

2022



Industry Overview



CRA

2022 BOARD OF DIRECTORS

CHRIS CUDDY

Chairman | Archer Daniels Midland Company

MICHAEL J. WAGNER

Vice Chairman | Cargill

DAVID RESAC

Treasurer | Primient

TRAVIS ELLIOTT

Tate & Lyle

MINDAUGAS GEDVILAS

Roquette

RICARDO GRIZZO

Roquette

PAT HOMOELLE

Grain Processing Corporation

DANA JOHNSON

Cargill

JORGEN KOKKE

Ingredion

KRIS R. LUTT

Archer Daniels Midland Company

WILLIAM MAGEE

Tate & Lyle

ROB RITCHIE

Ingredion

JIM STUTELBERG

Primient

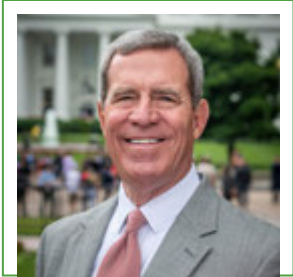
RON ZITZOW

Grain Processing Corporation



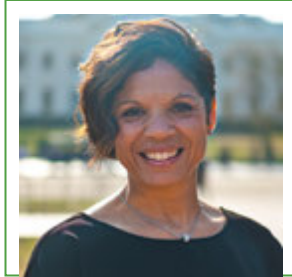


2022 STAFF



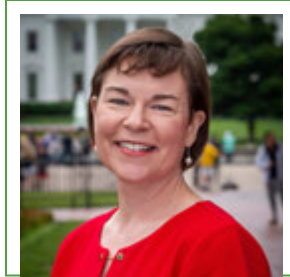
JOHN BODE

President and CEO



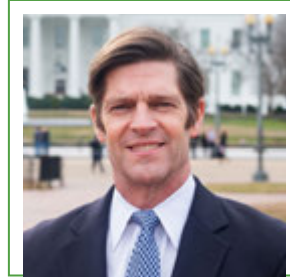
KENIECE BARBEE

Chief of Staff



ROBIN J. BOWEN

Senior Vice President



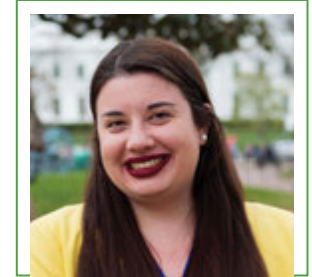
MICHAEL ANDERSON

Vice President, Trade & Industry Affairs



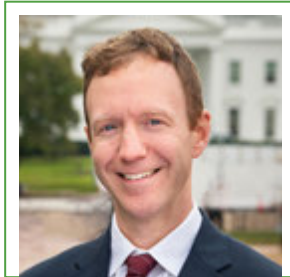
JESSICA BOWMAN

Vice President, Advanced Bioproducts



ALLISON COOKE

Vice President, Food Policy



EAMON MONAHAN

Vice President, Environmental Affairs & Workplace Safety



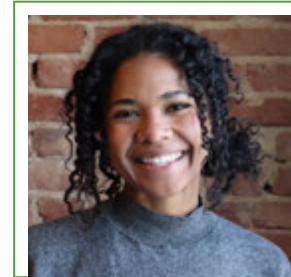
JOHNELLE BROWN

Director, Operations & Human Capital



JACQUELINE BOGGESS

Director, Communications



JAMAICA GAYLE

Senior Manager, Sustainability



KENT ROBERSON

Senior Manager, Government Relations

It is said that creating a successful relationship is like farming: you have to start over again every morning.

That is why CRA strives to be a good neighbor in the agriculture policy community.

Looking south, the U.S.-Mexico relationship yields mutual benefits for each country's food and agriculture sector. In 2022, to nurture this crucial partnership, CRA engaged in a number of activities. We sponsored the North Capital Forum in Mexico City and had numerous conversations with U.S. and Mexican leaders. CRA also held regular meetings with major food and agriculture trade associations to discuss the critical relationship between the two nations and spearheaded a vital economic impact study on President López Obrador's initial ban on genetically modified corn. We will keep working to nurture a strong agricultural trade relationship that supports North American sustainability and food security.

Our work regarding Mexico is one example of how CRA strives to be a good neighbor. Other examples include: bringing together more than 25 food and agriculture organizations for Feeding the Economy, a study on the food and agriculture sector's influence on the U.S. economy; working with Food and Beverage Issue Alliance members to provide regular updates to the Food and Drug Administration on the state of the food industry supply chain amid multiple potential rail stoppages; and organizing trade advocacy calls with CEOs of major food and agriculture trade associations and disseminating the weekly CRA Trade Update to bring attention to trade policy issues impacting our industries.

