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2018

INDUSTRY OVERVIEW



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- **Keniece Barbee**
Executive Assistant to the President & CEO

WELCOME LETTER

Since our last edition of the Industry Overview, CRA has achieved incredible progress in public policy, launched an array of new initiatives and even added a pivotal member of the business community.

While CRA has only a handful of staff, our dedicated team helped shape 2018's most pressing issues.

CRA played a leading role in trade advocacy over the last year. We fought for open markets for corn products and retained important dispute settlement procedures in the NAFTA successor agreement, USMCA. Next, comes ratification by Congress.

In food policy, we've been a strong partner to our food and agriculture industry partners, helping to provide information that led to sound FDA decisions regarding labeling of dietary fiber and worked closely with disparate industry partners regarding labeling of foods produced with biotechnology.

Great strides were made in work with environmental groups and industry partners to advance sustainability objectives and recognition for the tremendous potential contributions of plant-based products as an answer to calls for reduced carbon emissions and waste reduction.

While these issues continue to evolve as this letter goes to print, we are proud that our work has been done working jointly with our many friends and allies in the food, agriculture and related industries. Some of our success can be attributed to CRA's central location – across the street from the White House complex and two

blocks from the office of the U.S. Trade Representative. So, CRA is a central hub for our strategic allies. We convene critical industry discussions and act as an information clearinghouse before and after many of the sector's most consequential policy meetings. And when they visit, our peers and partners inevitably comment on CRA's new look. This year, CRA launched new branding, refreshed our website and designed new office space, while cutting lease costs by 20 percent.

Our new headquarters showcases the impressive versatility of corn. Corn is in the carpet, chairs, tile flooring and disposable kitchen service ware. Corn products are utilized in everyday workplace items, including CRA's printer ink, cardboard, soaps and adhesives. Some of the walls feature floor-to-ceiling informational graphics and images that highlight over 70 uses of corn products, including in fireworks, crayons and deodorant.

Finally, over the last year, Roquette has settled into renewed CRA membership, bringing a unique perspective to our already-impressive team.

The following pages provide greater detail on each of these successful initiatives and much more, including our annual industry data.

I hope you'll take a moment to read about our accomplishments and share this information with our friends across the food and agriculture communities.

Thank you.



Christopher M. Cuddy
Chairman



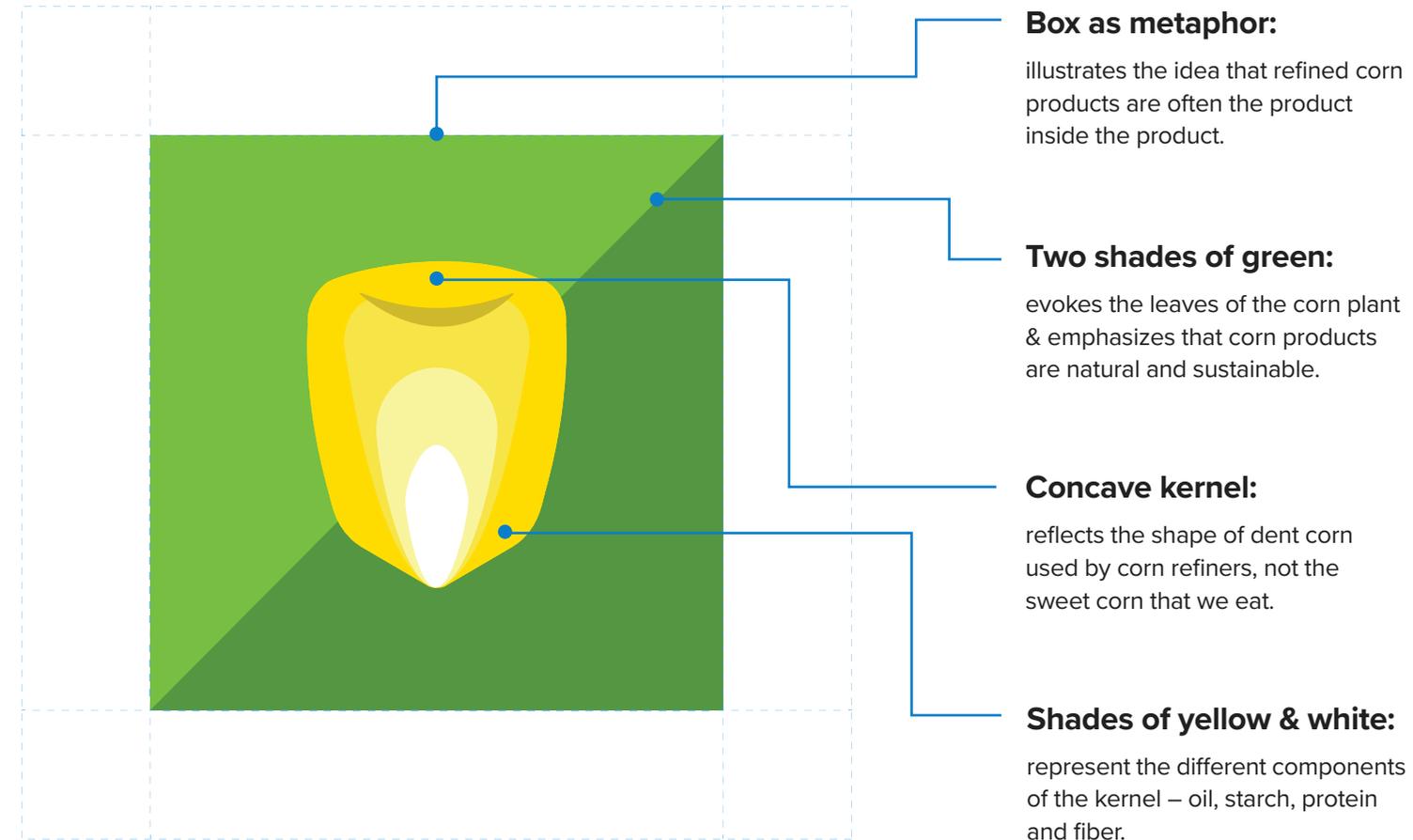
John Bode,
President & CEO

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CRA'S NEW BRANDING - THE LOGO

