

# INDUSTRY OVERVIEW

# 2017





## 2017 BOARD OF DIRECTORS

- **Jim Stutelberg, Chairman**  
Tate & Lyle Americas
- **Christopher M. Cuddy, Vice Chairman**  
Archer Daniels Midland Company
- **Kris R. Lutt**  
Archer Daniels Midland Company
- **Julian Chase**  
Cargill
- **Michael J. Wagner**  
Cargill
- **Richard N. Kyle**  
Ingredion Incorporated
- **Rob Ritchie**  
Ingredion Incorporated
- **Peter M. Castelli**  
Tate & Lyle Americas

---

## STAFF

- **John Bode**, President & CEO
- **Christina Martin**, Executive Vice President
- **Allison Cooke**, Director, Food Policy
- **Dianne Douglass**, Director, Operations
- **Ben Gruitt**, Director, Sustainability & Advanced Bioproducts
- **Julia Gustafson**, Counsel & Director, Legislative Affairs
- **Cassandra Kuball**, Director, Trade & Industry Affairs
- **Shannon Marshall**, Director, Member Services
- **Kyle Harris**, Environmental Affairs / Workplace Safety Manager
- **Keniece Barbee**, Special Assistant to the President & CEO

# WELCOME LETTER

With our mission always at the forefront, the Corn Refiners Association strives to create policy and market conditions that allow corn wet milled value-added ingredients and products to thrive and expand. Looking ahead, 2018 promises to be a busy year in Washington.

As such, CRA is actively working to share our views with the Trump Administration on topics such as the Waters of the United States (WOTUS)/Clean Water Rule and biogenic CO2 issues (page 31). By working toward appropriate outcomes, we can help ensure the success of future economic opportunities, including advanced bioproducts (page 33).

Yet trade is likely to dominate the conversation in 2018. As corn wet millers, we are proud to play an essential role in the larger food and agriculture export economy, fueling a job growth machine here at home. We know that trade is central to our members and our industry, and as a result, promoting wise trade policies is a core focus of CRA. In 2017, our trade-related concerns began with the sugar suspension debate. But, CRA rallied the nation's governors and heartland lawmakers to advise a new Administration of the potential of retaliation through crippling tariffs, causing great economic harm to the U.S.

CRA continues to use a similar approach to other trade debates – amplifying our voice by uniting and cooperating with allies. For example, CRA is playing a leadership role in the U.S. Food & Agriculture Dialogue for Trade's North American Market Working Group. There, we stand shoulder-to-shoulder with over 100 organizations working to strengthen the competitiveness of U.S. food and agriculture within the global marketplace.

CRA also worked with others to lead the creation of a cross-sector study (pages 23-26) that quantifies the combined economic power of food and agriculture. This first-of-its-kind report revealed that together we support one-fifth of the nation's economic activity – helping make our case for free trade, open markets, and responsible application of regulatory burdens. As these debates continue – shaping the very future of our sector – we have compiled this data to help tell our story to lawmakers in Washington. As crucial members of the corn community, we hope you will find this Industry Overview equally compelling and share it with friends and allies.



**Jim Stutelberg,**  
Chairman



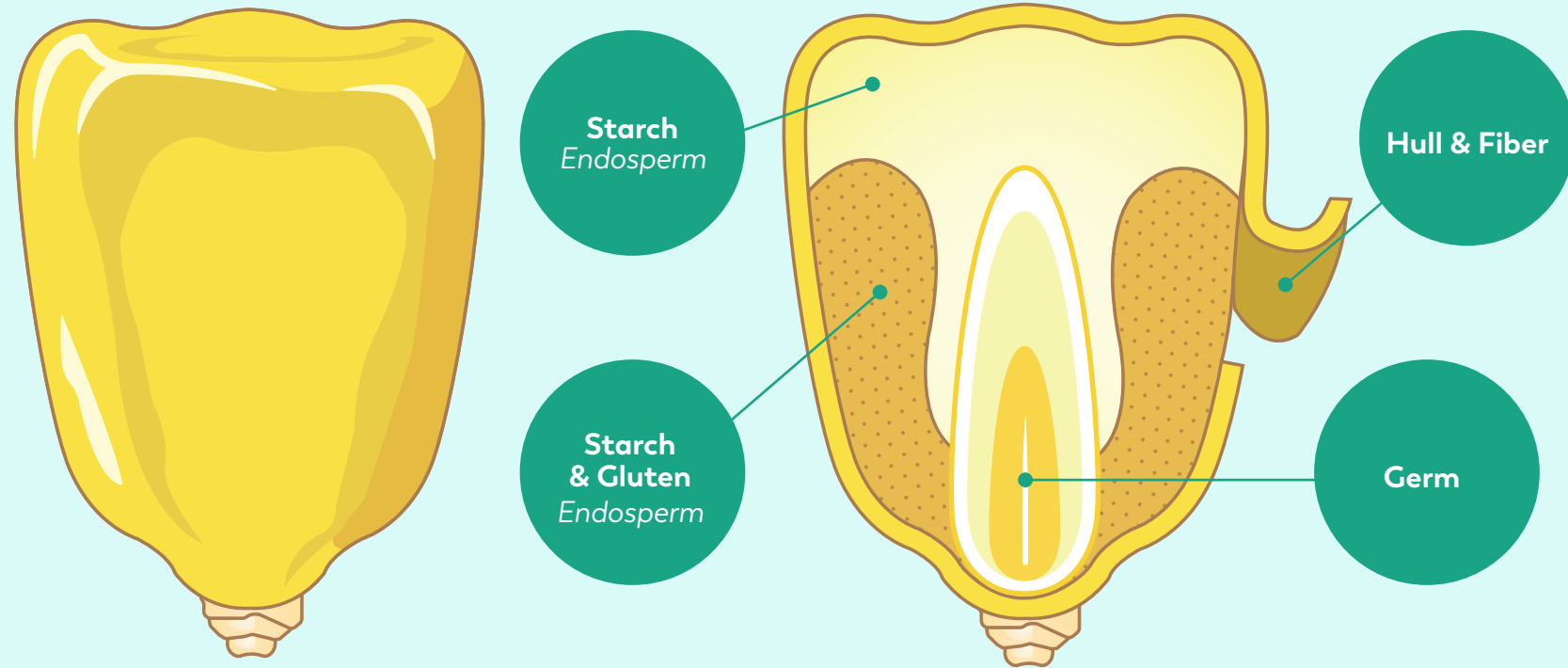
**John Bode,**  
President & CEO

# TABLE OF CONTENTS

---

<b>U.S. Corn Refining Industry at a Glance - 2016</b> .....	<b>6</b>
<b>Shipments of Products of the Corn Refining Industry - 2016</b> .....	<b>9</b>
<b>U.S. Corn Refining Products &amp; Uses</b> .....	<b>10</b>
<b>Corn Refiners Association Member Companies' Products</b> .....	<b>17</b>
<b>Corn Refiners Association Member Companies' Domestic Plant Locations</b> .....	<b>19</b>
<b>2016 Safety Program Winners</b> .....	<b>21</b>
<b>Feeding the Economy</b> .....	<b>23</b>
<b>Issues &amp; Committees</b> .....	<b>27</b>

