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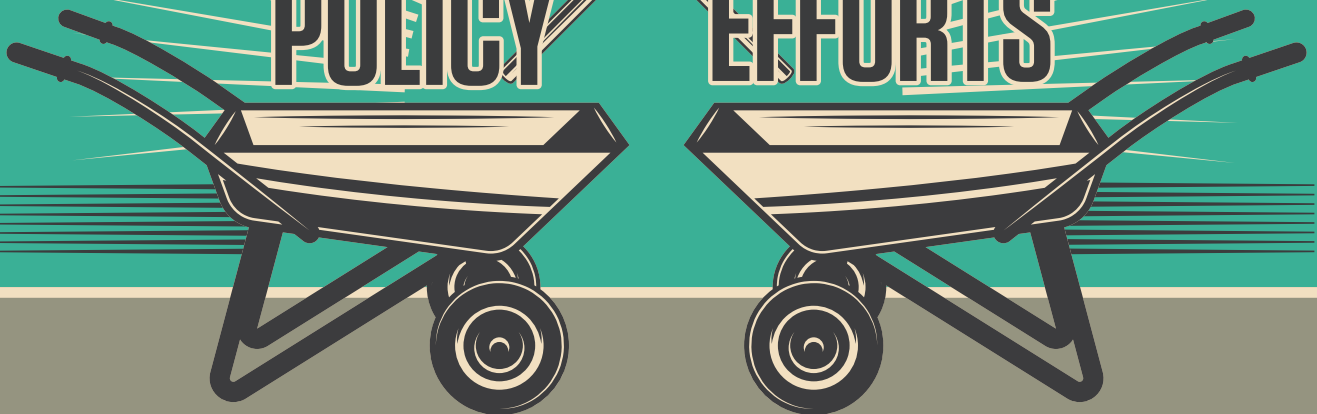
People. Policy. Profitability.

A PUBLICATION OF THE AMERICAN SOYBEAN ASSOCIATION

# SPRING CLEANUP



## ASA & TRADE POLICY EFFORTS



### SOY FORWARD

Leading Ag Educators  
Talk About 2020  
Farm Economy

### SOY FACES

Minnesota Farm Wife and  
Mom Embraces Advocacy

### ISSUE UPDATE

Positive Movement on  
ASA Trade Priorities

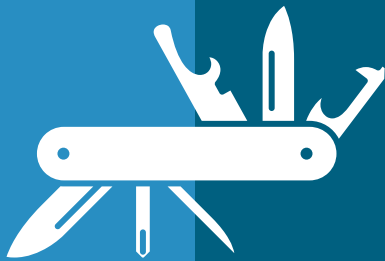
### INDUSTRY PERSPECTIVE

Outlook for the  
U.S. Soy Industry

SHT 산업 Spring, 2020


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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 300,000 soybean farmers.

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# ASA leadership corner

The energy around spring is almost palpable, and we often find ourselves getting into projects we've put off or doing a little spring cleaning to prepare us for the future. Whether organizing the back of the shop, cleaning out the garage, or tackling that intimidating storage closet inside your house, we tend to travel down memory lane a bit. Give yourself permission to reflect, and then move on. It's okay to throw out that 4-year-old pair of gym shoes! Yes, they may have fit perfectly, and you wore them on some memorable excursions, but they were done a couple of years ago. Reflect on the memory, throw them away, and be organized and ready for the future.

We've been digging around our ASA closet lately, taking stock of our accomplishments in 2019 and preparing for what lies ahead in 2020. Commodity Classic was a great transition point for our spring cleaning. A record crowd of more than 4,600 farmers joined us in San Antonio, and we had a robust discussion on ASA policies through our annual resolutions process.

On the domestic front, Congress ended 2019 by passing the biodiesel tax credit and providing a much-needed boost to our industry. And, after nearly two years of challenges with international trade, we are starting to see positive momentum with

China Phase One, USMCA and other agreements. Globally, COVID-19 may be a hurdle to overcome, as the epidemic could cause an economic slowdown and reduce demand for soybeans.

Cleaning out our closet of issues accomplished and now-outdated talking points as we prepare for the future is key to our next soybean successes in 2020. Activity on Capitol Hill continues with last-minute legislation before campaigns start ramping up later this year. We look for the little windows where infrastructure legislation may advance, especially on inland waterways. Sustainability and carbon markets are areas receiving a lot of attention. It's important ASA is a resource for credible information about agricultural practices used by farmers today. We also need to engage with regulators to make sure technology is safe, available to farmers and accessible to consumers around the world.

ASA also continues to move forward with the transition to an independent office in Washington, D.C.; we are almost fully staffed. Later this spring, we will pivot to the future beyond 2020 as we begin development of our next strategic plan. A steady wave of challenges has hit U.S. soybean farmers, so ASA works daily to be a better organization and advocate even smarter for U.S. soy farmers on policy and

Ryan FINDLAY



Ryan Findlay, ASA CEO

trade. Our strategic plan is a road map for turning those daily accomplishments into long-term goals and achievements. In a way, it's like spring cleaning—preparing ourselves to be better in the future.

#### Important note from the editor:

*Mr. Findlay's Leadership Corner and other content in this magazine was written prior to the COVID-19 pandemic's widespread impacts here in the U.S. ASA takes this situation very seriously and is providing timely COVID-19 updates to its members and valued partners on resources and issues important to soy and agriculture through its other, more immediate communications vehicles. We encourage you to contact ASA or your state soybean staff if you need information assistance pertaining to COVID-19.*



## New Study Finds U.S. Soybean Industry Has \$115 Billion Impact on the American Economy

The National Oilseed Processors Association (NOPA), a trade association representing owners/operators of oilseed crush facilities, announced the availability of a new study, *The Economic Impact of the U.S. Soybeans & End Products on the U.S. Economy*, that examines the value of the American soybean industry. NOPA partnered with the United Soybean Board (USB) in commissioning LMC International Ltd, an independent economic consulting firm that specializes in global agricultural commodity and agribusiness sectors, to develop the study.

This 31-page study analyzes the soybean value chain's impact to the U.S. economy, based on data from crop years 2014-15 to 2016-17. As highlighted in the report summary during this period:

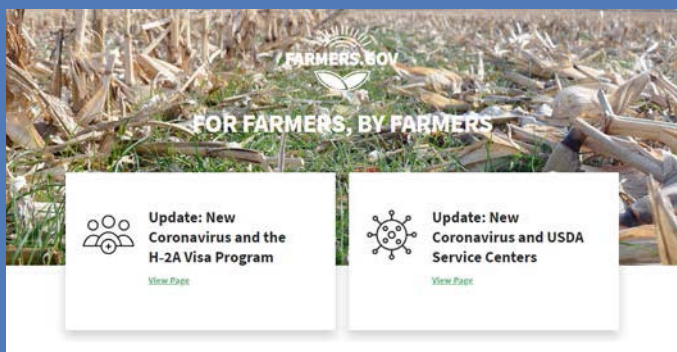
- The total economic impact on the U.S. economy from the soybean sector averaged \$115.8 billion.
- The soybean sector supported an average of 357,000 people, comprising 280,000 paid, full-time equivalent jobs as well as an additional 78,000 family members, beyond growers themselves, who support and are supported by soybean farming operations.
- The total wage impact of the sector averaged \$11.6 billion.

Economic impacts highlighted in the study are quantified in terms of revenue, wages, jobs and number of people dependent on the sector—all focused on the production, distribution and use of soybeans, and soybean products, spanning across the value chain from soybean farming and production to consumers and exports. Findings are presented, with educational intent, at the national and state levels, as well as by congressional district. The study also includes one-page summaries for 39 key states where the soybean industry primarily operates.

**A copy of the full study is available under the Resources section of NOPA's website at [nopa.org](http://nopa.org).**



## USDA Encourages Ag Producers to Visit Farmers.gov for Updates on Services in Their Community



During this time when proactive health measures are being implemented to reduce coronavirus spread, the United States Department of Agriculture (USDA) is taking steps to ensure the safety of its employees and customers. Those measures in part include communicating to the American Soybean Association (ASA) and other agriculture groups on resources available to those with questions and concerns.

USDA reports Farmers.gov is the best resource for farmer information. Producers can find their service center's phone numbers, in addition to the latest information on available services and the latest status of service centers impacted by these locally specific health measures.

Source: U.S. Department of Agriculture

# ASA in action



U.S. CHINA PHASE ONE

ASA President Bill Gordon (third from right), along with Sen. Joni Ernst, South Dakota Gov. Kristi Noem, Ambassador Terry Branstad, USB leaders and NCGA leaders attend the U.S. China Phase One signing at the White House in early January.