CRA officially unveiled its new logo and new look in October of 2018. We sought inspiration from across the corn value chain, while emphasizing the kernel's versatility and benefits. Here's a look behind our thinking as we created a new symbol to represent our industry in Washington and around the globe:



CRA'S NEW BRANDING - OUR MESSAGE

CRA didn't simply redesign its logo in 2018, we took a deep dive into the core values and attributes of our organization and industry, sharpening our focus to ensure CRA is ready to meet future opportunities and master future challenges. While corn products are essential ingredients within other consumer goods, they are often hidden from sight. To help the average consumer better understand the role of corn products, we developed a core set of examples that explain their surprising role in our daily lives:



Corn is a versatile resource that can be used for just about everything – from making our food taste better and our cosmetics last longer, to making our plastics more environmentally friendly and our medicines easier to swallow.

That's why we call corn "nature's renewable building block."

CRA'S MISSION:

Responsibly bringing corn products to life

CRA'S TAGLINE:

The kernel of innovation

CRA'S VALUE PROPOSITION TO MEMBERS:

CRA is the corn refining industry's proactive, nimble and highly-effective trade association. We champion corn – from kernel to consumer -- in Washington and around the globe. We work to open markets and expand commercial opportunities, building the bioeconomy and feeding the world. As a result, CRA has increasingly become one of the preeminent issues management organizations in the food and agriculture sectors.

