

AMERICAN WINTER 2015
soybean
Vol.2, No.3 People. Policy. Profitability.

A PUBLICATION OF THE AMERICAN SOYBEAN ASSOCIATION

China's voracious appetite for soybeans

SOY HORIZONS
How ASA helped open U.S.
soy export opportunities
in Asia

SUSTAINABILITY
Iowa farmer educates foreign visitors
about his sustainable practices

SOY FUTURES
Soybean farmer Kate Danner
is making her own way

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The American Soybean Association (ASA) represents all U.S. soybean farmers on domestic and international issues of importance to the soybean industry. ASA's advocacy, education and leadership development efforts are made possible through voluntary membership in ASA by farmers in states where soybeans are grown.




If you believe, belong.





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BY THE NUMBERS



Soy Protein Meal Replacement Found to Help Control Blood Sugar for Those with Pre-diabetes



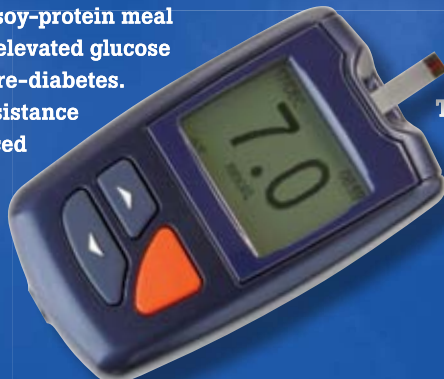
More than 86 million Americans have pre-diabetes, defined as glucose levels that are higher than normal, and are at increased risk for developing type 2 diabetes and cardiovascular disease. A new study out of Germany has shown a high-soy-protein meal replacement is a highly effective tool for rapidly stabilizing and reducing elevated glucose and insulin levels.

The clinical trial split 42 otherwise-healthy obese men and women into either a six-week lifestyle intervention group to receive dietary counseling on a low-fat, low-calorie diet and increasing physical activity, or a meal replacement group. Participants in the meal replacement group replaced two daily meals with a low-calorie, high-soy-protein drink with a low glycemic index. Body weight and glucose control were measured at baseline and at the end of the study.

A significant decrease in body weight, Body Mass Index (BMI) and insulin resistance was demonstrated in both intervention groups, with a greater reduction seen in the meal replacement group. In both groups, glucose concentrations decreased significantly, and glucose levels returned to the normal range. The findings strongly indicate that a low-calorie, high-soy-protein meal replacement effectively stabilize elevated glucose and insulin levels in those with pre-diabetes.

The alterations in BMI, insulin resistance were significantly more pronounced following the meal replacement regimen versus the lifestyle intervention.

Source: Soyfoods Association of North America



20 percent

The percentage of America's population that live in rural areas. (USDA)

99,171

The number of farms in Missouri, which has the second highest number of farms in the nation. (USDA)

50 percent

The percentage of increase in soybean yields since 1980. (Soyfoods Association of North America)

65 percent

The percentage by which U.S. farmers have reduced the amount of energy use per bushel of soybeans grown in the last 25 years. (Soyfoods Association of North America)

1 in 9

The number of U.S. bridges rated as structurally deficient. (United Soybean Board)

478

The number of miles a train can move one ton of freight on one gallon of fuel. (United Soybean Board)

74 cents

The amount biodiesel helped raise the price of a bushel of soybeans since 2006. (United Soybean Board)

37 percent

The amount pesticide use has decreased with the use of biotechnology. (Foodinsight.org)

SoyFutures

Kate Danner is Making Her Own Way

By **Kenna Rathai**

Kate Danner doesn't fit the mold of a typical soybean grower but she's gaining ground

Before she became the fifth generation operating her family's farm in western Illinois, Kate (Longley) Danner started off playing volleyball at a local community college that just happened to have an ag program. Every weekend she asked her dad more questions that ratcheted up her interest. She ended up working for him for a full cropping season after she earned her associate's degree.

"I didn't know if I would enjoy farming, but I discovered I loved it," Danner said, "And my dad and I work well together. He's nearing retirement; I'm ready to move ahead. What I lack in experience, he's got more than 40 years in. We complement each other."

After earning a bachelor's degree from Iowa State University with a triple major in agronomy, farm management and environmental studies, Danner moved back to farm full-time.

"I'm proud that I can do all the things that a 'typical' farmer can," she said. "I run the machinery, I

understand agronomics, I make marketing decisions." She is involved in every part of their 1,500-acre row crop operation and is gaining more responsibilities each year.

As a young woman in a typically male world, she runs across some unique challenges. "I think I'm held to a higher standard," she explained. "I'm under more scrutiny, so I'm more aware of my actions."

Danner's husband, Jason, manages an excavation business but helps on the farm during busy times. She admits being his boss can be a delicate situation. "He's not just free labor, although that's a little joke

Photo Courtesy Longley Farms, Inc.



Kate Danner and her father, John Longley, operate Longley Farms near Aledo, Ill.



Photo Courtesy Longley Farms, Inc.

“I didn’t know if I would enjoy farming, but I discovered I loved it.”

– Kate Danner

between us. We are equal partners in life, but I feel like I have to be more sensitive to this and voice it more to other people just because I’m a woman.”

Getting involved with organizations to help influence other young women, motivate the industry and communicate with consumers is a passion of Danner’s, which is why she appreciated her role as 2013-

2014 Soy Ambassador for the Illinois Soybean Association. The program helps develop leadership qualities in growers for their future roles as industry leaders.

“I want to be a good example for the next generation of young female farmers, to help contribute to their success and to help educate consumers about our industry,” she said. ■

Although there has been a slight decline in the percent of female farm operators since 2007, the share of U.S. farms operated by women has nearly tripled during the past three decades, according to the U.S. Department of Agriculture’s Economic Research Service. And the most recent census proves this group is gaining ground – women control 7 percent of U.S. farmland and account for 3 percent of sales.

Do you know someone who represents the diverse, changing face of agriculture that should be featured in Soy Futures? If so, send an e-mail to jbright@soy.org.

HORIZONS



PASSPORT TO CHINA: How U.S. Soybean Growers Opened Export Opportunities in Asia

SOY

| By **Darcy Maulsby**

Photo Credit: Iowa Soybean Association

While nearly one out of every four rows of soybeans that U.S. farmers plant are exported to China, this is no overnight success story. In fact, this milestone was decades in the making.

“When farmers like my dad wanted to go after the Asian market, everyone thought they were crazy,” said Ron Heck, a soybean grower from Perry, Iowa, and a past president of the American Soybean Association (ASA). “It took several generations and a lot of effort to get where we are today.”

