

Citric Acid and Certain Citrate Salts from Belgium, Colombia, and Thailand

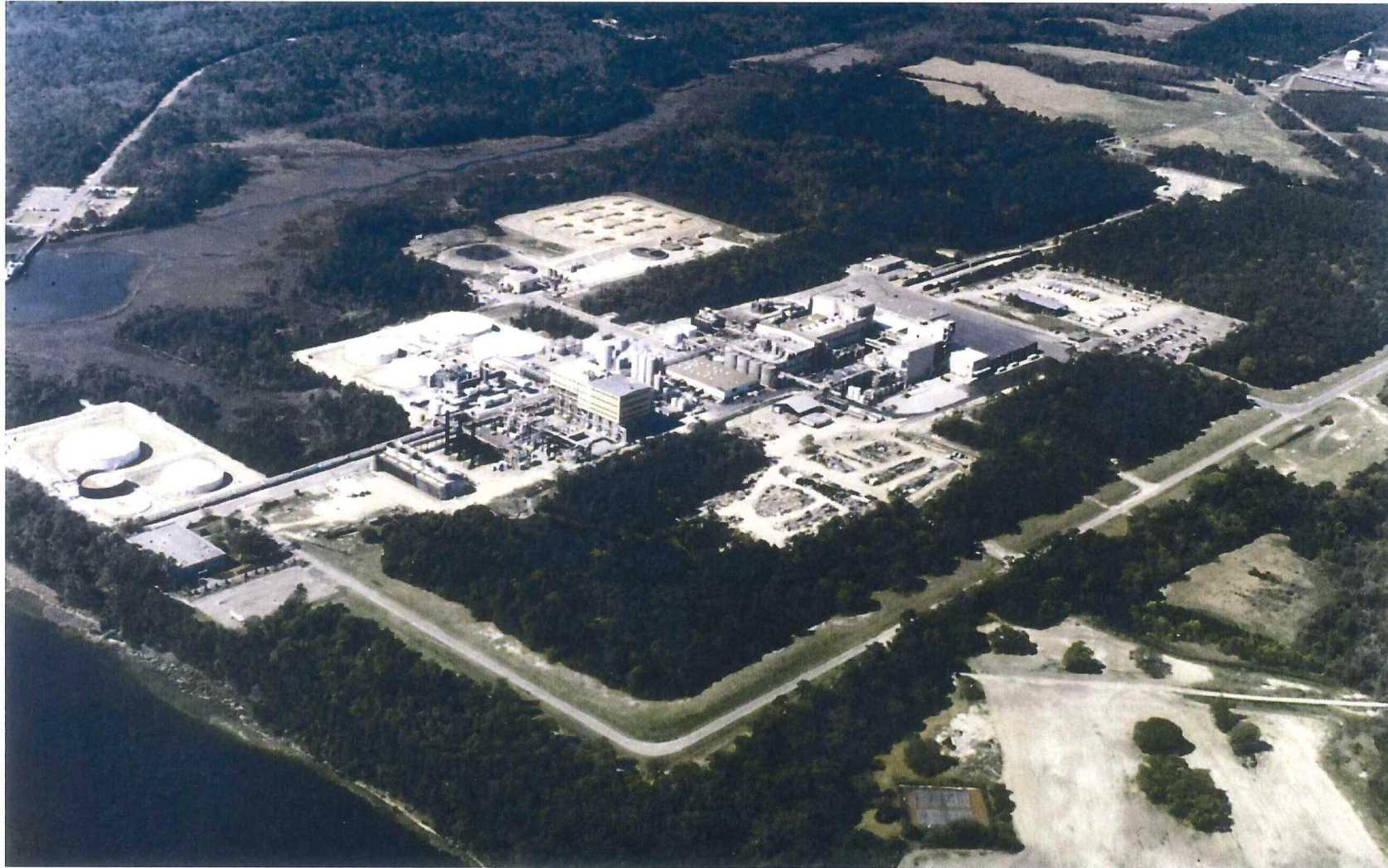
Petitioners' Presentation
ITC Prehearing Staff Conference
June 23, 2017