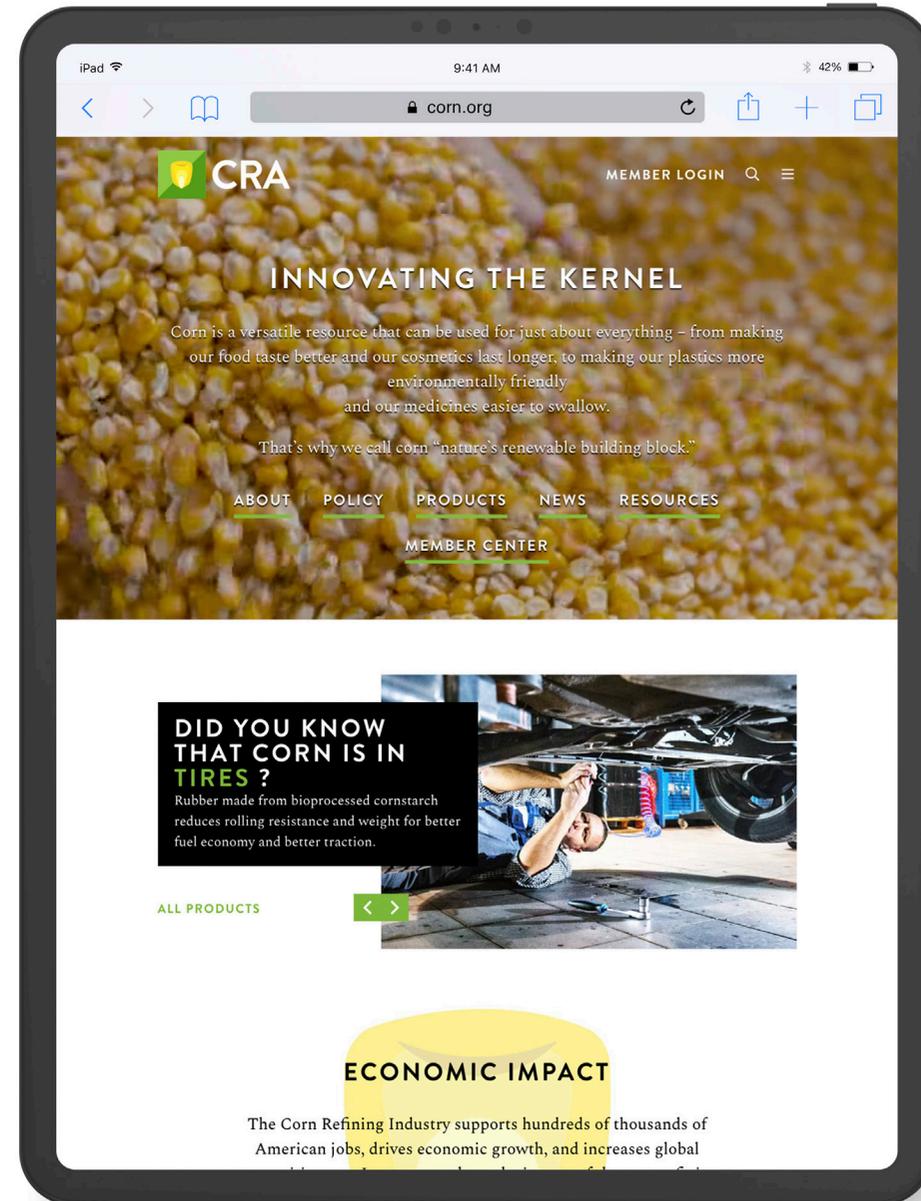
CRA'S NEW WEBSITE

CORN.ORG GETS A MAKEOVER

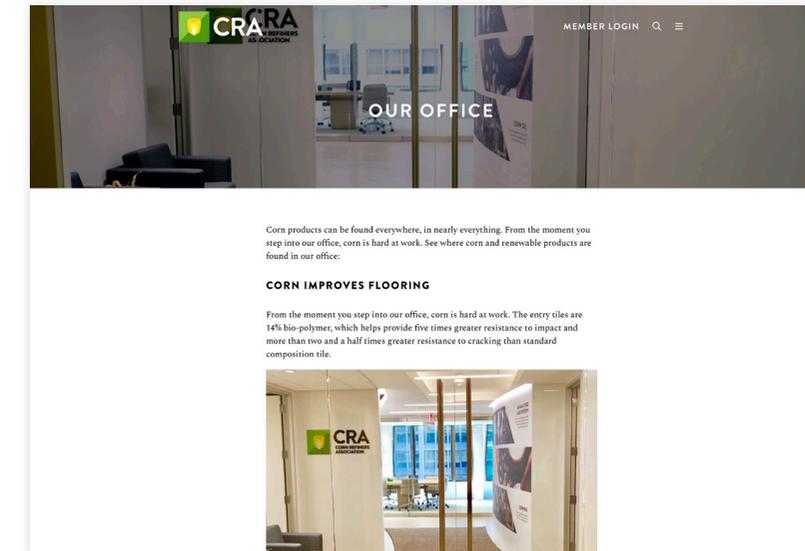
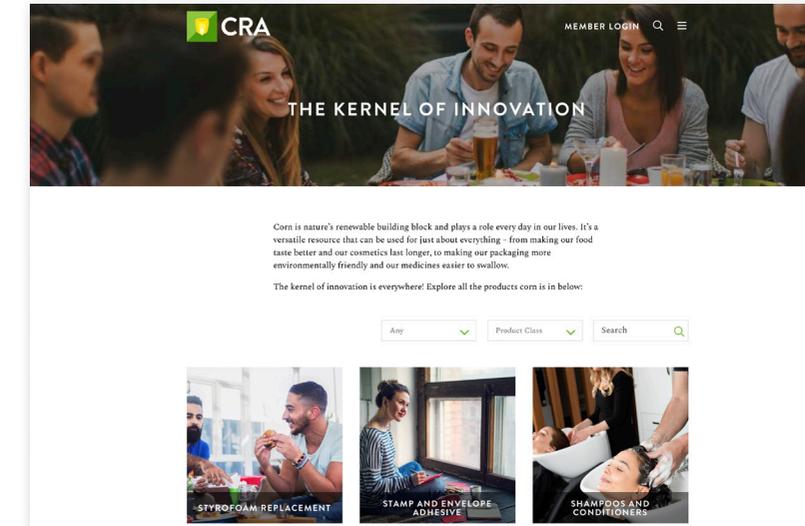
To better shine the spotlight on CRA's issue advocacy and the industry's outsized economic impact, we also redesigned our website: www.corn.org.

The new look is clean and bold. Meanwhile, the website's back-end has been restructured to be more responsive and to function more smoothly across a broader range of devices, including mobile.

The new site also includes a revised Member Center, offering participating companies more resources and information.



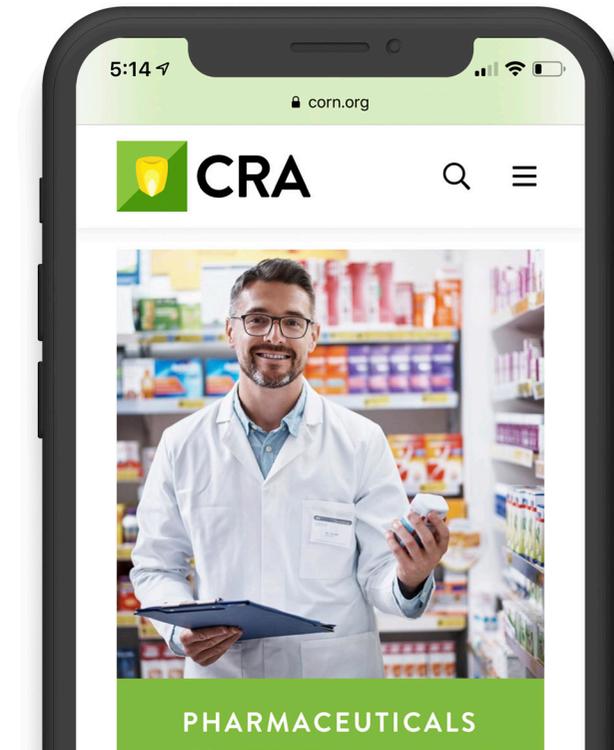
CRA'S NEW WEBSITE



Among our favorite features on the new site:

The **"Kernel of Innovation"** page, created to help educate the public about the incredible versatility of corn products. We think it is among the site's best new sections (see pages 13-16).

The **"Our Office"** page, created to highlight how CRA, itself, has incorporated corn products and other sustainable features into the design and daily life of our workspace. At our headquarters you can find corn flooring, corn carpet, corn chairs and much more (see pages 9-12).

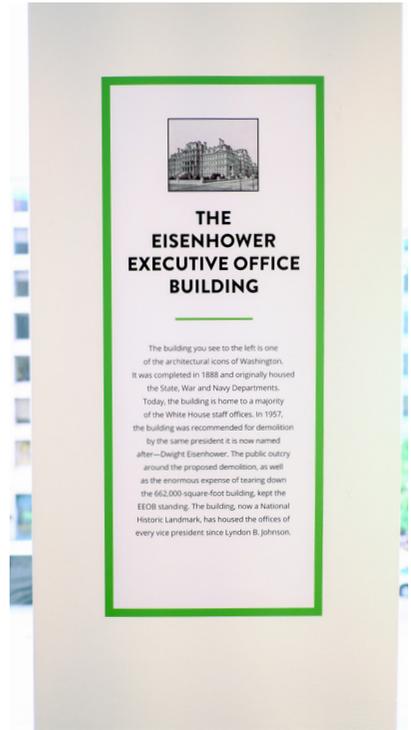


CRA'S NEW OFFICE SPACE



Located conveniently near both the White House complex and the office of the U.S. Trade Representative in Downtown Washington D.C., **CRA's office serves as a central gathering place for industry leaders.**

When the CRA team designed the new space, we sought a look and feel that would be open, clean and modern – filled with natural light. Like a blank canvas, the office serves as the background for a number of large infographics that help educate visitors about the corn refining industry, including the Kernel of Innovation wall.