Heck’s father, Raymond, began farming after World War II when

the final transition from traditional horsepower to mechanical horsepower prompted more farmers to switch from oat production to a new crop—soybeans. While some growers used soybeans for cattle forage, others took a different approach. “Farmers like my dad not only wanted to learn how to grow soybeans, but how to market them, too,” said Heck, a fourth-generation farmer from central Iowa.

The concept of finding permanent, paying customers in foreign countries was a foreign concept for many U.S. soybean growers in the mid-twentieth century. “The overseas

markets weren't very big for many years," Heck said. "In fact, it wasn't until about 1964 that the United States started keeping track of U.S. soybean exports."

While there were no sophisticated methods to track grain exports in years past, progressive soybean growers began to understand the importance of export markets, especially in light of grain embargoes during the Nixon and Carter administrations. "U.S. farmers like my dad kept looking for opportunities, and they saw potential in Asia," Heck said.

Their foresight paid off after decades of hard work. While U.S. soybean exports to China were non-existent to miniscule through the 1980s, they started to gain traction by 1995-96. The trend accelerated in the last five years, soaring to nearly 27.6 million metric tons in 2013-14.

"I'm sure there were many lively discussions and difficult decisions in the early years about whether to invest dollars in China," said Jim Sutter, CEO of the U.S. Soybean Export Council (USSEC). "There were some leaders, however, who knew this could become something big. I applaud them for their vision and perseverance."

Partnering to produce results

China's need for ag imports grew out of a prolonged famine in the late 1950s and early 1960s that killed more than 30 million Chinese. To put the sheer magnitude of that catastrophe in perspective, it would be as if the entire population of California had perished.

China's leaders never forgot the legacy of the famine, especially as the nation's population exploded in subsequent years, Heck said. While U.S. farmers began to create markets overseas for their soybeans in the 1960s and

1970s, forming relationships with the Chinese wasn't easy. Opening the ASA's office in Beijing in 1982 marked the beginning of a new era, said Heck, whose father spent three weeks in China in 1983.

"It was still extremely hard to travel in China back then, due to all the government clearances you needed. Still, my dad and other soybean growers on that trip went where no American farmers had gone before."

The delegation toured Chinese farms and met with Chinese government officials. One of their main goals was to develop a germplasm exchange that would lead to higher-yielding soybeans. "That's what helped thaw relations between the United States and China," said Heck. "China needed our help in the form of soybean imports for greater food security."

Building opportunities without borders

To work successfully with the Chinese, one must first understand the Chinese culture. Consensus and government dominate in China, Heck said.

"Everything there is government-driven, from getting a job to having children," he added, "China is also a nation defined by permits, a communal mindset and a focus on maintaining social order."

Contracts are viewed differently in China than in the United States, Heck said. "To Americans, a contract means you have a deal and you're done. To the Chinese, a contract establishes permission to negotiate."

Understanding these intricacies didn't translate into immediate, tangible benefits. "U.S. growers had to invest in China for years before China imported any U.S. soybeans," Sutter noted.

Since the Chinese are accustomed to

negotiating with organizations rather than individuals, the ASA's Beijing office became a vital intermediary for U.S. soybean growers, Heck noted. In its early years, it functioned somewhat like a university Extension Service to help share education and knowledge with the Chinese.

As China's economy and its population grew, the nation's officials wanted China to become self-sufficient in corn and rice, although they were willing to import more soybeans. ASA leaders knew this could open doors for U.S. growers, especially as the Chinese improved their diets and wanted more protein.

"My dad always emphasized the importance of contract sanctity," said Heck, who noted that the U.S. State Department codified this concept during President Reagan's term in office. "We want buyers to know that when they make a contract with us, it's good."

Selling more soybeans in China also required the construction of new infrastructure during the 1980s and 1990s so Chinese buyers could receive and transport U.S. soybean imports. Through the years, building relationships has been just as important as building more port facilities and distribution systems within China. "Relationships are the key," said Heck, who made his first trip to China in the early 1990s and has hosted international trade delegations at his farm each year for the past 30 years. "Foreign buyers want to see our farms and meet our families."

When Chinese buyers visit his farm north of Perry, Heck points out the grain elevator in the tiny town of Beaver, which is located seven miles from his farm. He explains that after he delivers his soybeans to the elevator, the beans can be shipped to China within a month.

(continued on page 10)



Heck said it's important for U.S. farmers to continue participating in trade missions to China and continue to build trust and remain China's supplier of choice.

"This impresses the Chinese buyers, who want plentiful supplies of high-quality soybeans," said Heck, who noted that a majority of U.S. soy imports are processed into feed for hogs, poultry and aquaculture. "They are also stunned at U.S. farmers' incredible productivity and ask how we grow so much with so few people."

Foreign visitors who are accustomed to subsistence farming are also amazed that U.S. farmers raise enough soybeans for both domestic needs and the export market. "This productivity is unbelievable to them until they visit the farm and see it for themselves," Heck said.

Exports in action

China has become the top international destination for U.S. soy, with nearly 50 percent of the crop going to China. Not only did U.S. soybean exports to China set new records in 2013, but this momentum continued to grow throughout 2014 and remains strong into 2015 and beyond. "China has a population of 1.25 billion people, and this number is projected to grow through 2030," Sutter said. "This creates new opportunities for U.S. soy."

To keep ahead of these trends, the ASA has maintained strong support for its International Marketing office in Beijing. ASA also opened a second office in Shanghai, the commercial center of China. It's a plus that Xiao Ping Zhang, the country director for the ASA's International Marketing office in Beijing, has served the organization for more than 14 years.



"Boots on the ground go a long ways to providing consistent representation, enhancing trust and building long-term relationships," Sutter said.

That's why it's important for U.S. farmers to continue participating in trade missions to China, added Heck, who received the ASA's Lifetime Achievement Award, like his father before him. "We should never forget that China can turn to South America, Europe and other countries to buy soybeans. Face-to-face meetings help

us continue to build trust and remain China's supplier of choice."

These meetings now include U.S. farm moms. Since various media reports in China have been increasing the public's concerns regarding genetically modified organisms (GMOs), USSEC invited four moms who are steeped in agriculture to travel to China in September of 2014 and connect with Chinese moms about the safety of GMO soybeans. The farm moms met with professional women from public relations agencies in China, as well as journalists, bloggers and staff from the U.S. Embassy in "town hall" meetings in Beijing.

USSEC also supports a "Counter the Myths" campaign in China to address misperceptions about biotechnology. The campaign includes biotech research from scientists worldwide, including studies that have been translated into Chinese, Sutter said. Beyond biotech, USSEC is finding new ways to add more value for Chinese soybean buyers, such as helping them learn about risk management strategies. "It takes a lot of small steps to make a big impact," Sutter said.

