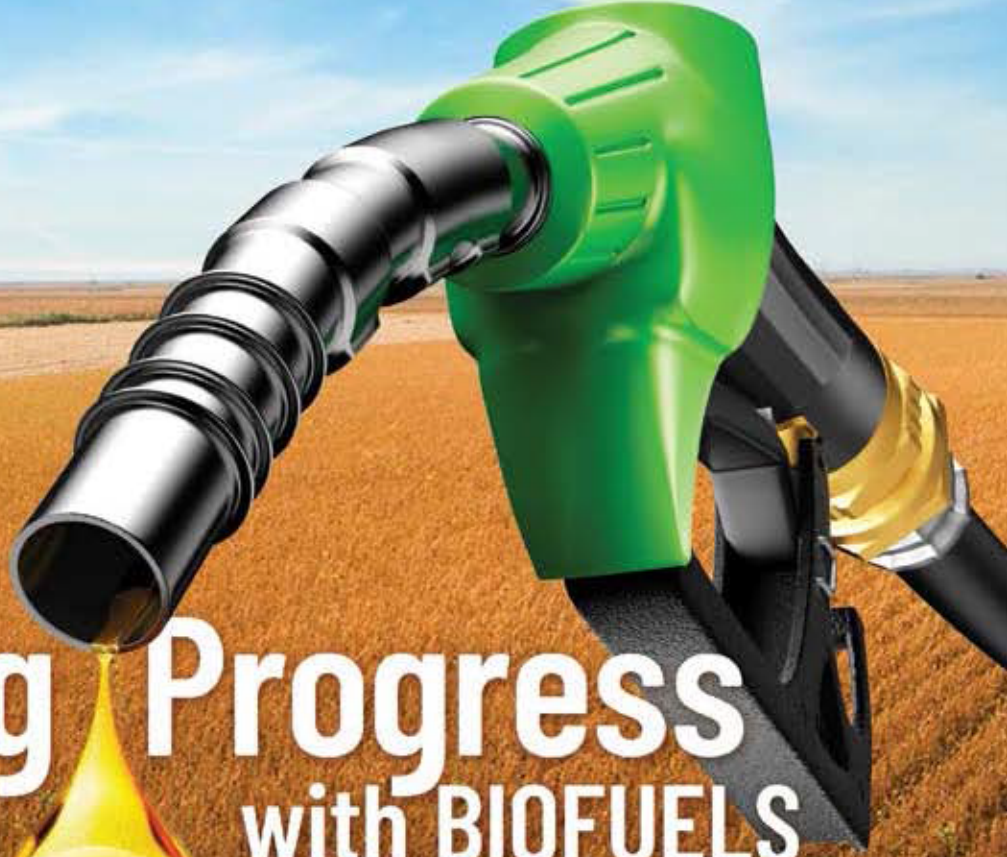


AMERICAN SUMMER 2024 soybean

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People. Policy. Profitability.

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Fueling Progress with BIOFUELS

SOY FACES

ASA Leaders Out
Front on Soy Fuels

SOY FORWARD

Whole Bean Delivers
Sustainable Solutions

ISSUE UPDATE

Diplomacy Needed
for Trade with China

INDUSTRY

PERSPECTIVE
BNSF Troubled by
State Emissions Rule

디자인세미한 Summer, 2024

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ASA
American Soybean
Association



WISHH leverages partnerships *for U.S. Soy to help meet the protein needs of 8 billion consumers*



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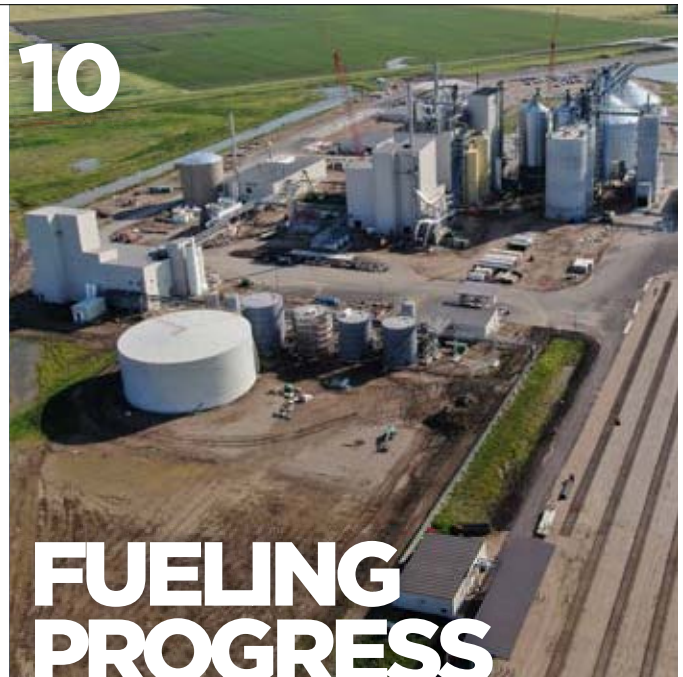
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The American Soybean Association (ASA) represents U.S. soybean farmers on domestic and international policy issues important to the soybean industry. ASA has 26 affiliated state associations representing 30 states and more than 500,000 soybean farmers.

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ASA leadership corner

Greetings from Missouri, where presently temps have cooled a bit—a far cry from temps topping 100 degrees during ASA’s summer Board of Directors Meeting and Capitol Hill visits. Converging on Washington, D.C., were most of ASA’s 66 farmer board members, soy state affiliate staff and farmer leaders, and ASA staff, including our D.C.-based policy team and others who joined me from our St. Louis office. Rushing around from meeting to meeting in our most appropriate (read: not very cool) business attire, the wet conditions and flooding followed by extreme heat were often the topic of conversation. It has taken a toll on soy, corn and other crops in many parts of the country, and farmers continue to be at the mercy of Mother Nature.

As we met with congressional staff, EPA leaders and other decision-makers, we were prepared to talk about a “short list” of soy priorities. The list of topics affecting soy is never, in reality, short, but these are the most pressing issues—in large part because they are areas that have long and significant impacts on soy—and they are areas where, unlike the weather, farmers can be offered certainty.

It is our job as soy leaders and staff to convey just how much farmers rely on certainty to sustain their businesses. That need for predictability applies to the still-pending farm bill. And it applies to climate-smart agriculture (CSA) practice requirements for the Clean Fuel Production Credit that have the potential to make or break soybean oil’s viability and profitability as a sustainable aviation fuel (SAF) feedstock.

Earlier this summer (June), Senate Agriculture Committee Ranking Member John Boozman released a farm bill framework in response to Chairwoman Debbie Stabenow’s proposal in May. His proposal favorably addresses many ASA priorities, including:

- **Farm Safety Net:** Meaningful improvements to make Title I programs more responsive and predictable, including significant adjustments to reference prices, improvements to coverage under ARC and PLC, and expanded access to base acres.
- **Trade Promotion:** Doubled funding for MAP and FMD programs to boost agricultural exports.
- **Crop Insurance:** Strengthened protections against weather and crop losses.
- **Soybean Research & Promotion:** Continued support for soybean checkoff to drive innovation.
- **Biobased Markets:** Promoted soy use in biobased products for market diversification.
- **Research & Innovation:** Significant investments to enhance competitiveness.
- **Biofuels:** Expanded biofuels opportunities using soybeans.
- **Conservation Program:** Increased access through historic investments in oversubscribed programs.

