

AMERICAN soybean

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People. Policy. Profitability.

A PUBLICATION OF THE AMERICAN SOYBEAN ASSOCIATION

BIG MEDIA

Soy in the Global Spotlight

ISSUE UPDATE

What the New Farm Bill Means for the Next One



LEADERSHIP



SOY FACES
Leadership Programs
Polish Rough Edges

SOY FORWARD
WISHH Builds Demand
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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

We Are Always Advocating on Your Behalf

As I write this letter, it's been just over a week since I was elected to serve as your 2019 ASA President, and what a week it's been. From waterways to biotech to trade initiatives, we've seen Congress and the Administration scramble to make good on promises and productively close out the end of 2018.

We had positive news that private exporters sold 1.13 million metric tons of U.S. soybeans for delivery to China, news that hopefully signals a crack in the door to the ever-so-important China export market. Yet, as encouraging as that first movement in months is, it has brought with it uncertainty over the fate of the second Market Facilitation Program (MFP) payment and further illuminated the pressing need to rescind the tariff on American beans going to a market we worked carefully and thoughtfully for years to build. While we appreciate the Administrations' first step, we need their continued leadership to expedite negotiations with China and end this trade war so we can begin to rebound from its repercussions.

The U.S. Environmental Protection Agency (EPA) and Army Corps of Engineers at long last announced their proposed Waters of the United States (WOTUS) rule. We were pleased they took extra time to get their decision right, taking into account ASA and other impacted stakeholders' comments. Farmers and landowners need the regulatory certainty it will provide, including clearly outlining regulated

bodies of water, better defining the terms, and staying within the bounds of the Clean Water Act. While the proposed rule will now be open for formal comment, it is a boon for farmers that this rule better reflects the intent of the Supreme Court. We all want to be good stewards of our environmental resources, but governing decisions have to reasonably allow farmers and other landowners to function without being encumbered by unnecessary regulation.

Farm bill, at last! The President is expected to sign next week the Agriculture Improvement Act of 2018, and with his signature will come a layer of stability and certainty for the next five years that the agriculture industry desperately needs. We have inside this issue an update on details of that bill, but we are pleased that in those 801 pages of legislation there are resources for market development, crop insurance provisions, and other components that bode well for soy. Thank you to the House and Senate for their bipartisan work on this vital piece of legislation.

We still await the future of the Biodiesel Tax Credit, with ASA and our colleagues at National Biodiesel Board encouraging members and other affected parties to ask lawmakers to support the tax extender that directly helps the soy industry, related businesses and rural economies.

By the time you read this letter, some of this will have gone into

Davie STEPHENS



Davie Stephens, ASA President

effect, some will still be pending final approval, and undoubtedly, some will have gone by the wayside. But, I offer this recap to demonstrate what, in just a week's time, can come to pass in the policy arena that greatly affects our industry as a whole and our livelihoods as individuals.

I have seen, in my previous service to ASA as your vice president this past year and as a director since 2012, that my fellow leaders and your staff in both the ASA St. Louis and Washington, D.C. offices are always advocating on your behalf, so as the torch light dampens on certain initiatives, whether good or bad, and flames ignite concerning others in the new year, know that I am proud to lead this organization, and we will continue to work hard to face concerns with trade, technology and other areas of importance to you. Happy New Year, and thank you again for electing me to serve on behalf of our industry in 2019.

NEWS

Footwear Company Shares How U.S. Soy Fits for Sustainability



Photo courtesy of United Soybean Board

Made with 45 percent U.S soy by weight, OkaB sandals are one of the newest soy-biobased innovations helping customers shrink their environmental footprint.

"Here at Okabashi Brands, we made the choice to go with a soy-based compound for our shoes because it aligns with our commitment to sustainability and manufacturing domestically," said President Kim Falkenhayn. "Not only are our shoes recyclable and Prop 65 compliant, but every pair displaces that much more petroleum-derived material with renewable soy feedstocks instead. We believe that manufacturing sustainably is the way of the future."

OkaB is considering United Soybean Board (USB)-provided information that could help them find new markets for their soy-based footwear. The Georgia company's sandals are available online.

Visit www.oka-b.com for more information.

Source: United Soybean Board

Soy Growers Elected to National Biodiesel Governing Board



Photo courtesy of NBB

The 2019 National Biodiesel Board Governing Committee will lead the way in advancing the interests of its members by creating sustainable biodiesel industry growth.