Imagine what the U.S. soybean industry would look like today if innovative U.S. soybean growers hadn't started taking small steps nearly 60 years ago, Heck said. "Back then, who would have believed all this was possible? Now everyone knows about the importance of China. We owe much of our current prosperity to exports and will continue to focus on China going forward." ■

SoyTown Hall

As we head into the new year, with newly elected lawmakers, we asked soybean growers: If the 114th Congress could pass one bill to help farmers be more competitive, sustainable and secure, what would it be? Here's what they said:

Kevin Hoyer, Wisconsin

"A transportation bill that would improve the transportation of goods by rail, river and road. Without up to date infrastructure, the costs of moving goods into and out of the center of our country is unsustainable."

Tom Raffety, Missouri

"Reining in the EPA's misguided efforts to provide 'clarity' while grossly expanding their reach through the Waters of the U.S. proposal should be a priority for the 114th Congress. The heavy burden of regulating on-farm ditches and intermittent streams on the same level as navigable waters will fall upon farmers and their families, who are already our greatest stewards of the land, depending on their clean water to fertile soil to support their families, our communities, and the world."

Theresa Gillie, Minnesota

"It would be the Section 179 Expensing Provisions so we could access and use the dollars. That deduction, which allows us to not have to pay as many taxes, allows us to put those dollars back into our communities. It's a wonderful, realistic tax tool."

Andy Bensed, Wisconsin

"As it relates to protecting of our natural resources—we must streamline and reform the way that we spend money for soil conservation and environmental stewardship. Too many of our programs incentivize changes in behavior and at much too small of a scope without lasting benefits."

Andy Scott, Texas

"We need to get the farm prices back at parity for all commodities. This day in age, costs to produce our crops are substantially more than 30 years ago. Under this price squeeze, the only way we as growers are still in business is because of the tremendous increase in our efficiency of what we do to produce the crops."

Dwight Meyer, Kansas

"My first thought would be to pass a bill that would force the EPA and other regulatory agencies to stop unnecessary regulations placed on farmers, livestock producers, and other agricultural interests."



ASA in Action

ASA Announces 2015 Officers

The Board of Directors of the American Soybean Association (ASA) confirmed Wade Cowan from Brownfield, Texas, as its newest President and moved outgoing President Ray Gaesser from Corning, Iowa, to the position of Chairman. Board members also elected Richard Wilkins, Greenwood, Del., to serve as First Vice President.

"I'm pleased with the team we elected and I think it's an important step toward a world class standard as an organization," Cowan said. "We will work together this year to unify and move agriculture forward."

First Vice President is an office that places Wilkins in line to be the association's president in 2016.

"It's an honor to be selected by your peers and given the opportunity to serve the soybean industry," Wilkins said. "It will be an endeavor to work hard with the other leadership and address the challenges and opportunities we face as an industry."

Also elected to form ASA's nine-member executive committee were Secretary Ron Moore, Ill.; Treasurer Davie Stephens, Ky.; Vice Presidents Kevin Hoyer, Wis.; Bret Davis, Ohio; Joe Steinkamp, Ind. and John Heisdorffer, Iowa.

Gaesser said he looks forward to working with the newly elected leaders this year.

"We have a great team elected for leadership at ASA," he said. "We're excited about being proactive and addressing those issues that impact soybean farmers."

Elections were held in St. Louis at ASA's annual winter board meeting, and the meeting also served as a venue to celebrate the retirements in December of Alan Kemper, Jim Andrew, Robert Ross, Dean Campbell, Danny Murphy, Bob Worth and Ron Bunjer.

Assuming positions on the Board as new members at the meeting were Kendall Culp, Ind.; Wayne Fredericks, Iowa; E.L. Reed, Mo.; Brooks Hurst, Mo.; Bill Wykes, Ill.; Willard Jack, Miss.; Monte Peterson, N.D.; Joel Schreurs, Minn. and George Goblisch, Minn. □

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Lawrence Sukalski
Fairmont, Minn.



Steve Wellman
Syracuse, Neb.



Wyatt Whitford
Ernul, N.C.



Bill Wykes
Yorkville, Ill.

ASA Discusses Sustainability, Biotech Acceptance and Future Trends at Bayer CropScience Event in Germany

Bayer CropScience hosted their Corn & Soybean Future Forum Oct. 29-31, in Frankfurt, Germany. The event brought together farmer-leaders, agronomists, scientists and Bayer industry representatives from all over the world to discuss challenges such as pollinator health concerns and specific regulatory and biotech acceptance challenges. ASA then President Ray Gaesser (Iowa) presented to the group on sustainable farming practices in the United States and the U.S. Soybean Sustainability Assurance Protocol. 2014 officers, ASA Chairman Danny Murphy, Miss., First Vice President Wade Cowan, Texas, and Treasurer Richard Wilkins, Del. joined farmer-leaders from South America and industry representatives in panel discussions on future trends impacting corn and soybean markets, and challenges and innovation needs for sustainable farming.

"It's important for us to take time, even during the busy harvest season, to meet with other farmer-leaders, agronomists and scientists around the world to share ideas and build relationships as we are all working together toward a common goal of sustainability and providing the food that feeds all of our families." ▣



Photo Credit: Chuck Zimmerman

From left to right: Bayer's Michael Chmielewski; ASA's First Vice President Wade Cowan; ASA Treasurer Richard Wilkins; ASA Chairman Danny Murphy and ASA President Ray Gaesser with Bayer's Alan Ayers, Ph.D. (ASA leader positions were in 2014.)

ASA Announces 2015 Class of ASA DuPont Young Leaders

The 31st class of ASA DuPont Young Leaders began their leadership journey at DuPont Pioneer headquarters in Johnston, Iowa. The Johnston training session was the first phase of a program designed to identify new and aspiring leaders and provide them with opportunities to enhance their skills and network with other growers. Representatives from 23 states and Canada participated in training that included educational and skill-building components.



The 2015 class of ASA DuPont Young Leaders are: Kyle Bridgeforth, Ala.; James Bisswanger, Ark.; Dave McEachren, Canada; Nick Wurl, Ill.; Adam & Hannah Steen, Ind.; Morey & Rhonda Hill, Iowa; Andrew & LaVell Winsor, Kan.; Andrew & Jenny Alford, Ky.; Brennan & Serena Gilkison, Ky.; Odis Hill, La.; Matthew Doss & Stephanie Francis, Mich.; Aaron Yaggie, Minn.; Ryan and Wendy Wondercheck, Minn.; John Mark Looney, Miss.; Bill Hayen, Mo.; Amanda Fairley, Neb.; Brent & Brenda Svoboda, Neb.; Brad Macauley, N.Y.; Christopher & Cherish Naylor, N.C.; Jarred Billadeau, N.D.; Dan & Cindy Sturgill, Ohio; Cliff & Hailey Barron, S.C.; Antron Williams, S.C.; Brandon Wipf, S.D.; John Dodson & Kristi Kosman, Tenn.; Chase & Jessica Ann Hickman, Tex.; Glenn Dye, Va.; and Brad & Nicole Kremer, Wis. Also pictured (front center), then ASA President Ray Gaesser, Iowa and First Vice President Wade Cowan, Tex.

