partner and closely collaborate with PSC and their work on major systemic issues facing the pet industry such as packaging, protein sourcing, and equity.

So much of the value that we see in our engagement with PSC is how their projects and programs help to inform, advance, and enable transformation in OUR environmental and social performance. And how they constantly challenge us to improve on the way in which we operate as a force for good as well as for profit. PSC played an instrumental role in helping us reach one of our key goals: becoming B Corp Certified!

We could only have reached this powerful milestone with PSC’s support in the hard work needed to meet the rigorous B Lab requirements, including:

- Life Cycle Analyses of our key products
- Scope 1 & 2 Greenhouse Gas Accounting
- Supplier Code of Conduct
- Industry-first Animal Welfare Policy

10 years ago, when Stephanie Volo (our Chief Impact Officer) was Co-CEO of Planet Dog, she immediately committed to becoming a Founding Member of the PSC. Throughout the decade, she has served as an Advisory Board Member, Chairwoman of the Board, and now serves as Chair Emeritus.

To honor Stephie’s commitment, to thank PSC for the leadership it fosters in our industry, and for helping Earth Animal to continuously improve, we are proud to sponsor PSC’s year-long 10-year anniversary celebration. Join us all year as we commemorate the remarkable change they have created and nurtured, and anticipate all that their next decade will bring.

Here’s to the next 10!

*Stewart Shanley*
CEO
PSC is born at Global Pet Expo as a project of Natural Capitalism Solutions, a non-profit accelerator of sustainability led by the renowned iconic leader Hunter Lovins.

PSC has 17 members:
- Cardinal Pet
- Cloud Star
- Fetch
- Honest Kitchen*
- I and Love and You*
- KONG*
- Molly Mutt*
- Nordic Naturals
- Only Natural Pet*
- Petco*
- Petmate
- PetSmart*
- Planet Dog
- Sojos
- Vital Essentials
- West Paw*
- Worldwise

*2023 members

PSC conducts 6 Member Projects from:
- Camp Bow Wow
- I and love and you
- Only Natural Pet/ Blog Paws
- PetSmart
- KONG
- Mom’s Organic Market

PSC revenue = $158,500

Pet Industry Sustainability Coalition (PISC) becomes Pet Sustainability Coalition (PSC)

PSC eliminates its FREE Membership while ensuring its on-line toolkit and education series remained fully accessible to the entire pet industry

PSC holds first-ever Impact Unleashed industry-wide inspirational and educational conference.

5,000 visits to the PSC website
<table>
<thead>
<tr>
<th>Year</th>
<th>Event/Achievement</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>PSC expands to international membership</td>
</tr>
<tr>
<td></td>
<td>PSC hires its second staff member</td>
</tr>
<tr>
<td></td>
<td>Facebook Audience of 486; LinkedIn audience of 162</td>
</tr>
<tr>
<td></td>
<td>PSC expands mission to include sustainable ingredients and packaging</td>
</tr>
<tr>
<td>2019</td>
<td>PSC reaches 100 members</td>
</tr>
<tr>
<td></td>
<td>PSC has first trade show booth</td>
</tr>
<tr>
<td>2020</td>
<td>PSC launches Flex Forward Pilot Project</td>
</tr>
<tr>
<td></td>
<td>PSC becomes its own 501(c)3</td>
</tr>
<tr>
<td></td>
<td>PSC expands toolkit with social responsibility section and leads DEI challenge that inspires 6,000+ actions</td>
</tr>
<tr>
<td></td>
<td>PSC transitions member performance assessment in alignment with the United Nations Sustainable Development goals</td>
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<tr>
<td>2021</td>
<td>PSC surpasses $1M in revenue</td>
</tr>
<tr>
<td></td>
<td>PSC introduces UnPacked event</td>
</tr>
<tr>
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<td>PSC releases the 4-Factor Ingredient Framework</td>
</tr>
<tr>
<td>2022</td>
<td>PSC holds 1st annual Earth Day Rally, a 30-day sprint to inspire 10,000+ earth friendly actions</td>
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<tr>
<td></td>
<td>PSC surpasses 10 full-time staff</td>
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<tr>
<td></td>
<td>PSC successfully launches first philanthropic campaign and raises $100,000 to support sustainable packaging programming</td>
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<tr>
<td></td>
<td>PSC reports 65% annual growth</td>
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</table>
Membership

