



CRA

2021 INDUSTRY OVERVIEW



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Roquette

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Eamon Monahan
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Kent Roberson
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Michael Anderson
Vice President, Trade & Industry Affairs

Keniece Barbee
Director, the Executive Office and Member Services

Megan Schwinden
Senior Administrative Assistant

Jessica Bowman
Senior Vice President,
Advanced Bioproducts

Johnelle Brown
Director, Operations & Human Capital



Jim Stutelberg, Chairman



Chris Cuddy, Vice Chairman



John Bode, President & CEO

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WELCOME LETTER

Martin Luther King, Jr. famously observed that, “The time is always right to do what is right.” Amid a global pandemic and numerous policy challenges, the CRA Board has kept CRA’s focus on doing what is right.

CRA has followed through on our Values Statement by hosting an initial webinar on diversity and inclusion in agriculture and related industries, which shattered participation records. And this is just the start. Also, I hope you will give particular focus to the report on pages 9 and 10 regarding our industry’s progress in making corn wet mills among the safest workplaces in the world.

CRA’s focus on sustainability led to extensive work on a new Life Cycle Analysis for leading products, continued support for the Monarch Collaborative’s work to expand pollinator habitat and, of course, our work with the Plant Based Products Council (PBPC). PBPC is the leading advocate for bio-based chemicals and other products that address the challenges of climate change, water quality, municipal waste and soil health. Confident that corn can compete with other feedstocks, we are eager to support the PBPC’s promotion of renewable bio-based materials, ranging from chemicals to plastics to textiles and beyond. Our industry is committed to building an increasingly circular bioeconomy.

Further, the CRA staff has a collaborative, mission-oriented culture that promotes strong teamwork within the association and with other industry groups. We work to be good neighbors in the food and agriculture policy community, partnering with fellow stakeholders in a broad array of coalitions and leading several working groups. Through all of this, we maintain a best-in-class intern program to mentor outstanding students as they find the first step on their career ladder.

Despite the challenges, we have had a good year doing what is right. Next year, we intend to build on that with stronger contributions to the industry we serve and the communities in which we live.

Sincerely,

John W. Bode
CRA President & CEO



CRA VALUES STATEMENT IN PRACTICE

In 2021, we put the CRA Values Statement into practice within our organization and our broader community.

In April, CRA sponsored a webinar hosted by AgriPulse, entitled *“Diversity, Equity & Inclusion: Ideas for Improvement.”* The webinar featured remarks by House Agriculture Chairman David Scott and a dynamic discussion panel including Patricia Sheikh, former Deputy Administrator of USDA’s Foreign Agriculture Service, PJ Haynie III, Chairman of the National Black Growers’ Council and owner of Haynie Farms, LLC, Kathryn Unger, Vice President of Cargill’s North America government relations team, and H.R. Bert Pena, former Staff Director for the House Committee on Agriculture. The webinar was the most widely watched event in AgriPulse history, with 1,000 live attendees and over 600 post-event views on Facebook. You can view the recording [here](#).

CRA launched our Diversity and Inclusion Committee, which will guide our work with member companies to build a pipeline of diverse workforce talent for our industry.

Our leader John Bode signed the CEO Action Pledge, furthering CRA’s long-term commitment to support a more inclusive workplace.

Diversity and inclusion
are essential values
to creating a workplace
where everyone feels
they belong. CRA
is committed to
listening, learning,
and growing together.





ADVANCING CORN-BASED BIOPRODUCTS

Corn-based bioproducts are high-performance, sustainable alternatives to petroleum-derived materials. Used in cups and caps, fabrics, carpeting, golf tees, and a host of other consumer products, corn-based bioproducts can also help reduce waste through reuse, recycling, biodegradability, and composting.

In partnership with the Plant Based Products Council, CRA worked to advance legislation that grows domestic and international markets for advanced bioproducts made from a variety of agricultural feedstocks, including corn.