Several soybean growers were elected to the National Biodiesel Board (NBB) Governing Board this past November. The board reflects the wide range of member companies in the biodiesel industry from feedstock operations to producers. NBB members voted to fill eight board member spots for two-year terms, including American Soybean Association (ASA) Director Rob Shaffer, Illinois Soybean Association Director Jeff Lynn and Nebraska Soybean Board Director Greg Anderson. They join Ryan Pederson of North Dakota Soybean Council, Ron Heck of Iowa Soybean Association and Robert Stobaugh of Arkansas Soybean Promotion Board, who are current soybean farmers on the NBB Governing Board.

"The National Biodiesel Board is the sole organization representing American-made biodiesel's entire value chain and renewable diesel interests. Our strong team of leaders from all sectors of the industry continue to move this American-made fuel forward," said NBB CEO Donnell Rehagen. "We look forward to continuing our efforts to secure strong markets for America's Advanced Biofuel and the nearly 64,000 jobs we represent."

ASA Board Elects 2019 Governing Committee

A new group of leaders is set to tackle soybean policy issues in the coming year. The American Soybean Association (ASA) Board of Directors elected its governing committee during the annual winter board meeting in St. Louis, and new board members immediately began their terms.

Davie Stephens of Clinton, Ky., will serve as 2019 ASA president. Stephens has been an ASA national director since 2012, serving as secretary and most recently vice president. He also represented his fellow state farmers on the Kentucky Soybean Association board from 2006-14, holding positions as treasurer, secretary, vice-president and president. Stephens farms more than 5,000 acres in Kentucky and Tennessee. In addition to soybeans, he grows corn and raises chickens.

Stephens replaces John Heisdorffer, Iowa, as president, and Heisdorffer moves to the role of ASA chairman. Former chairman Ron Moore, III., rotates off the nine-member governing committee.

"Davie will transition smoothly into this role, as he has been intrinsically involved in ASA's heavy trade advocacy this past year, among other issues," said Ryan Findlay, CEO of ASA, "And for those leaders stepping down from the board or resuming other posts, we cannot thank them enough for all they have done during this past year. John Heisdorffer showed true leadership as our president, speaking on behalf of the nation's soybean farmers in a time of increased media attention and anxiety. We know Davie will provide continuity in that remarkable level of dedication and service to the soy industry."

The ASA board also elected Bill Gordon, Minn., to serve as vice president, a position that places him in line to serve as the association's president in 2020. Gordon is a fourth-generation farmer who grows soybeans and corn across two-thousand acres, including 250 acres of buffer strips and wetlands. He is also the owner of Worthington Tax and Business Services, a full service business including farm analysis and planning.

In addition, the ASA board voted to elect Bret Davis, Ohio, as secretary and Brad Kremer, Wis., as treasurer; Kevin Scott, S.D., Joe Steinkamp, Ind., Brad Doyle, Ark., and Ronnie Russell, Mo., were elected as at-large members of the governing committee.

2019 DIRECTORS

2019 GOVERNING



Davie Stephens
President,
Clinton, Ky.



Bill Gordon
Vice-President,
Worthington, Minn.



John Heisdorffer
Chairman,
Keota, Iowa



Charles Atkinson
Great Bend, Kan.



Jerry Bambauer
New Bremen, Ohio



Cliff Barron
Johnsonville, S.C.



Kendell Culp
Rensselaer, Ind.



David Droste
Nashville, Ill.



Todd Du Mond
Union Springs, N.Y.



Morey Hill
Madrid, Iowa



Jered Hooker
Clinton, Ill.



Brooks Hurst
Tarkio, Mo.



Eric Maupin
Dyersburg, Tenn.



Alan Meadows
Halls, Tenn.



Scott Metzger
Williamsport, Ohio



Caleb Ragland
Magnolia, Ky.



Joel Schreurs
Tyler, Minn.



Rob Shaffer
El Paso, Ill.

COMMITTEE



Bret Davis
Secretary,
Delaware, Ohio



Brad Kremer
Treasurer,
Pittsville, Wis.



Brad Doyle
At-large,
Weiner, Ark.



Ronnie Russell
At-large,
Richmond, Mo.



Kevin Scott
At-large,
Valley Springs, S.D.



Joe Steinkamp
At-large,
Evansville, Ind.



Stan Born
Dunlap, Ill.



Ken Boswell
Shickley, Neb.



Sam Butler
New Hope, Ala.



Daryl Cates
Columbia, Ill.



Dean Coleman
Humboldt, Iowa



Wade Cowan
Brownfield, Texas



Wayne Fredericks
Osage, Iowa



Dennis Fujan
Prague, Neb.



Josh Gackle
Kulm, N.D.



George Goblsh
Vesta, Minn.



Gerry Hayden
Calhoun, Ky.



Chris Hill
Brewster, Minn.