ASA Secretary Brad Doyle (AR), left, not only took the stage with President Donald Trump for the USMCA signing at the White House, but also had the opportunity to snap a selfie with the President.

ASA Treasurer Brad Kremer (WI), left, talks with U.S. Vice President Mike Pence during the USMCA signing at the White House in January.



USMCA SIGNING

Members of the ASA board of directors from five states attended the United States-Mexico-Canada (USMCA) trade agreement signing ceremony at the White House in celebration of the new treaty. From left: ASA President Bill Gordon (MN), ASA Treasurer Brad Kremer (WI), USDA Deputy Secretary Steve Censky and ASA Governing Committee Members Bret Davis (OH), Brad Doyle (AR) and Daryl Cates (IL).



# INLAND WATERWAYS



ASA Chairman Davie Stephens (KY) meets with Rep. James Comer (KY) to discuss trade, infrastructure and biofuels.

ASA President Bill Gordon (MN) (second from left) speaks at the Mississippi River Cities and Towns Initiative (MRCTI) luncheon on Capitol Hill during the group's annual conference, discussing the need to better fund the inland waterway system and support locks and dams. Attendees who also spoke at the lunch included House Ag Committee Chair Collin Peterson (MN) and Rep. Dave Loebsack (IA).



ASA leaders Davie Stephens (KY), left, and Kevin Scott (SD), right, initiated meetings with the Administration on the Hill in January, including USDA.



# USB MEETING

(From left) ASA Chairman Davie Stephens (KY), ASA Vice President Kevin Scott (SD), ASA President Bill Gordon (MN), USB Chair Jim Carroll (AR), USB Vice Chair Dan Farney (IL) and USB Past Chair Keith Tapp (KY) met in Las Vegas in February for the United Soybean Board meeting. Photo Credit: United Soybean Board



# ASA in action



In January, at the National Biodiesel Board's (NBB) annual National Biodiesel Conference & Expo in Tampa, NBB unveiled its "Vision 2020." Attending the conference (left to right): ASA Directors Chris Hill (MN), Jerry Bambauer (OH), Dave Walton (IA) and Rob Shaffer (IL); NBB CEO Donnell Rehagen; ASA CEO Ryan Findlay; and ASA Directors John Heisdorffer (IA), David Droste (IL), and Matt Stutzman (MI). Photo Credit: National Biodiesel Board

State and national soybean growers and staff gathered in Orlando in January for ASA's inaugural Soybean Leadership Academy, a training program to build leadership skills and a stronger voice for U.S. soy and agriculture.



LAIB



## LEADERSHIP ACADEMY

The 2020 Leadership At Its Best class, sponsored by Syngenta, began its training in Raleigh, North Carolina, before heading to Washington, D.C., for additional advocacy training and Hill visits in February. In this year's class are: (front row, l to r) Mauricio Garcia (TX), Kevin Cox (IN) and Scott Gaffner (IL); (back row, l to r) Sara Stelter (WI), Quint Pottinger (KY), Jean Lam (OK), Klinton Holliday (MO), and Jason Creamer (SC).



## YOUNG LEADERS



The 35th class of ASA Corteva Agriscience™ Young Leaders who completed their training in San Antonio, in conjunction with Commodity Classic includes: Caper & Alison Robinson (AR); Jesse Patrick (GA); Brady Holst (IL); James Ramsey (IN); Eric Schwenke (IN); Noah & Anna Fedders (IA); Ryan & Kristin Oberbroeckling (IA); Jeremy Olson (KS); Houston & Katy Howlett (KY); Nathan Engelhard (MI); Allison Morse (MI); Mike & Dawn Kuerth (MN); Ryan Mackenthun (MN); Garrett & Cara Riekhof (MO); Josh England (NE); Lucas & Becky Miller (NE); Trey & Rebecca Liverman (NC); Justin Sherlock (ND); Justin & Emily Esselburn (OH); Scott Ruck (OH); Jesse King (SD); Drew & Lauren Peterson (SD); Casey Youngerman (TN); Adam & Brittany Davis (VA); Matt Rehberg (WI); and Chris & Rachel Renwick (Canada). Photo Credit: Joe Murphy



## Positive Movement on ASA Trade Priorities



### USMCA

USMCA was ratified with strong bipartisan support from both the U.S. House of Representatives and the U.S. Senate—the House in Dec. 2019 and Senate early Jan. 2020—and was signed into law by President Trump on Jan. 29. The successful passage of USMCA through both Chambers of Congress and the White House concludes over three years of advocacy by ASA to see trade certainty with Mexico and Canada restored. The signing of USMCA ensures soybean growers will maintain access to two of their top markets. The deal is expected to take effect once all three countries have ratified the agreement.

Mexico is the #2 market for whole beans, meal and oil, and Canada is the #4 buyer of meal and #7 buyer of oil for U.S. soybean farmers, making the trade agreement essential to sustaining the growth realized in those two countries under the North American Free Trade Agreement (NAFTA).

Once ratified, ASA looks forward to resuming gains already achieved through NAFTA and modernizing our trade

relationship through USMCA by maintaining zero tariffs on U.S. soybeans and soy products, increasing enforceable agricultural biotechnology, enhancing sanitary and phytosanitary standards and expanding transparency.

### CHINA

In December, the Administration announced it had reached what it was calling a “Phase One” agreement between the U.S. and China that would include reduced barriers to trade across a variety of sectors, as well as commitments by China to purchase a substantial amount of U.S. goods including agricultural products. However, the content of the agreement was not fully known until Jan. 15, 2020, when President Trump and China officially signed the initial deal.

Soybean growers who have long advocated for a negotiated solution between the U.S. and China were pleased to have reached a Phase One agreement that could deescalate the tariff war that has been negatively affecting the agriculture economy and soybean growers for the last two years.

The Phase One agreement offers resolution to non-tariff

barriers including promising language on agriculture biotechnology, sanitary and phytosanitary issues, and intellectual property rights, among other areas. China agreed to implement a transparent, predictable, efficient, science- and risk-based regulatory process for the evaluation and authorization of agricultural biotechnology products. This language has the potential to significantly reduce the time it takes to reach approval of new traits in China, thereby allowing U.S. farmers to utilize traits that help combat a host of challenges.

The agreement also makes broad commitments by China to purchase an additional \$200 billion worth of U.S. goods over two years in the areas of agriculture, manufacturing, energy, services and goods. The agricultural purchases component of the agreement committed China to purchasing \$80 billion worth of U.S. agricultural products in that time period. Under this agreement, China has committed to purchase an additional \$32 billion (\$12.5 billion in 2020, \$19.5 billion in 2021) in agriculture products above the 2017 baseline of \$24 billion. While it is unknown what portion soybean purchases will comprise of the overall number, soybean growers are hopeful these commitments will help get them back to pre-2018 export levels.

Despite the advances in the Phase One deal, soybean growers remain concerned that it does not include an official commitment by China to remove the harmful retaliatory tariff on U.S. soybeans. ASA urges the U.S. and China to include full removal of agriculture tariffs immediately.



# FRESH START for 2020

By Dan Lemke

After a long winter, machine sheds, farm shops and workbenches need a cleanup from the clutter that accumulates following the rush of harvest and the chill of winter. Sifting through the collection of tools and equipment gives farmers the chance to put things in their proper place or to repair what needs fixing in preparation for the coming growing season.

For the American Soybean Association (ASA), spring presents an opportunity to reflect on issues that the organization has supported and to prepare to advocate on behalf of soybean farmers in the year ahead.

ASA CEO Ryan Findlay categorizes 2019 as a very emotional year for most U.S. farmers. Weather challenges, trade frustration and low commodity prices made 2019 difficult. Despite the difficulties, ASA and its grower-leaders achieved many

positive outcomes on key issues.

“We have to applaud the successes and thank farmer-leaders for their engagement,” Findlay said, “because that’s who we are as an organization. The strength of ASA is the farmer backbone.”

Just as farmers put tools and equipment away when they’re finished but keep vital pieces handy for when they’re needed again, ASA is shifting attention from resolved issues to those needing more attention.

## Boxed up

Some key ASA issues have been largely resolved, allowing the organization to put them aside to focus efforts elsewhere.

### USMCA

The United States-Mexico-Canada Agreement (USMCA) was ratified by Congress and signed



by President Trump in January, ending a years-long effort to replace and enhance the former North American Free Trade Agreement. Canada has yet to ratify the trade agreement, but trade experts expect Canadian passage in 2020.