- CRA convenes the Biogenic CO₂ Coalition, which represents a cross-section of agriculture and related sectors in advocating for sensible policies recognizing the carbon benefits of agricultural biomass. In 2021, the coalition engaged with the White House, USDA, EPA, and Congress on the need for EPA action on the coalition's petition for rulemaking on biogenic CO₂.
- CRA is a member of the U.S. Composting Infrastructure Coalition and supported the introduction of the COMPOST Act – H.R. 4443 sponsored by Rep. Julia Brownley (D-CA) and S. 2388 by Senator Cory Booker (D-NJ), designed to provide funding for the development of composting infrastructure.
- CRA endorsed the Adopt GREET Act, companion legislation introduced in the House and Senate to ensure that the Environmental Protection Agency uses the most up-to-date GREET (Greenhouse gases, Regulated Emissions, and Energy use in Technologies) model developed by the Argonne National Laboratory when it produces life-cycle analyses of greenhouse gas emissions related to the production of corn-based fuel products. CRA is also exploring ways the GREET model could support improved life-cycle analyses for other advanced bioproducts made from corn.
- CRA supported H.R. 2532, the Renewable Chemicals Act, which would provide tax credits for the production of renewable chemicals and investment in renewable chemical production facilities.

PBPC's leadership and accomplishments in 2021 have established its reputation as the leading advocate for plant-based products. CRA applauds PBPC's ground-breaking work, and we look forward to working with PBPC to advance the U.S. bioeconomy.



SAFETY FIRST IN CORN WET MILLS

As part of its commitment to tracking and improving workplace safety performance across the industry, the Corn Refiners Association has administered a voluntary safety reporting program for its members since 2000. Two decades worth of data show that CRA members have achieved a remarkable improvement in workplace safety, far outpacing similar industries and the nationwide average.

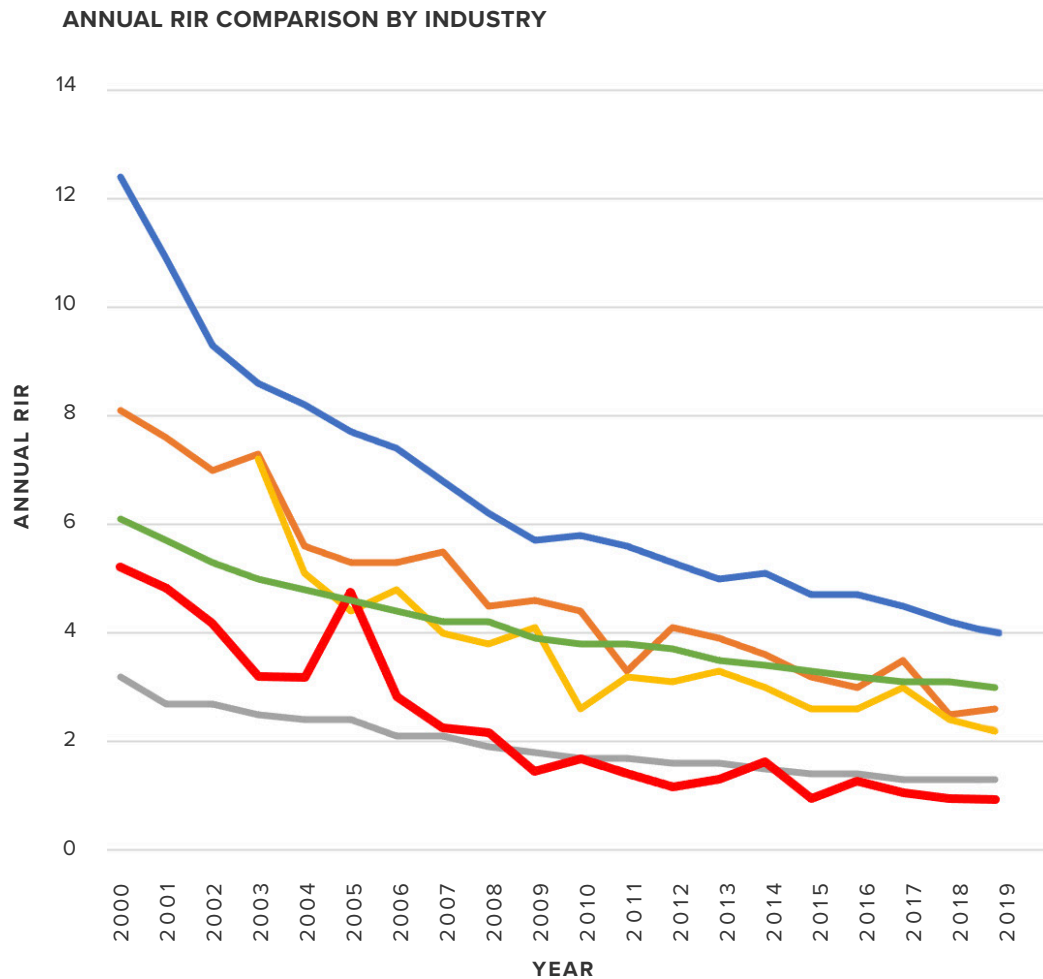
Recordable Incident Rate (RIR) is a metric used by the Occupational Safety and Health Administration (OSHA) and other regulatory agencies to track the safety record of individual facilities or entire industries.