## CORN REFINING – THE FOUR COMPONENTS OF THE KERNEL



**For more than 150 years,** corn refiners have been perfecting the process of separating corn into its component parts to create a myriad of value added products. Through corn wet milling, a kernel is divided into four basic components: starch, germ, fiber, and protein. Those components are then utilized in countless innovative ways, for example: to make food taste better, cosmetics last longer, pharmaceuticals easier to swallow and plastics environmentally friendly.

## U.S. CORN REFINING INDUSTRY AT A GLANCE – 2016

Corn Refining Plants .....	26
Additional Processing Plants .....	6
Location .....	11 states
Corn Grind .....	1.64 billion bushels (41.60 MMT*)
Value of Corn Purchased .....	\$5.76 billion
Number of Corn Suppliers .....	41,000
Direct Employment by CRA Member Companies .....	7,948
Total Supported Jobs .....	259,000
Capital Investment (replacement value) .....	\$19.10 billion
Value Added by Manufacture .....	\$11.16 billion

### Major Products

Sweeteners (dry weight) .....	26.72 billion pounds (12.12 MMT)
Starches .....	7.57 billion pounds (3.43 MMT)
Ethanol .....	1.59 billion gallons
Co-products .....	28.66 billion pounds (13.00 MMT)

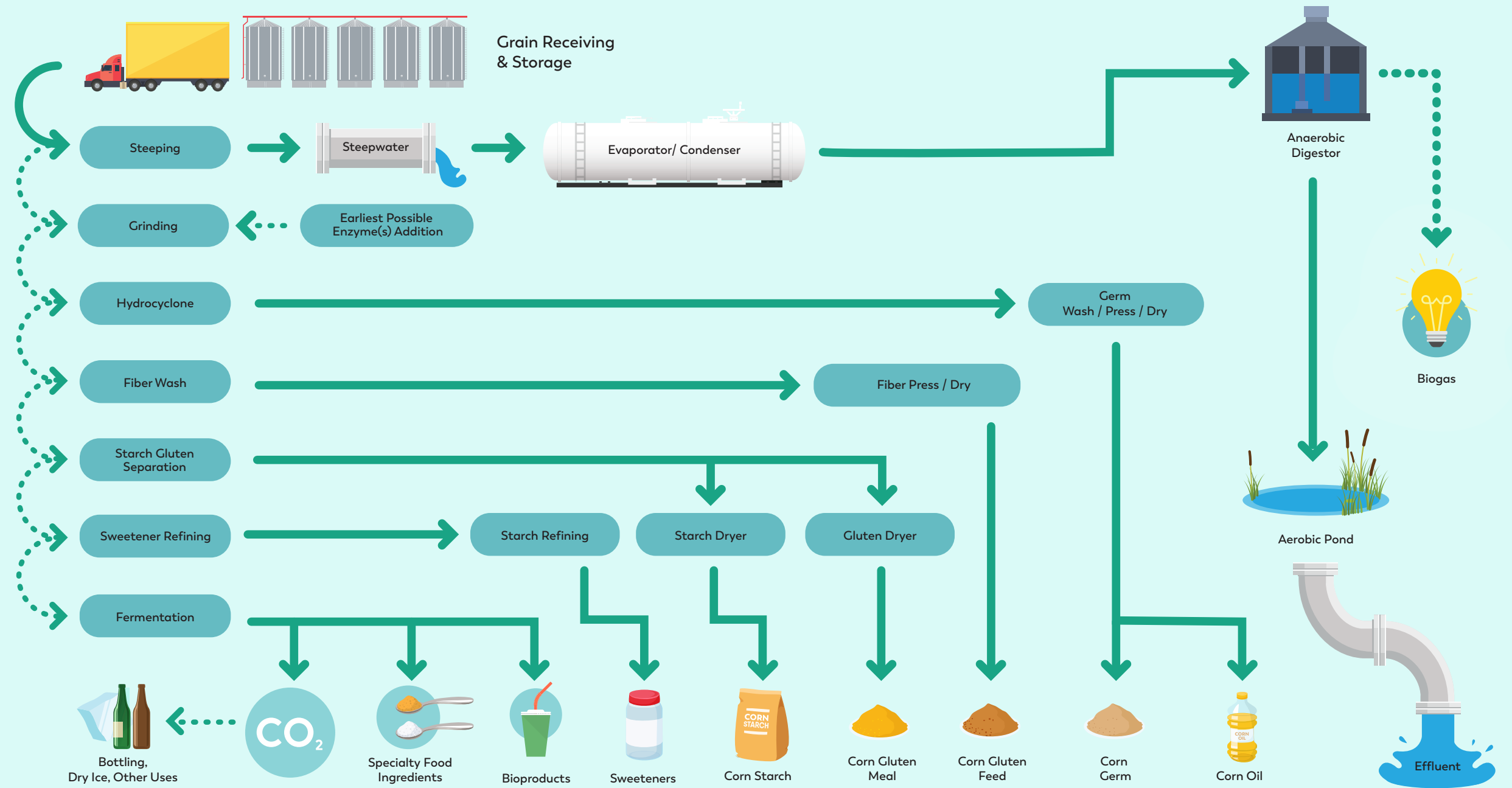
**\*MMT = million metric tons**

Compiled by the Corn Refiners Association based on 2016 data from the U.S. Department of Agriculture, Bureau of Labor Statistics, LMC Commodity Studies, Renewable Fuels Association, Energy Information Administration, and industry data compiled for CRA by Vault Consulting, LLC. Figures are representative of entire U.S. industry.

# THE CORN REFINING PROCESS SIMPLIFIED

When corn wet milling began in the 1840's, the process utilized gravity, flat-bottom wooden tanks and wooden shakers and some of the kernel's separated components were discarded as waste.