1. Common Types and Forms of Citric Products

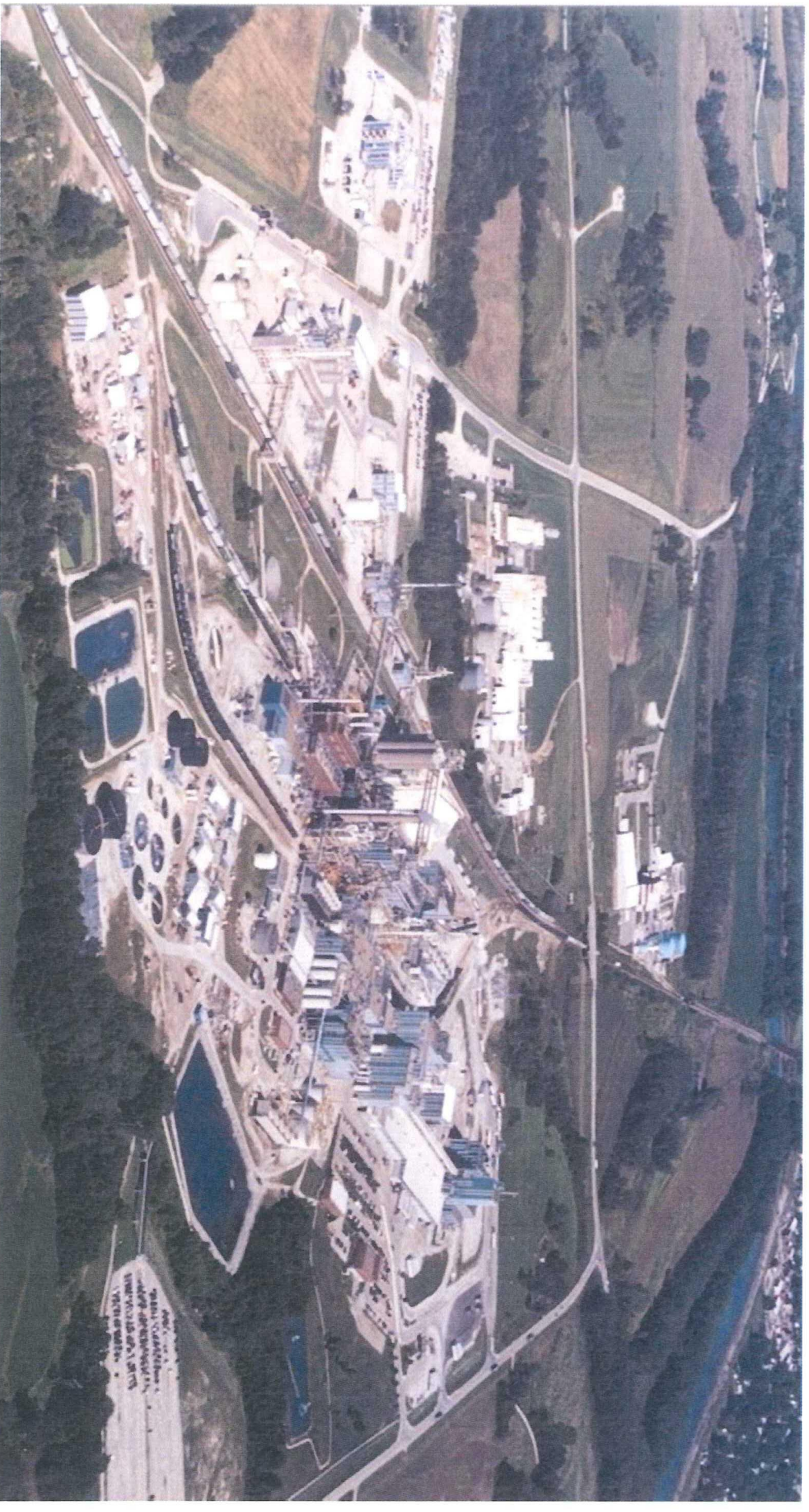
Products	Hydration	Particle size	Grade*	Package type
Citric Acid	Anhydrous	Granular	USP/ Pharmaceutical	25 kg/50 lb bags
	Mono-hydrate			Drums
	Solution	Fine granular	FCC/ Food Industrial	Supersack
Potassium citrate	Mono-hydrate	Powder		Bulk Truck (liquid)
Sodium citrate	Dihydrate			Rail Car (liquid)
	Anhydrous			

*All citric manufacturers comply to all international standards: USP, FCC, EP, JECFA, JP