In the early 2000s, corn wet milling had an RIR hovering near 6.0, which was similar to relatively dangerous heavy industry like aluminum smelting and auto manufacturing at the time. The corn wet milling industry took action to lower its injury rate, and the efforts were a game-changer. Our industry's injury rate has been on a steady trajectory downward to the current RIR level of about 1.0. That means working in a corn wet mill is as safe as typing in an office.



RECORDABLE INCIDENT RATE STATISTICS

It is an incredible achievement for any manufacturing industry to have a safety record as impressive as an **RIR of 1.0**. CRA celebrates the priority its members place on making sure their workers come home safe every day through our annual [Safety Awards Program](#).



PERCENTAGE IMPROVEMENT IN RIR SINCE 2000

■	National Average	51%
■	Professional Business Service	59%
■	Food Manufacturing	68%
■	Grain and Oil Seed Mill	68%
■	Starch and Vegetable Fats and Oils Manufacturing	69%
■	CRA	82%



OUR INDUSTRY'S COMMITMENT TO SUSTAINABILITY

Sustainability is an essential pillar in the work of CRA and our member companies. Across the value chain, the sustainability preferences of global consumers are driving complementary change across the corn wet milling industry. From increasing responsible sourcing to manufacturing products and materials that reduce the environmental footprint of numerous sectors, corn wet milling is on the forefront of sustainability initiatives.

In 2021, CRA advocated for policies to help advance our members' current sustainability efforts while also ensuring that the industry meets the impressive sustainability goals it has set. In these efforts, CRA applied its Climate Change Principles to legislation and regulatory advocacy:



- CRA endorsed the Growing Climate Solutions Act of 2021, which seeks to help farmers, ranchers, and foresters navigate the agricultural carbon market landscape.
- CRA participated in COP26, our 8th year in row to help drive more sustainable climate practices.
- CRA marked its third year as a member of Farmers for Monarchs.
- CRA worked with other allied associations across the agricultural value chain to ensure that USDA's climate smart policies work in tandem with the existing robust efforts of industry.
- CRA joined the Food and Agriculture Climate Alliance.
- CRA joined the US Composting Infrastructure Coalition as an original member.

A GOOD NEIGHBOR IN FOOD AND AGRICULTURE POLICY

CRA is proud to partner with food and agriculture organizations, non-profit organizations, and policy experts on initiatives to address policy challenges in trade, food and nutrition, environment affairs, agriculture sustainability, transportation, COVID-19 pandemic response, and many others. CRA regularly works with more than 30 coalitions and working groups to dissect complex problems, find workable solutions, and assist policymakers in finding the path forward.

FEEDING THE ECONOMY

- Did you know that America's food and agriculture sectors are responsible for more than 13% of US employment? Since 2017, CRA has collaborated with over 30 food and agriculture organizations on Feeding the Economy, an economic study that highlights the jobs, wages, taxes, exports, and more generated by food and agriculture nationwide, by state, and by congressional district. Visit feedingtheeconomy.com to learn more.

- CRA's Corn Refining Industry Economic Impact Study spotlights the economic contributions of our industry to the nation's agricultural and economic value chain.