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Soy SHOTS

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membership@soy.org

Robbins Family Grain in Sackets Harbor, N.Y. saw the first snow fall of the season in early November 2014. *Photo Credit: Ron Robbins*



“This is a photo of hoar frost on our farm. The farm will be in our family 100 years in 2015. The rock has a metal ring attached because it was the hitching post,” said Alan Ask of Dunnell, Minn.
Photo credit: Alan Ask



Winter came early to Jonathan Gibbs' farm in Fox Lake, Wis. “It may look like winter on the farm but it was actually Halloween,” Gibbs said, “We finished beans the afternoon before.” *Photo Credit: Jonathan Gibbs*

A truck stops at the elevator during the lake effect snow storm that brought two feet of snow to northern New York in November.
Photo Credit: Jeff Martin



Lawrence and Diane Sukalski (center) take a family picture after a snowy day on their farm in southern Minnesota. *Photo submitted by Kristina Sukalski O'Brien*

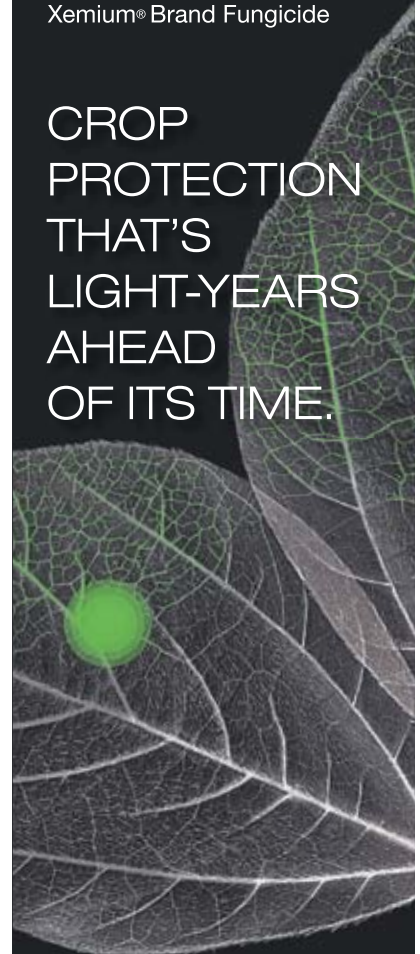


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Industry Perspective

Soybean Exports: Onward and Upward?

| By **Candace Krebs**

Today one of every four rows of soybeans grown in the U.S. will end up in China, according to Tom Hammer, president of the National Oilseed Processors Association.

Even if economic growth in China has slowed — it's now running at roughly 7 percent — that's still much higher than more mature economies like the U.S. and Europe.

Hammer said the popularity of U.S. soy and soy products in China and other important markets is understandable. "We are reliable, we have great transportation systems, we don't have political upheaval or unstable currencies, we deliver outstanding quality and the service is great," he noted.

"As people join the global middle class, their consumption habits change," added John McGowan, ADM's vice president of North American oilseed processing. "Since 1990, population has grown 35 percent. Food staples such as wheat and rice have grown at about the same rate. But, during the same period, pork consumption grew 70 percent. Poultry and soybean meal consumption grew 180 percent, and fats and oils grew over 200 percent."

ADM is also seeing expanding demand for soy-based proteins used in foods, McGowan added. "We produce products that are used in processed meat applications, nutrition bars and beverages, and are continuing to grow that business," he said.

Increasing demand for high quality U.S. meats overseas is another opportunity to expand soybean exports that should not be overlooked, Hammer said.

"I like to say we can be a lot surer we will export those beans if they are in the belly

of an animal than in the belly of a ship," he said. "We know there's a 100 percent chance if that animal was fed in the U.S., it was fed with U.S. grown feed."

No organization has done more to increase U.S. meat exports than the U.S. Meat Export Federation, which puts "boots on the ground" in target markets overseas, Hammer said. "I take my hat off to that organization," he said. "They are highly credible experts in the field who are establishing relationships at the community level in countries around the world."

Challenges do lie ahead. Hammer is concerned about the lack of progress on international trade agreements. One example is the Trans-Pacific Partnership (TPP), which stalled after tariffs on beef became a sticking point. "The linchpin of a bilateral agreement between the U.S. and Japan is that Japan is trying to protect its most sensitive industries," he said.

Gary Martin, president and CEO of the North American Export Grain Association, and ADM's McGowan both cite transportation as another challenge. Martin expects the Soybean Transportation Coalition to take a leading role in addressing infrastructural competitiveness in the future.

Another critical priority is promoting acceptance of technology around the world, Martin said.

"The U.S. is a major innovator in modern production systems including biotechnology," he said. "Anything that interferes with the application of those technologies will have a major impact on all crops, not just soybeans." ■



Tom Hammer, president of the National Oilseed Processors Association.



John McGowan, ADM's vice president of North American oilseed processing.



Gary Martin, president and CEO of the North American Export Grain Association.

Issues Update



A Great Year for Soy in Washington, Despite Obstacles

| By John Gordley, ASA Washington Representative

Despite a dysfunctional environment in Washington DC, ASA was still able to accomplish multiple key policy victories for soybean farmers.

Farm Bill - ASA worked to ensure the new Farm Bill preserved planting flexibility by decoupling both the Agricultural Risk Coverage (ARC) and Price Loss Coverage (PLC) programs to prevent future production distortions between crops. The bill also allows producers to update their payment yields and reallocate base acres; raises the soybean reference (target) price in the PLC program from \$6.00 to \$8.40 per bushel; consolidates conservation programs on working lands; and provides full funding for the Foreign Market Development and Market Access Programs.

Tax Extenders - The one-year tax extenders package reinstated expensing provisions, including the Section 179 small business limitation of \$500,000 and the \$2 million phase-out amount for property placed in service during 2014. The tax extenders package also restored the 50 percent bonus depreciation provision and the dollar-per-gallon biodiesel tax credit.

Waterways - The Water Resources Reform & Development Act (WRRDA) passed, authorizing investments in

waterways infrastructure and the tax extenders package included a nine-cent-per-gallon increase in the barge fuel fee to fund the Inland Waterways Trust Fund (IWTF). Together, the barge fuel increase and the WRRDA bill will yield \$185 million per year in additional funding for waterways infrastructure.