The Boozman framework differs primarily from Chairwoman Stabenow’s proposal in that it significantly boosts investments in the Title I farm safety net and trade promotion programs, both of which are critically important to soybean farmers and can provide needed certainty for farmers—be that during

Stephen CENSKY



Stephen Censky, ASA CEO

unforeseen emergencies like the 2018 China trade war or by enabling soy to secure new, and better sustain existing, trade markets.

The House Agriculture Committee has already approved its farm bill. ASA was pleased to actively support Chairman Thompson’s bill, which also addressed virtually all the priorities for which ASA has advocated the last two years.

In the pages ahead, we turn to another key issue that was on our “short list” this week: biofuels. The topic is complex and includes many subtopics. Right now, these include the California Air Resources Board proposal to update the Low Carbon Fuel Standard; concerns over the effects of used cooking oil (UCO) and other imported feedstocks on our domestic market; outcomes of CSA practice eligibility for the Clean Fuel Production Credit that I mentioned above; and of course, our ongoing plea for support of the Renewable Fuel Standard through timely, robust RVOs—again, an area where soy and the biofuels industry at large must have certainty.

As the days of summer start to wane and we look to fall harvest, I hope your weather will be like Goldilocks and the Three Bears—not too hot, not too rainy, not too dry—but juuuust right. Meantime, we will continue to add elbow grease to hope in getting advantageous decisions critical to soy passed in D.C.

New Sustainable Soy Product Greases Way to a Win-Win Partnership for Soy Industry, Trucking Companies—and Environment

A recent partnership between the Soy Transportation Coalition and trucking companies highlights how soybean farmers can simultaneously diversify markets for soybeans while meeting the growing imperative for environmental sustainability.

STC conducted a promotional initiative in which it provided free samples of soy-based fifth wheel lubrication pads to trucking companies and farmers throughout the country. The pads are produced by Gear Head Lube, a Cedar Falls, Iowa-based manufacturer of environmentally sustainable lubricants.

Mike Steenhoek, STC executive director, said the goal of the project was to elevate awareness and motivation to use these soy-based fifth wheel lube pads so the benefits can be accelerated. “There can often be a significant delay between the development of an innovative and effective product and the widespread utilization of it,” he added.

The square-shaped soy-based fifth wheel pads are 3x3 inches in size and a half-inch thick. After the trailer is hooked up, the grease from the pads is evenly distributed around the fifth wheel with no mess. The pads are made of more than 80% U.S. soy and are listed on the United States Department of Agriculture’s Certified Biobased Product program.

STC capitalized on its relationships within the trucking and agricultural sector to widely distribute free samples of the pads for individual testing on both large and small truck fleets. Ruan, one of the largest family-owned transportation management companies in the nation, partnered with STC in evaluating the pads for its own fleet. The benefits of utilizing them were quickly apparent.

“At Ruan, we examine each aspect of our business to identify opportunities to implement more sustainable practices,” said Mike Elliott, technical maintenance operations manager for Ruan. “The use of soy-based fifth wheel pads is one such example. These pads are very effective, easy to use and affordable. And as a product listed on USDA’s Certified Biobased Product program, they are better for the environment. We look forward to expanding our usage of this product across the fleet in the future.”



Soy-based pads have proven to be an environmentally sustainable alternative that are easier to apply while providing better lubrication over the entire fifth wheel.
Photo Credit: Gear Head Lube

On average, a semitruck uses 20 pounds of fifth wheel grease a year. With approximately three million semis operating in the country, this amounts to a market in the United States of 60 million pounds of fifth wheel grease each year. Fifth wheel grease is predominantly petroleum based and applied by hand, grease gun, or via small plastic pouches that often become litter after application. The soy-based pads have proven to be an environmentally sustainable alternative that are easier to apply while providing better lubrication over the entire fifth wheel.

“Farmers are always looking for opportunities to use products derived from the soybeans we grow,” said Chris Brossart, a soybean farmer from Wolford, North Dakota, and chairman of the North Dakota Soybean Council and the Soy Transportation Coalition. “I have utilized the soy-based fifth wheel lube pads on the trucks at our family farming operation. They are incredibly easy to use and very effective. Finally, they are a great example of how soy products continue to provide sustainable solutions for our environment.”

ASA **in** action



OILSEEDS DIALOGUE

ASA President Josh Gackle (ND) and CEO Stephen Censky visited Wismar, Germany, to attend the 26th International Oilseeds Processors Dialogue. The annual gathering brings together leaders and representatives from oilseed associations worldwide to discuss critical issues impacting the industry.



FARM BILL

The Scott family hosted a farm bill listening session with Sens. John Boozman and John Thune on their South Dakota farm. Jordan Scott (third from left) is an ASA director and his father, Kevin (right), is a past president/director. The Scotts are pictured here with Sens. Boozman and Thune, along with other local leaders during the farm bill listening session.



PITCH2FORK

ASA Director/USSEC Vice Chair Janna Fritz (MI) shared innovations she uses on her soybean farm and served as a guest judge at Pitch2Fork event, which spotlights startups with a focus on innovations in the protein industry.



INDIA DELEGATION

ASA Director Brad Doyle (AR) joined a trade delegation of officials from USDA, USTR, state agriculture departments and other farm groups in New Delhi to meet with Indian officials and companies. From left: Kevin Roepke, USSEC regional director for South Asia & Sub-Saharan Africa; Jim Sutter, USSEC CEO; Brad Doyle, ASA director (AR); Doug McKalip, USTR chief agricultural negotiator; Lance Rezac, USSEC chair; Alexis Taylor, USDA undersecretary for trade & foreign agricultural affairs; and Jaison John, USSEC country team lead-India.

CONSERVATION CHAMPIONS



ASA Conservation Champions met in Tennessee and Arkansas to learn about conservation efforts employed in southern parts of the country and hear updates on pressing issues that can impact farmer conservation efforts. In Tennessee, the Conservation Champions participated in educational sessions on conservation-related policy issues, biofuels, crop protection tools and new biobased products. The program took place at the Ducks Unlimited headquarters

BNSF MEETING



ASA directors George Goblish (MN) (left) and Jordan Scott (SD), pictured, and ASA Director of Government Affairs Alexa Combelic attended the BNSF Ag Rail Business Council meeting in Fort Worth, Texas.

OILSEEDS OUTLOOK



ASA Chief Economist Dr. Scott Gerlt spoke at the "Farm: Oilseeds Outlook" session during Bloomberg's Farm, Food, & Fuel Summit in Kansas City.



2024 YOUNG LEADERS

The 40th class of ASA Corteva Agriscience Young Leaders finished training with the 2024 Commodity Classic Convention and Trade Show in Houston in February. This year's Young Leaders are: Kelsey Banks & William De Jong, CAN; Terrance Scott, AL; Adam Collier, DE; Casey Collier, DE; Daniel Williams, IN; Skyler Rinker, IA; Michael & Amanda Tupper, IA; Ryan & Alisha Delaney, KS; Bryan & Lauren Bickett, KY; Grant Ziliak, KY; Nick & Mary Van Mol, LA; Shawn & Tera Baker, MI; Jenna Gardner & Logan Maher, MI; Parker Revier & Gabrielle Carmichael, MN; Christian & Laura Good, MS; Andrea Kientzy, MO; Sarah Kliethermes, MO; Justin & Samantha Fiala, NE; Derek & Nicole Van Heek, NE; Christopher Bay, NY; Daniel & Marilyn Fincher, NC; Alexander & Camille Zavara, OH; Riley & Kelcy Schoenfelder, SD; Ross Tschetter, SD; and Danny Brisky, WI.