“Canadian officials have indicated they don’t expect any bumps in the road,” explained ASA International Trade Policy Director Hanna Abou-El-Seoud. “We expect it to be fully finalized and implemented. There’s not a lot more we need to advocate, so we feel pretty good about having USMCA behind us.”

## Biodiesel Tax Credit

In late December, Congress passed a multiyear extension of the blenders tax credit for biodiesel and renewable diesel. The measure was reinstated retroactively from when it expired in 2018 through December 2022.

“This has been a long-term, major goal for the biodiesel industry,” said Paul Winters, director of public affairs and federal communications for the National Biodiesel Board (NBB).

NBB leaders have long advocated for a multi-year incentive because it provides some stability in the industry.

“The two years where the tax incentive was expired, 2018 and 2019, was longest it had ever been expired,” Winters said. It really took a toll on the industry, and people in the biodiesel industry are still recovering from it.”

Having the incentive in place for the next three years means biodiesel producers can plan for the future. Winters says in years where the incentive was in place at the start of the year, biodiesel production increased substantially.

## Japan Trade Agreement

Japan and the United States came to a trade agreement in September, a move Abou-El-Seoud says is a big deal for U.S. agriculture, particularly after the United States pulled out of the Trans-Pacific Partnership (TPP).

The 11-nation agreement gave preferred trading status to export competitors. Getting back into Japan on essentially the same level as TPP signees was a victory.

“What we wanted with a narrow agreement with Japan was to get ag product quotas and tariffs in line with what other TPP countries had. That was a big success,” Abou-El-Seoud said.

Japan is already a large customer of U.S. soy products, but the agreement opens the door for more U.S. protein products like beef and pork.

## Keep handy

Some ASA priority issues came closer to resolution in recent months. Those issues may have moved away from the front of the line but still warrant monitoring.

(continues on page 12)

*Picture: ASA President Bill Gordon on his Minnesota farm. The biodiesel tax credit will help expand markets for soybean growers during an unsteady time. Soy growers and biodiesel industry partners took time out of their fields to advocate passing this incentive before the end of 2019.*





## China Phase One Agreement

Signing a Phase One trade deal with China was an accomplishment many soybean industry leaders weren't sure would ever happen.

"I'm not sure any of us thought we would get here or that the agriculture piece of the agreement would be as robust as it is," Abou-El-Seoud admitted. "That being said, the ability to see any of it completed and enforced is really what we're looking for now that the ink has dried."

"Phase One is definitely the right first step," Findlay agreed. "Now it's about accountability and China proving to U.S. that they can uphold their end of the bargain."

China has agreed to buy \$80 billion of U.S. agricultural products in the next two years. Abou-El-Seoud expects it will take the entire year for those purchases to come together. Equally important is a commitment by China to approve new biotechnology traits in a 24-month average timeframe. Previously, biotech approvals could take seven to ten years.

"This may be a signal by China that they really do want to reform their internal system for biotech approvals, and that could really cut

down how long it takes for growers to be able to use these new and critical technologies in their operations," Abou-El Seoud said.

## Waters of the United States

In January, the Trump Administration announced a replacement regulation for Waters of the U.S. (WOTUS), called the Navigable Waters Protection Rule. Under the Clean Water Act, the Federal Government has the right to regulate navigable streams. Under WOTUS, water standing in farm fields could be considered navigable waters. Several court cases determined that the terms and definitions of what could be regulated under WOTUS were unacceptable.

The new Navigable Waters Protection Rule, "removes a lot of that encroachment of federal government onto farmers," Findlay said. "This proposal is very good, and I think this is what farmers expected a while ago."

Findlay says it will take time to get the details ironed out, and the proposal will likely go through the courts.

"This is going to have to be litigated, but I definitely think that farmers view this as much more appropriate in how the

government should regulate waters of the United States," Findlay said.

## On the workbench

ASA leaders have a wide range of priorities they'll work on in the coming year. Like projects on the farm shop workbench, ASA is actively working to bring them to a favorable outcome.

## Trade

Trade remains a primary ASA focus for 2020. In addition to monitoring implementation and effects of the Phase One agreement, development of a Phase Two deal with China is a priority. Abou-El-Seoud said Phase One is good news for soybean farmers, but the agreement did not deliver market certainty.

"Our specific ask was for the U.S. to find a solution to remove China's 25% retaliatory tariff. The Phase One deal did not achieve that," she explained. "If a Phase Two deal isn't worked out, what happens to these tariffs when the end of 2021 comes around?"

The Chinese government has granted tariff waiver exemptions to some Chinese companies, allowing them to purchase U.S. soybeans duty free. While that move is a



positive sign, soybean industry leaders want the retaliatory tariffs permanently removed.

Crafting a trade deal with the European Union (EU) is an issue of interest to the Trump Administration, but the United Kingdom's exit from the EU has complicated matters. A deal with the United Kingdom could also help open markets.

"A free trade agreement with the EU is one of the biggest areas of potential for the United States, but there are some really challenging topics," Abou-El-Seoud said. "There's a lot of opportunity for growth, especially if we can address some really pressing and challenging regulatory issues around food labeling, maximum residue levels and import tolerances. If that gets off the ground, we could see a lot achieved."

India is a tantalizing market for U.S. soybean farmers. Its population of 1.37 billion people is a tempting draw because of a growing standard of living. However, India remains a challenging market to enter because of restrictions on the import of agricultural products.

There is also strong interest in formalizing trade relationships with other possible partners including Kenya, Indonesia, Vietnam and the Philippines.

## Small Refinery Exemptions

Small Refinery Exemptions granted to oil refiners by the Environmental Protection Agency (EPA) since 2017 drastically reduced the market for biodiesel. Winters says that over the three years where EPA was granting widespread exemptions, about 4.5 billion gallons of renewable fuel were cut from Renewable Fuel Standard obligations.

A U.S. circuit court ruled that EPA overstepped in granting several exemptions, but Winters says the impact of that ruling remains to be seen—and it could



be contested still by EPA in the courts. EPA also kept 2020 overall volume obligations for renewable fuel at same level as 2019.

"That cut off our path to growth," Winters said. "Now that the biodiesel tax incentive is back and pushing growth, EPA's volumes aren't allowing that growth."

State initiatives like low carbon fuel standards in California and Oregon, tax credits in Iowa and Illinois, and a 20% biodiesel mandate in Minnesota are pushing growth for the biodiesel market, but EPA volumes aren't keeping up.

"We need growth and resolution to the small refinery exemptions," Winters said.

## Infrastructure

Findlay says there is a lot of potential energy surrounding infrastructure improvements from the White House and Congress. Transportation and infrastructure are vital to moving soybeans to market.

"There are a lot of people saying they want some type of infrastructure package," Findlay said. "ASA needs to be engaged in any conversation about roads and bridges, inland waterways and broadband infrastructure."

The Water Resources Development Act reauthorization is up this year. It supports funding for river channel dredging, ports,

Infrastructure issues like rural broadband access and upgrading inland waterways are as important as ever.

and locks and dams, which are key for moving soybeans to market and bringing inputs like fertilizer upriver.

## Risk Management

Crop insurance remains a vital tool that farmers across the United States use to manage risk. Findlay says ASA will work to make sure that crop insurance remains a viable option.

"It's important that the tools farmers have today are maintained. That will take a lot of work by ASA staff and farmers meeting with policymakers, providing ongoing education about risk management products," Findlay commented.

## Crop Protection Tools

Lawsuits over the use of dicamba, glyphosate, atrazine and the neonicotinoids are concerning for farmers. This is a challenge and is something that agriculture is facing, but Findlay says responsible use of crop protection products is important to farmers who need access to available tools.

"Whether it's discussions with EPA about registration or reregistration of products or whether it is us looking at whether we need to engage with the legal system to make sure products are defended, that is a big part of what we'll be doing in 2020," Findlay said.

# COMMODITY Classic

## Record Farmer Attendance at 2020 Commodity Classic



ASA directors serving on the Commodity Classic Committee, Brad Doyle (AR) (front row, second from left) and Bill Wykes (IL) (back row, far right), are among the group of growers and sponsors at the ribbon cutting ceremony marking the grand opening of the 2020 Commodity Classic in San Antonio. A record number of farmers registered at 4,678—the highest number in the show's 24-year history. Photo Credit: Steve Dolan



ASA President Bill Gordon (MN), left, on the General Session stage talks soybean policy priorities with emcee Mark Mayfield during the Presidents' Roundtable. Photo Credit: Steve Dolan



ASA Vice President Kevin Scott, left, (SD) welcomes USDA Secretary Sonny Perdue before his speech at Commodity Classic in San Antonio.