Regulatory - While EPA has yet to withdraw its proposed Waters of the United States (WOTUS) rule, it is expected to undergo significant revision in 2015. Another regulatory achievement was publication of a proposed rule that would allow aquaculture operations in the Gulf of Mexico, a critical first step to building a domestic aquaculture industry and building domestic demand for soy meal.

Trade - ASA was a leader in efforts by the U.S. Biotech Crops Alliance to convince the Obama Administration to make international biotech approvals a major trade policy priority, leading to China's decision to approve three longstanding applications for importation of biotech crops, including two soybean varieties. The Administration also moved to establish formal diplomatic relations with Cuba, whose top imports include frozen poultry, soybean meal, corn and soybeans. ■

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A large cargo ship is shown at sea during sunset. The ship's silhouette is dark against the bright orange and yellow sky. The Chinese flag is overlaid on the left side of the ship. The sun is low on the horizon, creating a strong glow and long shadows on the ship's deck.

U.S. Soybean Growers Build Relationships and Market Development in China

DESTINATION CHINA

| By Lekan Oguntoyinbo

Once upon a time, corn took up about 60 percent of the tillable acreage on Alan Kemper's farm near Lafayette, Ind. Soybeans made up the rest. In recent years, there's been a significant shift in the numbers. Now soybeans account for 52 percent, a number that he expects will continue to rise.

Kemper estimates rising soybean sales add \$3 in revenue to each bushel of soybeans he sells.

Kemper's story mirrors that of the hundreds of thousands of soybean farmers in the United States. Soybean sales have risen significantly over the last 15 years, driven chiefly by soaring demand from China.

Soybeans are by far China's largest agricultural import. In 2013, they accounted for \$38 billion in imports, more than twice that of cotton and timber and more than six times that of natural rubber, according to Loren Puette, an agribusiness research analyst who manages ChinaAg.org, an English-language website devoted to promoting a broader understanding of China's agricultural trade and food sector.

"From 2009 to 2011, China's soybean imports consistently comprised over 50 percent of the world's soybean purchases by volume," he said. "In 2012 and 2013, China's soybean imports by volume increased to over 60 percent of the world's purchases, well ahead of Germany, the Netherlands, and Mexico, which each comprised approximately 3.6 percent of global imports by volume in 2013. Not only are soybeans China's largest agricultural import, China dominates the global soybean trade and can affect international soybean prices with purchase agreements and/or cancellations."

As the world's largest soybean producer, the United States plays a critical role in meeting China's soybean needs. The United States produced 89.4 million metric tons of soybeans in 2013. Brazil, which produced 81.7 metric tons that year, is the second largest producer.

"In general, approximately 20-25 percent of soybeans grown in the U.S. each year are exported to China," Puette said. "From 2011 to 2013, over 60 percent of U.S. soybean exports by volume were purchased by China."



Chinese trade teams inspect a combine on Todd Hansen's farm in Hope, Minn., as part of the Soyatech Summit in 2010.

The next largest export markets were Mexico, Japan and Indonesia, whose combined purchases were less than 20 percent.

"The Chinese market is important to the bottom line of the American soybean industry because China purchases the bulk of U.S. exports," Puette said. "Since 2009, annual Chinese purchases of U.S. soybeans have consistently been above 20 million metric tons."

Dwain Ford, a member of the United Soybean Board executive council, noted that the United States was the biggest supplier of the 1.013 billion bushels of soybeans exported to China last year. China is also a large buyer of soybean oil. He said only one country – Mexico, at 36 million bushels – bought more soybean oil from the United States than China, which imported 35 million bushels from the U.S. this past year.

"It's very possible that China could soon surpass Mexico," in soybean oil sales, said Ford, a fifth-generation soybean, wheat, corn and hog farmer based in Kinmundy, Ill. "China is the number one producer of poultry, swine and aquaculture in the world. They have a great demand for feeding livestock. As the median income grows over there, people want a better diet and more meat in their diet."

The U.S. soybean industry's dominance in China parallels that country's rapid economic growth and the growing affluence of its emerging middle class in recent decades.

(continued on page 22)



ASA's then-First Vice President Danny Murphy, left, speaks before a 2011 signing ceremony in Chicago at which Chinese buyers agreed to purchase \$1.78 billion in U.S. soy. Present for the signing are, from right, Illinois Governor Pat Quinn, Chinese Vice Minister of Commerce Wang Chao, U.S. Senator Mark Kirk of Illinois, U.S. Soybean Export Council CEO Jim Sutter, and United Soybean Board then-International Marketing Chair Jim Call.

It has an evolution that Jim Harkness has witnessed first-hand for nearly 40 years.

Ever since Harkness, a senior advisor on China at the Institute for Agriculture and Trade Policy in Minneapolis, first started visiting China in the 1970s, he's seen remarkable changes in the consumption patterns of the population of the world's biggest country. In the 1970s, he said, simple material items like ballpoint pens and wristwatches were considered status symbols.

But by the mid-1980s, he noticed a growing acquisition of consumer items like bicycles, radios and black and white television sets. Then in the 1990s there was an explosion in the purchase of consumer goods such as automobiles and color TVs. Women discarded the somber dark blue or green Mao jackets and pants for fashionable western style blouses and skirts. Many adults started sporting sunglasses.

He saw big changes at the dining tables too.

"I saw an increase in the consumption of meats, fats and oils and an increase in the consumption of sugars," said Harkness, who lived in China for 16 years. "Chinese people actually consume less rice and less wheat

than they did 30 years ago. There was almost no dairy in the Chinese diet until the 1980s or the early 1990s. Now there's a tremendous amount of variety in the diets. When I lived in China in the 1980s what you got in cafeteria was what was in season. The shift there has resulted in an increase in the consumption of processed foods, consumer foods, ramen noodles, lunch meats and eating foods not native to their area."

But by far the biggest dietary change has been an increase in consumption of protein, particularly poultry, pork and seafood.

In the last two decades, the Chinese government has lifted more than 300 million people into the middle class, noted Danny Murphy, a past president of the American Soybean Association. This increase in prosperity is driving protein consumption.

And the key to sustaining this protein consumption, he said, is producing enough soybeans, which are processed to make feed for chickens, pigs and seafood.

Murphy, a Canton, Mississippi-based soybean and corn farmer, said the potential for continued growth in the Chinese market is enormous.

"I can remember it seems like it was only five or six years ago we were talking about exporting 55 million metric tons to China," he said. "It's now 70 million metric tons. It's greatly increased over the last 15 years. The potential is still there. As long as the economy continues to grow or improve, there's still a billion people there that have a lesser diet and they still have the potential to grow. It's a huge market, a huge growth market with huge potential for the future."