Today, corn wet millers utilize central process control computer systems and stainless steel membranes. In addition, what was once considered waste energy is today being recirculated throughout the system. And of course, we utilize every component of the kernel.



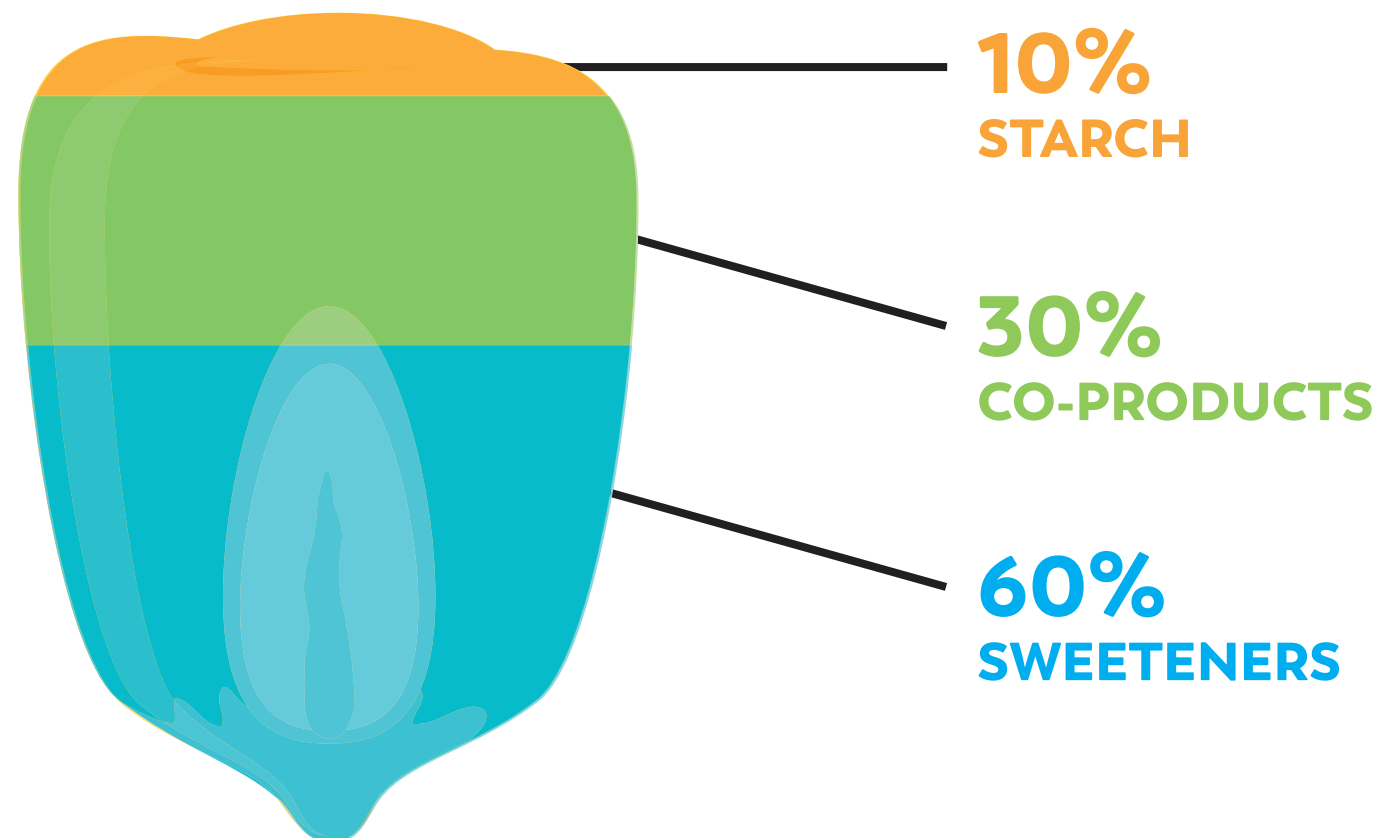
*Based on a report from the University of Illinois at Urbana-Champaign, May 2016*

## SHIPMENTS OF PRODUCTS

Shipments of Products of the Corn Refining Industry – 2016	Pounds, commercial weight		In Million Metric Tons
Starch Products <i>(includes corn starch, modified starch and dextrans)</i>	5.53	billion	2.51 MMT
Refinery Products <i>(includes glucose syrup, high fructose corn syrup, dextrose, corn syrup solids, maltodextrins)</i>	32.28	billion	14.64 MMT
High Fructose Corn Syrup 42%	6.57	billion	2.98 MMT
High Fructose Corn Syrup 55% and Above	11.49	billion	5.21 MMT
Total High Fructose Corn Syrup	18.06	billion	8.19 MMT
Total — Domestic Basic Products	37.81	billion	17.15 MMT
Total — Export Basic Products	4.37	billion	1.98 MMT
Corn Oil — Crude and Refined	0.95	billion	0.43 MMT
Corn Gluten Feed and Corn Oil Meal	11.88	billion	5.39 MMT
Corn Gluten Meal	1.92	billion	0.87 MMT
Steepwater	2.97	billion	1.35 MMT