In 2022, we met our goal to make strong contributions to the industry we serve and the communities in which we live. In 2023, we will work to build on that momentum.

Sincerely,

John W. Bode

CRA President and CEO



CRA VALUES STATEMENT IN PRACTICE

In 2022, CRA worked to advance causes and issues that have long mattered to us and our member companies.

We continue to cultivate future agriculture and policy leaders both within and outside CRA.

- 💡 This year's interns were some of the brightest young minds we've seen yet. The diversity of backgrounds, experiences, policy focuses, and future aspirations of our interns continues to benefit our organization semester after semester.
- 💡 CRA sponsored two educational events highlighting the wealth of careers within the corn refining industry and across the food and agriculture sectors:
 - 💡 In July, CRA staff served as featured speakers at a Lunch & Learn for students involved in the Washington D.C. Ag Intern Network, a summer networking group for ag association interns organized by CropLife America.
 - 💡 In November, CRA and the National Association of State Departments of Agriculture (NASDA) jointly hosted a webinar entitled "Innovation and opportunities in food and ag: An example from the corn refining industry." In addition to CRA staff, representatives from CRA member companies GPC and Ingredion participated.

Building on CRA President and CEO John Bode's signing of the CEO Action Pledge in 2021, CRA staff participated in Collective Perspectives in November. This CEO Action initiative consisted of a candid conversation about representation and the power of being one's authentic self.

CRA staff and interns volunteered at Food & Friends, the only community-based organization in the D.C. region providing home-delivered, medically tailored meals and nutrition therapy to our neighbors living with cancer, HIV/AIDS, and other serious illnesses.



ADVANCED BIOPRODUCT ACCOMPLISHMENTS

With today's innovations, corn-based bioproducts vary greatly.

Performance is critical to today's consumer and, because bioproducts can be chemically identical to ones derived from fossil fuels, they perform just as well. In fact, with the diversity of feedstocks available, American agriculture can make bioproducts that outperform their fossil fuel-based counterparts.

In addition to CRA's work with the Plant Based Products Council, we engaged on a number of important issues related to advanced bioproducts in 2022.

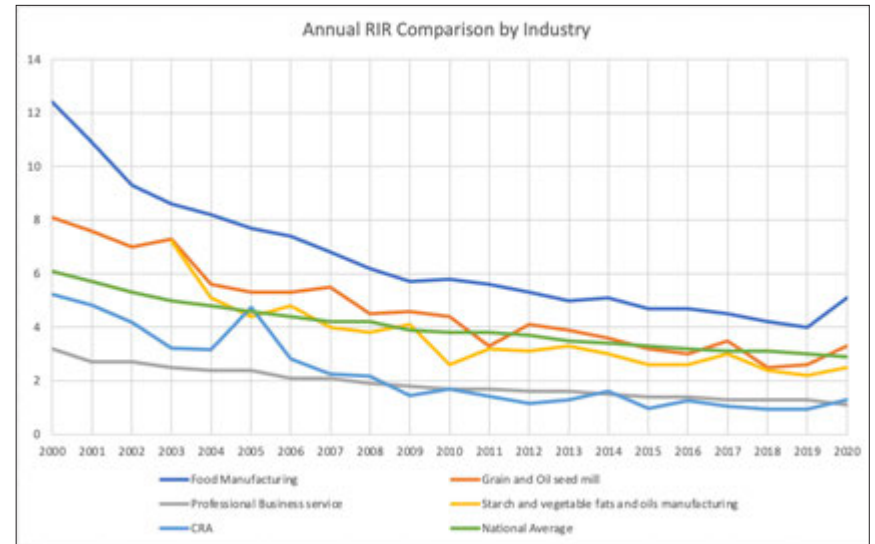
- 💡 CRA joined other leading industry associations to launch the Ag Bioeconomy Coalition to advance federal policy initiatives that can foster growth in the agricultural bioeconomy. The coalition's main policy objectives are: promoting the development and expansion of bioeconomy markets and infrastructure, particularly in rural economies; supporting transparency and visibility initiatives; and bolstering government entities' support for bioeconomy research and development.
- 💡 CRA celebrated President Biden's Executive Order on National Biotechnology and Biomanufacturing Innovation. The order underscores the wide-ranging benefits presented by the U.S. bioeconomy and reinforces American agriculture's role in supporting supply chain resiliency, rural economies, and innovation on a global stage.
- 💡 In June, CRA's Robin Bowen joined the Decatur Regional Chamber of Commerce's biannual Ag Café in Decatur, IL, to speak with leaders in business and agriculture about the importance of fostering our country's ag bioeconomy. In addition to speaking at the Ag Café, Bowen and Chris Olsen, Primient's then-Vice President of Community and Government Affairs, joined Byers & Co on Decatur's WSOY radio.