ASA President Bill Gordon (MN) (fourth from left) and leaders from the National Corn Growers Association, National Association of Wheat Growers, Association of Equipment Manufacturers and National Sorghum Producers chat with USDA Secretary Sonny Perdue (third from left) before his speech during the General Session at Commodity Classic.



Ag leaders have lunch with USDA Secretary Sonny Perdue at Commodity Classic. Pictured left to right: Dan Atkisson NSP Chairman; Kip Eideberg, AEM Senior VP Government Affairs; Tim Lust, NSP CEO; Jerry Johnson, AEM Director; Bill Gordon, ASA President; Secretary Perdue; Ryan Findlay, ASA CEO; Kevin Ross, NCGA President; Jon Doggett, NCGA CEO; Ben Scholz, NAWG President; and Chandler Goule, NAWG CEO. Photo Credit: Steve Dolan



Auctioneer Eric Maupin and spotter/ASA Director Casey Youngerman stand by as fellow Tennesseans Steve and Vivian May consider a bid at the ASA Soy Social and Auction on Feb. 27, 2020. Photo Credit: Steve Dolan





# 2020

# San Antonio

SEE YOUR FUTURE CLEARLY



The regional ASA Conservation Legacy Award winners gather on stage as they wait to hear the announcement of the National Winner. From left: Susan and Mike Brocksmit, Northeast Region Winners; Nicole Small and her son Dexter, Midwest Region Winners; Charles Hammer and Nancy Kavazanjian, Upper Midwest Winners; and Alison and Frank Howey, Southern Region Winners. Charles Hammer and Nancy Kavazanjian received the national award. Photo Credit: Joe Murphy



During the ASA Banquet, Kenlon Johannes, CEO of the Kansas Soybean Association, accepts the Pinnacle Award—ASA's highest honor, recognizing individuals who have demonstrated the highest level of contribution and leadership within the soybean family and industry throughout their lifetime. For nearly 50 years, Johannes has focused on broadening relationships to strengthen the soybean industry. He was recognized for his commitment and skills as an educator and organizer, particularly around biodiesel, that have made the U.S. soybean industry stronger for all soybean farmers. Photo Credit: Joe Murphy



AgDay Anchor and Executive Producer Clinton Griffiths moderates a panel discussion on conservation issues during a luncheon gathering of ASA conservation leaders, award winners, NRCS leaders and Conservation Legacy Award sponsors during Commodity Classic. From left: Panelists included ASA Director Wayne Fredericks, National Conservation Legacy Award Winner Nancy Kavazanjian and Bev Paul, staff lead on conservation policy issues in ASA's Washington office. Photo Credit: Steve Dolan



ASA President Bill Gordon (MN), left, presents ASA's Distinguished Leadership Award to ASA Past President Steve Wellman (NE), who continues to serve as a leader in ag as director of the Nebraska Department of Agriculture. Photo Credit: Joe Murphy



From left: ASA Vice President Kevin Scott (SD) opens the 2020 voting delegates session in San Antonio, alongside ASA Chairman Davie Stephens (KY) and ASA President Bill Gordon (MN). Photo Credit: Steve Dolan



ASA Past President Neal Bredehoeft (MO), left, accepts the Outstanding State Volunteer Award from ASA President Bill Gordon (MN), right, at ASA's annual banquet. Bredehoeft was an early advocate for biodiesel in Missouri and has served the Missouri Soybean Association in many leadership and advocacy roles. Photo Credit: Joe Murphy

# ASA celebrates 100th anniversary



ASA super-sized its Commodity Classic booth in 2020 to incorporate elements of ASA history, policy information and soyfoods. Photo Credit: Steve Dolan

## ASA Celebrates 100 Years During Commodity Classic

The American Soybean Association (ASA) is celebrating its “First Soy Century” throughout 2020. To celebrate 100 years of advocating for soybean growers, ASA’s exhibit booth at Commodity Classic featured historical photos, artifacts and soy treats; interviews with past leaders; and a fun-filled annual banquet focused on the 100th anniversary.



ASA staff challenge attendees to test their knowledge on a variety of soybean-related topics with rounds of trivia in the ASA booth on the trade show floor. Photo Credit: Steve Dolan



In the ASA booth, Charles and Mary Jo Hamon from Valley Falls, Kansas take a walk down memory lane, viewing a century-long timeline of the association's milestones and relics including magazines, buttons, ties, promotional materials and more used over the past 100 years. Photo Credit: Steve Dolan



United Soybean Board (USB) Chair Jim Carroll (AR), right, presents ASA President Bill Gordon (MN), left, with a proclamation of gratitude from USB for ASA's 100 years of dedication and service to soybean farmers and the soy industry. Photo Credit: Joe Murphy



## ASA continues its 'Soy Century' celebration throughout 2020 with:

- A policy-focused event on July 8, 2020 at the National Museum of American History in Washington, D.C.
- A celebration on Aug. 4, 2020 on the Fouts family's Soyland farm in Camden, Indiana, the site of ASA's birth in 1920. Also, dedication of a historical marker.
- A forward-looking symposium entitled "The Next Soy Century" to be held on the campus of Purdue University on Aug. 5, 2020, featuring an impressive line-up of thought leaders and industry experts.

Visit [ASA100Years.com](http://ASA100Years.com) for more 100th anniversary information or to order commemorative anniversary gear. Also, make sure to follow ASA on social media for #SoyCenturyFacts throughout the year.



@ASA\_Soybeans



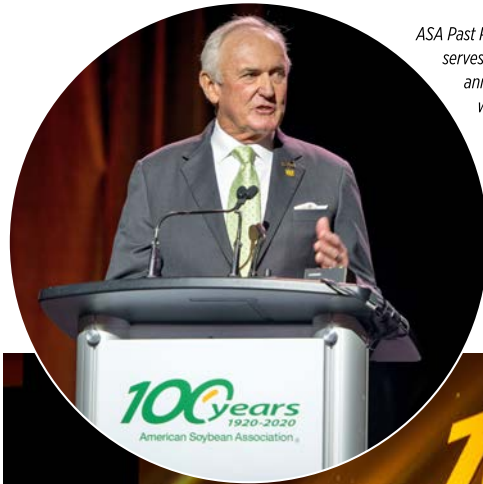
/AmericanSoybeanAssociation



@AmericanSoybeanAssociation



(From left) ASA Past Presidents Ray Gaesser (IA), James Lee Adams (GA) and Danny Murphy (MS) connect at the ASA booth to celebrate the association's 100th anniversary. Twenty-four former ASA presidents gathered in the booth to renew friendships and offer their unique perspectives as leaders who helped shape the industry. Photo Credit: Steve Dolan



ASA Past President John Long (SC) serves as a co-host at ASA's annual Awards Banquet, where the soybean industry celebrated the association's rich history and achievements of its past leaders. Photo Credit: Joe Murphy

**100 years**  
1920-2020  
American Soybean Association

ASA honored its leaders of the past during the annual Awards Banquet at Commodity Classic in San Antonio. On stage, leaders spanning from the early 1980s through the present represented Kansas, Missouri, Iowa, South Carolina, Georgia, Illinois, Minnesota, Ohio, Mississippi, Nebraska, North Dakota, Tennessee, Indiana, Texas, Delaware and Kentucky. The past leaders were recognized for their many contributions to shaping our policy positions and advocating to protect soy interests through the years. Photo Credit: Joe Murphy






[unitedsoybean.org](http://unitedsoybean.org)

# KEEPING THE FUTURE OF SOYBEANS BRIGHT

*From researching new uses for soybeans to identifying new markets for U.S. soy, the soy checkoff is working behind the scenes to create new opportunities and increase profits for soybean farmers. We're looking inside the bean, beyond the bushel and around the world to keep preference for U.S. soy strong. And it's helping make a valuable impact for soybean farmers like you.*

*See more ways the soy checkoff is maximizing profit opportunities for soybean farmers at [unitedsoybean.org](http://unitedsoybean.org)*

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## EGYPT: U.S. Soy's New Jewel

An aquaculture industry on the cusp of exploding in the middle of a desert, coupled with poultry and dairy farms increasing in scale, are just two of the reasons why Egypt is emerging as the fastest-growing buyer of U.S. soybeans.