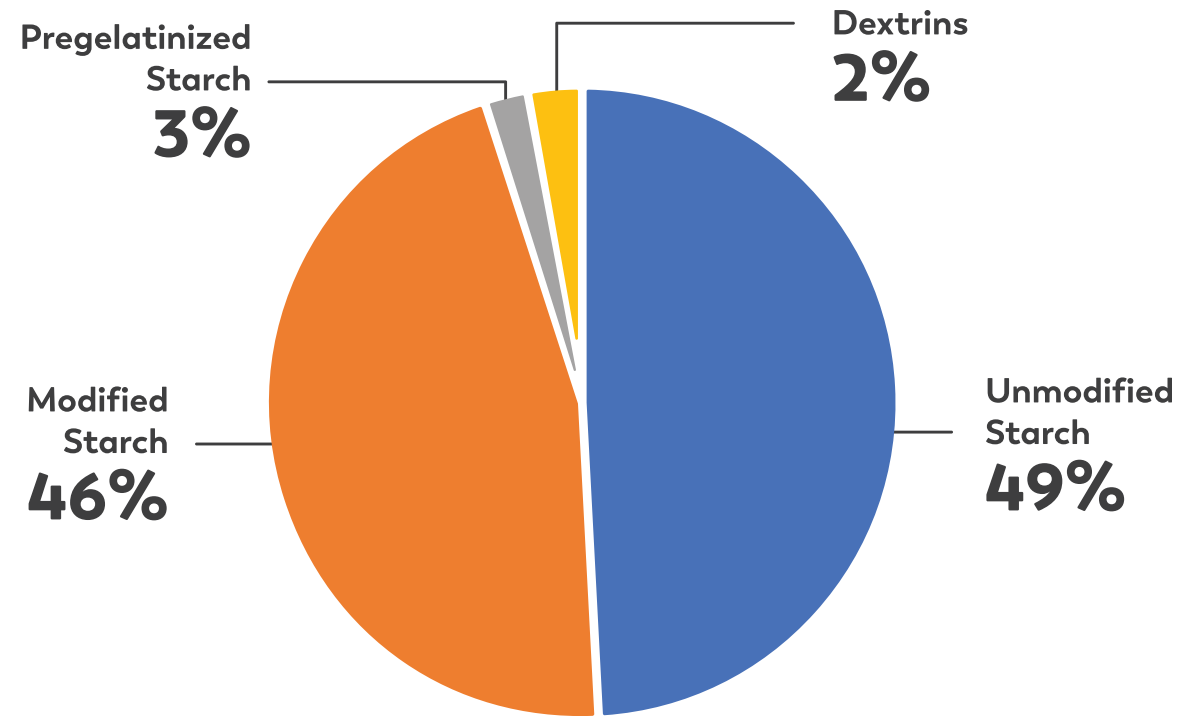
*Compiled for the Corn Refiners Association by Vault Consulting, LLC. Statistics represent shipments by members of the Association. Shipments are in pounds, commercial weights, and do not include co-products derived from ethanol production.*

## U.S. CORN REFINING PRODUCTS 27.17 MMT IN 2016\*



*\*All data compiled for the Corn Refiners Association by Vault Consulting, LLC. Statistics represent shipments by members of the Association. Shipments do not include co-products derived from ethanol production.*

**CORN STARCH PRODUCTS 2016**



Domestic shipments of starch products

**STARCH PRODUCT USES 2016\***

**2.44 MMT**



PAPER PRODUCTS

FOOD PRODUCTS

BAKING & CONFECTIONERY

BUILDING MATERIALS

PHARMACEUTICALS & CHEMICALS

MARKET SHARE >  
%

**56%**

**20%**

**4%**

**3%**

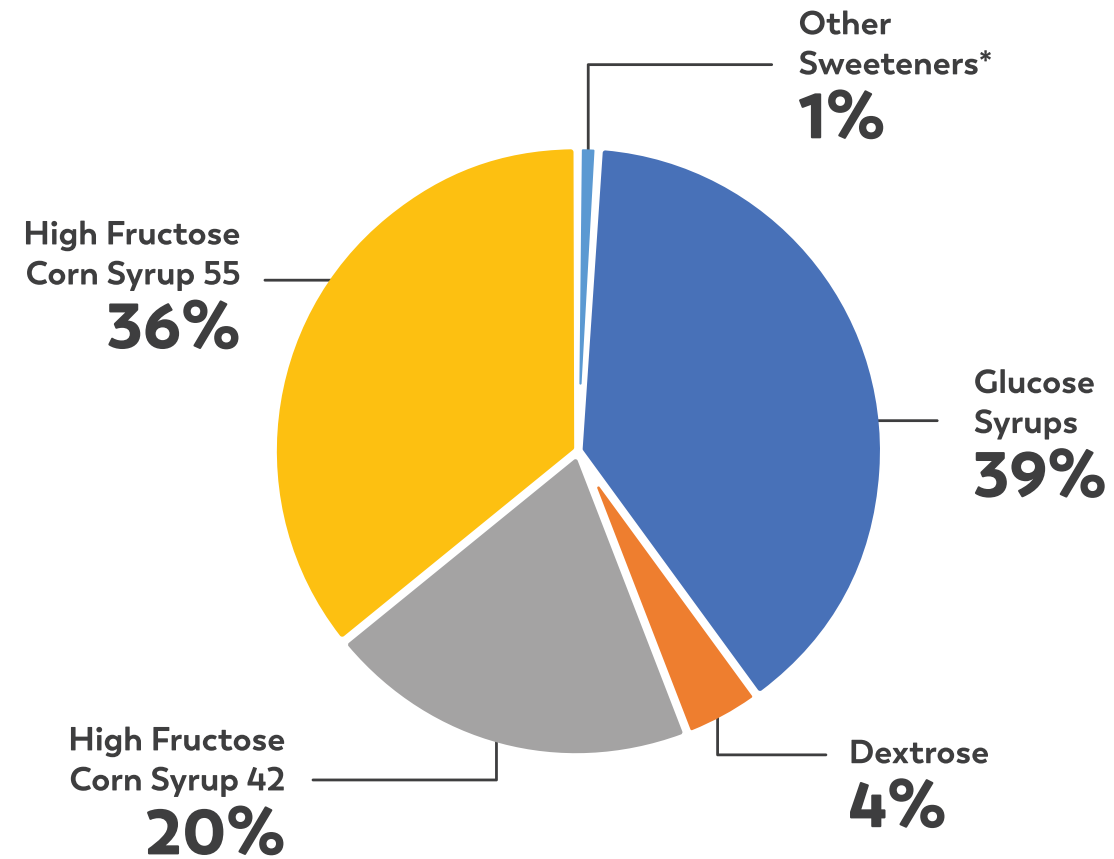
**1%**

**OTHER NON FOOD 16%**

\*Domestic shipments of unmodified starch, modified starch and dextrins only. All data compiled for the Corn Refiners Association by Vault Consulting, LLC. Statistics represent shipments by members of the Association.



## CORN SWEETENER PRODUCTS 2016



Domestic shipments of sweetener products

\*Includes maltodextrins, corn syrup solids and crystalline fructose

## HIGH FRUCTOSE CORN SYRUP PRODUCT USES 2016\*

8.19 MMT



BEVERAGES  
& SYRUPS

ALCOHOLIC  
BEVERAGES

DAIRY  
PRODUCTS

FOOD  
PRODUCTS

BAKING  
& CONFECTIONERY

MARKET  
SHARE  
>  
%

72%

2%

2%

14%

5%

OTHER  
5%

\*Domestic shipments of HFCS 42 and 55. All data compiled for the Corn Refiners Association by Vault Consulting, LLC. Statistics represent shipments by members of the Association.