Fascinating Fact:

CRA's new offices also served as the headquarters of Richard Nixon's 1972 presidential campaign. Members of the campaign were directly involved in the planning, execution and cover-up of the Watergate break-ins, which ultimately led to the resignation of President Nixon.

THE KERNEL OF INNOVATION

One of 2018's most exciting endeavors was the opportunity to share with policymakers and the public more details about the incredible diversity and versatility of corn products as an ingredient – in the food we eat, in the consumer products we buy and in the industrial processes that help our economy flourish and grow.

CRA gathered more than seventy examples of products and processes that utilize corn protein, oil, starch, sweeteners or bioproducts. And then we built innovative ways to share these surprising corn products with policymakers and the public. We:

- Built a special web page at corn.org (see [www.https://corn.org/kernel-of-innovation/](https://corn.org/kernel-of-innovation/))
- Launched an online social media campaign to raise awareness
- Dedicated an entire wall inside our DC headquarters to educate CRA's visitors.
- In fact, so many of our guests liked our Kernel of Innovation wall, we also created posters and banners from the design.

The following pages feature some of our favorite products from the Kernel of Innovation campaign...



STAMP ADHESIVE

Dextrin serves as the water-activated adhesive on stamps and envelopes.



SHAMPOO

Cornstarch helps to strengthen hair, while corn oil acts as a conditioner. Xanthan gum, made from corn bioprocessing, is a stabilizer and thickener.



STYROFOAM REPLACEMENT

Polystyrene cups, long considered a threat to the environment, are being supplanted by biodegradable products made from bioprocessing cornstarch.



SUGAR FREE CAKE

Erythritol is a zero-calorie sweetener and sugar substitute that results in moister, softer baked goods.



PHARMACEUTICALS

Cornstarch is a key ingredient in cellulose acetate phthalate (CAP), which coats pills to ensure their structural integrity, ease of swallowing, & timed release of medicine inside.



POULTRY FEED

Corn gluten meal provides energy, essential fatty acids, and amino acids, and helps give egg yolks their golden yellow color.



OIL DRILLING

Drilling fluid, which cleans and cools the drill bit, contains cornstarch, which ensures the appropriate viscosity.



PRINTING INK

Different inks require different "body." Some are soft and fluid, like newsprint, while others are thick and stiff. Cornstarch is added to control consistency.



PICKLES

Lactic acid is used to help preserve pickles and give them their tart flavor.



COSMETICS

Cornstarch is found in body powders, skin care, lipsticks, and eye and facial makeup. Corn oil can be found in skin care products. Xanthan gum is a makeup stabilizer & thickener.



HIGH-FIBER PASTA

Resistant starch can be used to increase the fiber in pasta and may even help reduce the risk of type 2 diabetes.



DOG FOOD

Corn gluten feed is a good source of fiber and a valuable aid in controlling obesity in adult dogs.



CONCRETE

Starch products in cement increase strength and speed up set time. Corn syrup helps keep the surface even.



LAUNDRY DETERGENT

Cornstarch brightens fabric & removes dirt during the washing process. Citric acid, a corn product made through bioprocessing, increases the cleaning power & helps soften water.



SELF-REPAIRING PAINT

German researchers are developing paint for cars that is derived from cornstarch and automatically repairs minor scratches.



BIOMEDICAL NANOTECHNOLOGY

Due to the unique size, shape and structure of the corn protein zein at the nanoparticle level, scientists are studying how it can deliver drugs that fight cancer. in many wallpaper adhesives.



CONVENIENT VEGETABLES

Citric acid helps preserve the texture, color, aroma, and vitamin content of canned and frozen vegetables. in many wallpaper adhesives.



LOW FAT YOGURT

Cornstarch makes low-fat yogurt creamy, smooth, and tasty by enhancing texture and keeping all the ingredients evenly mixed.



IV SOLUTION

Patients with low blood sugar are often given IV drips, many of which contain dextrose, a corn derivative.



DIAPERS

Starch-based materials provide a super-absorbent core for diapers, while PLA, a biodegradable material made from corn bioprocessing, can replace petroleum plastics & outer covers.



CURED MEATS

Dextrose counteracts intense saltiness. It also keeps spices evenly dispersed and helps give sausages their tangy flavor.

CRA & MILLENNIALS EMBRACING THE SUSTAINABILITY MOVEMENT

As the corn refining industry continues to innovate and push the boundaries of corn's uses, the sustainability movement offers an exciting path forward for bio-based products and packaging to become mainstream, with corn products leading the way.

CRA has founded the Plant Based Products Council (PBPC): a group of organizations working to guide the global economy toward more sustainable and responsible consumer products and packaging through greater use of plant-based materials.

One of today's greatest environmental challenges is the increasing global appetite for consumer goods and convenient packaging. When disposed of improperly, they damage our planet, pollute our oceans, and threaten our wildlife.

As awareness surrounding the health of our environment has moved into the mainstream of public attention, major corporations, such as The Coca-Cola Company, PepsiCo, and many more, have pledged to move toward sustainable packaging.

Meanwhile, America's Millennials are one of the driving forces behind these changes.

In 2018, CRA led a poll to determine the attitudes of millennials toward bioplastics. The polling confirmed that there is a major opportunity to start a bioplastics movement among millennials, as respondents across all segments of the millennial population showed support for bioplastics, and even a willingness to pay more for them.

Not only did the polling show widespread support amongst millennials for bioplastics, but it revealed that as millennials learn more about bioplastics, they become more favorable toward corn production and sustainable materials.

Millennial bioplastics polling makes clear that there is significant opportunity to win millennials' support, and that increased education surrounding bioplastics can have a variety of positive effects.