Like many countries in the Middle East and North Africa region, Egypt has seen an increase in population with an uptick in people who want to add more protein to their diet. To meet that need, Egypt's animal agriculture sector has expanded, creating a domino effect in growing Egypt's crush industry. Development and expansion have led to increased U.S. soy imports into the area. Egypt imported an average of 1 million metric tons over the past five years, yet jumped to a whopping 2.4 million metric tons (90 million bushels) last year.

"We've seen major growth in the crush industry in Egypt," said Brent Babb, U.S. Soybean Export Council (USSEC) regional director for the Middle East and North Africa region. "As the animal ag sector continues to grow, their demand for U.S. soy is going to continue to increase as well."

U.S. soy is optimistic that this growth will continue, thanks in part to intensive pond raceway systems (IPRS), a new aquaculture system developed by the soy checkoff and USSEC. Demonstrations of IPRS are currently underway in Egypt. As IPRS adoption rates increase, Egypt's aquaculture sector, and in turn soy-based aquaculture feeds, will expand.

The dairy industry in the region



is also expected to see growth. USSEC sees increasing opportunity to step in, providing information and support to dairy producers and nutritionists.

"The dairy sector in this region is so hungry for knowledge, information and connections to help them with their business especially as they look for creative ways to increase energy in their rations," said John Motter, soybean farmer from Ohio and former USB chair. "It's exciting that U.S. soybean farmers and our farm-led organizations can play a role in fulfilling that need."

Across all species in Egypt, USSEC works specifically on nutrition and biosecurity. One example is an exchange program that brings representatives from Egypt's animal ag sector for training at the University of Florida, then the experts involved in the training travel to Egypt for onsite, one-on-one meetings to work on

specific issues.

Feed mills in the Middle East are mostly family owned, so personal relationships are critical. USSEC offers access to resources and connections to experts who can address specific issues the feed companies may face.

While Egypt's soybean-consuming animals are growing in number, this country has been a trade center since the ancient pyramids and pharaohs. Located on the Mediterranean Sea and home to the Nile River and Suez Canal, Egypt's location is rapidly becoming a strategic asset for the distribution of U.S. soybeans and other agricultural products.

With many industries, the pattern around the world is a rising concern with sustainable growing practices. USSEC can use U.S. soy's long history of sustainability as a service and differentiator in this expanding market.

*Source: United Soybean Board*

## Expanding Markets in Indonesia

The U.S. soybean industry maintains a market share of more than 95% of all soybean imports to Indonesia. However, the soy checkoff still saw an opportunity for growth.

Often consumed as tempe, soy is a traditional and staple protein for the island of Java, but the same can't be said for other Indonesian islands. To help remedy this situation and increase U.S. soybean exports to the island nation, the soy checkoff partnered with the U.S. Soybean Export Council and a local company, Rumah Tempe, to build a production facility on the island of Sulawesi. Cultural distinctions and limited access mean the people of Sulawesi do not consume as much tempe as their Javanese neighbors.

Before Rumah Tempe, the Sulawesi people had no way to process whole soybeans into the traditional fermented soyfood, which naturally restricted tempe consumption compared to neighboring islands. With help from the soy checkoff, Rumah Tempe built a processing facility and helped Sulawesi people develop the skills to process soybeans into tempe.

Rumah Tempe is a checkoff collaboration with the Forum Komunikasi Doa Bangsa (FKDB), an Indonesian cooperative nonprofit. Founded in 2005, FKDB's highest priority is developing and growing local tempe production. With the completion of the tempe processing facility on Sulawesi, the checkoff's multiyear investment has accomplished its task of establishing a pilot plant to increase the consumption of U.S. soy and help create new markets for U.S. soybean farmers.



Increasing the production and consumption of tempe in Sulawesi offers greater export opportunities for U.S. soybean farmers in new markets in Indonesia. April Hemmes, checkoff farmer-leader from Hampton, Iowa, says increasing the demand for soybeans throughout Asia is a significant win for U.S. soybean farmers.

"It's an exciting opportunity because this project will lead to new businesses in the region and a transfer of technical knowledge, along with higher quality and more desirable tempe products for international consumers," Hemmes said. "All of those factors will drive more imports of U.S. soy."

Successful development of the Rumah Tempe pilot production facility will create a higher-value product and can serve as a template to increase the tempe consumption across Asia. Launching this checkoff initiative in Sulawesi gives consumers on the island a

new option—an easily accessible, higher-quality product.

The soy checkoff is dedicated to producing the best possible crop for end users and their customers who depend on soy for the nutritional value it provides each day. Ensuring soy is a readily available food source through products like tempe helps increase demand of soy globally. The creation of this facility in Sulawesi is just one way the checkoff is investing in projects that will benefit U.S. soy's consumers and U.S. soybean farmers for years to come.

The future of soy in Indonesia is bright, said Hemmes.

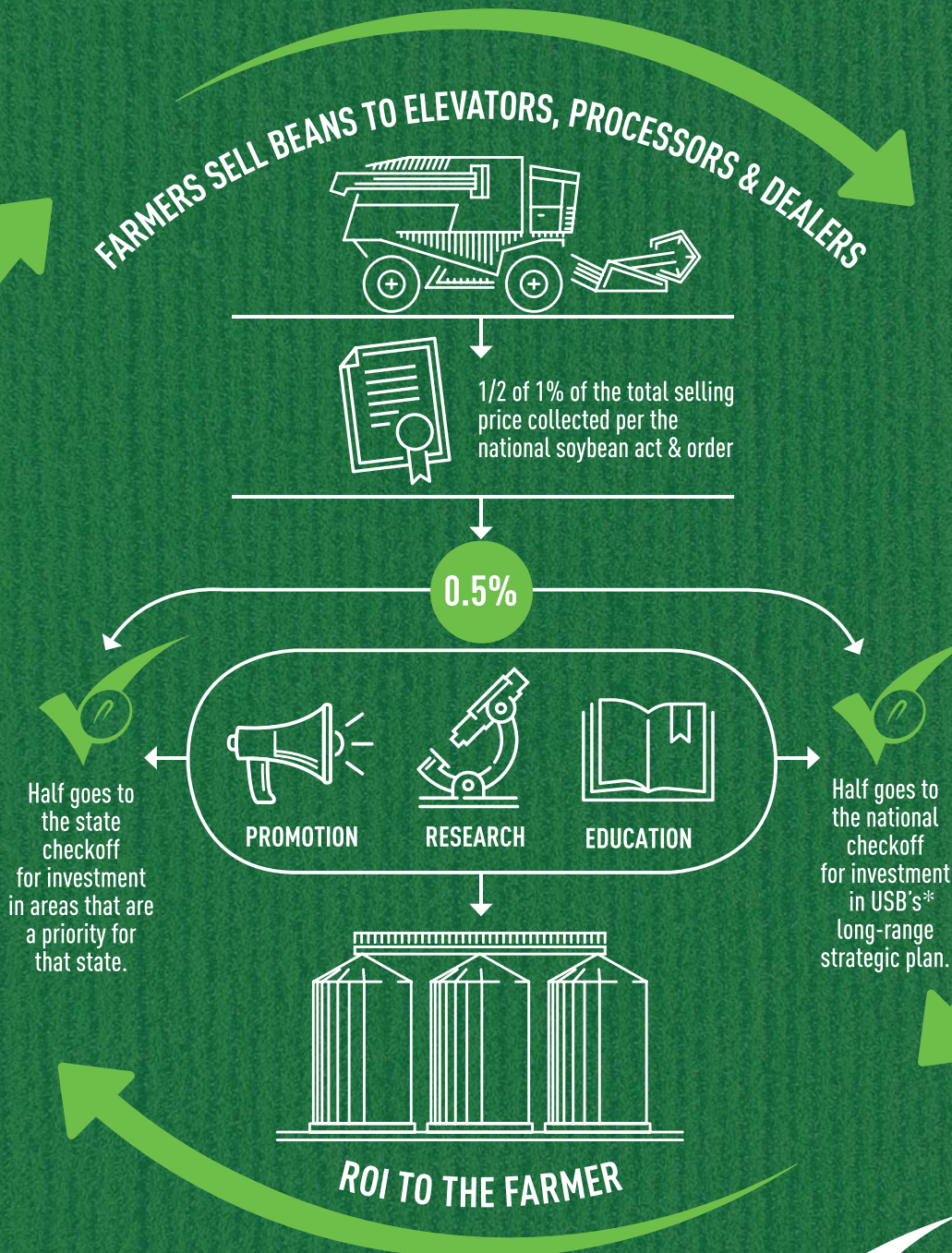
"This project will create new markets for U.S. soybeans beyond Sulawesi, Java and Indonesia," she added. "If we can increase the consumption of tempe in Sulawesi, imagine what we can do with this pilot program in other markets globally."

