

# 2023

## Industry Overview



CRA

# 2023 BOARD OF DIRECTORS

## **MICHAEL J. WAGNER**

Chairman | Cargill

## **ROB RITCHIE**

Vice Chairman | Ingredion

## **DAVID RESAC**

Treasurer | Primient

## **CHRIS CUDDY**

Archer Daniels Midland Company

## **TRAVIS ELLIOTT**

Tate & Lyle

## **MINDAUGAS GEDVILAS**

Roquette

## **RICARDO GRIZZO**

Roquette

## **DANA JOHNSON**

Cargill

## **JIMMY KENT**

Grain Processing Corporation

## **KRIS R. LUTT**

Archer Daniels Midland Company

## **WILLIAM MAGEE**

Tate & Lyle

## **BRIAN PETERS**

Grain Processing Corporation

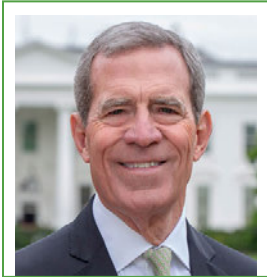
## **JIM STUTELBERG**

Primient



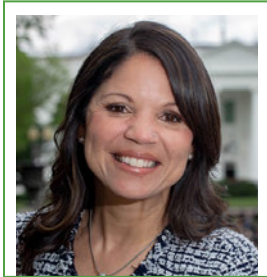


# 2023 STAFF



**JOHN BODE**

President and CEO



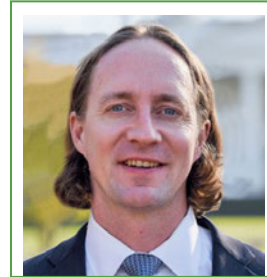
**KENIECE BARBEE**

Chief of Staff



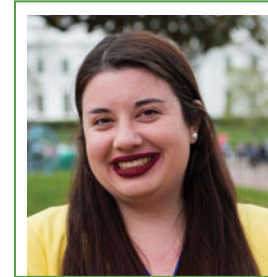
**ROBIN J. BOWEN**

Senior Vice President,  
External Affairs



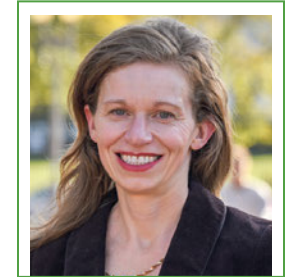
**JAMES GLUECK**

Senior Vice President,  
Advanced Bioproducts



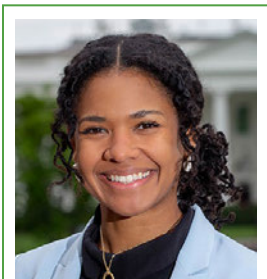
**ALLISON COOKE**

Vice President,  
Food Policy



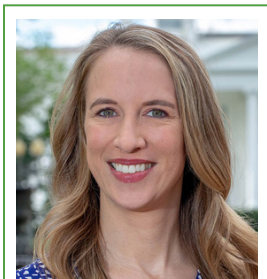
**KRISTY  
GOODFELLOW**

Vice President, Trade  
and Industry Affairs



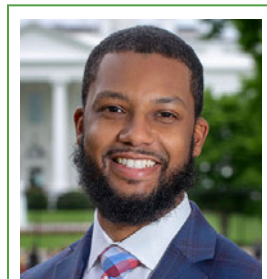
**JAMAICA GAYLE**

Director, Sustainability  
and Environmental  
Affairs



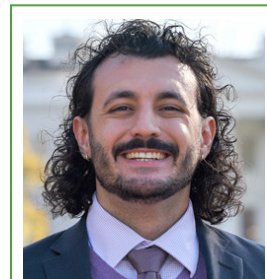
**JACQUELINE  
BOGCESS**

Director,  
Communications



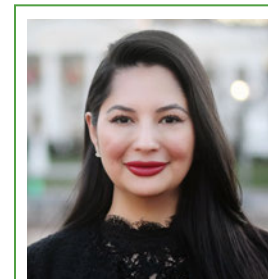
**KENT ROBERTSON**

Director, Government  
Relations



**MAX CAMAEROS-  
MANN**

Manager, Sustainability  
and Workplace Safety



**RUTH RICHARDS**

Executive Assistant

# WELCOME LETTER

America's corn refiners play a vital role in transforming the crops of the world's best farmers into hundreds of products with thousands of uses that touch your life everyday in countless ways. Environmentally sustainable refined corn products are not just present in the personal care products we all use every morning, but also in the foods we eat, the medications we take, and — increasingly — in a broad array of chemicals, building materials, packaging and textiles.