CEOs Stephen Censky (ASA) (second from left), Jim Sutter (USSEC) (third from left) and Lucas Lentsch (USB) (right) shared insights on organization priorities and farmer support at the 2024 State & National Soybean Staff Meeting in Virginia Beach.

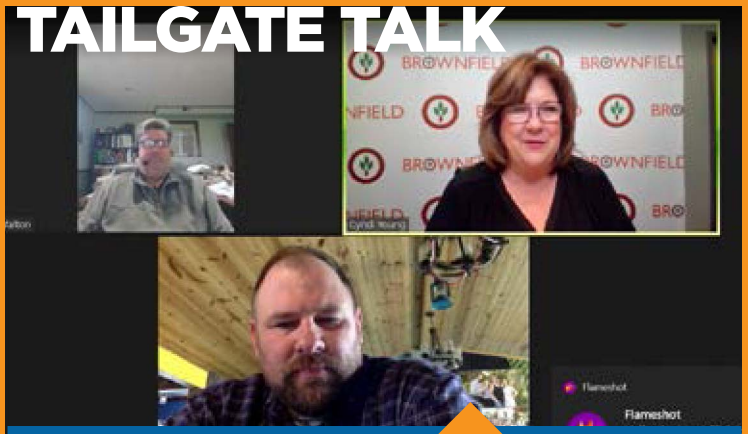


SOYBEAN STAFF MEETING



USSEC IN CHINA

USSEC recently participated in the 2024 U.S.-China Agriculture Roundtable held in Jinan, Shandong Province, marking the first in-person gathering in China since 2021. Pictured: Stan Born (IL), past chair of USSEC and chair of ASA's Trade Policy & International Affairs Advocacy Team, experienced popular live-streaming sales of agricultural products while attending the roundtable



TAILGATE TALK

ASA Director Dave Walton (IA) talked about farmer media habits and planting updates on Brownfield Tailgate Talk.

TECHNOLOGY IN AG



ASA President Josh Gackle (ND) talks about technology in agriculture at the 2024 Midwest Agriculture Summit.

CONGRESSIONAL BASEBALL

ASA was pleased to be invited by Anheuser-Busch to be among its partners supporting the company's annual Congressional Baseball Game reception; Anheuser-Busch's well-attended event was in appreciation of agriculture, with videos and signage drawing attention to the important work of America's farmers and ranchers. ASA's logo was prominently displayed on materials throughout the event, held at the Nationals Park PNC Diamond Club in D.C. ASA staff pictured from left: Blair Shipp, state policy communications coordinator; Wendy Brannen, senior director, marketing & communications; Christy Seyfert, executive director, government affairs; and Alexa Combelic, director, government affairs.



ASA WISHH Chair Roberta Simpson-Dolbeare (IL) (left), also a USSEC director, joined the Agribusiness Trade Mission to Korea. Pictured with Rosalind Leec, USSEC executive director, market access & strategy.



Members of the ASA Communications and Industry Relations teams helped staff a "Celebration of Modern Agriculture" on the National Mall in Washington, D.C. While the event organized by the Association of Equipment Manufacturers is strictly educational for soy and other checkoff-based commodities and policy is not discussed, it provides an invaluable opportunity to share soy innovations and farmer-funded successes with members of Congress, EPA officials, USDA leaders and staff from various other government agencies.

COOPERATOR'S PANEL



ASA Directors Rob Shaffer (IL) (left) and Phil Ramsey (IN) (second from left) recently participated in a grower-leader panel at the America's Cooperator's Conference in Columbia with USSEC.

FUELING PROGRESS



Amid regulatory challenges, biobased diesel continues to provide soybean farmers with value-added opportunities

By Allison Jenkins

From zero to 100 million bushels—that’s about how much soybean crush capacity has increased in North Dakota since fall of 2023. Two new soybean processing plants, with another on the way, are opening a world of opportunity for farmers much closer to home.

“Last year at this time, almost all of our soybeans were shipped as whole beans to the Pacific Northwest for export to Asia,” says Nancy Johnson, executive director of the North Dakota Soybean Growers Association. “By this fall,

nearly half of the soybeans grown in North Dakota could be crushed in North Dakota. That’s quite a swing in value-added capabilities.”

The state’s first-ever soybean crushing plant and refinery, Green Bison Soybean Processing, opened in Spiritwood, N.D., in September 2023, as a joint venture between ADM and Marathon Petroleum. The plant is expected to process more than 50 million bushels of soybeans per year.

On its heels came the opening of North Dakota Soybean Processors in Casselton, N.D.,

Photo credit: North Dakota Soybean Processors

created by CGB Enterprises, Inc., and Minnesota Soybean Processors. The new facility, which began accepting soybeans this July, is expected to crush 42.5 million bushels in its first year.

A third processing plant proposed by Epitome Energy in Grand Forks, N.D., will have the ability to crush 42 million bushels of soybeans per year. Construction on that facility has not yet started, but Johnson said the company has received necessary permits and is moving forward with development plans.



USDA Secretary Tom Vilsack announces the request for information on Climate Smart Ag at the Clean Fuels Member Meeting on June 26. Photo Credit: Clean Fuels Alliance America

“Suddenly, our farmers are going to have this tremendous opportunity to take advantage of local sales and basis improvement,” Johnson says. “The crush business also makes it possible to think about a biodiesel facility coming to the state. There’s certainly room for options because, until now, we haven’t had a lot of access to biofuels here.”

Robust demand for soybean oil, especially from biodiesel and renewable diesel sectors, is driving this growth in crush capacity in North Dakota and across the

nation. In a report released March 21, CoBank predicted U.S. soybean crush capacity will expand 23% during the next three years. If all renewable diesel projects currently under development begin operations as scheduled, U.S. renewable diesel capacity could reach nearly 6 billion gallons per year by the end of 2025.

That’s good news for soybean farmers, says Paul Winters, director of public affairs and federal communications for Clean Fuels Alliance America.

“The oilseed processing industry has invested more than \$6 billion to expand U.S. capacity, and biodiesel and renewable diesel demand is one of the main reasons for those investments,” Winters says. “It gives farmers multiple opportunities to sell their grain without being tied to any single market. The more options farmers have, the more value they get from their crop. And because we are creating domestic demand for fats and oils, that means that more value is kept here in the United States.”

Standard deviations

The bad news is that capacity for biobased diesel is outpacing federal Renewable Volume Obligations (RVO) levels set by EPA for 2023 to 2025 under the Renewable Fuel Standard program, which requires transportation fuel sold in the U.S. to contain a minimum amount of biofuel. The current RVO levels are “significantly below” existing production and ongoing expansion, says Winters, whose organization recently filed a petition asking EPA to increase those numbers for 2024 and 2025.

As written, the EPA rule sets biomass-based diesel at 3.04 billion gallons in 2024 and 3.35 billion in 2025. Winters says Clean Fuels Alliance America believes those volumes should be 5.1 billion gallons and 5.6 gallons,

respectively, to more accurately reflect the industry’s current status and future outlook.