Willard Jack
Belzoni, Miss.



Brian Kemp
Sibley, Iowa



Ryan Kirby
Belcher, La.



Kurt Krueger
Rothsay, Minn.



Jim Kukowski
Strathcona, Minn.



Don Lutz
Scandinavia, Wis.



Nick Moody
Blackstone, Va.



Ron Moore
Roseville, Ill.



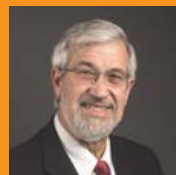
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Milner, Ga.



Scott Persall
Ontario, Can.



Monte Peterson
Valley City, N.D.



Bill Raben
Ridgway, Ill.



Pam Snelson
Wann, Okla.



Matt Stutzman
Adrian, Mich.



Jimmy Thomas
Timberlake, N.C.



Richard Wilkins
Greenwood, Del.



Brandon Wipf
Huron, S.D.



Bill Wykes
Yorkville, Ill.



BOOT CAMP



Participants of the American Soybean Association's (ASA) first State Policy Communications Boot Camp visit with House and Senate Ag Committee staff on the Hill. ASA brought together national and state communicators to build relationships and policy knowledge while exploring how ASA as an association communicates about key policy issues like trade and farm bill.

U.S.-SOY EXPORTS



(From left): U.S. Soybean Export Council (USSEC) Chairman Derek Haigwood, American Soybean Association (ASA) President Davie Stephens, USSEC CEO Jim Sutter and Under Secretary Ted McKinney discuss "Keeping US Soy Exports Great" during December's joint ASA and United Soybean Board (USB) lunch.

CHINA TOWN HALL



American Soybean Association Director Ronnie Russell of Missouri participates in a town hall held across multiple states to discuss the complex U.S.-China relationship during the countries' ongoing trade war. Photo courtesy of Missouri Soybean Association

U.S.-CUBA AG



American Soybean Association Director Joe Steinkamp (center) joined other delegates from the U.S. agriculture industry in Cuba this fall for the Cuba-U.S. Agriculture Business Conference. Photo courtesy of Kansas Association of Wheat Growers

By John Gordley

What the New Farm Bill Means for the Next One

President Trump signed the “Agriculture Improvement Act of 2018” into law on December 20, the first farm bill enacted in the same year it was introduced since 1990. The bipartisan achievement, which Congress passed with overwhelming support, will ensure that crop insurance and farm program risk management tools will be in place the next five years. However, these policies provide only a basic economic safety net for farmers and ranchers. Attention will continue to focus on low commodity prices and incomes, difficulties obtaining operating loans, and foreign markets that have been in turmoil this year as a result of retaliatory tariffs by U.S. customers.

In 2019, ASA will work with Congress, the Administration, and other farm organizations to improve the competitiveness and restore the profitability of U.S. soybean producers; support bipartisan efforts to fund modernization of our inland waterways infrastructure, including expanding capacity of shipping channels and upgrading locks and dams; press Congress to pass the USMCA trade agreement negotiated with Mexico and Canada and urge the Administration to enter into new trade agreements with Japan, the European Union, the United Kingdom, and other countries that have potential to significantly increase imports of U.S. soy and livestock products. And, we will keep as our top trade priority the need to restore the U.S. soybean market in China, including

eliminating the current tariff.

We note some significant takeaways from the new farm bill. Broad support of this legislation affirmed the long-standing alliance between food producers and consumers. Nutrition programs, including Supplemental Nutrition Assistance Program (SNAP), represent more than 70 percent of total farm bill spending, and we could never pass a bill in the House that benefits farmers and rural communities without the votes of its urban and suburban members. Landslide support in both Houses of Congress proves this alliance is alive and well.

Policies reflected in the current crop insurance program and in Title I were also affirmed. After fighting two years over differences between the revenue-based Agriculture Risk Coverage (ARC) program and the price-based Price Loss Coverage (PLC) program, both Agriculture Committees agreed to continue providing producers with choices under the new bill. Importantly, the policy of separating farm program payments from the crops actually planted in the current year, tying them instead to historical base acres, was extended without debate. ASA led a long, difficult fight to preserve this “decoupling” policy in the last farm bill so farmers would look to the market rather than the prospect of receiving government payments when making planting decisions.

Unfortunately, policies and programs supported by ASA in other titles did not fare well.



President Trump signs the 2018 Farm Bill into law on Dec. 20. Iowa soybean farmer and ASA Chairman John Heisdorffer is center back, left of man in hat. Photo courtesy of Associated Milk Producers, Inc.