MEMBER BREAKDOWN BY LEVEL

<table>
<thead>
<tr>
<th>Level</th>
<th>Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADVOCATE $2,500</td>
<td>87</td>
</tr>
<tr>
<td>CHAMPION $5,000</td>
<td>40</td>
</tr>
<tr>
<td>GUARDIAN $10,000</td>
<td>18</td>
</tr>
<tr>
<td>ICON $25,000</td>
<td>7</td>
</tr>
<tr>
<td>SMALL BUSINESS ADVOCATE</td>
<td>18</td>
</tr>
</tbody>
</table>

GRAND TOTAL 170

MEMBER BREAKDOWN BY PRIMARY SECTOR

- BRAND: FOOD & TREAT 5.3%
- MANUFACTURER: HARD GOODS 1.2%
- SUPPLIER: PACKAGING 1.8%
- SUPPLIER: INGREDIENT 2.9%
- RETAILER 7.1%
- BRAND: SUPPLEMENTS 7.1%
- DISTRIBUTOR 10%
- MEDIA PARTNER 11.2%
- MANUFACTURER: HARD GOODS 14.7%
- OTHER 25.3%

MEMBER BREAKDOWN BY YEAR

- 2013: 17
- 2014: 35
- 2015: 39
- 2016: 47
- 2017: 56
- 2018: 78
- 2019: 100
- 2020: 167
- 2021: 195
- 2022: 170

*In 2022, PSC consolidated from 6 Membership tiers to 4, accounting for the change in the membership total.
WE HAVE MEMBERS IN
16 COUNTRIES

- Belgium
- Brazil
- Canada
- Czechia
- Denmark
- Finland
- France
- Germany
- Italy
- Netherlands
- New Zealand
- South Africa
- Spain
- United Kingdom of Great Britain and Northern Ireland
- United States of America
- Vietnam

WE HAVE MEMBERS IN
42 U.S. STATES

- Alabama
- Arizona
- Arkansas
- California
- Colorado
- Connecticut
- Florida
- Georgia
- Idaho
- Illinois
- Indiana
- Iowa
- Kansas
- Kentucky
- Louisiana
- Maine
- Maryland
- Massachusetts
- Michigan
- Minnesota
- Missouri
- Montana
- Nebraska
- Nevada
- New Hampshire
- New Jersey
- New Mexico
- New York
- North Carolina
- North Dakota
- Ohio
- Oregon
- Pennsylvania
- Rhode Island
- South Carolina
- Tennessee
- Texas
- Utah
- Vermont
- Virginia
- Washington
- Wisconsin
Events and Education

MOTIVATE AND EMPOWER

In a rapidly advancing market that indicates strong preference for sustainable products and companies, PSC’s events and educational programming inspire and equip pet industry leaders to turn increasing expectations into profitable business opportunities.

Our events are a platform for cross-industry collaboration fueled by world-class speakers. Our programs catalyze transformation resulting in improved environmental and social impact for the pet space.

4,690
EVENT ATTENDEES

4,792
EDUCATION REGISTRANTS
IMPACT UNLEASHED

Moving into its 6th year, Impact Unleashed has ignited industry transformation by inspiring and equipping businesses to integrate sustainable business practices. 90% of attendees rate Impact Unleashed as a “must-attend” event, and throughout the pandemic, the event was ranked as one of the best virtual events they have ever attended.

“The positive energy, passion and overwhelming sense of shared purpose in the Impact Unleashed rooms was unlike anything I’ve experienced at a pet industry event.”

MICHAEL BAKER, PRESIDENT, PET FOOD EXPERTS

UNPACKED

UnPacked is the first sustainable packaging event in the pet industry. It brings together sustainable packaging experts and suppliers, as well as pet industry brands, manufacturers, and retailers, to learn more about one of our industry’s largest and fastest advancing issues. We aim to unpack the ever-changing landscape of sustainable packaging to unify the industry toward scalable, sustainable packaging solutions.

EARTH DAY RALLY

A 30-DAY SPRINT TO INSPIRE 10,000 ACTIONS THAT LEAD TO A BETTER FUTURE FOR PETS, PEOPLE, AND PLANET.

While PSC members take action year-round, the pet industry has a bigger and bolder opportunity to claim its place as an active participant in the global shift toward sustainable business practices.

Building upon the outstanding success of its DEI Challenge that inspired the industry to take personal action toward a more diverse, inclusive, and equitable pet industry, PSC now rallies the industry on an annual basis to catalyze 10,000+ Earth-friendly actions that spread a united message of care and corporate responsibility.
INDUSTRY TRANSFORMATION:

Plastics in Packaging

Starting in 2018, we expanded on our packaging work to serve as a leading force uniting the pet industry around sustainable packaging solutions. That work includes many programs including supporting members on their individual packaging journey, as well as piloting Flex Forward, the pet industry’s first return to retail program, establishing UnPacked, the pet industry’s first bi-annual summit dedicated to packaging, and launching the PSC Packaging Pledge, a program dedicated to helping companies meet ambitious, transparent, forward-facing packaging goals.