“The volumes set by EPA last year constrained the market, stunted the industry’s growth and undercut the value of soybean oil,” Winters says. “That is not at all accomplishing any of the goals that they were aiming for in the Renewable Fuel Standard, which include cutting greenhouse gas emissions, generating jobs and economic opportunities, providing value-added markets for American agriculture and replacing petroleum-based fuel.”

New RFS volumes for 2026 were supposed to be finalized by Nov. 1, but the latest agenda of regulatory actions posted by the White House indicates that a proposal likely won’t be released until March 2025 with a final rule by December 2025.

Regardless of when the volumes are finalized, it’s important to get them right and ensure opportunity for growth, says Alexa Combelic, American Soybean Association director of government affairs. When it comes to soybean growers, she adds, the biofuel industry is a key domestic market, and the RFS program is crucial to its future.

“A lot of publicly traded companies are saying they need to decarbonize, and the easiest way to do that is through using renewable diesel and biodiesel in their fleets,” Combelic says. “But, to do that, you need the fuel. If we truly are a country that cares about lowering our emissions and carbon intensity, soybean-based biofuels are a great way to do it now.”

Taxing situations

New biofuel tax credits in the Inflation Reduction Act of 2022 are also providing growth opportunities, as well as some confusion and uncertainty.

(continued on page 12)

(continued from page 11)

The Sustainable Aviation Fuel (SAF) tax credit, known as 40B for the section of the legislation where it's found, is designed to encourage production and help overcome enhanced costs of producing biofuel to replace traditional jet fuel. The amount of the credit depends on the carbon intensity of the fuel's production, including the feedstock used to produce it. A SAF producer could enhance that credit by contracting with farmers who use climate-smart practices to produce the fuel's feedstock. The farmer should theoretically receive a premium in return for these practices.

However, guidelines for eligible farming practices are quite restrictive, Combelic says. In the case of soybeans—the primary feedstock for U.S. renewable diesel production—both no-till and cover-crop practices would have to be used to qualify for a SAF credit with enhanced value.

"We want to see more practices included in this list," Combelic says. "There are a variety of things farmers can do to lower the carbon intensity of their feedstock. To restrict it to just those two things—no-till and cover cropping—really limits the number of farmers who could participate and creates regional and economic disparities."

In a positive move, USDA collected public comments earlier this summer on climate-smart ag practices for biofuel feedstocks. The formal "request for information," which closed July 26, sought input on crops, cropping practices and how they can be documented, certified and traced to help guide potential USDA rulemaking.

Adding to the regulatory complexity, the 40B tax

credit expires at the end of 2024 and will be replaced by Section 45Z, the Clean Fuel Production Credit. The 45Z program continues to provide tax credits for SAF and other biofuels, albeit with different formulations. It also changes the \$1-per-gallon blender credit that has been in place since 2005 to a domestic producer credit based on their carbon intensity score.

Guidance on the new rule continues to be murky, Winters says, particularly as to who can claim the 45Z producer tax credit and how it should be valued.

"This new clean fuel producer credit is one of the biggest issues that people in the industry may not be paying enough attention to," Winters says. "For our members, this is a huge change."

Powerful potential

Despite regulatory challenges, the momentum for biofuel production and demand continues to gather speed in the wake of federal climate-focused programs and state low-carbon fuel standards. Along with over-the-road transportation, there's growing interest and emerging technology to promote the use of biofuels in rail, marine and aviation industries.

SAF is garnering much of the attention because air transportation creates some of the highest carbon emissions, Combelic says. According to the U.S. Department of Energy, the biofuel has the potential to deliver the performance of petroleum-based jet fuel with a fraction of its carbon footprint.

"The administration is eager to get sustainable aviation fuel developed quickly," Combelic says. "A federal initiative launched in 2021 was tasked

Know Your Soy-based Biofuels

The term "biofuel" applies to liquid fuels and blending components produced from renewable biological sources, including oilseed crops such as soybeans, which can be used to create biodiesel, renewable diesel, sustainable aviation fuel, biobased heating oil and more. But what's the difference between these types of fuels?

- **Biodiesel** is created from one or a blend of biomass oils chemically treated to create methyl ester. Biodiesel can be blended with petroleum diesel in any percentage, including B100 (pure biodiesel) and, the most common blend, B20 (a blend containing 20% biodiesel and 80% petroleum diesel). Soybean oil is the most commonly used feedstock for the production of biodiesel.
- **Renewable diesel** is derived from biomass, such as soybean oil, through the process of hydrotreating, similar to a traditional refinery operation. This high-heat, high-pressure process produces a fuel that is chemically indistinguishable from conventional diesel. Unlike biodiesel, renewable diesel does not have to be blended and can be used as a drop-in fuel for any diesel engine.
- **Sustainable aviation fuel (SAF)** is made from non-petroleum feedstocks and is very similar in its chemistry to traditional fossil jet fuel but with much lower carbon emissions. SAF can be blended with fossil jet fuel at different levels with limits between 10% and 50%, depending on the feedstock and how the fuel is produced. Soy is recognized as an eligible SAF feedstock under the federal Renewable Fuel Standard program.
- **Bioheat** is a blend of biodiesel and ultra-low sulfur heating fuel, providing a more eco-friendly alternative to traditional heating fuel. Currently offered in blends from 2% to 20% biodiesel, Bioheat® can be used in existing home heating fuel systems to improve indoor air quality.

with decarbonizing the aviation sector by 2050, but SAF is very expensive to make. That's why we have some of these programs in place to help spur growth in its production."

Biobased heating oil also offers tremendous market potential in certain regions, such as New England, where about 40% of homes use this method. Among the fuel sources Clean Fuels Alliance America represents is a product called "Bioheat®," a blend of biodiesel and ultra-low sulfur fuel that can be used in existing home heating oil systems.

"For indoor air quality, it's important to have the cleanest source of energy available, and Bioheat® is an eco-friendly alternative to traditional heating fuel," Winters says. "In 2019, the heating oil industry pledged to be carbon neutral by 2050. This year, they announced that they reached their first interim goal ahead of schedule—about 25% carbon neutral at this point. It's a growing market for biodiesel, primarily, but renewable diesel will also work."

A more obvious market is in offroad applications, especially farm equipment. But farmers have been reluctant to adopt biodiesel or renewable diesel, Winters says, citing reasons that range from bad experiences with the product in its early stages to lack of availability and noncompetitive pricing with traditional diesel. He believes those are obstacles that can be overcome with today's biofuels.

"We work with manufacturers such as John Deere that encourage farmers to use renewable fuel in their equipment. It's now truly a drop-in fuel," Winters says. "By adopting biodiesel and renewable diesel in their operations, farmers are supporting their own markets and helping build a stronger future for their industry."



Soy-based biodiesel fuels trucks and other equipment used to move around the tarmac at St. Louis Lambert International. Photo Credit: Allison Jenkins

Translating Biofuel Demand to the Local Level

By Dr. Scott Gerlt,
ASA Chief Economist

With all the growth in soy-based biofuel demand, it's natural to wonder how this matters to the average soybean farmer. Biofuels increase the demand for soybean oil, which improves the returns from processing (or crushing) soybeans. This spurs crushers to process more soybeans. They can do this by increasing the utilization of their current plants, potentially expanding those plants or even building new facilities. The U.S. has seen over 20 announcements to build or expand domestic crush plants due to anticipated biofuel demand.