TOTAL ECONOMIC IMPACT OF CORN REFINING – 2020

JOBS: 167,786

WAGES: \$10,013 Billion

OUTPUT: \$47.501 Billion

BUSINESS TAXES: \$3.328 Billion

For more information: <https://corn.org/economic-impact/>





A GOOD NEIGHBOR IN FOOD AND AGRICULTURE POLICY

TRADE

As a convener of multiple trade coalitions and working groups, CRA serves as a hub for the exchange of ideas and information on global trade issues important to food and agriculture. **CRA's trade advocacy focuses on achieving productive partnerships among trade officials, industries, and policy experts.**

- Each week, CRA publishes the Trade Update newsletter to help policymakers and industry members stay up to date on the many trade issues that impact food and agriculture. Curated by Michael Anderson, CRA's trade expert, the newsletter is a highly valued resource for over 900 subscribers and additional readers who receive it from a colleague.
- Strong US leadership is essential to achieving trade agreements that advance market opportunities for US food and agriculture. CRA coordinated food and agriculture industry letters of support for Biden Administration nominees at the forefront of food and agriculture trade: USDA Secretary Tom Vilsack, U.S. Trade Representative Katherine Tai, USDA Deputy Secretary Jewel Bronaugh, U.S. Ambassador to Mexico Ken Salazar, and Elaine Trevino, nominee for Chief Agriculture Negotiator at USTR.
- Mexico is one of the US's most important food and agriculture trade partners and the United States-Mexico-Canada Agreement (USMCA) is critical to the future growth of food and agriculture trade across North America. As concerns about the trade relationship between the US and Mexico emerged earlier this year, CRA coordinated a letter from 26 food and agriculture associations asking USDA Secretary Vilsack and U.S. Trade Representative Katherine Tai to prioritize this critical trade relationship.
- Education is essential to a deeper understanding of global trade dynamics and the benefits that international trade brings to US agriculture. CRA is proud to serve as one of the founding members of the Agriculture Trade Education Council, a 501(c)(3) non-profit that will be an educational resource on the value of a rules-based trading system.



USDA Secretary
Tom Vilsack



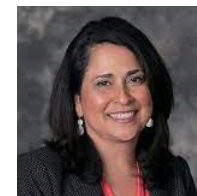
U.S. Trade Representative
Katherine Tai



USDA Deputy Secretary
Jewel Bronaugh



U.S. Ambassador to
Mexico Ken Salazar



Elaine Trevino, nominee
for Chief Agricultural
Negotiator at USTR

A GOOD NEIGHBOR IN FOOD AND AGRICULTURE POLICY

FOOD POLICY

CRA strongly supports policies that empower consumers to make informed, healthy purchasing decisions while preventing consumer misunderstanding and confusion. We believe that food and nutrition policies should be based on robust scientific evidence and deliver measurable benefits to consumers. These principles inform CRA's leadership within and contributions to the Food and Beverage Issues Alliance and other food and nutrition policy coalitions.



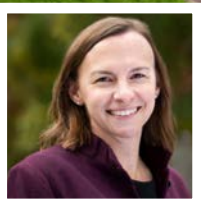
- To support the implementation of the National Bioengineered Labeling Standard, CRA worked with industry partners to develop a compliance toolkit, which was endorsed by 24 trade associations representing much of the food and beverage supply chain. Additionally, CRA continues to work with our members, industry partners, U.S. officials, and other interested stakeholders to discuss questions on the National Bioengineered Food Disclosure Standard, including those with specific relevance for our industry.
- What consumers think a food label term means and what a regulator understands it to mean can be very different. That gap in understanding impacts how well consumers can use food labeling to make better nutrition choices based on their individual needs. As the Food and Drug Administration works on label standards for the use of “healthy” and other claims, CRA has provided the agency with research on what consumers think these terms mean conducted by Dr. Jayson Lusk of Purdue University’s Department of Agriculture Economics. [Read here](#) about CRA’s position on the use of consumer perception research to develop labeling standards and our recommendation that FDA restrict the use of “healthy” claims on food products with high levels of sugar.

CRA HIGHLIGHTS FROM 2021

2021 was a year of professional accomplishment for CRA team members. We celebrate the recognition our colleagues received from their professional peers and members of the food and agriculture policy community.