SAFE WORKPLACE PRIORITIES

In March, CRA Vice President of Environmental Affairs and Workplace Safety Eamon Monahan attended the Agricultural Safety and Health Council of America's Safety Summit to present on the success of CRA's workplace safety program. Monahan's presentation centered on CRA's analysis of two decades of monthly injury data to identify trends and areas of improvement.

He found that, in the early 2000s, corn refining had a recordable incident rate (RIR) hovering near 6.0. This rate is common in relatively dangerous industries like aluminum smelting and auto manufacturing. Since then, the industry's injury rate has declined to nearly 1.0. An RIR of 1.0 is common in occupations considered safe, such as office work. CRA celebrates members' commitment to safety every year through our Safety Awards Program.



OUR INDUSTRY'S COMMITMENT TO SUSTAINABILITY

Corn refiners are primarily engaged in sustainability initiatives that aim to tackle two major factors contributing to our industry's environmental impact: corn production and emissions from energy consumption. Nearly every CRA member company has producer outreach or engagement programs at various levels to improve corn sourcing sustainability. Furthermore, CRA member companies' efforts to shift from higher-impact to lower-impact energy sources have made great reductions in greenhouse gas emissions throughout the refining process.

CRA actions in 2022 included:

- 💡 CRA supported the Recycling and Composting Accountability Act and the Recycling Infrastructure and Accessibility Act, bills seeking to improve the U.S. recycling and composting systems, which simultaneously supports the economic and environmental promise of the U.S. bioeconomy.
- 💡 CRA endorsed the Growing Climate Solutions Act (GCSA), which became law in 2022. GCSA seeks to help farmers, ranchers, and foresters navigate the agricultural carbon market landscape.
- 💡 In November, CRA's 2018 Life Cycle Analysis was presented at the American Center for Life Cycle Assessment Conference. The full report will be published in *Frontiers in Energy Research* in 2023.

A GOOD NEIGHBOR IN FOOD AND AG POLICY

NATIONAL AG DAY

In 2022, the agriculture community took National Ag Day to new heights.

- 💡 CRA and PBPC hosted exhibits at the inaugural Celebration of Modern Agriculture on the National Mall, referred to as 'Ag on the Mall,' which was organized by the Association of Equipment Manufacturers.
- 💡 More than 16,000 visitors engaged with hands-on, educational, and modern agricultural displays from many trade associations. CRA's exhibit theme was the Kernel of Innovation and featured personal care products, healthcare products, and bioplastics made from corn.
- 💡 Following the Agri-Pulse Food & Ag Policy Summit, CRA partnered with Agri-Pulse and the National Ag Day Council on a Celebration of Ag reception at the National Press Club.

FEEDING THE ECONOMY

- 💡 Since 2017, CRA has organized a coalition of more than 30 food and agriculture organizations to spearhead the release of Feeding the Economy, an economic study that highlights the jobs, wages, taxes, exports, and more that food and agriculture generate nationwide, by state, and by congressional district. Visit FeedingTheEconomy.com to learn more.
- 💡 2022 Feeding the Economy Study Highlights (National):
 - 💡 **Jobs:** 43,464,211
 - 💡 **Wages:** \$2.3 trillion
 - 💡 **Output:** \$7.4 trillion
 - 💡 **Taxes:** \$718.2 billion



A GOOD NEIGHBOR IN FOOD AND AG POLICY

FOOD

CRA served as Vice Chair of the Food and Beverage Issue Alliance (FBIA) in 2022. FBIA represents critical infrastructure industries and companies feeding the nation. It is an informational resource and conduit for members and the agencies and policymakers that care about our country's food system. In 2023, CRA will chair FBIA.

In 2022, CRA worked to improve food policy on its own and as part of FBIA:

- 💡 The Food and Drug Administration (FDA) released its proposed rule for the use of “healthy” claims on food labels. CRA urged FDA to assess the potential for consumer misunderstanding and to use clarifying statements as it develops symbols for “healthy” labeling.
- 💡 For the White House Conference on Hunger, Nutrition, and Health, held in September, CRA contributed comments about the importance of funding for regular updates of the Dietary Reference Intakes. CRA also joined the Food Marketing Institute and 17 other food industry organizations in sending the White House a report entitled Food Industry Contributions, Recommendations & Commitments. The report summarized the ways in which the industry helps Americans meet their dietary needs and health goals. The report also detailed the industry's collective contributions to the White House conference and provided policy recommendations for improving health and nutrition through high-quality food standards.