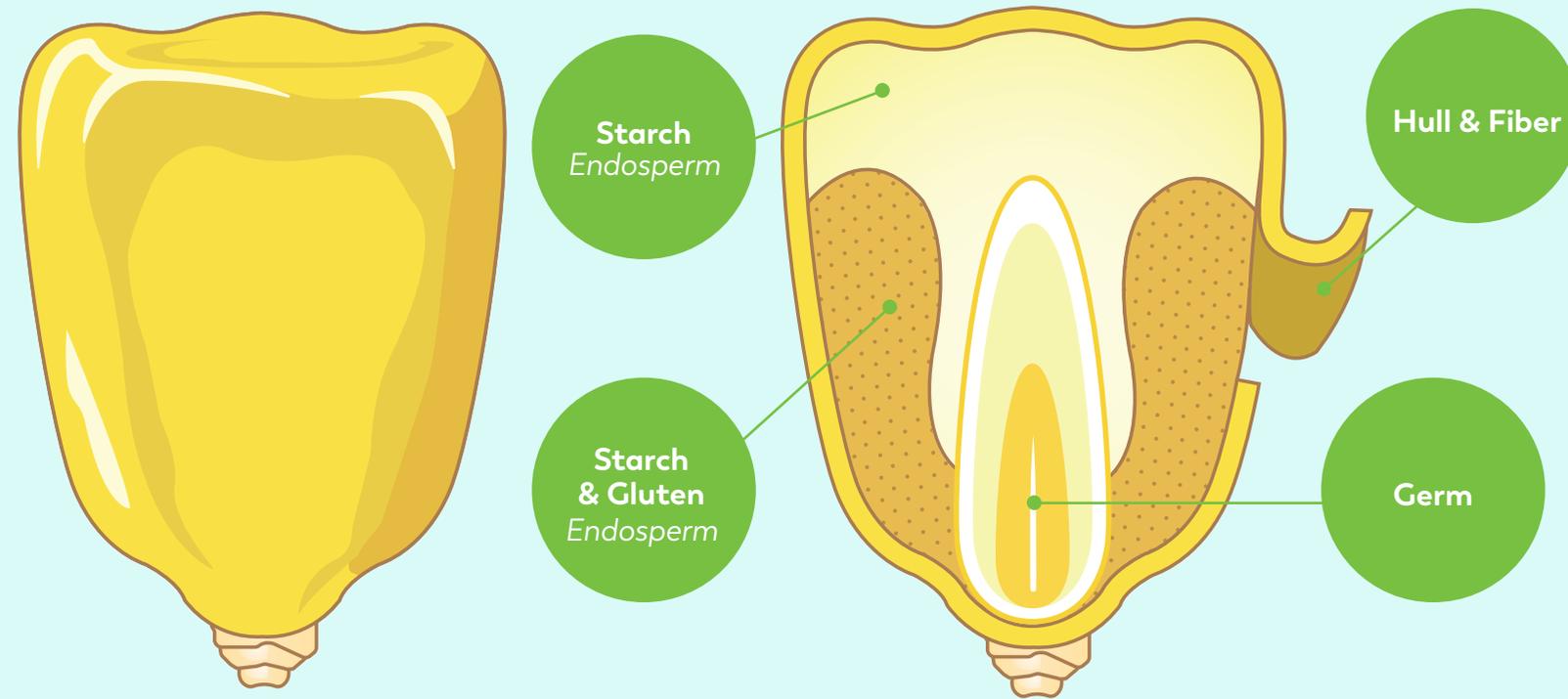
PBPC will advocate for private sector programs and government policies to encourage use of renewable materials and feedstocks, including policies to advance carbon emission reductions, waste reduction, and water quality improvement.



CORN REFINING – THE FOUR COMPONENTS OF THE KERNEL

It is incredible to think all of these products — from bioplastics to those found in our Kernel of Innovation campaign (pages 13-16) — all incorporate corn products.

Yet, it all starts with corn refining. For more than 150 years, the corn refining industry has been perfecting the process of separating corn kernels into their component parts. Through corn wet milling, a kernel is divided into starch, germ, fiber and protein.



U.S. CORN REFINING INDUSTRY AT A GLANCE – 2017

Corn Refining Plants	26
Additional Processing Plants	4
Location	11 states
Corn Grind	1.66 billion bushels (42.04 MMT*)
Value of Corn Purchased	\$5.59 billion
Number of Corn Suppliers	41,000
Direct Employment by CRA Member Companies	7,948
Total Supported Jobs	259,000
Capital Investment (replacement value)	\$20.05 billion
Value Added by Manufacture	\$12.32 billion