The seeds of success in this lucrative market were sown in the early 1980s when representatives of the American Soybean Association, with an eye on the potential of this gigantic market, open an office in Beijing. In those days China was self-sufficient in its production of soybeans. But the Americans sought to forge partnerships to help the Chinese strengthen their agricultural infrastructure by providing technical advice and other assistance.

Chinese officials routinely visited the United States to study agricultural practices and build relationships. In the meantime, China remained a net exporter of soybeans. That tide began to turn slowly in 2001 when China joined the World Trade Organization and the U.S. negotiated a three percent across-the-board tariff for soybean exports to China.

"That's when they really started importing soybeans and became a net importer," said Grant Kimberley, director of market development for the Iowa Soybean Association. "It's helped soybeans maintain a level of profitability. As demand has grown, it has created demand for more soybean acres. Soybeans are now the second largest rural crop in the United States after corn."

The increase in soybean exports comes at a time when China is seeing its most dramatic population shift in modern history.

“From 2000 to 2011, China’s urban population increased an average of 4 percent per year, boosting the demand for soy-based cooking oil to feed its growing cities,” said Puette.

They’ve literally built Chicago-sized cities in a matter of a couple of years,” added Kimberley. “They’ve added high speed rails, interstates and good road systems.”

Analysts say the bright future of the Chinese market bodes well for the American soybean producer for several reasons. First, members of the growing middle class have more disposable income and can afford to eat more meat. Second, to meet the rising demand for the meat and seafood, soybean meal, a key ingredient in animal feed, is needed to feed livestock, poultry and fish. Third, unlike the United States and Brazil, China has a shortage of arable land.

“Soybeans are a land intensive crop and China only has approximately 8 percent of the world’s arable land,” said Puette. “A significant share – between 20 to 40 percent, according to various estimates – of its arable land has been contaminated by industrial pollution and runoff. In order to better utilize its arable land, China has shifted land away from soybean production towards more profitable and less land intensive crops. Consequently, in 2012, the total sown area of soybeans in China fell below 10 million hectares for the first time since 1992.”

For these reasons, China is heavily dependent on soy importation from the U.S. “Their mindset is that they count on the United States as a reliable supplier,” said Kemper.

(continued on page 24)



Chinese President Xi Jinping addresses the U.S.-China High Level Agricultural Symposium in Des Moines, Iowa, in 2012. At right is Iowa Governor Terry Branstad. Former ASA President Steve Wellman and former Vice President Mark Jackson attended the symposium, at which Xi, then the vice president, pledged to further deepen the ties between Chinese purchasers and American farmers.

Unpredictable Biotech Approval Process

For more than a decade, representatives of the American soybean industry in China seeking approval of new biotech products could always count on this much: the process was slow but predictable.

But in the last couple of years, the process has become slower and less predictable, said Jim Sutter, CEO of the U.S. Soybean Export Council.

Sutter attributes the slowdown to a couple factors, including a change in the leadership of the Chinese government. But he believes the larger issue is growing sensitivity to public perception about the safety of genetically modified agricultural products, including soybeans.

“We believe the science of biotechnology is very sound,” said Sutter.

Sutter said the U.S. soybean industry is working closely with the Chinese government on ensuring a smoother and shorter approval process. He said if the current situation persists it could have a negative impact on the bottom line of soybean farmers and the entire soybean industry, particularly biotechnology companies that have invested considerably in research for new soybean products.

“I know it’s been a frustration for the seed technology companies,” Sutter said.

Added Loren Puette, an agribusiness research analyst who specializes in economics and food security, “China’s biotech approval framework is extremely bureaucratic, complex, and time-consuming for the applicant (that is, the biotech seed company). It generally takes years to receive import approval, while approval for domestic cultivation and commercialization is unlikely to occur at all.”

(continued from page 23)

But as is typical with every market, there are some hurdles. Some of them are not man made.

“The outbreaks of avian influenza and/or swine influenza in China can have a negative impact on the U.S. soybean industry,” said Puette. “During outbreaks, China typically culls large numbers of the affected livestock population, which in turn causes a decline in animal feed demand and by proxy soybeans. For example, in April 2013, U.S. soybean prices hit a 10-month low due in part to an outbreak of H7N9 bird flu in southern China. As a result of the outbreak, poultry farms in Hong Kong and Guangdong Province culled tens of thousands of chickens and other types of poultry.

Chinese scientists even began monitoring pigs for the virus. During the outbreak, there was a small shift in Chinese consumer preference for beef and seafood over poultry. ”

But one of the most formidable challenges is a lengthier process for the approval of new soybean biotech products and a public that is increasingly vocal about its distrust of genetically modified products.

In some instances, the government appears to be listening.

“Just [last] fall, the Chinese government apparently declined to approve a genetically modified variety of soybeans for import,” said Harkness. “This news is a real wake up call to farmers and grain traders. The [long-term] effect could be losses of billions of dollars for farmers. The other factor is that China is developing its own genetically engineered industries but haven’t had a very successful time in developing these kinds of crops.”

In addition, U.S. producers may have to contend with growing competition from other major soybean exporters, particularly Brazil.

“Brazil in particular has the potential to permanently dethrone the U.S. as the top soybean supplier to China,” said Puette. “In 2013, the U.S. harvested soybeans on approximately 30.8 million hectares of land while Brazil harvested soybeans on 27.8

million hectares. By 2021, Brazil may add an additional 3 million hectares and much more in the future. Brazil has approximately 158 million hectares of pastureland that it could use for soybean production. The U.S. does not have such a large reservoir of untapped land. In fact, the area under soybean cultivation in the U.S. has not expanded since 2010 when it hit a peak of 31 million hectares.”

But Ford says the U.S. could maintain its competitive position by keeping its roads, bridges, rail systems as well as its waterways infrastructure – the 12,000 miles of inland waterways, 171 locks and dozens of dams – up to date.

“That has been our main competitive advantage,” he said, adding that transporting soybeans to the Gulf of Mexico via waterway is cheaper than rail or road and helps hold down costs.

“Fifty-eight percent of our soybean exports come out of the Gulf of Mexico. Eight-nine percent of that 58 percent go down the river system,” Ford said. “Each barge can hold 57,000 bushels. They usually tie 15 barges together. A barge can move a ton of soybeans on one gallon of fuel. The lower our transportation costs we can provide China a better product and a better return to us.

“A car on a train can hold 4,000 bushels and total train can hold 400,000 bushels. If we don’t maintain [our infrastructure] we could lose that competitive advantage to main competitors, Brazil and Argentina,” Ford said. “Many of our locks and dams are over 50 years old. They are in need of repair and past their life expectancy.” □



Battling China's Perception of GMOs

Early in 2013, many Beijing residents unsuccessfully lobbied to remove products made with genetically modified soybean oil from school and university cafeterias because they deemed them unhealthy. Later that year, a high ranking military official published an article in the newspaper condemning American genetically modified crops. He made an unfounded claim that the genetically modified (GM) crops caused infertility and cancer.