A GOOD NEIGHBOR IN FOOD AND AG POLICY

SUPPLY CHAIN

The food and agriculture industries wrestled with supply chain challenges throughout 2022. The COVID-19 pandemic continued to generate unprecedented supply chain challenges and disruptions that contributed to higher prices and rising inflation across many sectors, including food and feed.

In addition, the war in Ukraine severely reduced the country's ability to supply grain, oil, and other agriculture commodities, which further disrupted global food supply chains.

Finally, a potential rail strike – on top of already inconsistent performance by rail service providers – forced temporary shutdowns at food processing facilities and prevented delivery of finished goods.

CRA worked with our food and agriculture neighbors to inform Congress and the Biden Administration about critical supply chain problems and potential solutions.

- 💡 We worked with other FBIA members to provide regular updates on the state of the food industry supply chain to the Food and Drug Administration (FDA) and to inform the Surface Transportation Board (STB) of the rail service challenges impacting the industry.
- 💡 In April, the Surface Transportation Board (STB) took the unusual step of holding a public hearing to address “urgent rail issues.” CRA provided an oral testimony recommending STB require all Class I railroads to submit written service improvement plans, and biweekly updates on those plans. STB accepted that suggestion in one of the few substantial outcomes of the hearing.
- 💡 CRA supported the Ocean Shipping Reform Act (OSRA), which passed in June. The legislation goes a long way in addressing unfair business practices by foreign-owned shipping companies by better defining the Federal Maritime Commission's enforcement authority.
- 💡 CRA served as a key resource on the various rail crises throughout 2022 for policy media, including Reuters, Bloomberg, and Politico, elevating the importance of immediate action and the impacts to corn refining and the broader agriculture industry.
- 💡 CRA joined a broad group of rail stakeholders including shippers and rail labor unions in advocating for legislative language that would provide clarity on railroads' common carrier obligation: the statutory requirement that railroads provide service “upon reasonable request.”
- 💡 As negotiations between railroads and labor unions approached deadlines in mid-September and mid-November, CRA and the National Corn Growers Association (NCGA) sent joint letters to every Member of Congress and the White House detailing how a strike would increase domestic consumer prices and food insecurity around the world. CRA President and CEO John Bode also spoke with Senators Boozman (R-AR), Fischer (R-NE), Burr (R-NC), and Tillis (R-NC) about the grave impact of either rail service slowdowns or a rail labor strike.
- 💡 During the run-up to the second rail labor deadline, CRA helped coordinate and lead meetings with members of the House and Senate, the National Economic Council, Department of Transportation, U.S. Department of Agriculture, and the Food and Drug Administration. Additionally, CRA launched a grassroots campaign that generated nearly 1,000 letters to Congress and the President.

Also, CRA celebrated the passage of the 2022 Water Resources Development Act (WRDA). The final bill, passed in December, delivered on two priorities for our industry: it amends the cost share for inland waterway projects to allow more general Treasury funds, which will expedite modernization of locks and dams; and it maintains navigational access to the Lower Snake River Dams, which transport nearly 30% of U.S. grain and oilseed exports.





A GOOD NEIGHBOR IN FOOD AND AG POLICY

TRADE

One of CRA's signature trade accomplishments is the publication of the Trade Update. The Trade Update establishes CRA as a leading expert on food and agricultural trade developments and policy. While readership predominately consists of Capitol Hill staffers, the Trade Update is also read throughout North America and in Europe, Asia, Africa, South America, and Oceania.