Representing the entire U.S. corn refining industry, CRA has been charged by its members to advance industry interests by responsibly promoting policies that serve the needs of our consumers, our co-workers in the industry, and the environment. We strive to do so by being a good neighbor in the food and agriculture policy community.

My CRA colleagues and I hope you enjoy reviewing our report on those activities in 2023.

Sincerely,

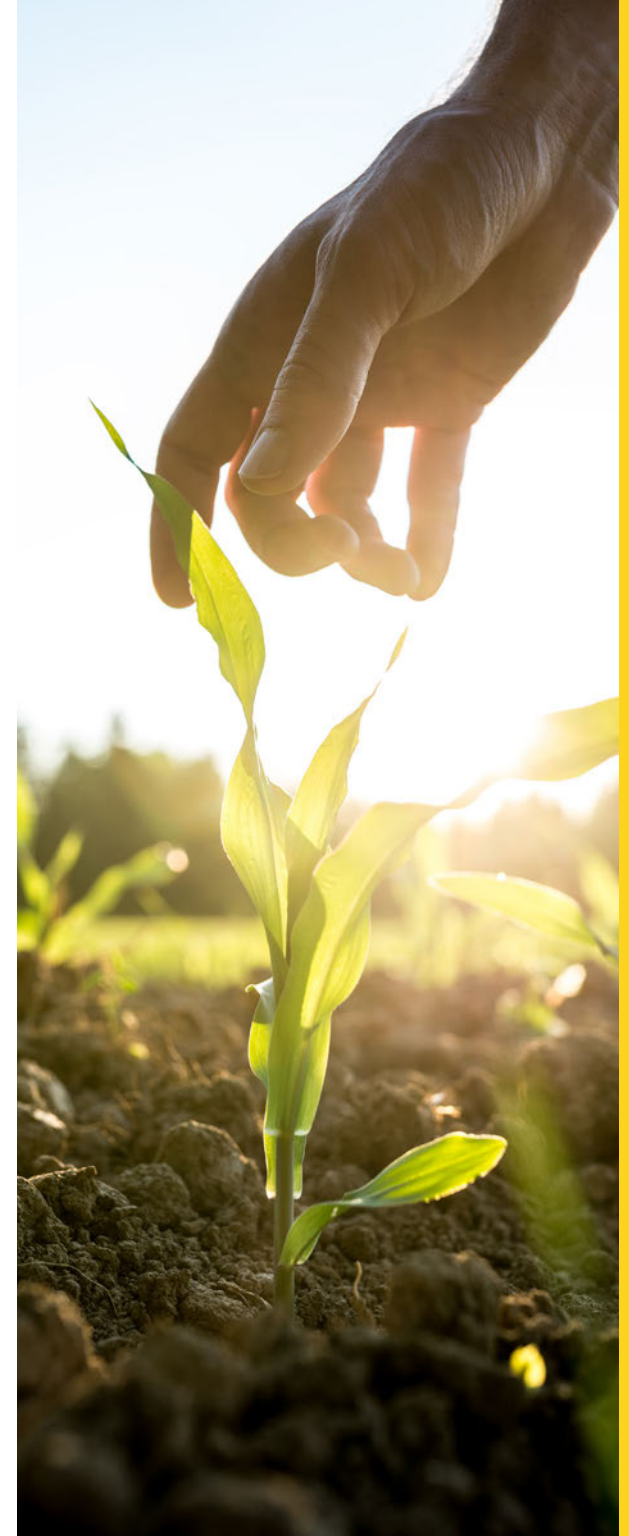
**John W. Bode**

*CRA President and CEO*

# CRA VALUES STATEMENT IN PRACTICE

CRA put its values of community, respect, and action into practice in 2023 by supporting the next generation of community and industry leaders through our engagement with organizations and programs advancing diversity, career mentorship, and education.