The new capacity will need to bid competitively to secure the necessary soybeans for operations. This improves the local basis by increasing the prices farmers are paid in the area. Even producers who are not next to a new or

expanding plant can experience benefits as the overall value of soy increases. While biofuel markets and policy can quickly become complex, their growth—bottom line—results in value growth for soybean farmers.

Soy is not, however, the only feedstock used in the production of biodiesel, renewable diesel and sustainable aviation fuel. Recently, imports of alternative feedstocks have caused concern over the potential missed growth opportunity for the soy industry. Even so, new crush capacity continues to come online. And margins from crushing soybeans continue to incentivize processing—and thereby, farmer margins. The key to these factors persisting is policy that is sufficient to sustain the use of U.S. soybeans in domestic biofuels.

Impactful Leadership Training for More Than 40 Years

ASA and its training partner, Corteva Agriscience, are always looking for soybean farmers who are excited to grow their leadership skills and the soybean industry. Over the past four decades, ASA and its partner have identified and nurtured over 1,000 emerging leaders through the American Soybean Association Corteva Agriscience Young Leader Program. Alumni of the program share their impactful leadership takeaways and encourage a new generation to embrace the program's opportunities.



Caleb Ragland
Magnolia, Kentucky
Class of 2012

Caleb is the current vice president of ASA. He is a past chair of the Kentucky Soybean Association's legislative committee and past president of the Kentucky Livestock Coalition. Caleb and his wife, Leanne, have three sons, Charlie, Cory and Carter.

“ The friends Leanne and I were able to meet through the program we'll have for the rest of our lives. The communications training we received has helped us to avoid some pitfalls and silly mistakes we would have otherwise made, especially with magazine, TV and live radio interviews. We're not always asked softball questions. We were taught to bring out the positive and get our story across while conducting an amicable conversation at the same time. This was probably the best leadership training I've been through in the ag industry. Corteva is making a great investment. Take advantage of it.”



Pam Snelson
Wann, Oklahoma
Class of 1999

Pam served nine years on the ASA board of directors, retiring in 2023. Currently, she is on the board of the Oklahoma Soybean Association and the Oklahoma CattleWomen. Pam and her husband, Steve, have two sons, Steven and Kevin.

“ For me, the program was a great springboard for starting advocacy. I was immersed in an awesome way, gaining insight on soy issues and agriculture in general. I was surrounded by forward-thinking mentors whom I still use as resources. You meet others passionate for communicating and promoting the soy message and farming interests. The program makes you confident in what you're doing and helps prepare you to visit with and get to know your legislators. If you know them, you get them in your corner. The program helped me with this type of communication.”



Steve Wellman
Syracuse, Nebraska
Class of 1994

Steve is a past president of ASA (2011-12) and was an ASA director for nine years. He served as Nebraska Director of Agriculture for five years, ending January 2023. Steve and his wife Susan have a daughter, Sara, and a son, Tyler.

“ The biggest advantage to my wife Susan and I was the confidence we gained from learning how to be prepared for things like media interviews, public speaking and working with other individuals all for a common cause. It prepared me for the many leadership positions I've held. Spouses are commonly involved in the program as well, and the relationships we built are extremely important for the greater success. I say thanks to the sponsors who are willing to step up and put in the funding and work to put on this program.”

In its 41st year, the Young Leader Program continues to set the bar for leadership training in agriculture, identifying and training new, innovative and engaged growers to serve as the voice of the American farmer. For more information and to apply for the class of 2025, go to [SoyGrowers.com](https://www.SoyGrowers.com).

Learn. Connect. Lead.

Apply for the 2025 ASA Corteva Agriscience Young Leader Program



Create
a Brighter
Future

Become a
Better Farmer



Build Lifelong
Connections

Young Leaders tell us that this unique experience gives them real tools to help navigate the complex dynamics of managing a farm. Through training that focuses on **ag innovation, connections** and **leadership**, participants come away with valuable skills, new ideas and relevant sources of information.

Anyone actively farming should **APPLY** for the 2025 Young Leader program. Spouse/life partners (if applicable) are encouraged to participate in all elements of the two-phase program. Not “young”? Yes, apply—actual age isn’t important! **The Young Leader program is for farmers who are “young” or “new” to leadership.**

PHASE I: Monday, December 2 – Thursday, December 5, 2024, at the Corteva Global Business Center in Johnston, Iowa

PHASE II: Friday, February 28, 2025 – Tuesday, March 4, 2025, in Denver, Colorado, in conjunction with Commodity Classic

For more information and to apply for the class of 2025, go to **SoyGrowers.com**

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ISSUE update

By Virginia Houston, ASA
Director of Government Affairs

China Gets No Pass, but Diplomacy Must Be Considered for Soy's Sake

In the world of soybean trade, it is hard to overstate the importance of China as a customer. Our trading partners are, of course, all critical to the success of U.S. soy growers, but no export destination compares to China when it comes to volume and value. In marketing year (MY) 2022/2023, the export value of U.S. soybeans totaled approximately \$32.6 billion. China accounted for over \$18.8 billion of this total. For perspective, the next largest destination by value totaled approximately \$3.3 billion. The sheer scale of China's demand for soybeans—more than 60% of global soy imports—cannot be replaced.

Every reader of this magazine will recall the impacts of the 2018 trade war with China on U.S. soybeans. According to a United States Department of Agriculture's Economic Research Service (USDA-ERS) analysis on the impact of Chinese retaliatory tariffs, U.S. exports to China dropped 76% from 2017 to 2018. Furthermore, ERS estimated the trade war cost U.S. agriculture over \$27 billion. Of those losses, soybeans accounted for 71%.

While prices and Chinese demand have stabilized since the U.S.-China Phase One agreement was signed in January 2020, we

are once again facing a presidential election that could jeopardize that trading relationship. Prior to the Republican National Convention meeting in Milwaukee, Wisconsin, in July, the RNC formally adopted a party platform that advocates for the revocation of China's Permanent Normal Trade Relations (PNTR) status. Furthermore, former President—and current Republican presidential candidate—Donald Trump has stated his intent to reignite the 2018 trade war by implementing anywhere from a 10% to a 60% tariff on all Chinese imports.

It is very likely that a change in China's trade status would result in immediate retaliation from Beijing, as soybeans were among the first products targeted when the trade war began in summer 2018. If past is prologue, it is entirely possible U.S. soybeans would again be impacted.

We are also seeing anti-China rhetoric gain traction on Capitol Hill from both Republicans and Democrats. ASA President Josh Gackle participated in a House Agriculture Committee hearing this spring on "The Danger China Poses to American Agriculture." During his 4.5 hours at the witness table, Gackle was able to remind committee members

of the strong economic relationship our industry has with China and how much work U.S. soy has done to cultivate the Chinese market the past 40 years. As we look ahead to the next six months, your voices as U.S. soybean farmers will be more important than ever to combat the rise of anti-China—and what could be anti-trade—rhetoric from Washington.

This last statement should not be interpreted as suggesting China get a pass on its longstanding history of unfair and unethical practices with the U.S. and other countries across intellectual property, biotechnology and other sectors; it is instead a reminder that good trade diplomacy must involve just that: diplomacy. The scars of the 2018 trade war are fresh—and ongoing—for U.S. soybean farmers. In the midst of real geopolitical issues, taking great care in how we approach China will be key to ensuring soy farmers retain access to this major market.

Make no mistake: The world is watching the U.S. to see what will happen this November, and China is no exception. The tit-for-tat tariff dispute may have been quiet the past several years, but we are keenly aware markets built over decades can be lost overnight.