In 2022, CRA's major trade work included:

- 💡 Building positive, collaborative relationships with Mexico was a priority in 2022 – and continues to be. Activities related to building and maintaining these relationships included:
 - 💡 CRA's John Bode was honored to co-chair the “Agriculture: Food Security Roundtable” at the North Capital Forum held in Mexico City. Participants featured at the event included: Juan Cortina Gallardo, President, Consejo Nacional Agropecuario, Mexico; Víctor Villalobos Arámbula, Secretary of Agriculture and Rural Development, Mexico; Daniel Whitley, Administrator, Foreign Agriculture Service, U.S.D.A.; Kenneth Smith Ramos, formerly Mexico's Chief Negotiator for USMCA; Sharon Bomer, former Assistant U.S. Trade Representative, Agricultural Affairs and Commodity Policy; among others.
 - 💡 CRA convened regular meetings with major food and agriculture trade associations to discuss and examine our critical economic relationship with Mexico. The meetings featured prominent officials and experts in the bilateral relationship including speakers from the U.S. Chamber of Commerce, The Wilson Center, and Mexico's National Farm Council (CNA).
 - 💡 CRA organized a coalition of numerous food and agriculture industry stakeholders in both Mexico and the United States released a study revealing the broad impacts of Mexico's initial proposed ban on genetically modified (GM) corn. The report, which was conducted by World Perspectives, Inc., revealed that the proposed restrictions would adversely impact food security in North America and raise consumer prices for corn, basic foods, and other critical products derived from corn, particularly in Mexico.

- 💡 As a founding member of the Agriculture Trade Education Council (ATEC), CRA continued to support, promote, and grow the newly established organization throughout 2022. CRA's Michael Anderson served as a Board Member and Chair directing ATEC's mission to educate the leadership of American food and agriculture organizations and businesses on international trade.
- 💡 CRA coordinated a bi-weekly trade advocacy call with CEOs of major food and agriculture trade associations to promote greater understanding of trade policy issues impacting the industries. The group generated several coalition letters to advance policy initiatives for the food and agriculture sector.
- 💡 CRA's John Bode moderated a press event organized by Farmers for Free Trade regarding the U.S.-led Indo-Pacific Economic Framework (IPEF). The featured speakers included former Senators Max Baucus and Pat Roberts, who addressed the potential opportunities and challenges presented by IPEF for U.S. agriculture producers and exporters.
- 💡 CRA's Vice President of Trade and Industry Affairs, and Co-Chair of U.S. Food and Agriculture Dialogue for Trade (USFADT) Michael Anderson worked with USFADT on a letter to U.S. Trade Representative Katherine Tai, Commerce Secretary Gina Raimondo, and Agriculture Secretary Tom Vilsack expressing USFADT's appreciation for their leadership and support for the Indo-Pacific Economic Framework (IPEF).
- 💡 CRA joined the agriculture industry in calls for the Senate to confirm President Biden's nominees Doug McKalip, as Chief Agricultural Negotiator of USTR, and Alexis Taylor, as Under Secretary for Trade and Foreign Agricultural Affairs at USDA. Thankfully, the Senate delivered their confirmations just before the new year.



CRA'S 2022 STAFF HIGHLIGHTS

Jessica Bowman was named one of The Hill's Top Lobbyists of 2022

Johnelle Brown served as Co-chair for the Next & Best Practices Working Group for Together We Grow and Co-chair for the Association and Non-Profit Signatory Led Community for CEO Action

John Bode participated in a discussion on Integrating Across Sectors: Business Leaders in Energy, Buildings, & Circular Economy at COP27

Eamon Monahan presented on CRA's safety record at the Agricultural Safety & Health Council

Robin Bowen presented at the Decatur Regional Chamber of Commerce's Biannual Ag Café

Kent Roberson participated in the US-Mexico Foundation 360 Mexico City study tour

Allison Cooke was invited to participate in the White House Conference on Hunger, Nutrition, and Health Listening Sessions and Conference

Michael Anderson participated in the World Trade Organization's 12th Ministerial conference in Geneva, Switzerland

Keniece Barbee was promoted to Chief of Staff

Jacqueline Boggess joined CRA & PBPC as Director of Communications

Jamaica Gayle joined CRA & PBPC as Senior Manager of Sustainability





CRA'S 2022 EVENTS

National Ag Day/Ag on the Mall | March

CRA, US-Mexico Foundation, and Hispanic Lobbyist Association Cinco de Mayo Reception | May

National Pollinators Week | June

National Safety Month | June

Decatur Regional Chamber of Commerce's Biannual Ag Café | June

Washington International Trade Association/Washington International Trade Foundation Annual Dinner | July

Taste of the South | July

Avanza Awards, Hispanic Lobbyists Association | September

U.S. Mexico Foundation's North Capital Forum | September

Friends of the National Arboretum (FONA) Dinner Under the Stars | September

Black Professionals in Food and Agriculture Congressional Black Caucus Reception | September

The Manufacturing Institute's Annual MFG Day | October

21st Annual Spirit of Mt. Vernon Dinner | October

COP27 "Integrating Across Sectors: Business Leaders in Energy, Buildings & Circular Economy" | November



CRA