# GLUCOSE SYRUPS AND DEXTROSE PRODUCT USES 2016\*

6.25 MMT



BEVERAGES & SYRUPS

3%



ALCOHOLIC BEVERAGES

9%



DAIRY PRODUCTS

4%



FOOD PRODUCTS

18%



BAKING & CONFECTIONERY

14%



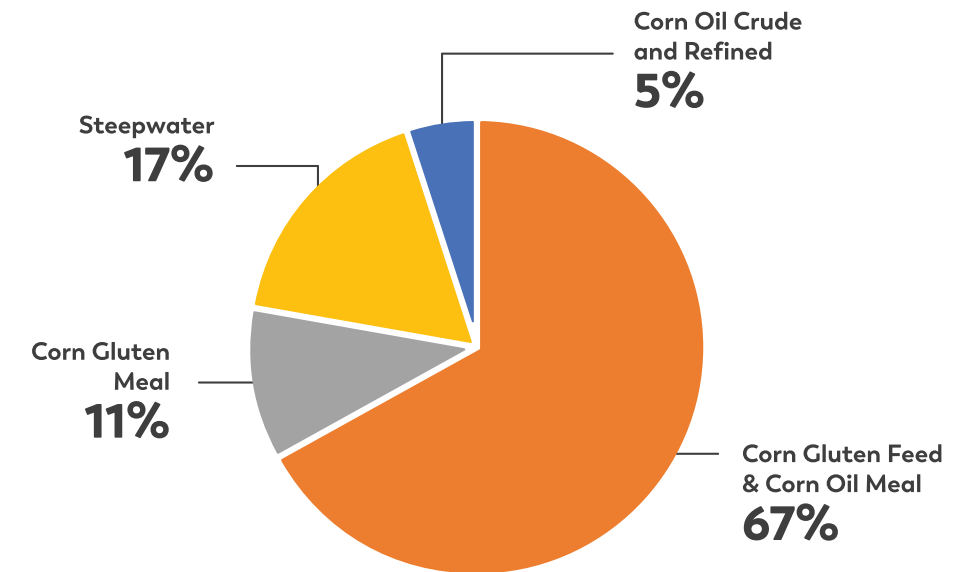
INDUSTRIAL OTHER

52%

*\*Domestic shipments of glucose syrups and dextrose. All data compiled for the Corn Refiners Association by Vault Consulting, LLC. Statistics represent shipments by members of the Association.*

MARKET SHARE %

## CORN CO-PRODUCTS 2016



Domestic and export shipments of co-products

## FERMENTATION, OTHER CHEMICALS & PRODUCTS

Citric Acid • Lactic Acid • Lysine • Threonine • Xanthan Gum • Erythritol • Sorbitol • Xylitol • Mannitol • Maltitol  
Hydrogenated Starch • Hydrolysates • Glucose Hydrolysates, etc.

ALCOHOLIC BEVERAGES

SOFT DRINKS

FOOD PACKAGING

PLASTICS

SOLVENTS

CARPETING

TEXTILES

# CORN REFINERS ASSOCIATION MEMBER COMPANIES' PRODUCTS

	Archer Daniels Midland Company	Cargill	Ingredion Incorporated	Tate & Lyle Americas
<b>STARCH</b>				
Unmodified, food	•	•	•	•
Unmodified, industrial	•	•	•	•
Modified, food	•	•	•	•
Modified, industrial	•	•	•	•
Dextrins	•	•	•	•
<b>SWEETENERS</b>				
Glucose syrups	•	•	•	•
Maltodextrins	•	•	•	•
Dextrose monohydrate	•	•	•	•
Dextrose anhydrous		•	•	
High Fructose Corn Syrup-42	•	•	•	•
High Fructose Corn Syrup-55	•	•	•	•
Crystalline fructose	•			•
<b>REDUCED-CALORIE SWEETENERS</b>				
Allulose	•			•
Erythritol		•	•	
Glucose hydrolysates		•	•	
Hydrogenated starch hydrolysates			•	
Maltitol	•	•	•	
Mannitol	•	•	•	
Sorbitol	•	•	•	
Xylitol		•		

	Archer Daniels Midland Company	Cargill	Ingredion Incorporated	Tate & Lyle Americas
<b>CO-PRODUCTS</b>				
Crude oil	•	•	•	
Refined oil	•	•	•	
Corn gluten feed	•	•	•	•
Corn gluten meal	•	•	•	•
Corn germ or corn germ meal	•	•	•	•
Steepwater (CFCE)	•	•	•	•
Carbon dioxide	•			•
Corn fiber food/industrial ingredients	•	•	•	
<b>FERMENTATION AND OTHER PRODUCTS</b>				
Citric acid	•	•		•
Lactic acid	•	•		
Lysine	•			
Threonine	•			
Xanthan gum	•	•	•	
Ethanol, fuel/industrial	•	•	•	•
Ethanol, beverage	•	•		

As of October 2016

# DOMESTIC PLANT LOCATIONS



## Archer Daniels Midland Company

P.O. Box 1470 Decatur,  
Illinois 62525

[www.adm.com](http://www.adm.com)

### Domestic Plants:

- Decatur, Illinois 62525
- Peoria, Illinois 61602\*
- Cedar Rapids, Iowa 52404
- Clinton, Iowa 52732
- Marshall, Minnesota 56258
- Columbus, Nebraska 68601
- Southport, North Carolina 28461\*



## Cargill

P.O. Box 5662/MS62 Minneapolis,  
Minnesota 55440

[www.cargill.com](http://www.cargill.com)

### Domestic Plants:

- Hammond, Indiana 46320
- Indianapolis, Indiana 46222\*
- Paris, Illinois 61944\*
- Cedar Rapids, Iowa 52406
- Eddyville, Iowa 52553
- Fort Dodge, Iowa 50501
- Blair, Nebraska 68008
- Wahpeton, North Dakota 58075
- Dayton, Ohio 45413



## Ingredion Incorporated

5 Westbrook Corporate Center  
Westchester, Illinois 60154

[www.ingredion.com](http://www.ingredion.com)

### Domestic Plants:

- Stockton, California 95206
- Bedford Park, Illinois 60501
- Indianapolis, Indiana 46221
- Cedar Rapids, Iowa 52404
- North Kansas City, Missouri 64116
- Winston-Salem, North Carolina 27107



## Tate & Lyle Americas

(A subsidiary of Tate & Lyle, PLC)