Do you know the function of SoyPAC?



SoyPAC is an important national soy advocacy tool.

The ASA SoyPAC is the only political action committee representing the interests of solely soybean growers. SoyPAC provides ASA with resources that help support candidates who champion soybean farmer priorities.

The list of issues affecting agriculture and soybeans is long and diverse. ASA staff work year-round to respond to these issues.

For more than 100 years, ASA has led efforts to advocate for U.S. soybean farmers on policy and trade.

Learn more about how SoyPAC advances ASA's mission by visiting SoyGrowers.com/soypac



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INDUSTRY

perspective

By Tom Steever



Allen DOYEL



Allen Doyel, general counsel for BNSF

California's emissions regulations are causing uncertainty for freight rail operations in the Golden State. The California Air Resources Board (CARB) wants a waiver from the U.S. Environmental Protection Agency to enforce state regulations that would have a big impact on rail companies doing business in California. Railroad company officials say that CARB should consider biobased fuels in its rulemaking to reduce pollution from locomotives.

BNSF, the nation's largest freight hauler, is especially concerned about two components of the rule, according to Allen Doyel, general counsel for BNSF. One calls for a spending account obligation funded by rail companies operating in California. The money in each spending account, based on the number of hours a train engine operates in the state, would be used to update locomotive equipment.

"In particular, CARB wants it to be spent on newer locomotives, preferably zero-emissions [electric] locomotives, which...are just decades away from being feasible," said Doyel. That spending obligation, he added, could reach \$800 million

annually for BNSF alone.

Another facet of the rule troubling for BNSF, effective in 2030, caps the useful life of a locomotive at 23 years.

"About 65%, or two-thirds of the national class I locomotive fleet, would not be able to enter the state of California by the year 2030," said Doyel, referring to the nation's six largest freight rail companies. "That is such a profound impact to the national fleet that there's just simply no way to comply in the timeframe that CARB has laid out."

BNSF partners with U.S. soybean growers by providing transportation of soybeans, as well as by using soy-based fuels as a viable pathway to meaningful emissions reductions, Doyel said.

"Renewable fuels such as biodiesel and renewable diesel are going to be part of the mix for a long time," he said, "certainly through 2050."

The effect of CARB's emissions rule, should it move forward, is added costs for moving freight in California via rail, and that could result in a shift to more goods moving in trucks, according to Lena Kent, director of public affairs at BNSF, "and that certainly contributes

to some of the highway congestion, wear and tear on the roads and increased emissions," she added.

Per engine manufacturer's specifications, BNSF is currently able to use 5% biodiesel and 30% renewable diesel, according to Doyel. With further testing during the next year, he said the company hopes to "get the manufacturers comfortable" with using up to 20% biodiesel and 95% renewable diesel.

Pointing out railroads' fuel efficiency, Lena Kent said that trains move a ton of freight nearly 500 miles on a single gallon of diesel fuel, adding that rail is the most environmentally friendly way to move goods over land.

"We play a vital role in moving our nation's goods, and we would like to continue to play that important role," said Kent.

Biodiesel and renewable diesel are critical to BNSF being able to meet emissions reduction targets, said Doyle.

"It's unfortunate," he said, "that CARB has not considered the availability and the use of these fuels as a way to reduce emissions today."



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Soy Leaders Wear Multiple Hats

By Jody Shee

As soy fuels increasingly power the future of the soybean industry, a key group of ASA directors is out in front, guiding legislative efforts and educating policymakers to ensure continuous momentum in the right direction. And that's just what they do in their spare time. Three directors reflect on their soy advocacy involvement, including the passion and purpose driving their commitment to advancing soy fuels.

Dave Walton, Wilton, Iowa

Dave Walton advocates for agriculture and soy to everyone, including Uber drivers he meets on his trips. His journey to national advocacy began when he wrote an article to non-farmers on the safety and usefulness of GMOs and herbicides like glyphosate, catching the eye of Iowa Soybean Association's policy director, who encouraged Walton to get in the game.

"The move to ASA was natural. I'd been thinking of national issues," he says. "Science and consumer safety issues around GMOs have always been a focus of mine." Walton was already using biodiesel on his 1,000-acre farm when he joined ASA's biodiesel advocacy. "Initially, we were almost begging people to convert to biodiesel," he says. "The growth I've seen is phenomenal." Now, through legislation, he aims to ensure supply can meet future demand. He notes that 14% of a soybean bushel's value comes from biodiesel. "If demand grows, soy will be more valuable, adding to the bottom line of every U.S. soy producer."

Rob Shaffer, El Paso, Illinois

Rob Shaffer, co-chair for Commodity Classic 2025, is driven

to learn. Having transported approximately 2 million bushels of soybeans annually to the local elevator, he aspired to understand that part of the business and eventually secured a position on the cooperative's board. His friends there talked up the Illinois Soybean Board, which he joined to learn more. Moving up the ladder, ASA came next. "I was more of a political animal, so it was a natural fit," he says.

With his 1,000-acre farm long using biodiesel, ASA's biofuel legislative efforts became his cause. Through that advocacy, he values the contacts and broader perspective beyond agriculture he has gained.

Shaffer points to the passage of the 2019 five-year \$1 per gallon biodiesel tax credit as one of the greatest accomplishments he has had a hand in. "I went to D.C. 10 times to lobby for this tax credit that had lapsed before," he says. Shortly after it passed, he was

gratified when he received a phone call from his congressman thanking him for his work. Shaffer and his colleagues pride themselves on these relationships built with people critical to the industry's success.

Chris Hill, Brewster, Minnesota

Chris Hill entered into ASA biodiesel fuel advocacy with some street creds. He was an operator at the soybean crush plant in his hometown when in 2005 it added a biodiesel production facility. For a year he worked for and advocated for biodiesel.

With ASA, he mostly focuses on transportation and biodiesel, sharing a carbon emission reduction message with railroads, aviation and marine transporters. "My message is that it's better, it's cleaner and it's now," he says.

Hill enjoys explaining how everyone benefits from increased soy fuel production, given that 80% of each bushel processed for fuel becomes economical soybean meal for animal feed. "You feed the chicken the soy meal, fry the chicken in oil, and convert that used oil into fuel to transport food, creating an endless cycle." He believes crush plants and biodiesel refineries are the economic engine for rural America, offering good jobs and pay.



ASA directors Dave Walton (IA), Chris Hill (MN) and Rob Shaffer (IL), who also serve on the Clean Fuels Alliance America board, attended a ribbon-cutting ceremony to celebrate the rebranding of the trade association at its headquarters in Jefferson City. They are pictured here with Missouri Governor Mike Parson (third from left).



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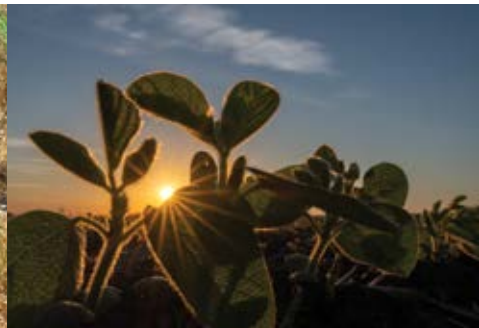
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SOY checkoff news

Soy Checkoff Partners With DEWALT® To Produce Soy-Based Bar and Chain Oil

What's the newest use for U.S. soy? Try a biobased oil for chainsaws because the innovation isn't slowing down—or bogging down in this case. Through a soy checkoff research and development investment, U.S. soybean farmers, in partnership with DEWALT® and Dynamic Green Products (DGP), in March introduced a groundbreaking sustainable solution: DEWALT®'s soy-based Bar & Chain Biodegradable Oil, now available at Home Depot stores nationwide. With over 1,300 Home Depot locations, as well as online platforms including Bomgaars, Mac Tools, Grainger and Amazon, among others, consumers and farmers alike have easy access to this environmentally friendly product.

