



# 2015

ANNUAL REPORT



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# GROWN WITH YOU

A healthy lifestyle begins with sound food choices for your family, and today's agricultural techniques help farmers and ranchers provide those meals for households around the country. Farming tools and practices, such as crop protection products and conservation tillage, are essential in growing the variety of produce regularly found at grocery stores and farmers markets.

Farmers continuously search for the responsible solutions that will help them manage their farm and field conditions and bring the freshest variety of produce to your local grocery store shelves. Each grower faces distinct climate and pest challenges, and they need access to all the available tools that work for their particular region to grow the healthiest crops possible. As a consumer, it's important to understand how food is grown, including why farmers use crop protection products and other agricultural methods used today. For this reason, CLA continues to advocate for honest and balanced conversations about American agriculture.

Today's farmers and ranchers are more involved than ever in talking about what they do on the farm, why they do it and how it affects each person on the planet. Agriculture affects each part of your family's life, from the eggs in your omelet to the clothes that you wear. As agriculture evolves to keep up with consumer demand, trade, climate shifts and more, let's talk about how agriculture will continue to grow with you.

DEAR



# CROPLIFE AMERICA MEMBERS AND ALLIES,

Seven billion people have one thing in common: food. From food waste to population growth to farming practices, people want to discuss agriculture in a new way. From Sub-Saharan Africa to East Asia to the U.S., there are an estimated 570 million farms worldwide. Of the more than seven billion people on Earth, 40 percent of the global workforce is employed in agriculture. Although the majority of the U.S. population is not personally involved in growing the country's food, what you eat and feed your family *is* personal. From local food to "conventional" agriculture, the choices we have at the grocery store and farmers market are vast and can be confusing. Farmers, ranchers and the crop protection industry want to take the guesswork out of grocery shopping by giving consumers the tools and knowledge they need to make informed choices that are right for each person's family.

Modern farming practices help provide the wide selection of produce that you're accustomed to seeing at the grocery store. From organic farming to the most innovative farming technologies, today's agriculture represents choice and choice begins with you.

This report celebrates the wide range of healthy food modern agriculture provides; whether you're looking for strawberries in December or researching different growing methods, the country's farmers and ranchers use a variety of techniques that support and sustain consumer choice. As the voice of the industry that develops, manufactures, formulates and distributes crop protection products, CLA's members and staff work directly with regulatory agencies to improve processes and advance agricultural solutions. By continuing to further today's technology and the precision of crop protection products, CLA's work ensures farmers have safe and effective products that offer a range of fresh and nutritious produce year-round for you and your family. Modern agriculture: the choice is yours.



A handwritten signature in black ink that reads "Vern Hawkins".

**Vern Hawkins**  
*Chairman,  
CLA Board of Directors  
Syngenta Crop Protection*



A handwritten signature in black ink that reads "Jay Vroom".

**Jay Vroom**  
*President and CEO  
CropLife America*



# WHY

## MODERN



Fruit and vegetable consumption has been linked to many health benefits: the reduced risk of cancer, diabetes, cholesterol and heart disease; an overall decreased risk of mortality; and savings in health care costs. With the responsible use of today's agricultural tools such as pesticides, farmers are able to safely grow the healthy crops you and your family need to lead a healthy life. In addition to increasing year-round availability of your favorite produce at the grocery store, crop protection products also contribute to stronger environmental and human health, sustainable growing practices and ecological diversity.

# AGRICULTURE?

- Using today's inputs and practices, one farm is able to grow enough food for 155 people, representing a 262 percent increase over the past 65 years.<sup>1</sup>
- Crop protection products also help support one of the country's most valuable exports: food. Agricultural exports continue to soar and represent approximately \$152 billion in value.<sup>2</sup>
- Crop protection products decrease the need for tillage operations, thereby reducing fossil fuel use by 558 million gallons per year, equaling 22.2 billion pounds of carbon dioxide emissions.<sup>3</sup>
- Pesticides help protect vulnerable species, 42 percent of which are endangered because of invasive species.<sup>4</sup> Crop protection is used to preserve land and resources for native species.

CropLife Foundation's StewardshipFirst™ initiative defines crop protection stewardship as the ethical management of a pesticide's life cycle, from the product's creation to its distribution and sale to the approved disposal of the container. Through the development of cooperative relationships with other national trade associations, grower groups, consumer advocacy organizations and regulatory bodies on the federal, state and local levels, CropLife StewardshipFirst™ works to continually improve and modernize stewardship practices; reinforce the proper use and disposal information for crop protection materials; and provide education for regulators and key stakeholders on voluntary industry stewardship initiatives.

Applying pesticides responsibly and according to label instructions is especially important for pollinator health. Pollinators, particularly managed honey bees, are a vital part of U.S. farming and it is estimated that they directly impact 35 percent of the world's agriculture. Scientists have determined that several factors influence bee health, including diseases, parasites, pesticides and access to forage. The crop protection industry understands the importance of bees to a healthy agricultural system and environment and frequently works with regulatory agencies, beekeepers and farmers to protect the health of the country's pollinators.