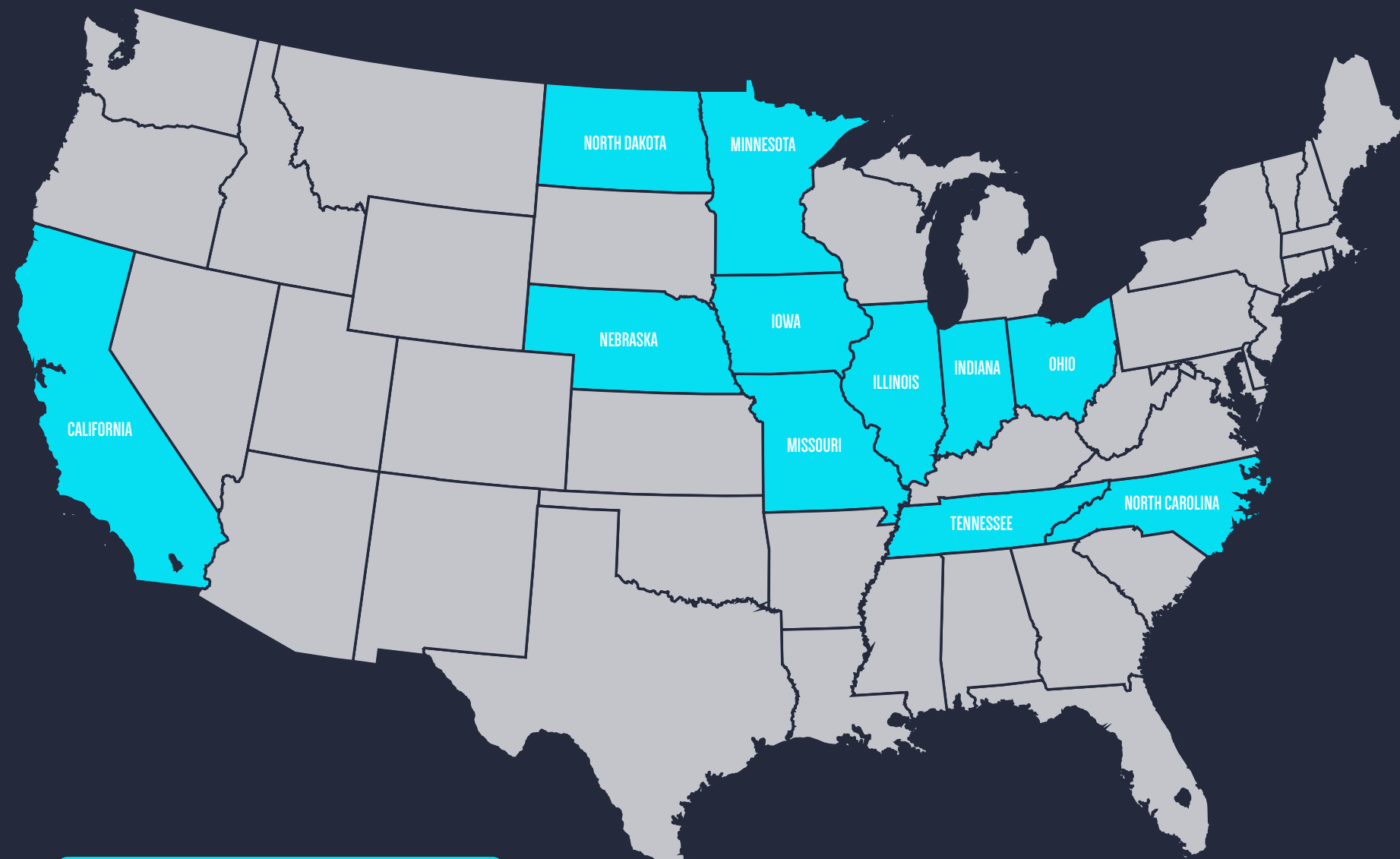
P.O. Box 151 Decatur,  
Illinois 62525

[www.tateandlyle.com](http://www.tateandlyle.com)

### Domestic Plants:

- Decatur, Illinois 62521
- Lafayette, Indiana 47902
- Lafayette, Indiana 47905
- Dayton, Ohio 45414\*
- Loudon, Tennessee 37774

*\*Specialty corn-based refinement facilities.  
Plants do not grind corn.*



International locations available at [www.corn.org](http://www.corn.org)

# AWARD WINNERS

Every year, CRA honors corn wet milling facilities across the country for their outstanding safety records and their unyielding commitment to ensuring an accident-free workplace.



## **ONE MILLION HOURS** (awarded bi-annually)

**Archer Daniels Midland Company** Decatur, IL (Bioproducts)

**Ingredion Incorporated** Bedford Park, IL (Argo) • Indianapolis, IN

**Tate & Lyle Americas** Loudon, TN



## **ZERO LOST WORK DAYS** (awarded year-end 2016)

**Archer Daniels Midland Company** Clinton, IA (BioProcessing) • Marshall, MN

**Cargill** Cedar Rapids, IA • Fort Dodge, IA • Indianapolis, IN • Paris, IL • Wahpeton, ND

**Ingredion Incorporated** Bedford Park, IL (Argo) • Indianapolis, IN • Stockton, CA • Winston-Salem, NC

**Tate & Lyle Americas** Dayton, OH • Loudon, TN (Bio Products)



## **INCIDENT RATE EXCELLENCE** (awarded year-end 2016)

**Archer Daniels Midland Company** Clinton, IA (BioProcessing) • Marshall, MN

**Cargill** Fort Dodge, IA • Paris, IL

**Ingredion Incorporated** Bedford Park, IL (Argo) • Indianapolis, IN

**Tate & Lyle Americas** Dayton, OH • Loudon, TN (Bio Products)

## ABOUT THE SAFETY PROGRAM

CRA has always recognized the vital importance of safety in its plants, products, and manufacturing processes. An awards program was implemented in 2009 to further underscore the industry's commitment to safety. In 2013, the program expanded to include bioprocessing and specialty product refinement facilities.



The **ONE MILLION HOURS AWARD** acknowledges facilities that operate for 1 million consecutive employee hours without an employee lost workday and without a workplace-related fatality of an employee or non-employee during that period.



The **ZERO LOST WORK DAYS AWARD** acknowledges facilities for operating a full calendar year without an employee lost workday case and without a workplace-related fatality of an employee or non-employee during the calendar year.



The **INCIDENT RATE EXCELLENCE AWARD** recognizes those plants that have achieved a superior level of safety performance, as demonstrated by:

- an employee total recordable incident rate of 1.0 or less;
- no employee lost workday cases involving days away from work for the calendar year; and
- no employee or non-employee workplace fatalities for the calendar year.