- 💡 CRA's internship program provides future leaders solid professional experience that facilitates the launch of their careers in rural economic development, regulatory and legislative advocacy, public affairs, community action, and more. Intern alumni have applied their talents and can-do spirit to a myriad of fields, including work as legislative staffers in Congress, international trade analysts, and an athletic turf technician. From federal agencies and Congress, advocacy organizations such as the American Farm Bureau Federation and the Consumer Technology Association to accomplished consulting firms including William & Jensen PLC and Edelman Global Advisory, our intern alumni are contributing to leading institutions.
- 💡 CRA was honored to participate in conferences that sparked conversations and positive action towards a more equitable and inclusive industry, including the National Black Growers Council Annual Conference, the Minorities in Agriculture, Natural Resources, and Related Sciences (MANRRS) Annual Conference, and the Congressional Black Caucus Mississippi Policy Conference.
- 💡 CRA was proud to support the Congressional Black Caucus Foundation's 52nd Annual Legislative Conference, Congressional Hispanic Caucus Institute's 46th Annual Awards Gala, the American Society of Association Executives ReadyMe educational program, and the Black Professionals in Food and Agriculture.
- 💡 CRA President and CEO John Bode was a keynote speaker at the 2023 Agriculture Future of America Leaders Conference.



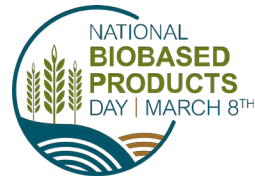
# ADVANCED BIOPRODUCT ACCOMPLISHMENTS

Corn is a versatile resource that can be used for a variety of advanced bioproducts, from personal care products and packaging to pharmaceuticals and bioplastics. In 2023, CRA collaborated with the Plant Based Products Council (PBPC) and other members of the Ag Bioeconomy Coalition (ABC) to spotlight the growing role of biobased products in the agricultural bioeconomy.

Throughout 2023, CRA engaged in advocacy efforts that advanced influential legislation and helped secure integral wins for the agriculture industry.

- 💡 CRA supported the introduction of the bipartisan, bicameral *Biomanufacturing and Jobs Act* and the *Agricultural Biorefinery Innovation and Opportunity Act (Ag BIO Act)* as part of Congress' work on the Farm Bill.
- 💡 CRA successfully advocated for Congress' unprecedented inclusion of USDA's biobased product and biorefinery support programs in the one-year extension of the Farm Bill.

CRA engaged in strategic partnerships to bolster public awareness of industry priorities and to highlight the impact of bioproducts, the agricultural bioeconomy, and the industry at large.



- 💡 CRA contributed policy advocacy resources as an industry group member of the Illinois Fermentation and Agriculture Biomanufacturing Hub, a consortium recognized as one of the U.S. Economic Development Administration's 31 Regional Innovation and Technology Hubs.

- 💡 In collaboration with the Plant Based Products Council (PBPC) and Ag Bioeconomy Coalition (ABC), CRA celebrated the inaugural USDA National Biobased Products Day on March 8th, 2023.



- 💡 CRA engaged in discussions on corn-based bioproducts and the agricultural bioeconomy with a host of stakeholders, including NASDA rural development partners, ambassadors of the Indiana Agricultural Leadership Program, and members of the Nebraska Corn Growers Association.

- 💡 CRA celebrated the one-year anniversary of the Ag Bioeconomy Coalition's advocacy on behalf of the farmers, rural communities, innovators, and businesses that make biobased products and renewable fuels possible.

