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- 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.

John Bode, President & CEO

Jim Stutelberg, Chairman

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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.

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

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.
### Shipments of Products of the Corn Refining Industry - 2016

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Pounds, commercial weight</th>
<th>In Million Metric Tons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starch Products (includes corn starch, modified starch and dextrose)</td>
<td>5.53 billion</td>
<td>2.51 MMT</td>
</tr>
<tr>
<td>Refinery Products (includes glucose syrup, high fructose corn syrup, dextrose, corn syrup solids, molasses)</td>
<td>32.28 billion</td>
<td>14.64 MMT</td>
</tr>
<tr>
<td>High Fructose Corn Syrup 42%</td>
<td>6.57 billion</td>
<td>2.98 MMT</td>
</tr>
<tr>
<td>High Fructose Corn Syrup 55% and Above</td>
<td>11.49 billion</td>
<td>5.21 MMT</td>
</tr>
<tr>
<td>Total High Fructose Corn Syrup</td>
<td>18.06 billion</td>
<td>8.19 MMT</td>
</tr>
<tr>
<td>Total — Domestic Basic Products</td>
<td>37.31 billion</td>
<td>17.15 MMT</td>
</tr>
<tr>
<td>Total — Export Basic Products</td>
<td>4.31 billion</td>
<td>1.98 MMT</td>
</tr>
<tr>
<td>Corn Oil — Crude and Refined</td>
<td>0.95 billion</td>
<td>0.43 MMT</td>
</tr>
<tr>
<td>Corn Gluten Feed and Corn Oil Meal</td>
<td>11.18 billion</td>
<td>5.39 MMT</td>
</tr>
<tr>
<td>Corn Gluten Meal</td>
<td>1.92 billion</td>
<td>0.67 MMT</td>
</tr>
<tr>
<td>Steepwater</td>
<td>2.97 billion</td>
<td>1.35 MMT</td>
</tr>
</tbody>
</table>

Shipment and gross data prepared 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**

- **60% Sweeteners**
- **30% Co-products**
- **10% Starch**

*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

Dextrins 2%
Modified Starch 46%
Unmodified Starch 49%
Pregelatinized Starch 3%

STARCH PRODUCT USES 2016*

2.44 MMT

PAPER PRODUCTS
FOOD PRODUCTS
BAKING & CONFECTIONERY
BUILDING MATERIALS
PHARMACEUTICALS & CHEMICALS

56%
20%
4%
3%
1%

MARKET SHARE %

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.
Domestic shipments of sweetener products
*Includes maltodextrins, corn syrup solids and crystalline fructose

High Fructose Corn Syrup
PRODUCT USES 2016*

*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%

*Corn Refiners Association. All data compiled by Vault Consulting, LLC. Statistics represent shipments by members of the Association.

FERMENTATION, OTHER CHEMICALS & PRODUCTS

Citrin 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 CO-PRODUCTS 2016

Domestic and export shipments of co-products

CORN REFINERS ASSOCIATION 18

INDUSTRY OVERVIEW 17
## CORN REFINERS ASSOCIATION MEMBER COMPANIES’ PRODUCTS

### STARCH

<table>
<thead>
<tr>
<th></th>
<th>Archer Daniels Midland Company</th>
<th>Cargill</th>
<th>Ingredion Incorporated</th>
<th>Tate &amp; Lyle Americas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unmodified, food</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Unmodified, industrial</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Modified, food</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Modified, industrial</td>
<td>✓</td>
<td>✗</td>
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<td>✓</td>
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</tbody>
</table>

### SWEETENERS

<table>
<thead>
<tr>
<th></th>
<th>Archer Daniels Midland Company</th>
<th>Cargill</th>
<th>Ingredion Incorporated</th>
<th>Tate &amp; Lyle Americas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Glucose syrups</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Maltodextrins</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Dextrose monohydrate</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Dextrose anhydrous</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>High Fructose Corn Syrup-42</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>High Fructose Corn Syrup-55</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Crystalline fructose</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

### REDUCED-CALORIE SWEETENERS

<table>
<thead>
<tr>
<th></th>
<th>Archer Daniels Midland Company</th>
<th>Cargill</th>
<th>Ingredion Incorporated</th>
<th>Tate &amp; Lyle Americas</th>
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</thead>
<tbody>
<tr>
<td>Allulose</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Erythritol</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Glucose hydrolysates</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Hydrogenated starch hydrolysates</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Maltool</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Maltitol</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Sorbitol</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Xylitol</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

### CO-PRODUCTS

<table>
<thead>
<tr>
<th></th>
<th>Archer Daniels Midland Company</th>
<th>Cargill</th>
<th>Ingredion Incorporated</th>
<th>Tate &amp; Lyle Americas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crude oil</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Refined oil</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Corn gluten feed</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Corn gluten meal</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Corn germ or corn germ meal</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Steepwater (CFCE)</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Carbon dioxide</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Corn fiber food/industrial ingredients</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

### FERMENTATION AND OTHER PRODUCTS

<table>
<thead>
<tr>
<th></th>
<th>Archer Daniels Midland Company</th>
<th>Cargill</th>
<th>Ingredion Incorporated</th>
<th>Tate &amp; Lyle Americas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Citric acid</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Lactic acid</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Lysine</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Threonine</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Xanthan gum</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Ethanol, fuel/industrial</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Ethanol, beverage</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

As of October 2016
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:
- 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
Domestic Plants:
- Decatur, Illinois 62521
- Lafayette, Indiana 47902
- Lafayette, Indiana 47905
- Dayton, Ohio 45414*
- Loubon, Tennessee 37774

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

DIRECT ECONOMIC IMPACT

JOBS
22,815,868

WAGES
$763.12 BILLION

OUTPUT
$2.82 TRILLION

BUSINESS TAXES
$894.13 BILLION

EXPORTS
$146.32 BILLION
...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

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.

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
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 every 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.

CRA continues to support two key committees 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.

Allison Cooke
CRA’s Director, Food Policy

ISSUES:

- Nutrition Facts Label
- Biotech (GMO) Labeling Law and USDA Rulemaking
- Dietary Guidelines for Americans Modernization
- International Organization Activities (e.g., Codex Alimentarius, JECFA)
- Mycotoxin Reviews
The Environment, Bio GENics & 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 CO2 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 workplace matters generally regulated by the Occupational Safety and Health Administration.

Kyle Harris
CRA’s Manager, Environmental Affairs/Workplace Safety

Issues:
- Biogenic CO2 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
Advancements in the corn refining industry have led to the development of a variety of advanced biobased products. These products, such as pharmaceutical casings, paper goods, and automobile tires, are made from refined corn products, which have long been utilized for more than food ingredients. Thanks to decades of work by scientists and researchers in the 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. 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
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
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:
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