In China, anti-GM sentiment runs high. Agribusiness research analyst Loren Puette calls anti-GMO

(genetically modified organism) sentiment one of the two biggest challenges faced by the U.S. soybean industry in China. The other is growing competition from Brazil.

"Anti-GMO sentiment in China should not be underestimated," said Puette.

Several leaders of the American Soybean Association say some of the perception is fueled by unfounded rumors that American producers and biotech companies export the products to China but do not sell them in the United States because they know they are unsafe.

Many of these rumors are fed by discussions on social media, said Jim Sutter, CEO of the U.S. Soybean Export Council (USSEC).

Sutter said USSEC and other members of the soy coalition are working aggressively to combat public perceptions about GM biotech products.

"One of things we're doing is providing the public scientific information about biotech products," to the media and through other influential public communication channels, Sutter said.

Soy Checkoff News from the United Soybean Board

Hidden Costs of Herbicide-Resistant Weeds

Herbicide-resistant weeds are a known threat to American soybean farmers. Spreading quickly across the country, these weed varieties threaten yields and increase management costs. However, other often overlooked factors add to the financial implications of these pests. For example, farmers who do not have a comprehensive weed-management program can also suffer from reduced land values and lost rental agreements.

"Herbicide-resistant weeds can pose a critical problem for farmers," says Clyde Smith, a field development representative for United Phosphorus Inc., a supplier of crop-protection and plant products. "People have lost the land they were renting and have even gone out of business because they failed to control weeds."

Allowing weeds to take control of a field can tarnish a farmer's reputation with other potential landlords.

"Those who don't implement effective weed management will affect the land value and can affect their ability to rent that land," Smith explains. "I have seen landowners forced to lower rates by 30 percent because their renters didn't control the weeds on their farm."

For farmers who own the land they operate, if farm ground has a history of weed mismanagement, that can impact the price of the property if it comes up for sale.

"To keep weeds out, you need to use both pre- and post-emergence herbicides and spread residuals every chance that you get," Smith said. "This can cost from



The soy checkoff's Take Action effort encourages farmers to proactively develop a weed-management strategy. That includes planning ahead, managing herbicide use effectively and incorporating a diverse set of controls.

\$20 to \$30 more an acre, but the yields often make up the difference."

For more information about herbicide resistance and to use weed-management resources developed by the soy checkoff, visit www.TakeActionOnWeeds.com. ■



Export Success Stories Begin with Research at Home



In 2013/2014, the United States exported over 2 billion bushels of U.S. soy, valued at more than \$30 billion. Top customers included China, Mexico and Indonesia.

Last year saw farmers bring in a bin-busting harvest. Finding buyers for a record amount of soybean meal and oil requires a coordinated effort across the entire U.S. soybean industry. In 2014, demand from international customers was as strong as ever. Just in the last marketing year, U.S. soybean farmers exported 62 percent of their crop.

Last year saw farmers bring in a bin-busting harvest. Finding buyers for a record amount of soybean

meal and oil requires a coordinated effort across the entire U.S. soybean industry. In 2014, demand from international customers was as strong as ever. Just in the last marketing year, U.S. soybean farmers exported 62 percent of their crop.

However, not all of the efforts leading to these outstanding international sales take place across U.S. borders; this demand is also supported by soy-checkoff-funded research and accomplishments achieved domestically that can be applied globally. A few highlights include:

Yield research: Research allowing American farmers to continue to produce an abundant supply of high-quality soybeans is a major reason the U.S. continues to export such high volumes.

New uses for polyurethanes: Many European and Chinese customers

have chosen to replace petroleum with soy polyols because they're versatile and durable and bring cost savings.

Nutritional advancements for aquaculture: Researchers have developed a soy protein concentrate without some of the carbohydrates and other anti-nutritional elements normally found in soybean meal, allowing more soy to be included in aquafeed rations.

Lifecycle analysis: The soy checkoff's Life-Cycle Profile confirmed U.S. soy as a renewable and sustainable feedstock for food, feed and industrial products.

With researchers conducting hundreds of soy-focused research projects around the country, farmers can continue to count on improvements like these, which create new export opportunities and continued increases in global demand. ■

Free Checkoff Tool Shows How Soybean Quality Grows Value

The next time you're evaluating soybean varieties, remember to also check out a free tool from the soy checkoff that shows how those varieties can affect demand for your soybeans.

The checkoff's Soybean Quality Toolbox, located at GrowSoybeanValue.com, calculates your soybeans' estimated processed value, or EPV. This metric is based on oil and protein content. Those components drive soybean demand and the price farmers receive.

Customers buy soybeans based on the amount of oil and protein inside – soybeans with greater oil and protein content are in greater demand, and better demand can lead to a higher price for farmers to receive.

Finding varieties that will produce higher value is just three steps away with the Soybean Quality Toolbox:

STEP 1: Select your state and other source data. The tool features protein, oil and yield data from 16 states. Simply select the state, year and test plot that most closely resemble your growing conditions.

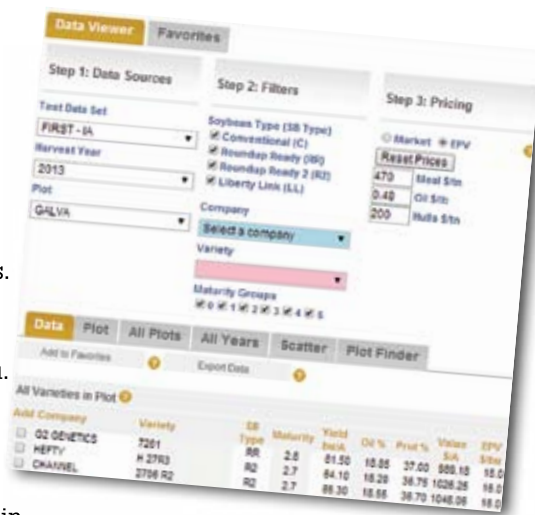
STEP 2: Choose which type of soybean variety is best for you. For example, the tool can filter your results by conventional, Roundup Ready and Liberty Link production systems, as well as seed company, maturity group and even specific variety.

STEP 3: Set current market prices. This allows the tool to calculate how much value each soybean variety is expected to hold for you.

Next, you're ready to browse the best varieties. The tool displays how various soybean varieties performed in the chosen test plot in

terms of protein, oil and yield and calculates the value of each variety based on those factors. □

Soybeans with higher protein content are in greater demand from customers, which can lead to a higher price for a farmer to receive. Visit GrowSoybeanValue.com to find varieties that will produce more protein without sacrificing yield.