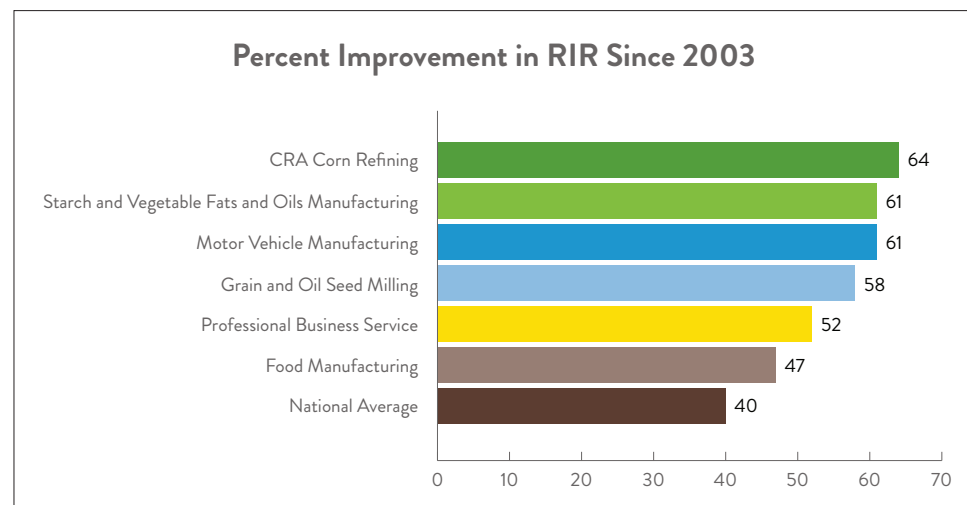
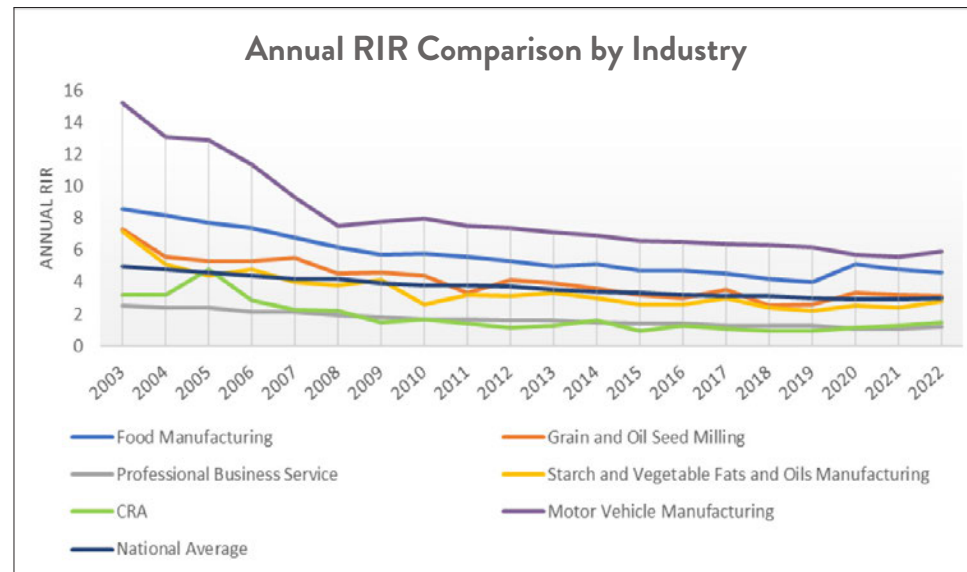


# SAFE WORKPLACE PRIORITIES

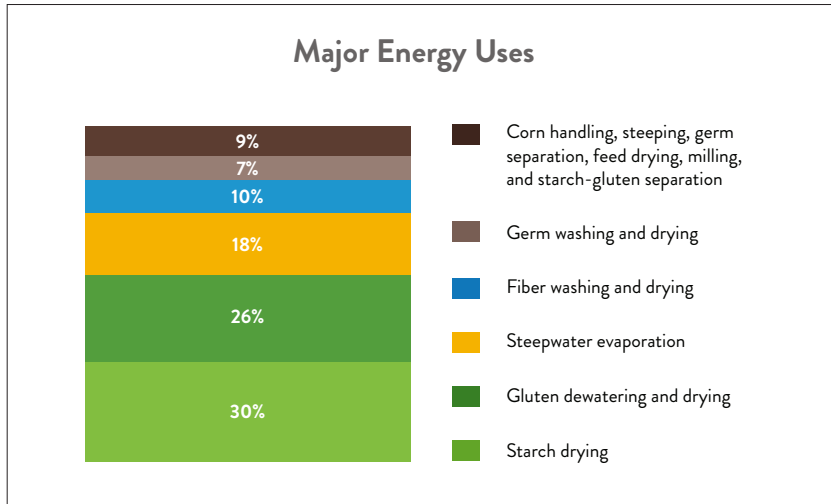
Driven by a commitment to the well-being of industry members at every point on the value chain, CRA continues to advocate for safe workplace practices as a key industry priority. The CRA Workplace Safety Committee aggressively shares problems and discusses solutions to make corn refining one of America's safest industries. The continued dedication and success of members in reducing workplace accidents and fostering safe environments earned wide industry recognition throughout 2023, with CRA honoring Cargill, ADM, Roquette, Grain Processing Corporation, and Primient facilities with our 2023 Safety Awards.