*Source: United Soybean Board*



# FULL-CIRCLE RETURN

HERE'S HOW THE SOY CHECKOFF WORKS. The national soy checkoff was created as part of the 1990 Farm Bill. The Act & Order that created the soy checkoff requires that all soybean farmers pay into the soy checkoff at the first point of purchase. These funds are then used for promotion, research and education at both the state and national level.



\* Led by 73 volunteer soybean farmers, the United Soybean Board (USB) invests and leverages soy checkoff dollars to MAXIMIZE PROFIT OPPORTUNITIES for all U.S. soybean farmers.

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# INDUSTRY

## perspective

By Jim Sutter

### Trade Clouds Starting to Part, Though Some Uncertainties Remain for U.S. Soy



As we move into the 2020 growing season, two long-standing truths remain for U.S. Soy: The outlook for the industry remains strong, and the industry will continue to face challenges and uncertainty along the way.

In 2019, we faced an extremely difficult combination of trade wars, adverse weather and Asian swine flu. This year, we are seeing meaningful progress in trade negotiations with China and reasons for optimism that retaliatory tariffs may be less of a concern for the U.S. Soy industry in 2020. But, at the same time, COVID-19, commonly called coronavirus, has developed into a new variable that could impact U.S. Soy exports, along with a wide range of other industries across the globe.

The specifics change every year, but U.S. farmers always deal with adversity in some form. Despite that, they always persevere and deliver for our trade partners across the globe. In my daily discussions with U.S. farmers and industry leaders, I have every reason to believe that will continue to be the case in 2020. And in my travels to China and throughout the world this year and last, I've seen more than enough interest, enthusiasm and action to confidently say that demand for U.S. Soy remains strong and will continue to grow.

On the trade front, the Phase One trade agreement between the United States and China that was signed earlier this year offers significant potential to provide

relief for U.S. farmers who have battled through more than a year of market uncertainty. U.S. soybeans are included in the agreement as part of, "food and agricultural products." As part of the agreement, importers can apply for tariff-free waivers to import U.S. agricultural products. Understand that these waivers are already being granted and we expect that sales to China will pick up later this year. It's important to note that we are unlikely to see immediate movement on sales, as China traditionally purchased more soy from Brazil in the spring and the U.S. in the fall, matching up with regional growing seasons.

Our relationship with China is very strong. The Phase One agreement has the potential to be



beneficial for both U.S. Soy and our partners in China: U.S. Soy has been investing in China for nearly 40 years to help livestock producers, feed manufacturers, aquaculture producers, and others to improve their efficiencies. That work has been well received, and China's industries have grown. This deal can continue that track.

That said, additional work is needed to complete a full trade agreement that will allow U.S. farmers to provide their customers with high-quality product that is free from retaliatory tariffs in the years ahead. We will continue to monitor trade developments closely and are hopeful this year's positive trends will continue.

Serious questions also remain about the impact of coronavirus. As it relates to U.S. Soy, these questions were limited a few short weeks ago to whether the virus would limit China's ability to purchase the volumes of soy agreed to in the Phase One agreement. Today, these questions are much broader and global in scope, and they of course go far beyond U.S. Soy. As a global community, our first priorities must be to contain the virus as much as possible and to protect the health of people around the world.

In this time of hourly developments and updates, it is impossible to predict the impact of the virus on global markets. That is true for agriculture just as it is for travel, manufacturing, consumer goods and virtually every other industry on the planet.

What we do know is this: People around the world need high-quality protein for food and

feed. They need more sustainable solutions for products ranging from tires and asphalt to carpet and plywood. These demands will only grow, and U.S. Soy is positioned to deliver the highest levels of quality, sustainable growing practices and ongoing innovation to help the world

JIM SUTTER



*Jim Sutter, CEO, U.S. Soybean Export Council*

overcome adversity and prosper. Even with swirling uncertainties, these facts bolster my confidence for a strong future for U.S. Soy.

Current challenges also demonstrate the importance for U.S. Soy to diversify and build relationships in markets across the globe. The U.S. Soybean Export Council (USSEC) has made great progress in these efforts in recent years, and it will continue to be a focus in 2020. We will stay fervent in our mission to identify and build strong relationships with customers worldwide.

We actively and strategically work to invest in growing markets where there is significant potential for U.S. Soy. This involves identifying factors like growing populations,

improving economic conditions, addressing protein deficiency among populations and meeting demands for plant-based oils.

In recent years, we've seen growth in the European Union, Middle East/North Africa and Southeast Asia. We are also working hard in emerging markets such as India, Bangladesh, Pakistan, Nigeria, Algeria and Myanmar.

U.S. farmers are well positioned to reliably serve these markets, even as we see renewed exports to China. We believe one of the smartest ways to drive enhanced value for U.S. Soy is to have a relentless focus on customers by ensuring they understand the "U.S. Soy Advantage." This is made up of the superior nutritional bundle delivered by a higher concentration of essential amino acids and digestible energy, the verified proof that soybeans are produced sustainably and the high oleic soybean oil that's heart healthy. Only the U.S. can supply all that.

Farmers are accustomed to overcoming challenges, and 2020 will undoubtedly bring them—some familiar and some new. But with their unparalleled expertise and resilience, they will continue to do their job of providing a sustainable and high-quality product. Those of us at USSEC will continue to do our jobs, as well, working to provide more stability by building demand and expanding global market access for U.S. Soy products. With our ongoing, collaborative efforts, the outlook for U.S. Soy is indeed strong.



## A House in Order: Advocacy Emergencies are No Match for Minnesota Leader

*Jamie Beyer, left, talks with Minnesota Gov. Tim Walz, right, regarding policies impacting local growers. Beyer jumped into ag advocacy in 2015 after completing the ASA DuPont Young Leader program. Photo Credit: Minnesota Soybean Growers Association*

A messy house is the sign of a successful soybean advocate. At least that is what Jamie Beyer jokingly says, even though her farmer husband, Rodd, denies their house is messy.

"I am able to keep track of all the irons in the fire because my great husband is supportive of what I do. We have three girls who are old enough to make ramen noodles in a pinch, but we make sure we have all the critical times on the calendar covered between the two of us," said Jamie Beyer, who is current president of the Minnesota Soybean Growers Association (MSGA).

"You have to be flexible and honest about what you can commit to, and we have learned to plug the leaks in the system," she said. "Having both of our mothers here helps with the girls, also."

Beyer is not your grandmother's definition of "farm wife." She works for the local watershed

district. She and Rodd live in town. And she did not grow up on a farm.

The Beyer family lives in Wheaton, Minnesota, and farms in Traverse County along the North Dakota border. The 3,500-acre operation includes soybeans, corn, alfalfa, sugar beets and grapes. They also employ two full-time workers. Rodd's mother still lives on the farm.

"My parents are a plumber and a substitute teacher," she said. "I have gotten more involved with the farm I married into, but my full-time job lets me help other farmers deal with challenges to their operations. I kind of stepped into my advocacy role more recently."

In 2015, Beyer said former Gov. Mark Dayton's Minnesota Buffer Law caught her attention. Calling it outrageous, she and Rodd were fired up and desperate to preserve their "right to farm" for their children. At the time, she felt Minnesota farmers were

collectively apathetic about a policy that proposed restrictive rules for buffer strips.

"After it passed, we wanted to get involved with advocacy on future issues," she added.

The couple participated in what was then the ASA DuPont Young Leader Program beginning in the fall of 2015. Beyer said she discovered "with enthusiasm" the separate existence of the Minnesota Soybean Growers Association from the commodity checkoff program.

"Since I didn't come from a farm, Young Leaders taught me how I could advocate and help with the farm. I liked that we could both participate in the program together," she said.

Beyer added that commodity boards in general lack enough female leadership. Young Leaders provides a good fit for more women to build skills to communicate about agriculture, learn how policy

affects decisions and how to make Hill visits count.

“It lays the groundwork for other leadership training,” she said. “You meet people from all across the nation. It really is no different than networking with a corporate job.”

Bitten by the advocacy bug, Beyer then participated in ASA’s Syngenta Leadership At Its Best Program and the Bayer Crop Science Ag Communications Team. She supplemented what she was able to glean at the national level by participating in various trainings at the state level.