"It's exciting to see the checkoff investment in this bar and chain oil pay dividends as it becomes widely available to more farmers as well as the professionals who care for parks, forests and more," said Steve Reinhard, United Soybean Board chair and soybean farmer from Ohio. "This oil is yet another example of U.S. soy delivering performance and sustainability benefits."

This USB initiative in partnership with DGP is part of a strategic collaboration with the Airable Research Lab, a division of the Ohio Soybean Council dedicated to bringing sustainable soy solutions to the market in



Photo credit: United Soybean Board

2024. Fifth-generation farmer Bret Davis, who grows soybeans, corn and wheat in Delaware County, Ohio, describes his eagerness to be an early adopter of the product.

"It's really pretty simple: if you grow it, you should use it," said Davis. "I'm proud to be part of the Ohio Soybean Council, which invested in the development of this high-performing, sustainable bar and chain oil that I'm now using on my farm. It works great in my battery-powered chain saw, which I use to clear downed trees and for general cleanup around the farm and fields. It lasts a long time and has excellent lubricating properties."

The soy-based bar and chain oil has gained widespread acclaim among professionals, highlighting its high performance as a sustainable option. Buckin' Billy Ray Smith, known for his adventures on the History Channel's "Ax Men" series and YouTube, said that after he gave it a trial, the 30-year-old veteran of logging and tree falling was

instantly impressed with the soy-based bar and chain oil.

"I found the soy-based oil so clean and easy to work with, and it has just the right amount of tack," said Smith, who has tested almost every bar and chain oil on the market. "Now it's the only thing I use, including in my vintage saws. It's also better for the environment, especially in sensitive areas around watersheds, and for workers who get the oil on their hands and breathe it in."

"I'm concerned about the environment, what's on my body and what's left behind. It's a wonderful option that's more sustainable and better for workers," Smith shares.

More information about soy-based products can be found at www.soybiobased.org. To find the oil at Home Depot, search these product numbers: DXCC1200 (16oz), DXCC1201 (32oz) and DXCC1202 (1gal).

Source: United Soybean Board

U.S. Soy Selects Winner for Inaugural NEXTILE: Soy in Textiles Design Challenge

U.S. soy selected Kasandra Wright from the University of Arkansas as the national innovative winner of its first-ever NEXTILE: The Soy in Textiles Design Challenge. In its inaugural year, design students across the country were invited to leverage their creative and problem-solving skills to produce the next sustainable innovation in textile design. The catch? Students must create their products using one versatile ingredient—soybeans.

Each participating individual or team received a design kit including seven sustainable, soy-based materials: soy thread, soy leather, soy French Terry, organic pigment and other soy products. Project submissions leveraged one or more of these ingredients to produce new textile threads, dyes, paints, designs and more. Judges from the United Soybean Board, Levander Design, Springs Creative Products Group and Modern Meadow selected the winner and runner-up.

"It's been incredible to see how our soybeans come to life in the creative hands of these talented students," said Carla Schultz, Michigan soybean farmer and United Soybean Board director, who served as a judge of the competition. "I'm so impressed with their designs—they were artful, progressive and captivating. I'm beyond excited by the creative thinking we saw in the inaugural NEXTILE challenge. I'm excited for the future of each competitor who participated and for the future of soy."

The winner, Wright, created a stunning moth design textile sample, symbolizing transformation, survival and new beginnings. As the winner, Wright will receive a \$1,000 scholarship.

"Throughout this experience, I learned about the importance



National Winner Kasandra Wright's moth design textile. Photo credit: United Soybean Board

of what soy-based products can provide in the apparel and textile industry," Wright said. "Soy fiber has an excellent drape and is a beautiful alternative to protein fibers as a sustainable material for apparel."

U.S. soy has long been a critical ingredient for product innovation, going all the way back to Henry Ford, who used soy-based paints, textile materials and plastics for automobile design. Soy is used in every industry. Farmers can find their products in the streets they drive on, the shoes they wear and the biofuels for their vehicles. The possibilities are endless. There are more than 1,000 soy-based products currently on the market, from tires and dust suppressants to fabrics and turf. You name an industry, and U.S. soy is almost always an essential component.

U.S. soybean farmers and industry partners consistently push the limits of innovation to discover and deliver solutions to the most

significant challenges our world faces, such as food security and climate change. NEXTILE was created to put sustainable soy materials into the hands of the brightest young minds in design to create the next generation of eco-friendly textile solutions.

The national winner was chosen from a pool of students who advanced past the first round of judging. The six participating schools included: the University of Arkansas, North Carolina State University, Kansas City Art Institute, Pratt Institute, Savannah College of Art and Design and the University of Wisconsin-Madison.

Learn more about NEXTILE, the participating schools and students, and the next round of soy-based sustainable innovation at ussoy.org/nextile.

Source: United Soybean Board

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Bridging U.S. Soy and Market Success in the Gateway to Africa

With help from ASA's World Initiative for Soy in Human Health program, Flosell Farms has trained over 300 aquaculture practitioners and impacted more than 12,000 value chain professionals and farmers across 16 countries in Africa.

"Surely, this could mean a greater reliance on U.S. soy in the future," said Flosell Farms CEO and founder Evans Danso as he welcomed a recent trade team of Illinois, Iowa and Kansas soy farmer leaders.

The team of soy leaders visited this summer to mark the accomplishments of U.S. soy's investment in Ghana, gather new updates from WISHH's strategic partners for feed and food, and explore ways both sides can continue the momentum for U.S. soy in Ghanaian markets.

Warm welcomes

The trade team's journey began by meeting leaders of Ghana's National Egg Campaign Secretariat. Collaborating with Ghana's Women in Poultry Value Chain, WISHH created the secretariat to promote egg consumption and improve nutrition in Ghana. The women noted that since its founding, per-capita egg consumption is rapidly approaching that of the United States. With an increasing customer base, Ghanaian egg producers can rely on U.S. soy for poultry feed, a key WISHH strategy as it develops soy markets overseas.

Celebrating progress at Flosell Farms

At Flosell Farms, Danso and three generations of graduates of Flosell's United Soybean Board-sponsored Training Program for



Evans Danso and interns at Flosell Farms share updates on WISHH's results in Ghana with U.S. soybean growers during a summer trade team visit

Young Professionals updated WISHH farmer leaders on how Flosell continues to expand its farming operation. The soy farmers learned how WISHH-led trainings provide real-world, on-farm knowledge, which is often missing from local university curriculum. Soybean growers helped lead the graduation ceremony for the latest class of interns. The graduates noted that the program also builds knowledge of high-quality soy-based feeds, an important tool for creating a preference for U.S. soy.

Yedent Agro's story of success with soy

The group also met with Samuel Ntim-Adu, the CEO of Yedent Agro Group. Yedent takes pride that just shy of a decade after he began partnering with WISHH, his company is a leader in both food and feed production.