As a result of CRA, CRA members, and industry efforts to create safe working environments, the corn refining industry experienced notable improvement in its recordable incident rate (RIR), from an already impressive 1.45 RIR in 2022 to a 1.15 RIR in 2023. Work in a corn refining plant continues to be as — or sometimes more — safe as working in an office setting.

In the past 20 years, the industry has experienced both the lowest RIR and the largest improvement among peer industries, such as food manufacturing and grain milling (see the chart for full list of comparisons). CRA members have decreased their RIR 64% percent since 2003.



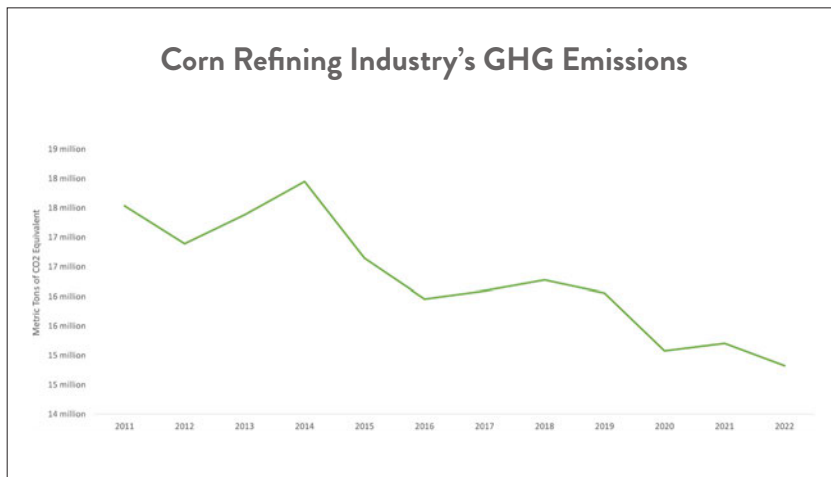
# OUR INDUSTRY'S COMMITMENT TO SUSTAINABILITY



The sustainability journey of corn refiners reflects a commitment to continuous improvement, innovation, and collaboration across all aspects of operations.

In 2023, CRA released the industry's first peer-reviewed Life Cycle Analysis (LCA), providing a snapshot of the environmental impacts of certain corn products across their lifetime, from the beginning stages of agricultural production to the final stages of facility operations. This farm-to-manufacturer assessment delves into a variety of environmental impacts, including global warming potential, fossil fuel consumption, energy demand, and land use.

CRA membership maintains a robust commitment to sustainability across all verticals of the value chain. Throughout the year, CRA members led by example and implemented programs and practices that advanced their sustainability commitments and surpassed their goals in sustainable agriculture, emissions, energy, waste, water, and more.



💡 Cargill hit a major sustainability milestone in 2023, implementing regenerative ag practices on 880,000 acres of North American agricultural land. Those programs increased water availability in their supply chains by 3.4 billion liters and reduced more than 60 metric tons of pollutants.

💡 Ingredion's ongoing collaboration with Truterra continues to amplify the production of sustainable dent corn in the U.S., with 99% of Ingredion's global waxy corn worldwide sustainably sourced.

💡 Primient's sustainable agriculture program includes more than 1.2 million acres of corn, providing enrolled farmers with a variety of sustainability and stewardship solutions aimed at promoting regenerative practices, such as improving soil quality through effective nitrogen management, tillage practices, and cover cropping.

- 💡 Roquette is on track to avoid 1 million tons of CO2 equivalents annually across global operations by 2025.
- 💡 Through a steadfast commitment to responsible stewardship and conservation, Grain Processing Corporation (GPC) implements advanced technologies and processes aimed at reducing, recycling, recovering, and reusing resources. An example of this commitment is evident at their Muscatine grain processing plant, where emissions have been reduced by an impressive 93%.
- 💡 By implementing 53 new seal pots on pumps at Tate & Lyle's Sagamore plant in Indiana and fine-tuning dryer sanitation schedules, the facility achieved a significant reduction in water consumption, saving over 26 million gallons. Seal pots, integral systems facilitating the reuse of water for pump cooling and lubrication, were pivotal in this endeavor.
- 💡 ADM's corn refining facility in Clinton, Iowa, works with a third-party waste management vendor to find a beneficial reuse option for previously landfilled organics, including biomass from their wastewater treatment operation. In 2022, the site began shipping the organic materials for land application, returning important nutrients to agricultural fields in the supply shed. It's estimated that this project will divert more than 11,000 metric tons per year from landfills.