2. Archer Daniel Midland Facility In Southport, North Carolina



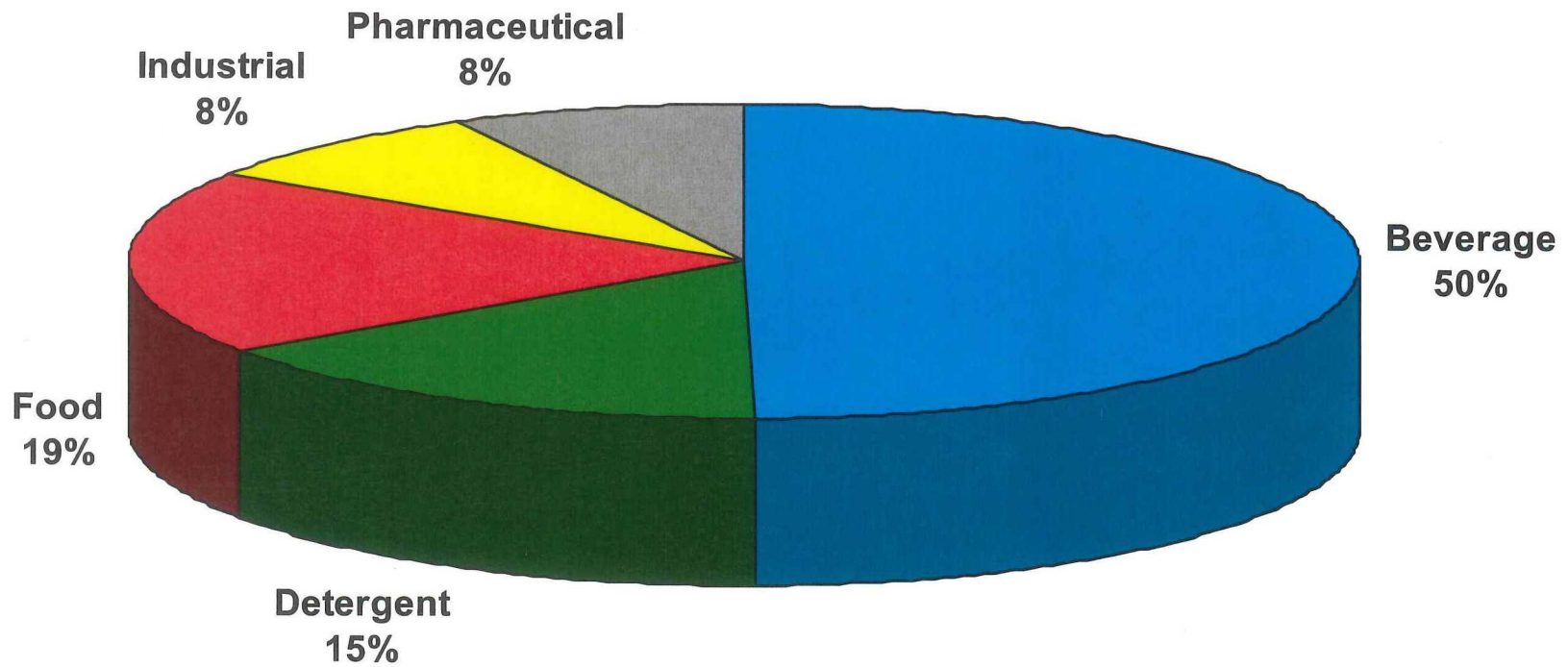
3. Cargill Facility In Eddyville, Iowa



4. Tate & Lyle Facility In Dayton, Ohio