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SoyWORLD

A Look Back at the Past 4 Years of WISHH's Success

The American Soybean Association's World Initiative for Soy in Human Health (ASA/WISHH) program started the new calendar year with a look back at the past four years of market development success that fueled economic growth, improved nutrition for both humans and animals and created commercial opportunities for U.S. soy.

Notable highlights included:

- WISHH tracked U.S. export of over 27,040 Metric Tons of U.S. soy product to partners across Sub-Saharan Africa, Central America and Asia over the past four years, and has seen a 382 percent increase over the past two years in soy product exports
 - Trade contacts report that a major commodity trader bought 40,000 Metric Tons of U.S. soybean meal for the feed industry in Pakistan, where WISHH has seen tremendous success through the USDA-funded FEEDing Pakistan project

- Under the USDA-funded Soybeans for Agricultural Renewal Initiative (SARAI) development project, WISHH exported the following to Afghanistan:

- 80 Metric Tons of defatted soy flour
- 4,000 Metric Tons of whole soybeans
- 13,140 Metric Tons of soybean oil

- Over the last two years, WISHH's Asia programs increased U.S. soy sales from one company purchasing 18 Metric Tons to three companies purchasing 126 Metric Tons, and U.S. soy exports in Central America increased an average of 43 percent in Guatemala and 10 percent in Nicaragua.

Particular U.S. soy export success is seen throughout Africa. In 2013, WISHH's Africa supply chain partners bought over \$2 Million in U.S. soy proteins. Nigeria has imported over 100 tons of soy flour per year for the last four years. To learn more about WISHH, visit www.wishh.org. ■



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Time
to just be
kids



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Sustainability

Iowa Farmer's Passion is Global Opportunity

By **Barb Baylor Anderson**

International trade teams that visit Jackson Farms in Rose Hill, Iowa, often stay longer than the time allotted on their itineraries. That's because Mark Jackson enjoys talking about sustainable practices on his farm and educating visitors about what those practices mean for them.

"I enjoy interacting with trade teams and putting a face on the American farmer. We need for these visitors to understand what we do and why we do it as well as understand the needs of those customers," said Jackson, who is a fifth-generation farmer. He raises corn and soybeans and has a wean-to-finish hog operation in partnership with his son, Michael.

Jackson first got involved with soybean activities about 10 years ago as a winner of the American Soybean Association (ASA) Conservation Legacy Award. The annual award showcases farm management practices that are both environmentally friendly and profitable.

"Our farm is based in the rolling hills of southern Iowa, where it is harder to farm and match the yields of the other flatter, fertile parts of the state," said Jackson, who also is a past president of the Iowa Soybean Association and now a national director for ASA. "I like to show trade teams we are still farming the same land as my great-great grandfather. We have improved the soils using biotech seed with half the inputs, and have quadrupled yields in the last 50 years."

Jackson has hosted 12 teams to their farm, including ones from Central America, the Philippines, China, Turkey and Japan. They generally have a meal in the farm shop and tour the farm.

"We give them a true feel for farming. Many have not seen a soybean plant and sometimes not even a soybean," he said. "You can't assume they know anything. We stress the efficiency of what we do. They are often surprised farmers make up only one percent of the U.S. population."

Jackson touches on the environmental, economic and social aspects of sustainability. "We drive around and show them our terraces and waterways and abundance of wildlife. We talk about the multi-generational aspect of our farm, and how advances in science and technology help us increase our conservation efforts.

It is an open, honest exchange of information," he said.

Talking conservation can be interesting, Jackson added, especially when talking to groups whose translation for no-till is "not farming."



Jackson (at the laptop computer) enjoys talking about environmental, economic and social aspects of sustainability practices on his farm and educating visitors about what those practices mean for them.

CREDIT: Courtesy Iowa Soybean Association.

Know & Use the Protocol



The U.S. Sustainability Assurance Protocol (ussec.org) describes the regulations, processes and management practices that ensure sustainable soybean production. It includes a national measurement system of the positive environmental outcomes of sustainable soybean production.

"Farmers should have a good working knowledge of the protocol. Don't be afraid to take the conversation outside your farm gates," said Jackson, noting that he worked through the protocol with Unilever and its product, Hellmann's mayonnaise, which contains soybean oil.

"Take time to learn about the various cultures so you can explain what you do in terms they understand," he said. "We are all in this business together. I want them to understand sustainability and that what I do is for tomorrow." ▣

SoyForward

TPA, TPP Key to Further Soy Trade Growth

By **Darci Vetter**

Happy New Year! 2015 is an exciting year for agricultural trade, which is central to the Obama Administration's strategy to support jobs, strengthen the middle class, and spur economic growth. During the last four years, exports of agricultural products achieved record levels, and are projected to reach \$143.5 billion in fiscal year 2015. Soybeans and soybean products represent an impressive 18 percent of that export value. Agricultural exports also supported nearly 1 million jobs, and created ripple effects throughout agriculture value chain; every dollar of agricultural exports stimulates another \$1.27 in business activity.

This export success depends on maintaining and expanding reliable access to foreign markets, including through negotiating trade agreements like the Trans-Pacific Partnership (TPP). The TPP is an ambitious, next-generation trade agreement that, when completed, will lower barriers for U.S. exports to the world's fastest growing region, representing 40 percent of the global economy. As the economies of the Asia Pacific grow, the emerging middle class in this region will be looking for better, safer, more diversified diets. These shifting consumption habits will continue driving export demand for U.S. soybeans and soybean products and create export opportunities for value-added products such as U.S. meat, poultry, dairy and increased demand for soybean meal.

The Administration is also working with Congress to move forward in a bipartisan way to reauthorize Trade Promotion Authority (TPA). TPA legislation provides Congressional direction to the President on trade policy priorities, defines Congress's role in developing trade policy throughout the negotiating process, and allows the trade agreements that result from this direction and consultation to be considered by Congress on an up-or-down vote.

TPA has been available for every President since 1974 but has not been updated in a decade. The Administration is encouraged by strong signs of support from this Congress for the TPA and the trade agenda, and we are working closely with leaders in Congress to secure TPA renewal as a top legislative priority.

We look forward to continuing work toward implementing the Trans-Pacific Partnership, TPA and other trade negotiations so that farmers, ranchers and businesses can grow it here, raise it here, make it here, and sell it all around the world. ■



Darci Vetter

Ambassador Darci Vetter is Chief Agricultural Negotiator in the Office of the United States Trade Representative



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I am a soybean farmer,
trade advocate,
and ASA member.



David Ausberger, Jefferson, Iowa

We are soybean farmers,
animal ag supporters,
and ASA members.



Phyllis & Mark Legan, Coatesville, Ind.

I am a soybean farmer,
biodiesel proponent,
and ASA member.



Jerry Peery, Clinton, Ky.

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