# FEEDING THE ECONOMY

**CRA helped lead a first-of-its-kind study examining the combined impact of the food and agriculture sectors on the nation's economy.**

America's food and agriculture sectors feed the economy and fortify the nation. Together, they account for roughly one-fifth of the country's economic activity, supporting over 22 million jobs or 15% of US employment. It begins in the rich soil of America's farms and ranches – more than 2.1 million of them – spread across the heartland and stretching to the coasts, covering two out of every five American acres.

Meanwhile, millions of food scientists, grocers, and truck-drivers work in more than 200,000 food manufacturing, processing, and storage facilities, to keep food fresh and deliver it on

time. The journey may conclude at one of the nation's 935,000 restaurants, staffed by some of the 11 million Americans employed there. More often, it ends at home, at the kitchen table, surrounded by a family grateful for the nation's bounty.

[WWW.FEEDINGTHEECONOMY.COM](http://WWW.FEEDINGTHEECONOMY.COM)

## DIRECT ECONOMIC IMPACT



**JOBS**  
**22,815,868**



**WAGES**  
**\$763.12 BILLION**



**OUTPUT**  
**\$2.82 TRILLION**



**BUSINESS TAXES**  
**\$894.13 BILLION**



**EXPORTS**  
**\$146.32 BILLION**

# FEEDING THE ECONOMY

...And the story gets better. To capture the total economic impact of the food and agriculture industries, economists must also add the indirect and induced effects of our sectors. For example, when suppliers buy equipment or hire staff, economists categorize that as an indirect impact. And when employees of the food and agriculture industries purchase goods and services for their own households, their spending is known as induced economic impact. These multipliers illustrate the powerful impact of the food and agriculture industries across the entire U.S. economy.

[WWW.FEEDINGTHEECONOMY.COM](http://WWW.FEEDINGTHEECONOMY.COM)

## TOTAL NATIONAL ECONOMIC IMPACT (INCLUDING INDUCED AND INDIRECT)



**JOBS**  
**43,311,057**  
more than one in four  
U.S. jobs



**WAGES**  
**\$1,985.10 BILLION**



**TOTAL ECONOMIC IMPACT**  
**\$6,788.26 BILLION**  
one-fifth of the nation's total  
GDP in 2016

“AMERICAN AGRICULTURE IS THE LARGEST POSITIVE CONTRIBUTOR TO OUR NATION'S NET TRADE BALANCE, GENERATING 10 PERCENT OF OUR EXPORTS AND MILLIONS OF AMERICAN JOBS.”

“AMERICA'S FARMERS AND RANCHERS HELP FEED THE WORLD, FUEL OUR NATION'S ECONOMY, AND LEAD GLOBAL MARKETS IN OUTPUT AND PRODUCTIVITY.”

*Donald J. Trump*  
*President of the United States*



**The Corn Refiners Association is active on a number of critical issues essential to the well-being of the corn wet milling industry. These key issues, addressed through member-driven committees, span trade, food policy, biogenics, sustainability, transportation, and advanced bioproducts, each described in the following pages.**

## TRADE

---

Mexico and Canada are the two largest export markets for refined corn products, averaging over \$900 million in shipments per year. As a result, the North American Free Trade Agreement (NAFTA) negotiations and related concerns are among CRA's highest-priorities. Meanwhile, other crucial international trade issues remain active, as do on-going threats of retaliatory tariffs targeting CRA members' products.

As a result, CRA is playing a leadership role in the North American Market Working Group of the U.S. Food & Agriculture Dialogue for Trade, in an effort to strengthen the competitiveness of U.S. food and agriculture within the global marketplace. The alliance includes over 100 other organizations. CRA also led the creation of a cross-sector study that

highlights the combined economic power of the food and agriculture industries, essential data that helps us make our case to policymakers (see pages 23-26).

The Trade Committee is responsible for providing to the Board recommendations regarding international trade matters that could affect the corn refining industry.



**Cassandra Kuball**  
Director, Trade & Industry Affairs

## ISSUES:

- NAFTA
- U.S.-Mexico Sweetener Trade
- Improving Market Access for Products of Modern Biotechnology
- Supporting New Bi- and Multi-lateral Free Trade Agreements
- Export Certificate Program
- Normalizing Trade Relations with Cuba





# THE ENVIRONMENT, BIOGENICS & WORKPLACE SAFETY

In 2010, the Environmental Protection Agency (EPA) began using the Clean Air Act to regulate greenhouse gases, including biogenic emissions, from stationary sources. As a result, the development of certain new corn refining facilities, or adding additional fermentation lines to existing facilities, has become more difficult and costly, despite the fact that many of these new technologies would create environmentally-friendly advanced bioproducts, and renewable, compostable or recyclable bioplastics.

CRA and its coalition have advocated that biogenic emissions should be excluded by the EPA when determining if a facility

is a major source of CO<sub>2</sub> because such emissions are negated when growers plant and grow more short-cycle crops. New leadership at the EPA has shown commitment to resolve the biogenic issue. CRA believes overcoming this regulatory hurdle would be an important step in boosting economic and manufacturing opportunities in America's heartland.

CRA's Environmental Affairs Committee is responsible for providing the Board recommendations regarding environmental matters, particularly matters generally regulated by the EPA, including air quality, water quality, pollution prevention, and toxins. CRA's Workplace Safety

Committee is responsible for providing the Board recommendations and promoting workplace matters generally regulated by the Occupational Safety and Health Administration.