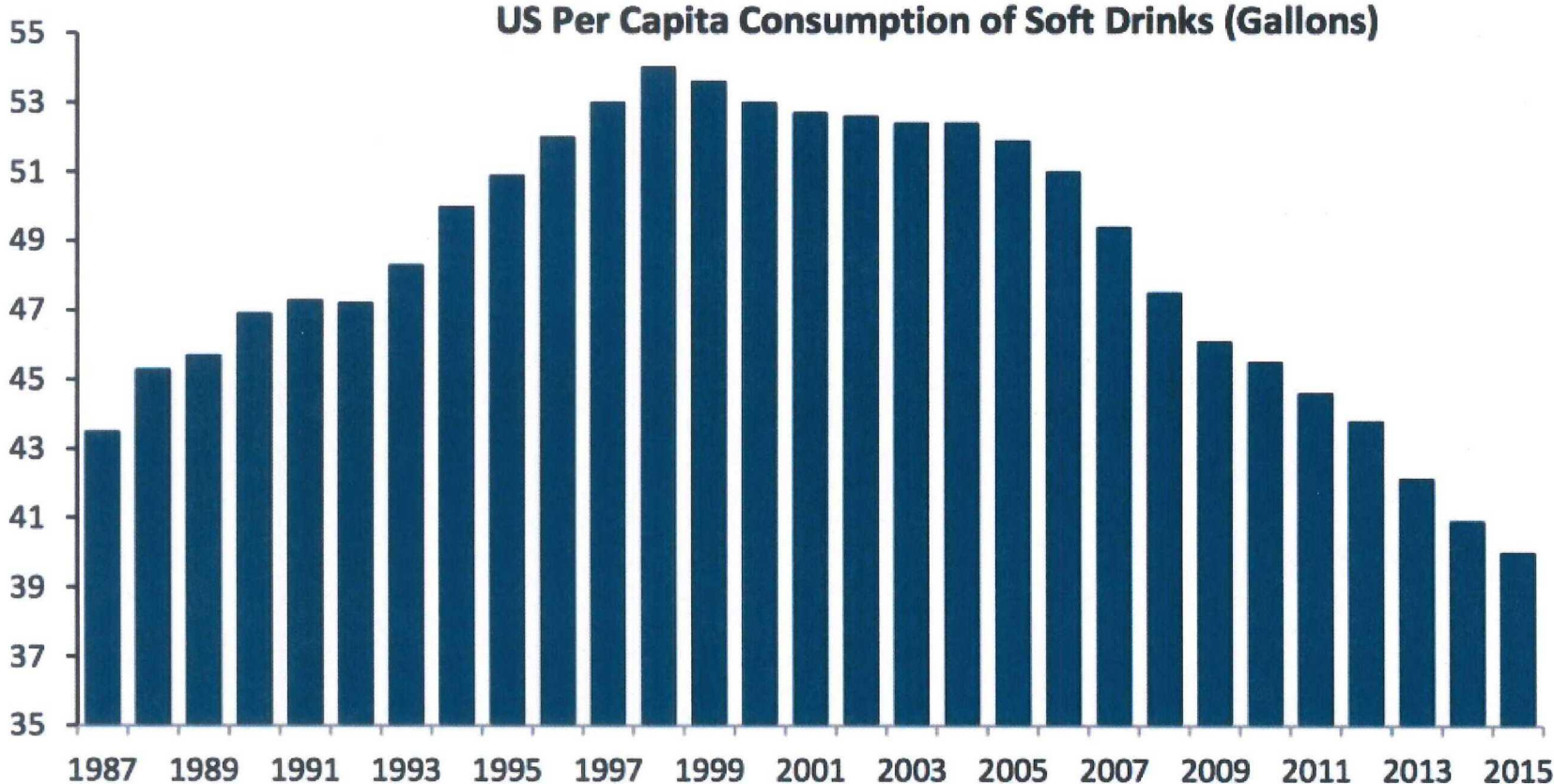


5. Applications Overview



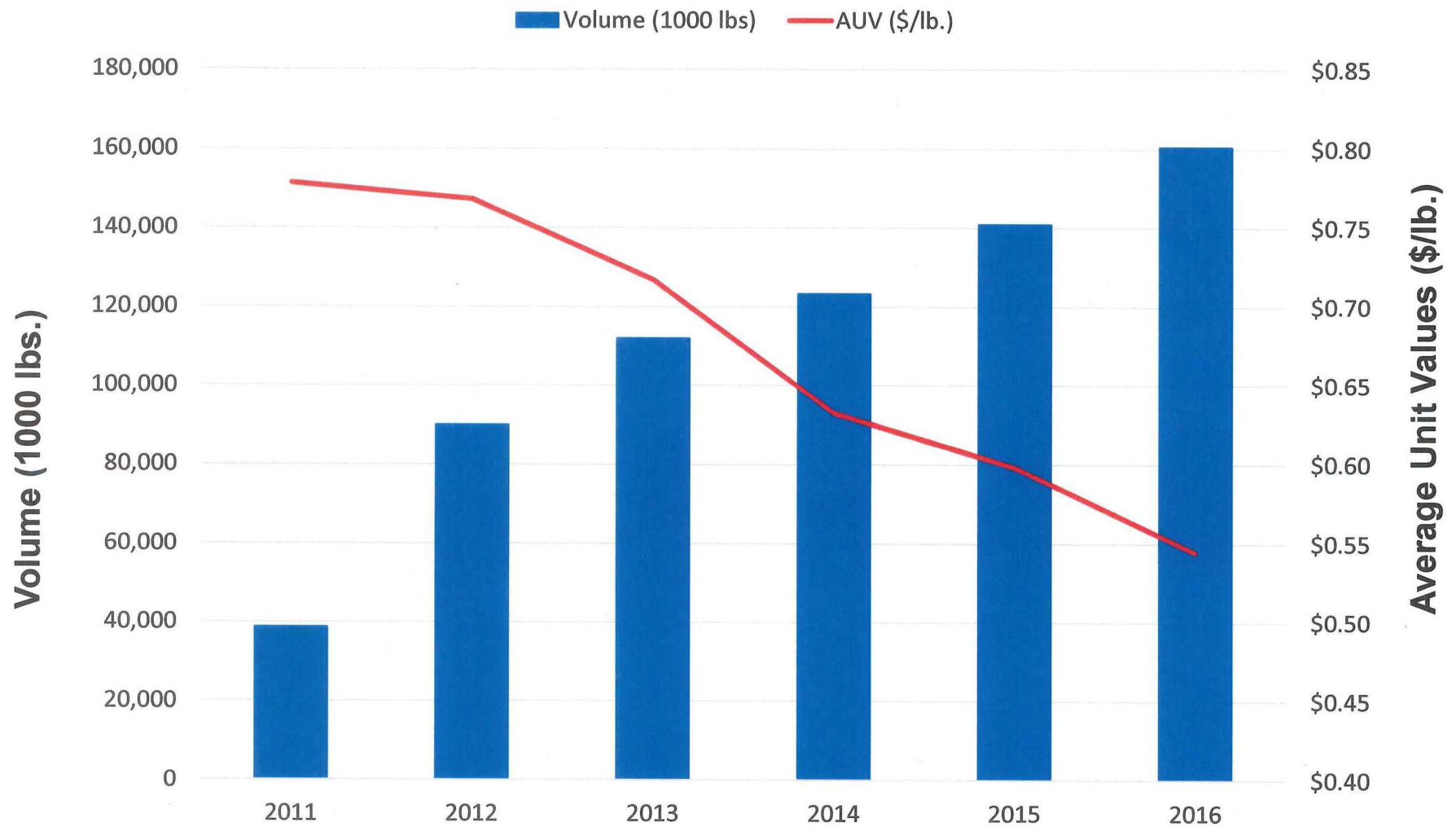
6. U.S. Consumption of Soft Drinks is Declining