1 [www.fb.org/newsroom/fastfacts](http://www.fb.org/newsroom/fastfacts)

2 U.S. Department of Agriculture. (2014). Statement from Agriculture Secretary Tom Vilsack on 2014 Agricultural Exports Setting New Record [Press Release]. Retrieved from [www.usda.gov/wps/portal/usda/usdamediafb?contentid=2014/11/0247.xml&printable=true&contentidonly=true](http://www.usda.gov/wps/portal/usda/usdamediafb?contentid=2014/11/0247.xml&printable=true&contentidonly=true).

3 Mark Goodwin Consulting Ltd. (2011). *The Contribution of Crop Protection Products to the United States Economy*.

4 [www.nwf.org/Wildlife/Threats-to-Wildlife/Invasive-Species.aspx](http://www.nwf.org/Wildlife/Threats-to-Wildlife/Invasive-Species.aspx)



# HOW DOES MODERN





In the U.S., crops must compete with approximately 30,000 species of weeds, 3,000 species of nematodes and 10,000 species of plant-eating insects, and experts estimate that 20 - 40 percent of our crops are lost globally due to plant pests and diseases. To protect against these threats, farmers use crop protection products as part of a comprehensive crop management plan to keep grocery store shelves stocked year-round with nutritious produce. CLA continues to work with federal agencies to develop protective, workable and dependable processes that protect consumers, farmers and the environment. From submitting comments to agency briefings, CLA and its members remain engaged in the issues affecting America's farmers.

# AGRICULTURE AFFECT ME?

In order to provide the country's farmers with the most innovative products, our member companies invest many years and hundreds of millions of dollars in research and testing before their new products are approved by the U.S. Environmental Protection Agency (EPA) for use on America's farms. After the EPA first registers a product, research and testing continue; the law requires the EPA to periodically review all product registrations to ensure that they meet the latest scientific health and environmental standards. As part of the intensive registration process, each product is carefully studied to ensure human safety and minimal impact on the environment. Through legislative and regulatory advocacy outreach, CLA supports common sense policies and regulations that enhance not only the health of consumers but the health of the environment and the entire agricultural industry. We believe that sound regulation and oversight are key factors that make the U.S. agricultural system the safest in the world.





# WHO IS THE FACE



Who is the face of today's agriculture? Food and farming are universal, and every person on the planet has a stake in agriculture. However, not every person has the guidance and education to help them understand what it takes to grow the food they find on their plate three times a day or has the tools they need to talk about it effectively. From those working in the crop protection industry to farmers to consumers, agriculture is more than breakfast, lunch and dinner.

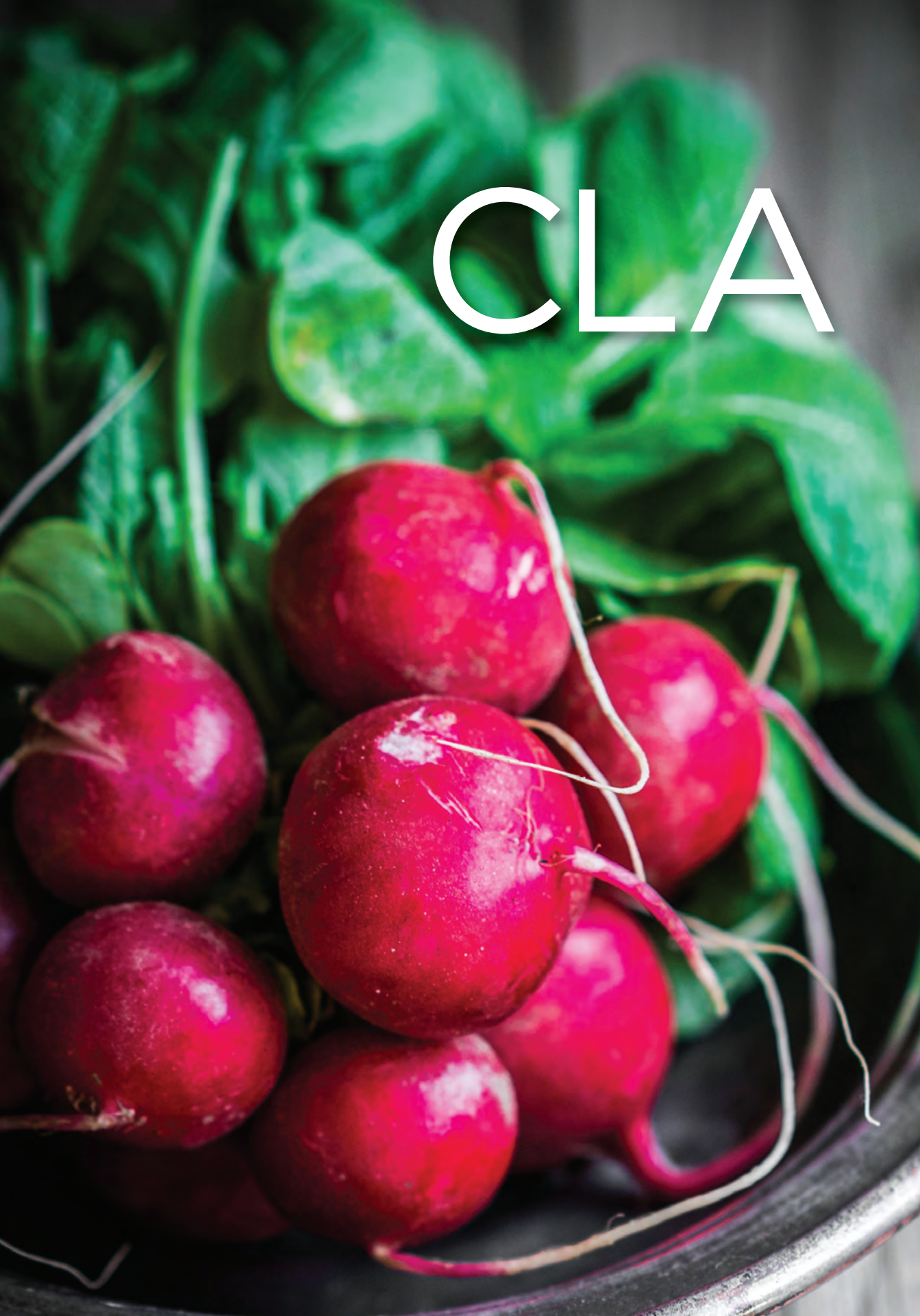
Through collaboration with large federal agencies and small local communities, CLA and its members are working to put a face on today's agriculture. By promoting farmers and ranchers on social media, we're able to connect consumers with questions to farmers with answers. By providing a voice to crop protection industry employees, we're able to shed light on the reasons for pesticide use and the safety standards upheld within the industry by those who work directly in the development and formulation of