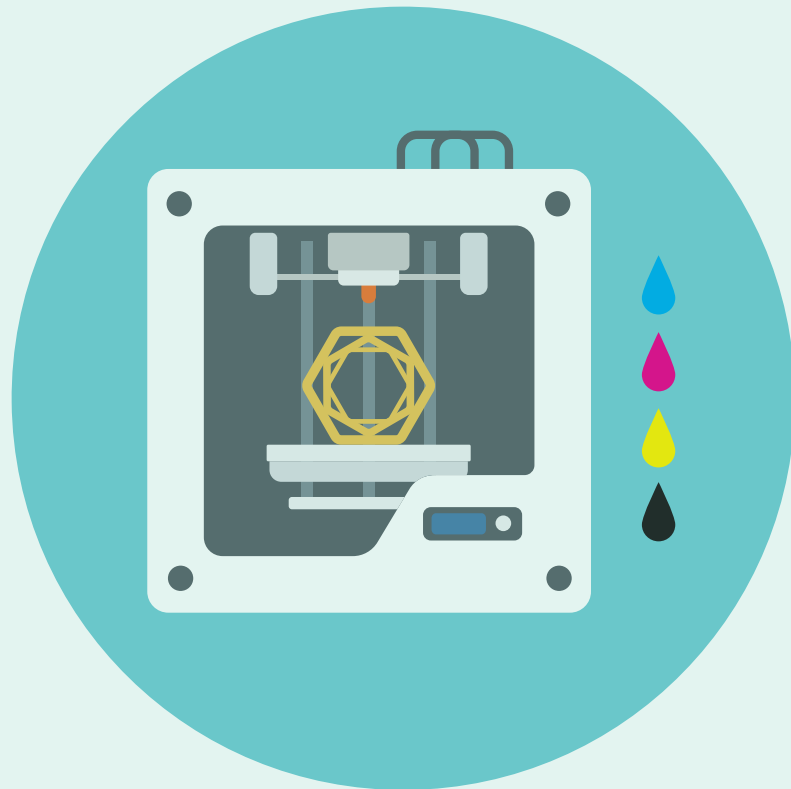


**Kyle Harris**  
**CRA's Manager, Environmental Affairs/Workplace Safety**

## ISSUES:

- Biogenic CO<sub>2</sub> Coalition
- Ambient Air Quality Standard
- TSCA Reform
- Waters of the United States (WOTUS)/Clean Water Rule
- OSHA Post-Accident Drug Testing & Discipline
- Process Safety Management of Highly Hazardous Chemicals

# ADVANCED BIOPRODUCTS



Refined corn products have long been utilized for more than food ingredients. Thanks to decades of work by scientists and researchers in our industry, the contents of a simple kernel of corn are the basis for a thousand everyday products, such as pharmaceutical casings, paper goods and automobile tires.

Today, renewable, sustainable corn products are a commercially-viable substitute for many petrochemical-based goods, from hard plastics to food packaging to carpets. And with technological improvements in fermentation techniques, they are moving into the next generation of technology: utilized in 3-D printing inks and studied by nanotechnology scientists as a method for delivering cancer treatments. These and other advanced biobased

products represent a growing economic opportunity for CRA member companies and their partners, with an estimated global market value of more than \$440 billion by 2020.

The Advanced Bioproducts Committee is responsible for providing the Board recommendations regarding policies that may facilitate development of a dynamic bioproducts market for the corn refining industry. The Committee also works with USDA agency staff as well as allies in Congress to help raise awareness of barriers to a vigorous bioeconomy.



**Ben Gruitt**  
CRA's Director of Sustainability  
and Advanced Bioproducts

## ISSUES:

- Advanced bioproducts
- Sustainable agriculture program

# TRANSPORTATION



From rail to road, from airports to ocean ports, elected officials from both sides of the aisle have raised concerns about America's aging infrastructure and strained transportation systems. Meanwhile, statistics from the Department of Agriculture highlight their importance to our sector: trucks carry about 75 percent of domestic agricultural tonnage, and nearly half of U.S. agricultural exports are moved by rail or barge.

In February 2017, CRA joined more than 200 other rural and agricultural groups announcing our readiness to work on critical infrastructure issues, calling on policymakers to ensure rural needs are addressed in any future legislation. While the Trump Administration focused on

other major legislation in its first months, indications are that an infrastructure package remains a priority.

CRA's Transportation Committee provides advice and guidance on legislative and regulatory policy issues related to transportation and infrastructure, and currently is focusing on advancing CRA member priorities for a future infrastructure package. CRA acts as an informal steering committee member for the Agriculture Transportation Working Group and is active in the Rebuild Rural Coalition, both of which focus on rural infrastructure projects.



**Julia Gustafson**  
CRA's Counsel & Director,  
Legislative Affairs

## ISSUES:

- Infrastructure funding
- Rail issues before the Surface Transportation Board
- Waterways funding
- Highway Trust Fund

# ADDITIONAL CRA COMMITTEES



**SUSTAINABILITY COMMITTEE:** The Sustainability Committee is responsible for providing recommendations to the Board regarding sustainability matters related to refined corn products.



**STATISTICAL REPORTING COMMITTEE:** The Statistical Reporting Committee is responsible for ensuring the accuracy and usefulness of the Association's shipments and grind reports via oversight of the Statistical Reporting Program.



**CO-PRODUCTS SUBCOMMITTEE:** The Co-Products Subcommittee is responsible for overseeing and providing recommendations to the Product Safety & Quality Committee on industry issues that concern corn oil, corn gluten feed and corn gluten meal.



**GOVERNMENT RELATIONS COMMITTEE:** The Government Relations Committee is responsible for providing guidance, oversight and support to CRA's government relations function, and recommendations to the Board regarding advocacy of CRA policy objectives.



**COMMUNICATIONS COMMITTEE:** The Communications Committee is responsible for providing the Board recommendations regarding CRA education and marketing activities, the public image of CRA and the corn wet milling industry, and other communication matters.

# STRATEGIC PARTNERS

To accomplish our goals in Washington, CRA works hand in hand with a wide range of other trade associations, ad hoc coalitions, and aligned businesses. These strong, strategic relationships ensure our voice is amplified on the most pressing policy issues of the day and enables CRA to consistently punch above its weight class. Examples include:



## HONORARY DIRECTORS \*

**Fred M. Ash**  
Cerestar USA, Inc.

**Patrick E. Bowe**  
Cargill

**C. G. Caldwell**  
National Starch and Chemical Company  
*in memoriam*

**Paul E. Grunder**  
CPC International, Inc.

**Leonard T. Lewis**  
Clinton Corn Processing Company

**E. S. Micek**  
Cargill Trustees

**J. Patrick Mohan**  
Tate & Lyle Americas

**William H. Powell**  
National Starch and Chemical Company

**Robert M. Powers**  
A. E. Staley Manufacturing Company

**H. T. Reed**  
Penford Products Co.

**John Rice**  
Archer Daniels Midland Company

**Dennis C. Riddle**  
Archer Daniels Midland Company

**Samuel C. Scott**  
Corn Products International, Inc.

**Richard Vandervoort**  
Corn Products International, Inc.

*\*Listed with their current (or prior) member company affiliation.*

**CORN REFINERS  
ASSOCIATION**

**WWW.CORN.ORG**

**1701 PENNSYLVANIA AVENUE, NW  
SUITE 950  
WASHINGTON, DC 20006**

**MAIN: 202-331-1634  
FAX: 202-331-2054**





## **Corn Refiners Association**

**[www.corn.org](http://www.corn.org)**

1701 Pennsylvania Avenue, NW  
Suite 950  
Washington, DC 20006

**Main: 202-331-1634 | Fax: 202-331-2054**