MAJOR PRODUCTS

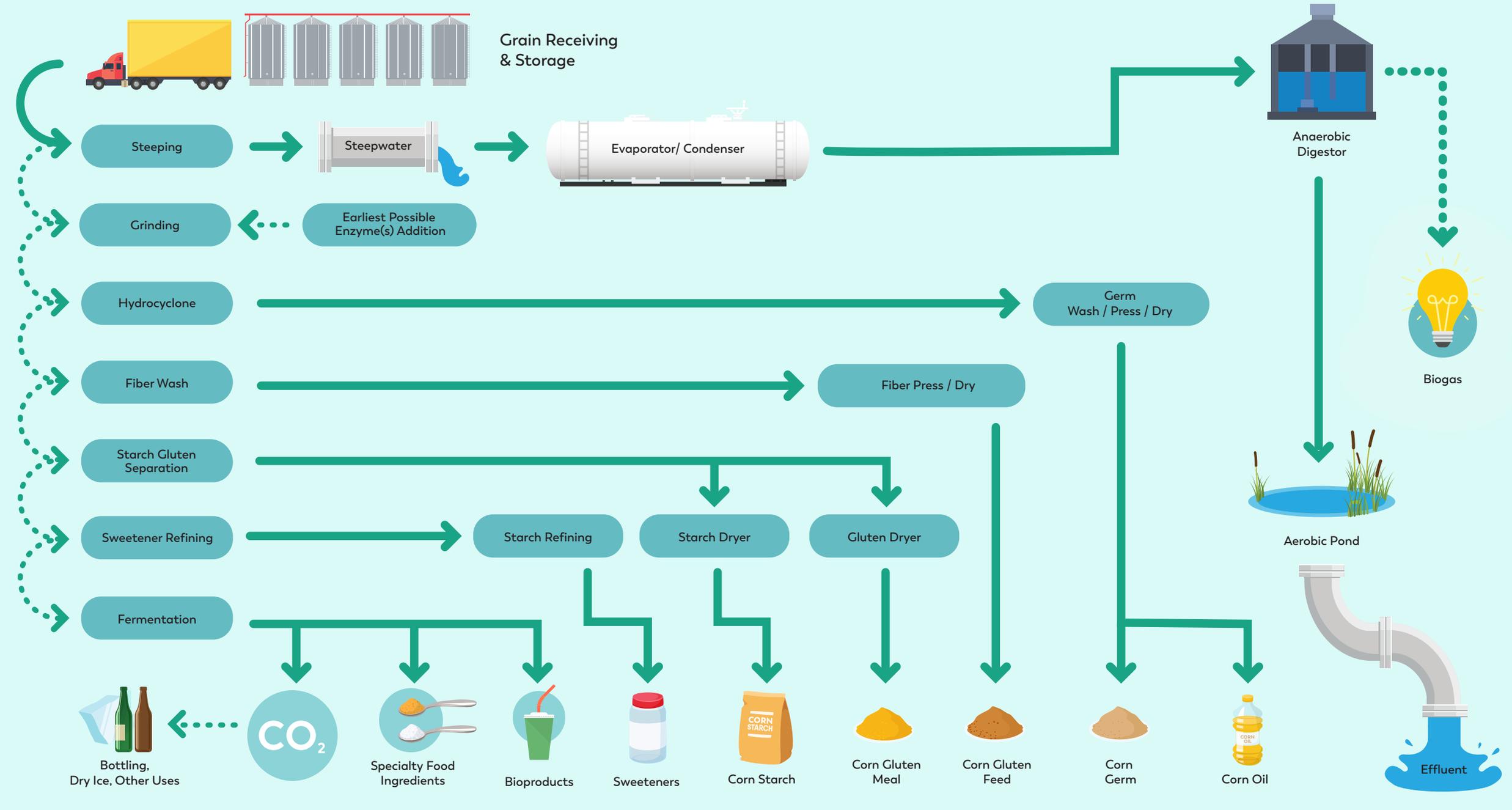
Sweeteners (dry weight)	27.64 billion pounds (12.12 MMT)
Starches	7.42 billion pounds (3.43 MMT)
Ethanol	1.57 billion gallons
Co-products	28.96 billion pounds (13.00 MMT)

*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 – 2017	Pounds, commercial weight		In Million Metric Tons
Starch Products <i>(includes corn starch, modified starch and dextrins)</i>	5.62	billion	2.55 MMT
Refinery Products <i>(includes glucose syrup, high fructose corn syrup, dextrose, corn syrup solids, maltodextrins)</i>	32.56	billion	14.77 MMT
High Fructose Corn Syrup 42%	6.32	billion	2.87 MMT
High Fructose Corn Syrup 55% and Above	11.36	billion	5.15 MMT
Total High Fructose Corn Syrup	17.69	billion	8.02 MMT
Total — Domestic Basic Products	38.18	billion	17.32 MMT
Total — Export Basic Products	4.46	billion	2.02 MMT
Corn Oil — Crude and Refined	1.10	billion	0.50 MMT
Corn Gluten Feed and Corn Oil Meal	11.78	billion	5.34 MMT
Corn Gluten Meal	1.94	billion	0.88 MMT
Steepwater	2.79	billion	1.27 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.

FEEDING THE ECONOMY

Economic Impact

The food and agriculture industries not only feed our nation, they add exceptional value to the country's economy, serving as a powerful multiplier when it comes to America's employment, wages and other measures of economic strength.

To quantify these contributions, CRA commissioned a first-of-its-kind study in 2017, examining the impact of the combined food and agriculture sectors, in a report and website called Feeding the Economy. Below, "Total Impact" is a measure that includes suppliers that support the food and agriculture industries, as well as those sectors supported by the induced spending of direct and supplier industries.

THE REPORT FOUND:

DIRECT IMPACT OF FOOD AND AGRICULTURE SECTORS:

Jobs: 22,815,868

Wages: \$763.12 Billion

Output: \$2.82 Trillion

Business Taxes: \$894.13 Billion

Exports: \$146.32 Billion

TOTAL IMPACT OF FOOD AND AGRICULTURE SECTORS:

Jobs: 43,311,057

Wages: \$1,985.10 Billion

Output: \$6.79 Trillion

CRA'S ROLE IN TRADE

Working with Partners for Better Trade Policy

Recognizing the vital importance of international markets and the positive impact NAFTA has had on the U.S. corn refining industry, CRA has played a leadership role in advocating for fair trade deals and strong trade relationships. As part of that effort, CRA helped lead two significant coalition efforts to advocate for the negotiation of trade deals.

Americans for Farmers and Families (AFF) represented a joint coalition effort between the CRA, National Corn Growers Association, American Farm Bureau Federation, and the National Pork Producers Council. Organized to ensure American farmers' access to foreign markets, AFF has worked tirelessly to advocate for constructive negotiations with Canadian and Mexican officials on a modified trade deal, attracting more than 100 member organizations along the way.

As evidence of the coalition's strength and ability to stand out in a crowded media environment, AFF Spokesman and Missouri Farmer Casey Guernsey's comments congratulating the Trump Administration on the announcement of the U.S.-Mexico-Canada Agreement (USMCA) were featured atop the White

House's press roundup highlighting the positive responses to the announcement.

In addition to AFF, CRA helps lead the U.S. Food & Agriculture Dialogue for Trade's North American Market Working Group, which consists of well over 100 companies and associations representing America's farmers, ranchers, processors, and agri-businesses. This organization serves as yet another example of CRA working with industry partners to advance and promote common interests on matters related to international trade.