Annual funding for the Conservation Stewardship Program will be cut from \$1.8 to \$1.0 billion, reducing its effectiveness in supporting best practices on working lands. Despite rhetoric in Congress linking agricultural research and farmer profitability, there are no new commitments to increase funding in Title VII. Support for biodiesel-related programs in the Energy Title has been cut in half. And, although the Committees did reauthorize the Foreign Market Development (FMD) program and fund both FMD and the Market Access Program (MAP), they were unable to double support for these export promotion programs, a key ASA priority.

To make the next farm bill more relevant to farmers and others who depend on conservation, agricultural research, biofuels, and export programs, ASA will need to work more closely with organizations that represent these constituencies. Working with Congress to increase support for sectors beyond the commodity and nutrition titles would result in a better farm bill that will continue to be broadly supported in 2023. *John Gordley is on the ASA Washington, DC staff*



One Vis

Three Organizations,

How the American Soybean Association, United Soybean Board and U.S. Soybean Export Council are working together for soy's future

The American Soybean Association (ASA), United Soybean Board (USB) and U.S. Soybean Export Council (USSEC) share a vision for soy producers.

That vision includes protecting the reputation of American soy and the interests of soybean producers within the legislative and regulatory process; providing increased opportunities for profitability for U.S. producers, both domestically and by advancing U.S. soy globally; and, not unimportantly within that process, providing nutrition for a hungry world.

While these organizations share outcomes for success, they each play separate roles in the effort.

ASA is the advocacy arm of the soybean industry, working on policy development and implementation. USB is the industry's checkoff program and serves research and promotion functions while it also supports market development. USSEC works to grow the international market for U.S. soybeans by advocating for the use of U.S. soy in feed, aquaculture and human consumption, and promotes the benefits of using soy through education programs.

ASA's World Initiative for Soy in Human Health (WISHH) complements the work of USSEC by exploring smaller, immature markets to promote the import of U.S. soy for human and animal diets in developing countries.

As we look toward 2019, CEOs from the three organizations offered their thoughts on what's to come on the topics of trade,

ion for the Future

By Chris Crawford



(Starting second from left) U.S. Soybean Export Council CEO Jim Sutter, United Soybean Board CEO Polly Ruhland and American Soybean Association CEO Ryan Findlay discuss the state of the soybean industry on a leadership panel in 2018. Photo courtesy of United Soybean Board

market development, technology, sustainability, brand reputation and the importance of collaboration.

Trade outlook

ASA CEO Ryan Findlay said trade was the number one issue for the soybean industry in 2018 and will continue to be so in 2019.

In early December, ASA said it was pleased to hear positive reports from the G20 Summit in Buenos Aires, Argentina that President Donald Trump and Chinese President Xi Jinping potentially agreed to deescalate current trade friction by not raising tariffs further while continuing negotiations.

In a statement, John Heisdorffer, a soybean grower from Keota, Iowa, and ASA's 2018 president, said, "If this suspension of tariff increases leads to a longer-term agreement, it will be extremely positive for the soy industry."

Findlay said the tariffs that China placed on U.S. soybean imports at 25 percent have been devastating for the industry ever since, with a sharp price drop and loss of a major market.

ASA has been working with the Trump administration to consider removing the tariffs and increasing trade back to original levels.

While the soybean industry waits, U.S. soy representatives around the world have been working to explore alternative markets including historic customers of U.S. soy such as the European Union and Japan, newer markets such as Egypt, plus several in Southeast Asia and the Americas.

For example, ASA and USSEC recently submitted joint comments and recommendations to the Office of the U.S. Trade Representative (USTR) to inform a new bilateral Japanese Free Trade Agreement.

"As part of the new free trade agreement with Japan, there has been talk about increased demand for animal protein there and how U.S. soy could be used to feed these animals," Findlay said.

Additionally, ASA is lobbying to make sure the new United States-Mexico-Canada Agreement, or USMCA, passes Congress as the replacement for the previous North

American Free Trade Agreement (NAFTA).

"Mexico is a top-three market for U.S. soybeans, so this is important for our industry," Findlay said.

Market development

USSEC CEO Jim Sutter said the group launched the "What it Takes" initiative in 2018 to pursue all potential viable markets for U.S. soy to best compensate for volume losses in China.

The goal is to prevent U.S. stock build-ups as much as possible and narrow the price spread between U.S. and other soybean-growing countries.

At networking events, USSEC has shown importers the advantages of buying U.S. product versus from other countries and the sizable export capacity of the West Coast and Gulf of Mexico.