"What can I say about what WISHH has done for us?" Ntim-Adu asked the team. "The best way is to show you, so I am excited about your chance to see our updated facilities and visit several of our supply chain partners who are indirect beneficiaries of WISHH."

Ntim-Adu led the visitors through Yedent, noting plans to

import more U.S. soy. He explained how as Yedent expanded its food business into feed production he witnessed a growing preference for U.S. soy's quality and reliability.

Empowering women and youth

Another WISHH strategic partner in West African poultry is Edith Wheatland, owner of Rockland Farms. Wheatland shared that WISHH was a key driver for her current success and the lofty goals she has set for Rockland.

"U.S. soybean meal is the best," Wheatland said. "That is why everyone in Ghana wants to source it. For a business like mine that will eventually sell to companies with high standards like KFC, the support from WISHH and U.S. soybean growers has been so critical."

The WISHH delegation was pleased to learn Wheatland will soon begin construction on a larger poultry processing facility. It is another milestone for a company that is supporting more than 9,000 farmers and 400 poultry producers. The majority are women and youth—the next generation of business leaders and partners for U.S. soy in Ghana.



WISHH leverages partnerships
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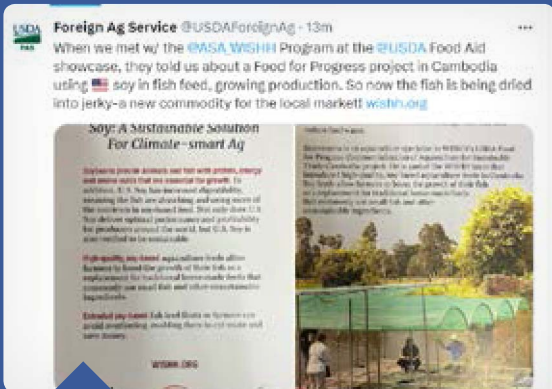
#SOY SOCIAL

Check out what's trending in U.S. soy on social media



The House Committee on Agriculture tweeted a quote from ASA President Josh Gackle (ND) expressing support for moving toward passing a new and improved farm bill.

ASA Director Jordan Scott (SD) shared photos from his recent trip to Barcelona, where he promoted U.S. soy to aquaculture feed buyers.



USDA FAS highlighted the ASA WISHH Food for Progress project in Cambodia on social media.



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SOY FORWARD

The Whole Bean = Oil + Meal

By Laura Temple

For soybeans to reach their full potential, they get broken down and taken apart.

Crushing soybeans allows the oil to be extracted, which accounts for about 20% of the bean. Whole soybeans are ground, flaked or broken in other ways and then either mechanically pressed or mixed with a solvent to separate the oil from the rest of the bean, called meal.

Refining that crude soybean oil creates the equivalent of a Swiss Army knife. It becomes an array of versatile products that can fry chicken fingers, increase water resistance in oil-based paints, fuel airplanes and much more. The chemical composition and flexibility of soybean oil allows it to replace petroleum-based ingredients in everything from artificial turf and shoes to plastics and tires.

A cooking staple

Soybean oil provides about one-third of the vegetable oil used around the world each year. Its neutral flavor blends smoothly into sauces, dressings and mayonnaise. Need shortening for baking? Or oil to sauté vegetables? An option for frying oil? Soybean oil works well in all those situations. Plus, high oleic soybean oil offers a fat profile similar to olive oil along with other benefits.

Biobased manufacturing solutions

Beyond the kitchen, soybean oil has been associated with candles and crayons, but that's not all. It has become an attractive,

renewable alternative to petrochemicals. Soybean oil adds a more sustainable component to asphalt, cleaning products, lubricants, furniture cushioning foam and much more. Replacing oil-based raw materials with those derived from soybean oil reduces the carbon footprint of the end product while maintaining or improving performance.



Soybean oil and meal deliver countless sustainable, practical solutions for everyday life. Photo Credit: United Soybean Board

Cleaner-burning fuel

Soybean oil also serves as a common feedstock for biodiesel, renewable diesel and sustainable aviation fuel. For example, it accounts for roughly 41% of the feedstocks used to produce biodiesel and renewable diesel, according to U.S. Soy estimates based on U.S. Energy Information Administration data.

With so many uses, along with the growing demand for low-carbon fuel, the U.S. needs more soybean oil. To produce it, the capacity to crush soybeans is

increasing. In 2023, three existing crush plants expanded, and a new facility opened in North Dakota. By 2026, five other expansions should be complete, along with 12 new plants throughout the country.

New potential for soybean meal

With that growth in soybean crushing, more soybean meal will be available, fueling innovative ways to use that portion of the soybean.

Soybean meal contains protein and carbohydrates, making it an ideal ingredient for animal feed—its primary use. Investments in infrastructure, like an expansion at the Port of Grays Harbor in Washington state, will allow more U.S. soybean meal to be exported, benefitting even more pigs, chickens, fish and other animals around the world. And soybean meal can do more!

- Firefighters can now use a new fire suppressant, SoyFoam TF1122, made with soy flour, to put out fires. It is free from harsh chemicals traditionally found in firefighting foam.
- A Midwest chemist founded Renewable Green Composites, a start-up committed to creating plastics from soybean meal, just like Henry Ford did.
- The protein in soybean meal can be spun into a soy-based skin replacement, OmegaSkin, that can help the body heal burns and open wounds.

Together, soybean oil and meal deliver countless sustainable, practical solutions for everyday life.



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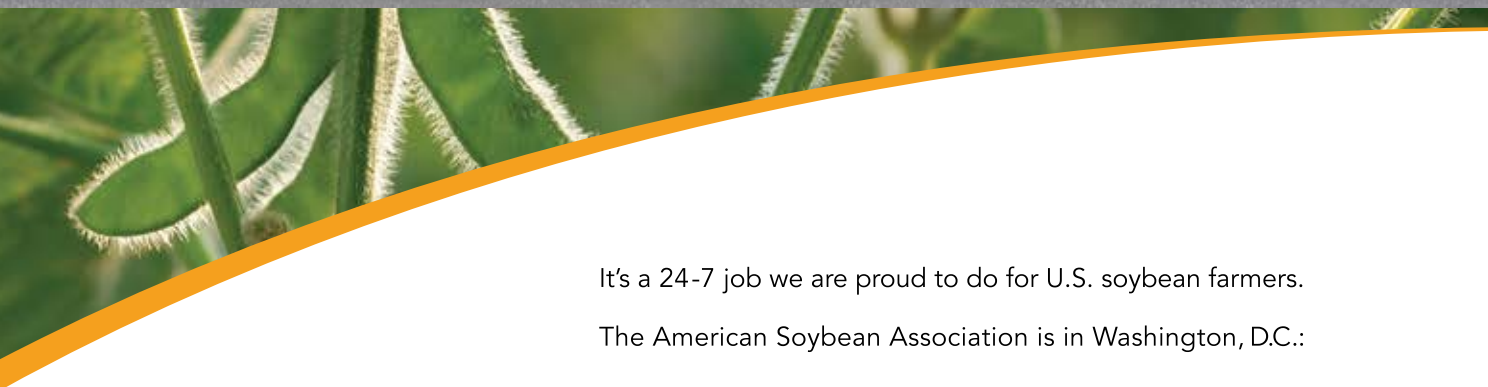
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- Fighting against burdensome EPA regulations
- Growing soybean trade opportunities

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