“Advocacy training pays off,” she said.

In 2018, Minnesota Gov. Tim Walz introduced a penalty order on buffers that Beyer said would have resulted in thousands of dollars of fines for farmers.

“As soon as I heard about it, I contacted the MSGA office. We issued a press release, and the proposal was repealed within an hour,” she said, noting the press release later won a national media award. “We were able to testify about the penalty and the ridiculousness of it because we had built up our visibility. We were prepared to get the spotlight.”

She added that farmers were able to see her testimony in St. Paul because she used Facebook Live to stream the presentation. The speakers before her had done the same, so Beyer was able to watch their presentation on the way to the capitol and adjust her testimony accordingly.

“I didn’t delve into social media until after Young Leaders. The program really pushed me to use those tools,” she said. “It’s good that I use social media, because we live in the least populated county in the state with only 3,500 people. I don’t have an opportunity to just run into people. Social media levels the playing field and helps our farm reach more people.”



*Beyer says social media levels the playing field and helps her family’s farm reach more people. Photo Credit: Minnesota Soybean Growers Association*

With social media, Beyer acknowledges she needed to be open to learning. She took the time to put together a network of farmers she can quickly contact when the association wants to get a message out to legislators quickly and effectively. She uses Twitter both to watch what farmers are talking about and to add her thoughts to critical discussions. She tracks legislators, scientists and environmental extremist Tweets for background and research.

“I also listen to podcasts so I can connect with specific people and follow their ideas,” she said. “In fact, through one podcast I discovered a research report that many water quality experts didn’t know about and we were able to use the information. You never know what you may find.”

Beyer’s term as MSGA president ends in July, but she won’t be throwing in the advocacy towel

so soon. She plans to continue engaging with lawmakers in session and be involved with ASA.

“One thing I have learned, is that as one opportunity ends another seems to be waiting for me,” she said. “I enjoy going to all of the commodity and farm group meetings. They each have their own unique culture. I like the soybean groups because they are scrappy and lean.”

As she looks to the future, Beyer hopes more young people will get involved with advocacy. She encourages farm groups to offer more husband/wife opportunities and family friendly events.

“We need to be more inclusive. People today, especially parents with young children, seem to have less time to be parents with all of their daily demands. We should include family activities,” she said. And that messy house? Well, maybe it will just clean itself.



*Beyer’s concern over preserving the “right to farm” for her children led her down the path to becoming an active ag advocate and the current Minnesota Soybean Growers Association president. Pictured here are Jamie, with daughters (from left) Aspen, Josie and Paige, and her husband Rodd.*



## WISHH's Southeast Asia Trade Team Cultivates U.S. Soy Sales Leads



*WISHH's trade team joins the owners of a Cambodian fish hatchery and WISHH strategic partners, as they install Cambodia's first in-pond raceway aquaculture system. Rathada is also demonstrating the benefits of fish feed made with U.S. soybeans.*

U.S. soybean growers delivered key soy protein messages to current and potential customers that ASA's World Initiative for Soy in Human Health (WISHH) works in Cambodia and Myanmar, where protein demand is rapidly growing for aquaculture and livestock feeds as well as human foods.

U.S. Department of Agriculture (USDA) funds supported the Jan. 12-20 travel for the 13 soybean leaders to have face-to-face discussions with WISHH's many contacts in the human food and livestock feed industries. U.S. Ambassador W. Patrick Murphy addressed the U.S. and Cambodian business leaders during WISHH's 2020 U.S.-Cambodia Soy Trading Conference.

"The most important part of the trip was to show potential buyers and users of soybeans that we would like to be their supplier, and we have a product to meet their specifications," said WISHH Treasurer Jim Wilson, a Michigan soybean grower on the team.

WISHH recruited seven companies that export U.S. soy or equipment to join the trade team. Importantly, WISHH continues to collaborate with U.S. soy exporters as well as the

current and prospective customers. A follow-up survey shows six of seven U.S. exporters on the WISHH trade team report the trip yielded new sales leads.

The trade team also celebrated a milestone with a WISHH strategic partner by joining a ribbon cutting for Cambodia's first in-pond raceway aquaculture system, an important innovation for the sustainable increase of fish production in the region. The Missouri Soybean Merchandising Council (MSMC) supported WISHH technical assistance in the planning and construction of the raceway aquaculture system, which is a channel for continuous flow of water to grow fish at the hatchery. The family owned Rathada Farms Hatchery breeds tilapia and catfish. Rathada raises the fish through the "seed" and fry stages before selling fingerlings to fish producers in the region.

"Our Missouri farmers' soybean checkoff dollars were vital to WISHH's work with Rathada on the new raceway," said David Lueck, a WISHH program committee member and a past MSMC chairman who served on its board for more than a decade. "Furthermore, WISHH leveraged our investment by

integrating Rathada's strengthened fish-production capacity into WISHH's USDA-funded Commercialization of Aquaculture for Sustainable Trade (CAST)-Cambodia project."

In addition to Wilson and Lueck, WISHH Program Committee members on the trade team included ASA Director and WISHH Chair Daryl Cates (IL), ASA Director and WISHH Vice Chair Gerry Hayden (KY), WISHH Treasurer Jim Wilson (MI), Bob Haselwood (KS), ASA Director Morey Hill (IA), Bob Suver (OH) and United Soybean Board (USB) Ex-Officio Member David Williams (MI). ASA Director David Droste (IL), USB Director Mike McCranie and South Dakota Research and Promotion Council Director Bob Metz joined.

While in Southeast Asia, the WISHH trade team also traveled to Myanmar. ASA and U.S. Soybean Export Council (USSEC) Director Stan Born, as well as USB and USSEC Director Doug Winter, both of Illinois, were part of the team in Myanmar. WISHH is leading USDA-funded activities to grow Myanmar's human food market, and USSEC is active in the animal feed and aquaculture sectors.

# #SOY SOCIAL

## Social Media is a Valuable Advocacy Tool

Social media as an advocacy tool has exponentially increased in the past several years, as it helps the public reach members of Congress to hear their views and opinions on how legislation or regulation impacts their lives. ASA continues to use social media alongside its in-person activities on Capitol Hill to advocate and educate the Administration and Congress on the importance of soybean policy issues for growers across the country. To the right are some of our top social media posts highlighting the advocacy being done in-person and online:

### Get involved with ASA on social using these hashtags:

- #USSoy
- #AgPolicy
- #SoyLeaders
- #RebuildRural
- #DevelopingDemand
- #ASAWISHH
- #Biodiesel
- #TradenotTariffs
- #FarmerFriday

### 5 to Follow:

- @Biodiesel\_Media
- @USSOY
- @USDAForeignAg
- @FarmersForTrade
- @UnitedSoybean



*When using social media as an advocacy tool, visibility in D.C. and on Capitol Hill is essential but sometimes not feasible with growers' responsibilities back home. ASA Director Dave Walton, IA, was able to participate in a press conference on renewable fuels with 21 media outlets from his home in Iowa between cattle chores and other projects. Tweets like this are then able to be shared by multiple accounts to raise awareness of the work being done on behalf of soy policy behind the scenes.*

*The outreach of social media is extremely helpful when dispersing policy information that might not make news outlets but is extremely important for soy growers. Here, ASA uses Twitter to inform growers that they are working with the National Biodiesel Board to request funding from the Administration for the Biodiesel Fuel Education Program.*



*The first quarter of 2020 packed the schedules of ASA's Governing Committee while they were in Washington, D.C. Here, ASA Vice President Kevin Scott (SD), Chairman Davie Stephen (KY), and Executive Director of Government Affairs Christy Seyfert meet with USDA's general counsel, Stephen Vaden, to advocate for ag policy.*

### Follow the American Soybean Association on:



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/AmericanSoybeanAssoc

# SOY FORWARD

By Chris Crawford



## Looking Ahead at Farm Economy in 2020

**A**s we head into the spring of 2020, we asked economists what they see as the major issues affecting the farm economy and specifically soybeans.

According to **Patrick Westhoff, Ph.D.**, director of the Food and Agricultural Policy Research Institute at the University of Missouri, Columbia, the net farm income 2020 outlook isn't terribly different from previous U.S. Department of Agriculture projections.

"There looks to be a drop in net cash income, as 2019 was a bad year in soybean production," he said. "The cash receipts will be lower for some crops including soybeans for the 2020 calendar year."

The USDA projects \$109.6 billion for net cash farm income

this year, a 9% decrease from 2019. However, USDA projects \$96.7 billion for net farm income this year, a 3.3% increase from last year.