FLEX FORWARD

Launched in 2020, and sponsored by Earth Animal and PetFood Experts, Flex Forward is the industry’s first return-to-retail packaging pilot program aimed at reducing landfill waste and delivering sustainable packaging solutions to the pet industry. Phase 1 of the pilot exceeded expectations, and the learnings are shaping the launch of a planned national expansion.

FLEX FORWARD PHASE 1 RESULTS

<table>
<thead>
<tr>
<th>Dates of Pilot</th>
<th>Aug 2020-Feb 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collection Weight</td>
<td>8356 lb</td>
</tr>
<tr>
<td>Gaylords of Collected Material</td>
<td>26</td>
</tr>
<tr>
<td>Store Participation</td>
<td>100+ independent stores</td>
</tr>
<tr>
<td>Contamination Level</td>
<td>Less than 5%</td>
</tr>
<tr>
<td>Brands Represented in Collection</td>
<td>50-75</td>
</tr>
<tr>
<td>Recycling Trials Conducted</td>
<td>17 (mechanical and advanced/chemical)</td>
</tr>
<tr>
<td>Successful Recycling Trial</td>
<td>Pyrolysis (15% saturation rate)</td>
</tr>
</tbody>
</table>

PACKAGING PLEDGE

A PATHWAY TOWARD SUSTAINABLE PACKAGING BY 2025

Pet Sustainability Coalition Packaging Pledge signatories join our effort to support pet companies to move to 100% recyclable, reusable, or compostable packaging by 2025. Our program is making change easy by providing benefits including:

- A vetted marketplace housing pre-qualified packaging suppliers that meet Ellen MacArthur requirements.
- Marketing assets including signatory badges, social media and exclusive promotion opportunities.
- Tools including packaging life cycle analysis, the Recycling Partnership’s Plastic IQ, How2Recycle labeling support, and packaging design guidelines.
- Ongoing and consistent legislative updates and education.
- Business case data set designed to pitch to company decision makers.
- Peer working groups to share successes and challenges for accelerated progress.
SUSTAINABLE INGREDIENTS:

Optimizing Sustainability and Nutrition

Proteins are the highest impact ingredients used in pet food today, and the demand for sustainable proteins are anticipated to rise as pet ownership increases globally. PSC recognizes a strong opportunity to positively influence the industry, increasing both the supply and use of high-performing sustainable protein ingredients. Our goal is to mobilize the pet industry with credible science and actionable business tools that will transform our sourcing practices for the better.

While environmental impacts of pet food proteins tend to get the most attention, there are multiple aspects of sustainability, apart from just environmental impacts that should be considered.

In 2021, we introduced the industry’s first comprehensive set of standards for ingredient sourcing called the Four Factor Framework. Developed in collaboration with industry experts, the framework is the first holistic model that can be used to evaluate the sustainability performance of any protein type according to its environmental impact, social impact, nutrition, and animal welfare performance.

If American dogs and cats were their own country, they would rank as the 5TH LARGEST CONSUMERS OF MEAT in the world, behind Brazil, China, Russia, and the U.S.

Through science and expertise, the pet industry can optimize how the pet industry selects protein ingredients so that our industry can sustain healthy pets, regenerate our agricultural lands, improve the lives of sourcing communities, and stand proudly by our ethical stewardship of all animals. While we support each company to make more sustainable choices, we are also systematically shifting the industry to increase the supply of transparent, traceable, and sustainable proteins.
ACCREDITATION:

Verified Performance

PSC Accreditation is the only industry standard that identifies leading pet companies that are driving positive impact for pets, people, and the planet.

Accredited brands use an assessment aligned with the United Nations Sustainable Development Goals to measure environmental and social performance and identify areas for quantifiable improvement. The assessment is verified by an independent third party to ensure accuracy and transparency. Accredited brands are required to meet a minimum performance standard, re-verify every 24 months, and demonstrate continuous improvement.