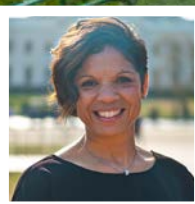


JESSICA BOWMAN, Executive Director of the Plant Based Products Council and Vice President, Advanced Bioproducts for the Corn Refiners Association, was named to The Hill's Top Lobbyists 2021 list.



CRA

KENIECE BARBEE was promoted to Director, the Executive Office and Member Services, managing executive office operations and enhancing member services.



Agriculture Trade Education Council

MICHAEL ANDERSON was named an original member of the board for the Agricultural Trade Education Council, starting in 2021. Additionally, Michael helped establish the Agriculture Economics and Data Users Group, which convened for its first meeting in January 2021.



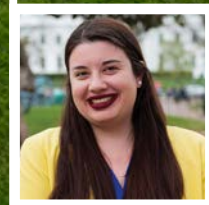
ROBIN BOWEN was promoted to Senior Vice President, broadening her portfolio to include issue management as well as external affairs.



CRA



**Food & Beverage
ISSUE ALLIANCE**



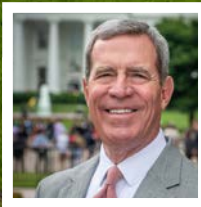
ALLISON COOKE served as President of the Washington, DC Section of the Institute of Food Technologies in 2020-21. In addition, CRA was elected Treasurer for the Food and Beverage Issue Alliance due to Cooke's leadership.

CRA HIGHLIGHTS FROM 2021 (continued)

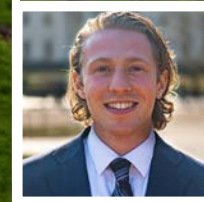


JOHN BODE was appointed to the Agriculture Policy Advisory Committee, which advises USDA and USTR on trade policy matters. NASDA gave John its highest honor, the Ambassador's Circle Award, for his years of service and commitment to the agriculture industry.

EAMON MONAHAN served as a leading voice for the bioproducts industry in the US Plastics Pact.



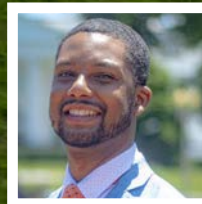
JOHNELLE BROWN organized and now leads CRA's Diversity & Inclusion Committee.



JUSTIN MAROCCIA participated in the Environmental Law Institute's Emerging Leaders Initiative.



KENT ROBERSON designed and launched the CRA Newsletter, a monthly update on the work of CRA and our members in support of the corn value chain.



CORN REFINERS ASSOCIATION



CRA 2021 EVENTS

CRA proudly sponsored and participated in these events in 2021

MARCH

National Ag Day - Release of Feeding the Economy 2021

APRIL

Diversity, Equity and Inclusion in Agriculture: Ideas for Improvement - hosted by Agri-Pulse

SEPTEMBER

The Nebraska Ag Technology Summit at Husker Harvest Days

The Fall Solstice Soiree by Friends of the National Arboretum

OCTOBER

The “Trade Prom,” a 2021 Annual Dinner sponsored by the Washington International Trade Association and the Washington International Trade Foundation

20th Anniversary of the Spirit of Mt. Vernon

NOVEMBER

COP26, CRA's eighth year participating in the yearly summit

Avanza Awards, the Hispanic Lobbyists Association's signature annual event. John Bode was honored to present the Avanza Poder Award for Congressional Leadership to Rep. David Valadao (R-CA).



RESOURCE LINKS

CORN KERNEL

<https://corn.org/resources/>

REFINING PROCESS SIMPLIFIED

<https://corn.org/wp-content/uploads/2021/02/CRA-Industry-Overview-2020.pdf> (p. 36)

DOMESTIC PLANT LOCATIONS 2021

<https://corn.org/about-cra/member-company-locations/>

CORN REFINERS ASSOCIATION MEMBER COMPANIES' PRODUCTS 2021

<https://corn.org/about-cra/>

SHIPMENTS OF PRODUCTS

<https://corn.org/wp-content/uploads/2021/02/CRA-Industry-Overview-2020.pdf>

HONORARY DIRECTORS

<https://corn.org/wp-content/uploads/2021/02/CRA-Industry-Overview-2020.pdf>



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