By prioritizing sustainable agriculture, energy efficiency, emissions reduction, and waste management, the industry is laying the groundwork for a more sustainable future within the corn refining industry and beyond.



# FEEDING THE **ECONOMY**

In 2023, CRA published the seventh annual Feeding the Economy report in partnership with 25 food and agriculture groups. The economic impact study explored new data on jobs, wages, and economic output at district, state, and nationwide levels. Visit [FeedingTheEconomy.com](https://FeedingTheEconomy.com) to learn more.

The 2023 Feeding the Economy report demonstrates a robust economic output throughout the food and agriculture sectors, finding at the national level:

- 💡 **Jobs: 46,283,917** (up 1.5% since the 2019 report)
- 💡 **Wages: \$2.61 trillion** (up 26.2% since the 2019 report)
- 💡 **Taxes: \$947.93 billion** (up 3.8% since the 2019 report)
- 💡 **Exports: \$202.2 billion** (up 24.4% since the 2019 report)
- 💡 **Output: \$8.6 trillion** (up 21.8% since the 2019 report)

The 2023 Feeding the Economy report won the LACP Platinum 2022/2023 Vision Award. The report was ranked sixth in the Worldwide Top 100 ranking and was recognized for its exceptional characteristics and contributions to agribusiness.



# A GOOD NEIGHBOR IN FOOD AND AG POLICY

## FOOD

- 💡 In 2023, CRA served as the Chair for the Food and Beverage Issue Alliance (FBIA). FBIA includes 45 food and beverage trade associations, representing critical infrastructure industries and companies feeding the U.S. and the world. The coalition serves as an informational resource for members and regulatory agencies. CRA led meetings with senior Food and Drug Administration (FDA) officials, providing an opportunity to highlight CRA's leadership in the food and beverage industry.
- 💡 For more than 15 years, CRA has offered the Carbohydrate Check Sample Program (CCSP), a testing methods service, for corn refiners globally. CCSP enables companies to compare the precision of their product testing methods with the performance of other facilities to maintain analytical accuracy. In 2023, 70 participants from 20 countries took part in the program. CRA also instituted a new best practice in 2023 by appointing CRA member liaisons to assist CCSP participants, particularly those in other countries, to improve their experience within the program.
- 💡 In 2023, CRA became Chair of the International Federation of Starch Associations (IFSA), an alliance of starch trade associations across seven different countries and regions. A forum for information sharing and collegial learning, the IFSA meets on a semi-annual basis to discuss the key issues impacting the starch industry worldwide. In 2023, the British Starch Industry Association “BSIA” joined the alliance, and efforts are currently underway to expand membership.



# A GOOD NEIGHBOR IN FOOD AND AG POLICY

## TRADE

One of CRA's signature trade accomplishments is the publication of the weekly CRA Trade Update, which shares relevant policy news on food and agriculture trade with readers around the world. The Trade Update is a premier source of trade and industry developments for trade missions, Congress, federal agencies, and trade advocates.

### In 2023, CRA's major trade work included

- 💡 Building positive, collaborative relationships with Mexico by attending the North Capital Forum held in Mexico City, meeting regularly with major food and agriculture associations to examine critical economic relationships with the country, and participation in the 2023 North American Leaders Summit (NALS) in Mexico City.



- 💡 The North Capital Forum in Mexico City featured a panel on “Food for Thought: Sustaining a Secure North American Table” with (from left) Sergio Gomez Lora, CEO de IQOM Strategic Advisors LLC (moderator); John Bode, President, Corn Refiners Association; Juan Cortina Gallardo, President, Consejo Nacional Agropecuario, Mexico; and Hector Lujan Valladolid, President and CEO of Reiter Affiliated Companies — the largest fresh multi-berry producer in the world.



- 💡 CRA convened regular meetings with major food and agriculture trade associations, featuring prominent officials and experts in the bilateral relationship, including former U.S. Ambassador to Mexico, Early Anthony (Tony) Wayne; experts from the McLarty Associates; Ken Smith Ramos, formerly Mexico's Chief Negotiator for USMCA; and Juan Cortina from Mexico's National Farm Council (CNA).
- 💡 In January, John Bode was the invited representative of U.S. agribusiness at the 2023 North American Leaders Summit (NALS), a head-of-state trilateral, in Mexico City, where CRA led an effort to create a “Statement of Agribusiness Leaders” that was signed by an international cross section of associations in support of open trade and integrated markets.