# OF TODAY'S AGRICULTURE?

such products. Connecting directly with consumers continually pushes the industry forward to create safe and sustainable crop solutions that provide nearly limitless choices at the grocery store. Every day we work with farmers, the industry and consumers to support better farming and a better world.

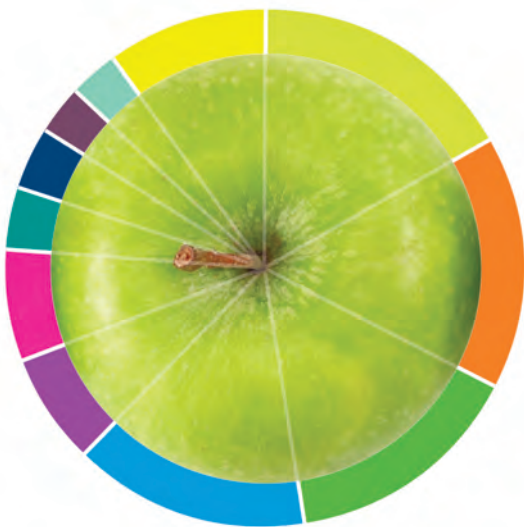


CLA



# OPERATIONAL OVERVIEW

CLA's strategic plan and the resulting prioritization of issues allows the association to plan and monitor where CLA resources are allocated for the benefit of our members. Tracking these priorities and the time spent on each also helps identify emerging challenges. The following chart depicts the major issues CLA dedicated resources to managing as part of its business plan during the first half of 2015.



Modern Agriculture Communications	17%
Local Issues Strategy/Preemption	16%
Endangered Species Act	15%
Pollinator Health	15%
Human Health Risk Assessment	7%
Water	7%
Stewardship	4%
Harmonization	4%
Pesticide Registration Improvement Act	3%
Environmental Risk Assessment	3%
Other	9%



During 2014, the global market for crop protection products (excluding sales of herbicide tolerant traits and insect resistant seed) is estimated to have increased by 4.5 percent over 2013 to reach \$56,655 million, according to the results of a market survey of the crop protection sector conducted by market research firm Phillips McDougall. Sales of herbicide tolerant (HT) and insect resistant (IR) seed into the crop protection sector increased in 2014 and overall the value of the agricultural biotechnology market, which is currently largely based on HT and IR seed, is estimated to have grown by 4.7 percent to reach \$21,054 million. As a result of the increase in both the value of the conventional crop protection market and trait sector, the value of the overall crop protection sector in 2014 is estimated to have increased by 4.6 percent to \$77,709 million.

In 2014, the overall growth of the global herbicides sector rose by approximately 1.9 percent. Sales of insecticides rose strongly by 8.6 percent, and fungicides recorded improved sales by 4.9 percent with a strong Asian soybean rust market in Brazil offsetting the negative effects of unfavorable weather conditions in the U.S. and Europe. Global sales of agrochemicals used in non-crop situations rose by 1.2 percent to \$6,557 million, the value of the biotech seed market rose by 4.7 percent to \$21,054 million, driven by value enhancement due to the increased adoption of stacked trait varieties as well as increased expansion in Latin America and Asia.

Over the next five years it is expected that fungicides will continue to lead market growth due to the products usage in developing markets. The herbicide sector should benefit from more stable prices and demand in developing markets. Lower growth is anticipated in the insecticide sector. Significant commodity price changes driven by weather and financial markets are adding substantial volatility to the crop inputs marketplace.





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