Coalition work remains a vital strategy, especially with regard to trade and related issues. These coalition efforts have not only made a positive impact on CRA's trade interests, but have provided the opportunity to build strong working relationships with industry allies while reinforcing CRA's leadership role in the food and agriculture space.

CRA will continue to advocate for American farmers, working to ensure open markets for their crops and products, as these trade issues continue to advance through Congress.



CORN REFINERS ASSOCIATION MEMBER COMPANIES' PRODUCTS

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

	Archer Daniels Midland Company	Cargill	Ingredion Incorporated	Roquette America, Inc.	Tate & Lyle Americas
CO-PRODUCTS					
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	•	•	•	•	•
FERMENTATION AND OTHER PRODUCTS					
Citric acid	•	•			•
Lactic acid		•			
Lysine	•				
Threonine	•				
Xanthan gum	•	•	•		
Ethanol, fuel/industrial	•	•	•	•	•
Ethanol, beverage	•	•			

Data current as of September 2018

DOMESTIC PLANT LOCATIONS



Archer Daniels Midland Company

P.O. Box 1470
Decatur, Illinois 62525
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

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

Domestic Plants:

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



Roquette America, Inc

1417 Exchange Street
Keokuk, Iowa 52632
www.roquette.com

Domestic Plants:

- Gurnee, IL 60031*
- Keokuk, IA 52632



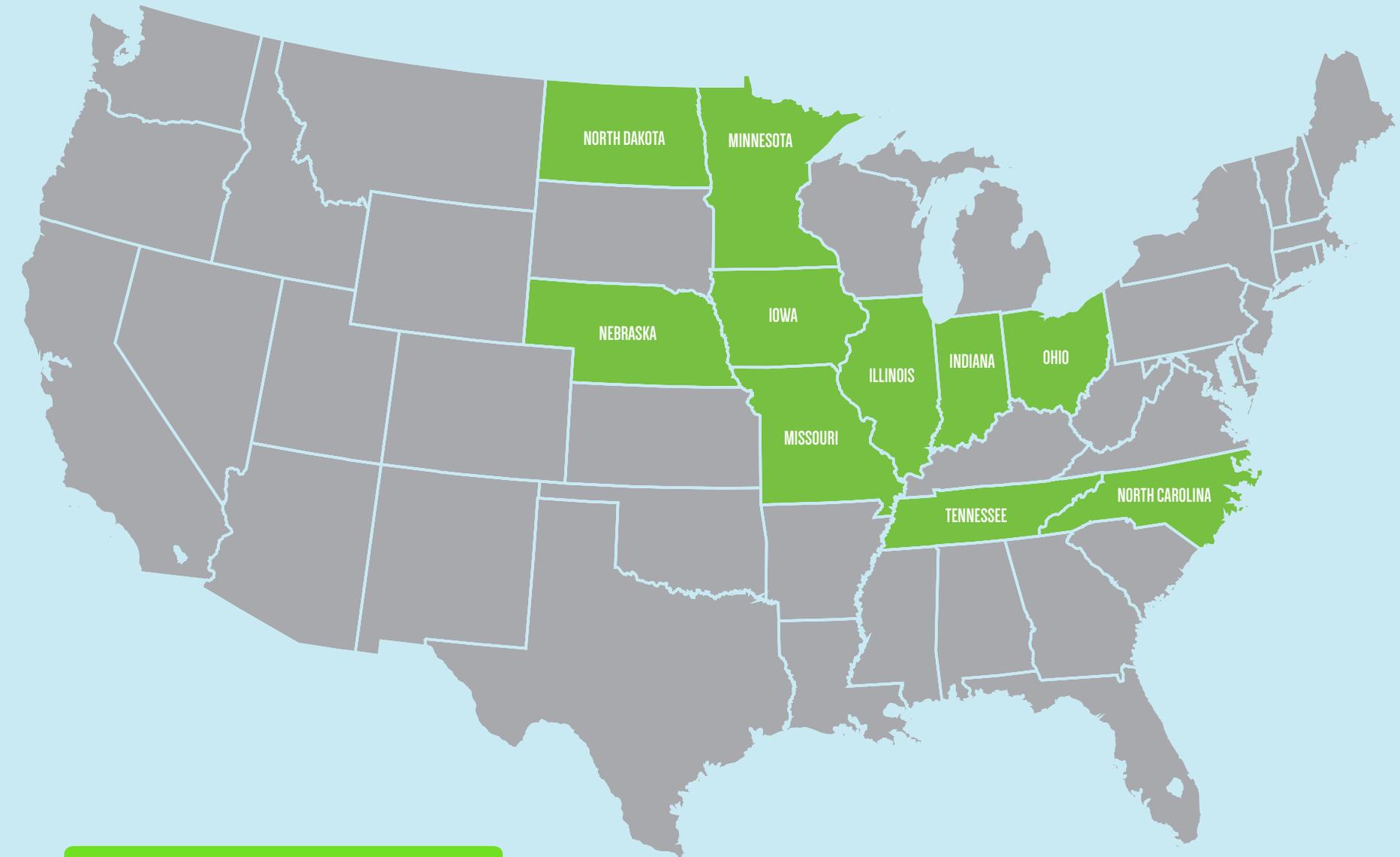
Tate & Lyle Americas

(A subsidiary of Tate & Lyle, PLC)
P.O. Box 151
Decatur, Illinois 62525
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

AWARD WINNERS

🏆 15 Corn Refining Facilities Win Industry Safety Awards from Corn Refiners Association

Every year, CRA honors corn refining facilities for their outstanding safety records and their unyielding commitment to ensuring an accident-free workplace. With 27 plants among CRA members nationwide, fifteen facilities, or more than half, were **recognized for achievements in workplace safety this year.**

“The men and women on the refinery floor are the beating heart of this industry, and it is absolutely imperative we provide them the safest possible working environment. I’m exceptionally proud to see so many of our members’ facilities achieving excellence in workplace safety.”