ACCREDITED BRANDS

- Aker Biomarine
- Alltech
- Animal Essentials
- Animal Supply Co
- Annamaet
- Austin and Kat
- Bark Potty
- Beaphar
- Betterbone
- Bright Planet
- Brutus Broth
- Canna Companion
- Catalyst
- Chews Happiness
- Earth Animal
- Eco-shell (Naturally Fresh)
- Fera Pet Organics
- Freshpet
- inClover
- Josera
- Kinn Inc.
- MFiber
- Mid America Pet Food (Victor)
- Moderna
- Molly Mutt
- Mondi
- Morris Packaging
- MPM
- Mud Bay
- Nature’s Logic
- Natural Pet Food Group
- Only Natural Pet
- Peel Plastics
- Petcurean
- Phillips
- Plastic Packaging Technology
- Portland Pet Food
- Stella & Chewy’s
- Takigawa
- Tender & True
- Thanh Phu
- The Natural Dog Company
- TC Transcontinental
- Tru Shrimp
- Tyler Packaging
- United Petfood
- Veramaris
- Wellness Pet Company
- West Paw
- Wild Earth
PSC has helped member organizations enhance their economic, environmental, and social value through a range of project offerings that integrate sustainability measures and practices into decision-making and company culture. Through life cycle analyses, employee surveys, greenhouse gas accounting, supplier codes of conduct, and more, we help our members understand their business so they can set goals to improve performance.

SUSTAINABILITY PROJECTS COMPLETED

<table>
<thead>
<tr>
<th>Year</th>
<th>Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>4</td>
</tr>
<tr>
<td>2014</td>
<td>6</td>
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<tr>
<td>2015</td>
<td>8</td>
</tr>
<tr>
<td>2016</td>
<td>12</td>
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<tr>
<td>2017</td>
<td>14</td>
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<tr>
<td>2018</td>
<td>7</td>
</tr>
<tr>
<td>2019</td>
<td>14</td>
</tr>
<tr>
<td>2020</td>
<td>18</td>
</tr>
<tr>
<td>2021</td>
<td>24</td>
</tr>
<tr>
<td>2022</td>
<td>19</td>
</tr>
<tr>
<td>TOTAL</td>
<td>126</td>
</tr>
</tbody>
</table>

162 of our members have taken the SDG assessment.

PARTNERS
TOMORROW:

Transformational Leadership

PSC’s work is igniting a movement within the pet industry. The Coalition is a critical bridge between consumer demands and the full spectrum of stakeholders in the pet industry, from producers and suppliers to distributors, brands, and retailers. We have the unique ability to convene market competitors at the same table to work towards industry-wide change.

Our challenge is not small. The pet industry is a rapidly growing sector estimated to reach $236 billion by 2030. Today, the pet industry lags behind the human food industry in its ability to make sustainable changes needed to ensure long term viability of our industry and life on Earth. More than 300 million pounds of non-recyclable packaging is made in the US alone, a problem that impacts 70% of US households that own pets. Additionally, traceability and transparency are extremely low in pet food ingredient supply chains. Meanwhile, pet food accounts for an estimated 25% of total animal proteins consumed in the US, equating to approximately 64 million tons of CO2-equivalent greenhouse gases that threaten our climate.

As we move into our second decade of growth and impact, we have set ambitious, transformational goals to lead the industry towards a more sustainable, more successful, and more profitable future. To do so we will:

• Mobilize and expand a powerful coalition of stakeholders across the pet industry implementing impactful solutions that address pressing climate issues.
• Drive independent, trusted sustainability research and innovative programs that lead to measurable impact.
• Advance cutting edge solutions to address our industry’s highest area of impact thereby achieving circularity in packaging, increasing access to, use of, and demand for sustainable ingredients, working toward net positive climate impact, and advancing corporate social responsibility.
• Activate the pet industry as a global leader in the corporate sustainability movement.
• Attract transformation funding through a formal philanthropic program.

THE FIRST 10 YEARS IS ONLY THE BEGINNING. JOIN US AS WE EMBARK ON OUR NEXT DECADE OF IMPACT!
A Decade of Fiscal Growth

Board of Directors

CHRIS BENTLEY  
Co-Founder, Pet Sustainability Coalition

DAVID YASKULKA  
Senior VP Corporate Social Responsibility

STEPHANIE VOLO  
Chief Impact Officer

GREG KEAN  
Global VP Advanced Innovation, R&D, and Sustainability

REBECCA ROSE  
President & Founder

MICHAEL BAKER  
President & CEO

ADREANNE TESENE  
Co-Owner

CHANTAL SAELEN  
Co-Owner

DUSTIN DOVER  
Chief Operating Officer

BRIAN STEINWAGNER  
Executive Vice President Business Development
THANK YOU FOR 10 YEARS OF LEADING AND FOSTERING A COLLABORATIVE INDUSTRY.

WITH PSC LEADING THE WAY, WE HAVE BUILT A MOVEMENT THAT POSITIVELY IMPACTS ANIMALS, PEOPLE, AND THE EARTH.

HERE’S TO THE NEXT 10 YEARS OF IMPACT!