Soybean receipts in 2020 are expected to decrease 2.5%, as lower quantities outweigh positive price effects, the USDA said.

"Because of the weather issues last year, fewer soybeans were planted," Westhoff said. "So, the question is, 'How much soy will be planted this year?' It shouldn't be much different than the 2019 intended planted soybeans, around 85 million acres."

"If there's better weather this year than 2019, we should have a normal production year," he continued.

Westhoff said it also should be noted that Brazil looks to have a good crop this year. "So even if we have an increase in exports to China with the Phase One deal, there still may not be enough global demand to increase overall demand for U.S. soybean exports. And coronavirus 2019 will be a big wild card still."

**Patrick WESTHOFF**



*Patrick Westhoff, director of the Food and Agricultural Policy Research Institute, University of Missouri, Columbia*



ChadHART



*Chad Hart, associate professor of economics, Iowa State University*

**Chad Hart, Ph.D.**, associate professor of economics at Iowa State University in Ames, Iowa, said this is an interesting time for a farm economy outlook.

“The general agriculture economy has been down for the past five to six years,” he said. “And we’ve been seeing tremendous productivity that’s strong enough to overwhelm demand. Demand is good, but we’ve produced more than enough to drop prices.”

Now, when you add coronavirus 2019 into this mix, Hart said markets have languished and he anticipates we will wrestle with the pandemic for at least the first half of the year.

“It hits the ag markets with travel stoppages and quarantines—stopping the movement of people and goods,” he said. “This is a bad thing, as we export about half of our soybeans. This is a direct effect.”

An indirect effect has been the slowdown in international shipping, as a global economy slowdown impacts domestic demand.

“So, there is a two-barrel hit here with a major disease outbreak,” Hart said.

The trade war with China led to 400 million bushels of soybeans being cut from international demand. But the U.S.-China Phase One trade deal, signed Jan. 15, will cut some U.S. tariffs on Chinese goods in exchange for China’s pledge to purchase more American farm, energy and manufactured goods, among other things.

“We’ve seen China reemerge in the U.S. soybean market,” Hart said, adding that compared to early March of last year, China has purchased roughly 100 million more bushels of soybeans so far. “It’s still not back to before the trade fight, but a lot closer today than it was last year.”

Unfortunately, Hart said some of this progress will be suppressed by the coronavirus 2019 pandemic, which he described as dragging the economy like a parachute on a funny car.

Regionally, in the Eastern Corn Belt, **James Mintert, Ph.D.**, director of the Center of Commercial Agriculture at Purdue University in West Lafayette, Ind., said a portion of Indiana was affected by prevented planting from the wet weather last season.

“This season has also been relatively wet so far, with rivers already full, and farmers are concerned about spring rainfall patterns and the possibility of a delayed planting season again,” he said.

JamesMINTERT



*James Mintert, director of the Center for Commercial Agriculture, Purdue University*

The wet weather last season led to another issue—some corn and soybeans went into storage at higher than normal moisture levels, Mintert said.

“People were scrambling in the later stages of harvest, and some of the crop was stored a bit wet, with the idea that it would come out of storage early,” he said. “So, Purdue has told farmers to be aggressive about checking their storage bins and looking for possible problems.”

In addition to the economic loss associated with crop damage or spoilage, there’s a safety issue. If corn or soybeans have crusted within a bin, growers need to be very careful about breaking up that crust to unload the bin, which Mintert said becomes a serious safety issue as it can lead to entrapment and possible suffocation.

Additionally, he said it’s especially important this season that soybean growers manage risk. At this point it’s not clear how long the impact of coronavirus

(continued on page 30)

# SOY FORWARD



will affect markets. Moreover, the dramatic reduction in the size of the Chinese hog herd as a result of African swine fever is also reducing world demand for soybeans and soybean meal.

“It’s always important to monitor cash flow projections as you move through the course of the year,” Mintert said. “When you have a situation that is volatile, like this year, it becomes even more important as it can provide you the information you need to make adjustments in your operation as the year progresses.”

FRAYNE OLSON



*Frayne Olson, crops economist/marketing specialist, North Dakota State University*

**Frayne Olson, Ph.D.**, crops economist/marketing specialist at North Dakota State University in Fargo, N.D., said the first issue needing to be addressed in North Dakota is cleaning up the 2019 corn harvest, with 40% still left in the field. “Farmers continue to try to get

in the fields between snows,” he said. “Spring weather will impact getting these crops cleaned up. But in my crystal ball, with a normal spring—not good or bad—a typical spring, I think most of the corn from last year will get cleaned up and harvested.”

Like Mintert, Olson said because of a wet harvest last fall, most soybeans went into bins at high moisture and drying them is a slow process.

“Farmers need to pay attention to their stored crop,” he said. “A bin of soybeans can turn fast. Monitor bins and make sure your soybeans stay in good quality.”

From a marketing standpoint, Olson said farmers are being pressured to sell their old crop early in the season but can be more patient for pricing the 2020 crop.

“I suggest being cautious with forward pricing 2020 soybeans early this season,” he said. “There will be price volatility in the spring, but also during the summer.”

Comparing early March with the same time last year, Olson said there are many fewer soybeans, as there were more left in storage during the trade war with China.

“The export pace wasn’t strong enough to support everyone’s sales,” he said. “Last year was a record year for on-farm storage.”

Finally, **Todd Hubbs, Ph.D.**, assistant professor of agricultural commodity markets at the

TODD HUBBS



*Todd Hubbs, assistant professor of agricultural commodity markets, University of Illinois, Urbana*

University of Illinois in Urbana, said Brazil’s huge crop of soybeans this season seems to keep getting bigger and will affect global demand for U.S. product.

“Then it could be late summer before China starts buying more soybeans, if we can maintain that relationship,” he said. “If there is now a vaccine for African swine fever, China will be rebuilding its hog population quickly, which would be a big boon for soybeans.”

As for the farm relief payments made as part of the Market Facilitation Program, Hubbs said it’s anyone’s guess if a third round will occur in 2020.

“If it does happen, I’d be curious to see how they would structure the payments for soybeans—if it would be more like the 2018 model or the 2019 version,” he said. “I’d be slightly surprised if they happen again.”





**1920** (L to R) Brothers and pioneer soybean growers Taylor, Finis and Noah Fouts on their Soyland farms in Camden, Ind., on Sept. 3, 1920, at the “First Corn Belt Soybean Field Day” where ASA was founded.

**2020** (L to R) John Heisdorffer, immediate past ASA chairman, Bill Gordon, ASA president and Davie Stephens, ASA chairman

# FROM SOYLAND TO CAPITOL HILL

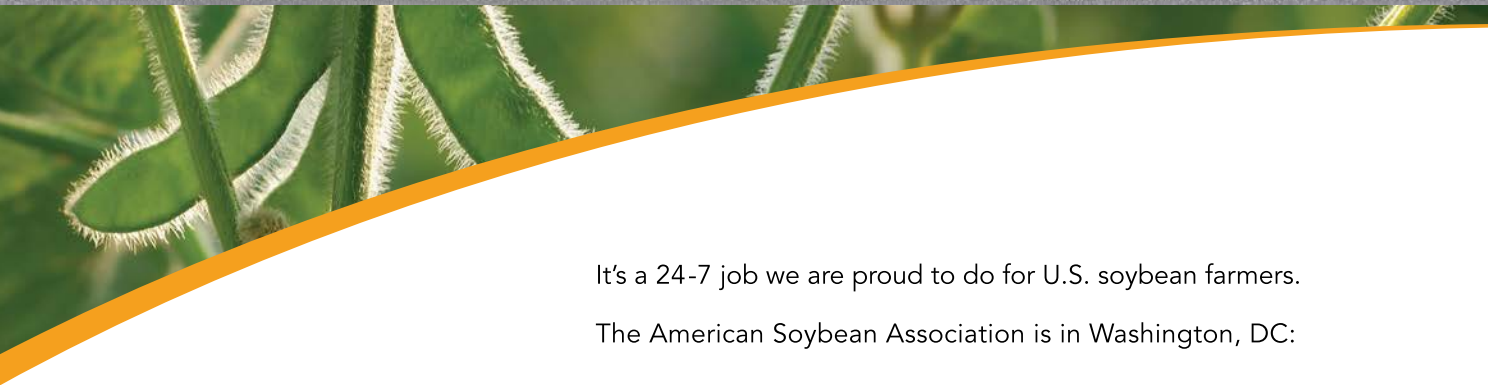
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