President & CEO of CRA, John Bode

🏆 CRA Incident Rate Excellence Award

This award recognizes those plants that have achieved a superior level of safety performance, as demonstrated by all of the following:

- 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.

Archer Daniels Midland Company

Clinton, IA; Clinton, IA (bio); Columbus, NE; Decatur, IL (bio); Marshall, MN

Cargill, Incorporated

Cedar Rapids, IA; Hammond, IA; Indianapolis, IN; Paris, IL

Ingredion Incorporated

Cedar Rapids, IA; Indianapolis, IN; Winston-Salem, NC

Tate & Lyle Americas

Dayton, OH; Loudon, TN (bio); Sagamore, IN

🏆 CRA One Million Hour Award

This 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.

Archer Daniels Midland Company

Clinton, IA

🏆 CRA Zero Lost Workdays Award

The 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 awardees listed above are for CY2017.

Archer Daniels Midland Company

Clinton, IA; Clinton, IA (bio); Columbus, NE; Decatur, IL (bio); Marshall, MN

Cargill, Incorporated

Cedar Rapids, IA; Hammond, IA; Indianapolis, IN; Paris, IL

Ingredion Incorporated

Cedar Rapids, IA; Indianapolis, IN; Winston-Salem, NC

Tate & Lyle Americas

Dayton, OH; Sagamore, IN; Loudon, TN; Loudon, TN (bio); Decatur, IL

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 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, the environment, advanced bioproducts and transportation, each described in the following pages.

TRADE POLICY

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.

In 2018, CRA was pleased with the Administration's ability to work with representatives of the Mexican and Canadian governments to reach the conclusion of negotiations on the newly named U.S.-Mexico-Canada Agreement, or USMCA.

CRA is pleased that the USMCA maintains the zero tariffs that were originally achieved for corn wet milled products under NAFTA, which allowed for Mexico and Canada to become our number one and two markets, respectively. Further, the agreement expanded and improved upon critical text concerning sanitary and phyto-sanitary measures, good regulatory practices, customs procedures, and cooperation on biotechnology. While important measures covering dispute settlement for international investments were heavily scaled back, dispute settlement provisions covering antidumping and countervailing duty reviews were wholly maintained.

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

ISSUES

- USMCA (formerly NAFTA)
- Improving Market Access for Products of Modern Biotechnology
- Supporting New Trade Agreements
- Export Certificate Program
- WTO Reform

Trade Policy Contact

Director, Trade & Industry Affairs



FOOD POLICY

Refined corn products have been part of the American diet for well over a century and represent one important option for providing the nutritional fiber, protein and carbohydrates required in a healthy diet. To promote consumers' healthy purchasing decisions, CRA strongly supports food and nutrition policies which are backed by sound scientific evidence. Refined corn products are also considered to be some of the safest human food ingredient products available today, with a long history of safe use.

That's why CRA has been active on biotech labeling, among other issues, throughout 2018. As USDA finalizes a national labeling standard, CRA is working with many industry partners to ensure refined corn products are treated fairly. Together, we are advocating for scientific-based policies to drive the USDA's new marketing standard. Our advocacy and educational efforts on this important issue will continue in 2019.

Two key committees drive CRA policies regarding consumer health and safety: the Health & Wellness and Product Safety & Quality committees. The Health & Wellness Committee provides recommendations to the Board regarding the public health role of refined corn products, including research that supports the nutrition education mission of CRA. The Product Safety & Quality Committee is responsible for providing recommendations to the Board regarding a range of product safety and quality matters generally regulated by the U.S. Food and Drug Administration and U.S. Department of Agriculture.

ISSUES

- Biotech (GMO) Labeling Law and USDA Rulemaking
- Dietary Guidelines for Americans
- US FDA Nutrition Innovation Strategy
- Nutrition Facts Label
- International Organization Activities (e.g., Codex Alimentarius, JECFA)
- Mycotoxin Reviews



Allison Cooke
Director, Food Policy



ENVIRONMENTAL POLICY

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 ability to modify or reconstruct a facility to expand bioproduct production 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 counted as de minimis by EPA when determining if a facility is a major source of CO2 because such emissions are negated when growers plant and grow more short-cycle crops. New leadership at the EPA has shown its 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, and pollution mitigation. 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.

ISSUES

- Biogenic CO2 Emissions
- NSR/PSD Reform
- Waters of the United States (WOTUS)/ Clean Water Rule
- EPA's RMP Program
- Process Safety Management of Highly Hazardous Chemicals



Kyle Harris

Director, Environmental Affairs and Workplace Safety



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 alternative to many traditional chemicals and materials, from hard plastics to cosmetics 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.

ISSUES

- Advanced bioproducts
- Sustainable agriculture program
- Municipal Waste/ Product End of Life



Ben Gruitt

*Director of Sustainability
and Advanced Bioproducts*



TRANSPORTATION POLICY

With the 2018 midterms behind us, an infrastructure package could be part of the 2019 agenda – a rare opportunity for cooperation between both sides of the aisle.

For years, elected officials from both parties have raised concerns about America's aging infrastructure and strained transportation systems, recognizing the need to refurbish our nation's rail systems, roads, airports and ocean ports. This is a key issue for our members, as trucks carry about 75 percent of domestic agricultural tonnage, and nearly half of U.S. agricultural exports are moved by rail or barge, based on Department of Agriculture statistics.

That's why CRA continues to work with more than 200 other rural and agricultural groups on critical infrastructure issues, continuing our congressional and coalition meetings to ensure rural needs are addressed in any future legislation.

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 both the Rebuild Rural Coalition and Rail Customer Coalition, all of which of which focus on infrastructure initiatives.

ISSUES

- Infrastructure funding
- Rail competition issues
- Waterways funding
- Highway Trust Fund
- Surface Transportation Board issues and nominations



Julia Gustafson
*Counsel & Director,
Legislative Affairs*



ADDITIONAL CRA COMMITTEES



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.

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.

SUSTAINABILITY COMMITTEE:

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

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.

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:



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