Exhibit 12: US Per Capita Consumption of Soft Drinks (Gallons)



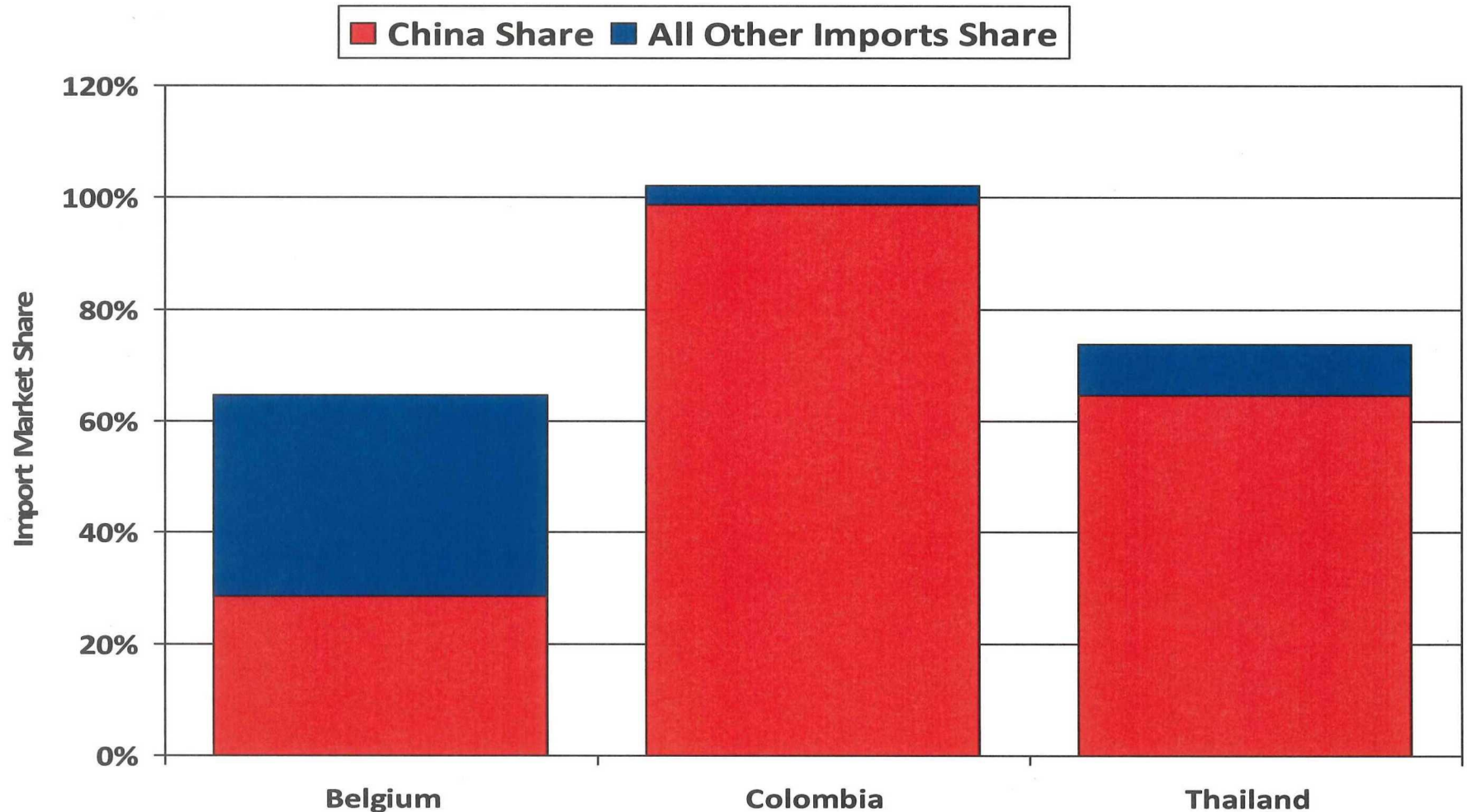
Source: NPD Group. 2015 estimate

7. Subject Import Volume and AUVs for Citric Acid: 2011-2016



Source: USITC dataweb (HTS 291814).

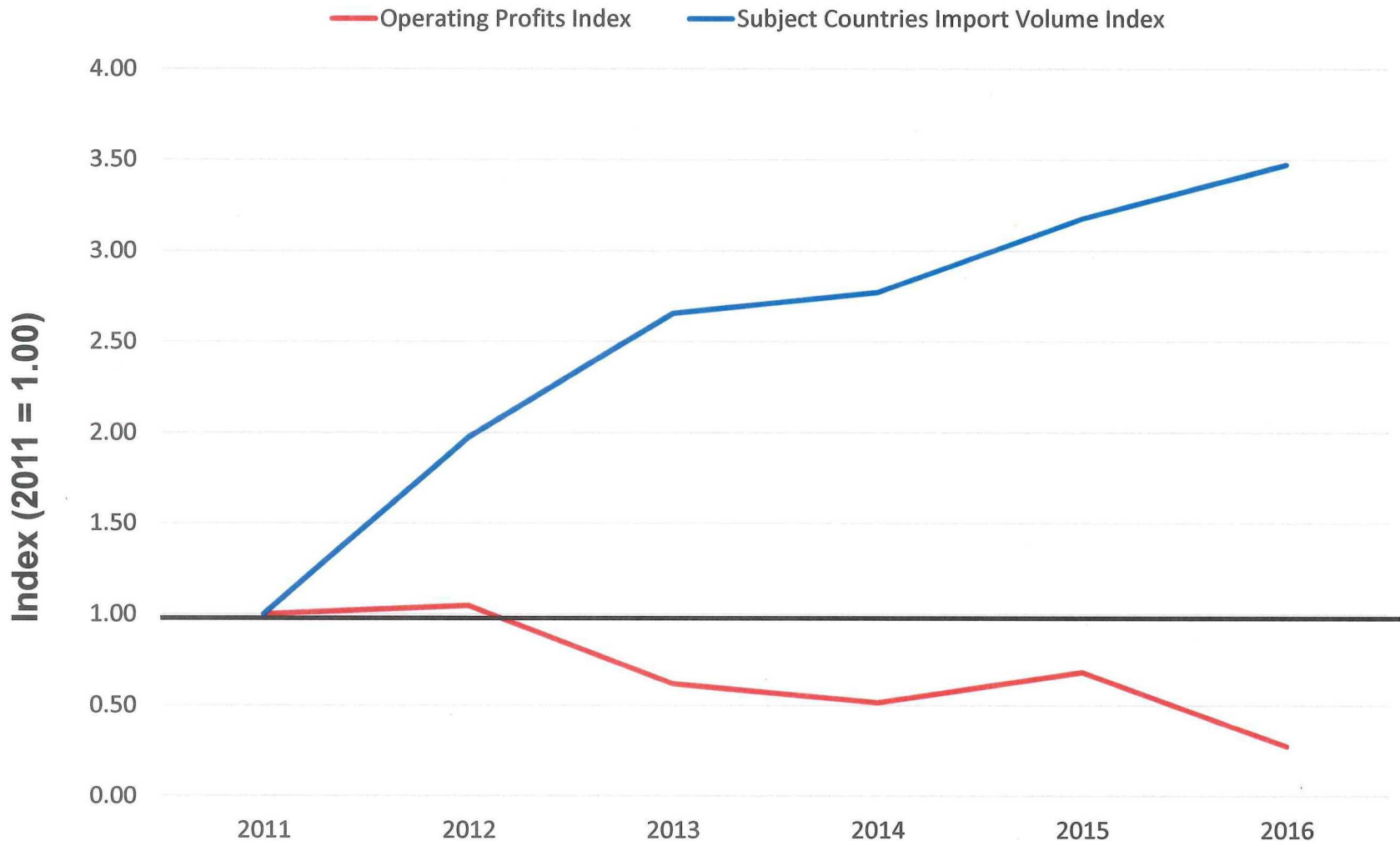
8. 2015 Citric Acid Market Share of Imports in Subject Countries



Note: 2015 was the latest data available. Belgium import market share calculated as EUROSTAT imports divided by apparent consumption (production (assuming operation at full capacity from CEH) plus imports and minus exports (calculated from Belgian imports into all countries on COMTRADE)). Colombian import market share calculated as GTA imports divided by CEH Colombian consumption. Thai import market share calculated as GTA imports divided by CEH consumption.