- 💡 CRA hosted biweekly virtual meetings of major food and agriculture associations to discuss trade advocacy and hear from a guest Member of Congress. CRA also participated in Farmers for Free Trade's 2023 fly-in to discuss agriculture trade priorities with members of Congress.



- 💡 CRA took part in a meeting with Rep. Marianne Miller-Meeks, R-IA, during the 2023 Farmers for Free Trade fly-in.

- 💡 CRA published a paper on trade agreements and U.S. competitiveness examining recent U.S. bilateral and regional trade negotiations in comparison with key trade partners — China, EU, Japan, and Canada. This work has been referenced and cited in many discussions about current U.S. trade policy positions and market opportunities.
- 💡 CRA led an industry-wide effort to draft and submit comments on a proposed rule related to modifications to U.S. antidumping and countervailing duties laws in order to advocate for positions that serve U.S. food and agriculture export interests.

# CRA'S 2023 STAFF HIGHLIGHTS

## CRA welcomed new leaders to our team



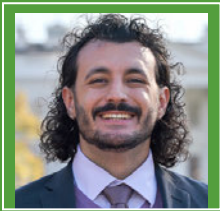
**JAMES GLUECK**

Senior Vice President,  
Advanced Bioproducts



**KRISTY GOODFELLOW**

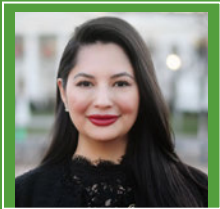
Vice President, Trade and  
Industry Affairs



Former CRA intern

**MAX CAMAEROS-MANN**

Manager, Sustainability  
and Workplace Safety



**RUTH RICHARDS**

Executive Assistant

**Robin Bowen** was an honoree of the 2024 Leading Association Lobbyist Award by Association TRENDS and CEO Update.

CRA celebrated the promotions of **Kent Roberson** to Director, Government Relations and **Jamaica Gayle** to Director of Sustainability & Environmental Affairs.

**Kent Roberson** became a member of the Maryland state legislature and was selected to serve as President of the Black Professionals in Food and Agriculture.

**John Bode** was named to the American Society of Association Executives ReadyMe Steering Committee to build educational opportunities in trade association leadership for underrepresented populations.

**Keniece Barbee** led CRA's diversity initiatives and represented CRA at the 2023 Minorities in Agriculture, Natural Resources, and Related Sciences (MANRRS) conference.







# CRA'S 2023 EVENTS

CRA proudly sponsored and participated in other events during 2023 that propelled the agricultural industry forward, including:

Farmers for Free Trade media roundtable and congressional fly-in on the importance of international trade to U.S. agriculture | February

Feeding the Economy release on National Ag Day | March

Agri-Pulse Ag & Food Policy Summit | March

2023 Commodity Classic | March

National Association of Farm Broadcasting 2023 Washington Watch | April

U.S. Chamber of Commerce - C100 | June and December

D.C. Agricultural Policy Intern Network Lunch-N-Learn | July

Washington International Trade Association Annual Dinner | July

Iowa Corn Day at the Iowa State Fair | August

Friends of the National Arboretum Dinner | September

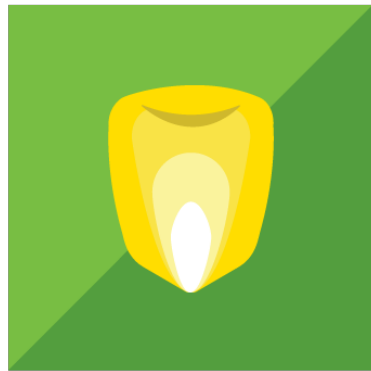
Congressional Black Caucus Foundation's 52nd Annual Legislative Conference | September

Congressional Hispanic Caucus 46th Annual Awards Gala | October

U.S. Mexico Foundation's North Capitol Forum | October

The Spirit of Mt. Vernon Sunset Reception and Dinner | October

National Coalition for Food and Agricultural Research Lunch-N-Learn | November



**CRA**