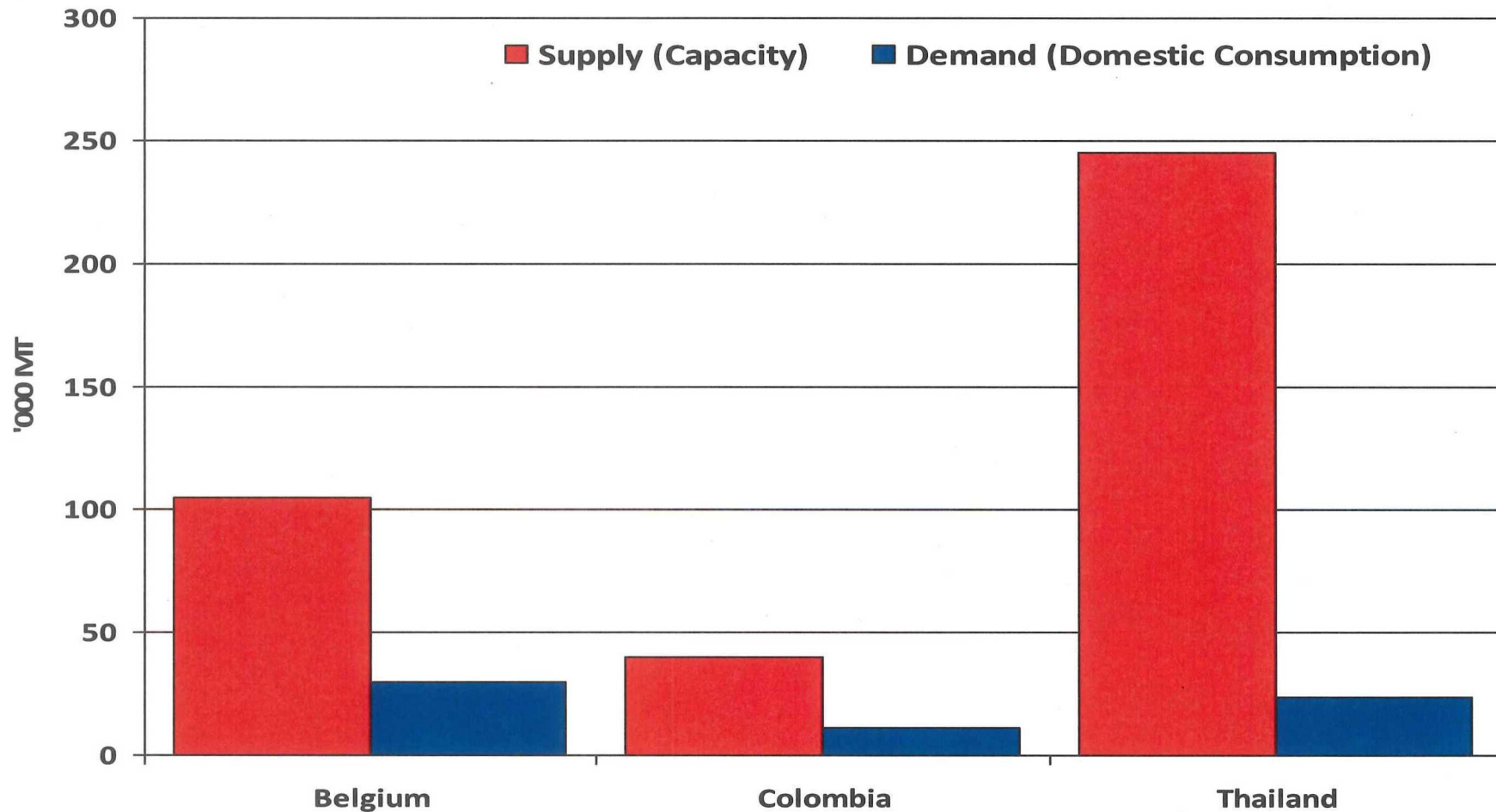
Source: Petition at Exhibit I-2 and Global Trade Atlas, COMTRADE and EUROSTAT import statistics.

9. U.S. Operating Profits and Subject Import Volume: 2011-2016



Source: USITC publications, USITC dataweb and Petition exhibits I-11 and I-14.

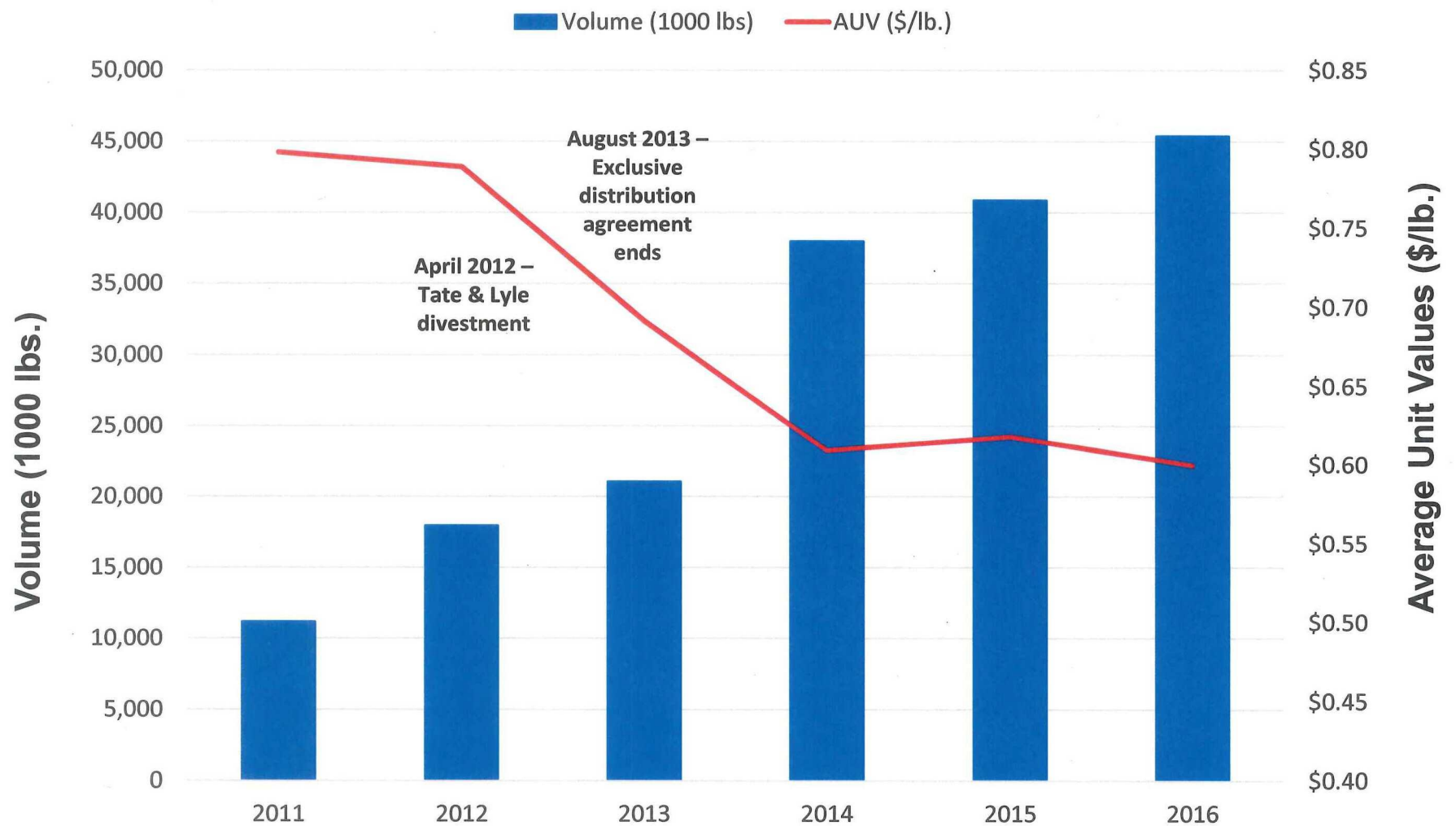
10. 2015 Citric Acid Supply and Demand: Subject Countries



Note: 2015 was the latest data available. Belgium apparent consumption calculated by adding production (assuming operation at full capacity from CEH) and imports and subtracting exports (calculated from Belgian imports into all countries on COMTRADE since Belgian export data is suppressed).

Source: Petition at Exhibit I-2 and COMTRADE and EUROSTAT import statistics.

Colombian Import Volume and AUVs for Citric Acid: 2011-2016



Source: USITC dataweb (HTS 291814).