"The tariff situation with China has affected not just our exports to that country, but also global trade flows as Brazil is currently supplying the bulk of China's needs, making it unable to supply as much demand from other countries," Sutter said. "The U.S. has stepped into that role, supplying multiple markets, even South American soy producers such as Argentina and Brazil itself with U.S. soybeans, but with a devastating effect on prices."

As the Chinese market remains suppressed, Sutter said the European Union has been a key market that USSEC is working to grow.

When China became U.S. soy's top market, U.S. market share in Europe decreased 30 to 35 percent, Sutter said.

"Now, we're trying to get that back up to 100 percent," he said. "This is the second largest market to China for the U.S."

(continued on page 12)



As soy growers face uncertain markets and a down economy, the soy family works together to ensure new opportunities. ASA/WISHH's FEEDing Pakistan Project connected trade and development with soy-based fish feed and helped convince the World Bank to invest \$150 million in Pakistan's aquaculture sector. Now USSEC leads the U.S. soy industry's work in Pakistan. Photo courtesy of WISHH

Another real growth market for U.S. soy is Egypt, Sutter added.

"We've been working there for numerous years, but they have been buying more soybeans total and more from the U.S., as well," he said. "They like our supply chain and quality, and demand in Egypt is growing along with their poultry and aquaculture offerings."

Argentina has also been a growth market for U.S. soybeans this year, as the country's own crop harvested April-June this year was down by a third and they turned to the U.S. to compensate for their shortcomings, Sutter said.

ASA's WISHH continues to tap new markets and prepare them for USSEC to promote U.S. exports.

Two examples of this are Ghana and Cambodia, Findlay said.

"Both are long-term market development focuses," he said. "We go into a region and country and work with partners to establish an industry—develop agricultural value chains around protein production, including

poultry, aquaculture and livestock."

Once the value chain is established and demand is created, U.S. soy products can fill gaps where they exist, having created sustainable opportunities for trade, Findlay added.

Sutter concluded by saying, "We work with WISHH to grow global demand. Once WISHH has laid the foundation for trade, we work with local industries to grow export opportunities for U.S. soy."

Technology

USB CEO Polly Ruhland said the organization uses checkoff dollars from soybean growers to fund research projects including production, sustainability, markets and nutrition.

"We will continue research in the production area, making sure profitability of soybean farmers is our number one outcome," she said.

New projects for 2019 will be picked in the springtime, according to Ruhland.

In 2019, a prime focus will be on finding new ways to use soybeans including industrial uses such as adhesives, tire rubber, powder coating on metal, and ink for printing, she said.

In addition, research will continue to focus on soybeans as a biofuel source.

"These things we like to find to keep soy moving outside the traditional feed-and-food area," Ruhland said.

One such emerging technology Ruhland pointed to is high-oleic oil.

"The USB has been involved in a three-to-four-year market introduction of high-oleic soybean oil," Ruhland said. "The project speaks to end-users directly about the advantages of high-oleic oil."

These perks include a higher heat point so the oil can be left in the fryer longer, and it has a health profile similar to olive oil.

"This is important, as there have been increased government regulations on trans oils recently," she said.

Additionally, USB is working hard to examine how data from soybean growers can best be used to help them improve their businesses.

"We are looking for solutions to help farmers harness the power of data they have for production decisions to use for inputs and soil health," Ruhland said. "We can't hide from this. Data is one of farming's greatest strengths."

Sustainability

ASA's Findlay said when it comes to how soybean growers tackle sustainability, it cannot be a one-size-fits-all approach.

"This will be different for different regions and focused on different social, economic and environmental factors," he said.

Points to address include how to improve conservation on the farm, fertilizer use and increased output per acre.

"Farmers are ready to engage in this," Findlay said. "We need to help define what sustainability is from the farm level and explain it to consumers and buyers. This has to happen while not creating additional burden on farmers in drastically changing what they are already doing."

USB's Ruhland said global markets already know the U.S. soybean product is created sustainably.

"What is expected is continual improvement," she said. "The USB sets measurable sustainability standards and looks to help farmers understand how to meet them and get better every year. Farmers have a strong interest in sustainability to keep their farms going for further generations, as well."



ASA CEO Ryan Findlay (left), USB CEO Polly Ruhland (center) and USSEC CEO Jim Sutter (right) are working together to protect U.S. soy growers and provide increased opportunities by advancing U.S. soy globally.

USSEC's Sutter said the group works internationally with buyers and other accreditation groups to make sure governments understand the sustainability of how U.S. soybeans are produced.

"Europe started this call for responsibility—the sustainability movement—about 10 years ago and people continue to care about it," he said. "It's a real selling



point—more people around the world want to know how their food is produced."

Sutter pointed to USSEC's U.S. Soy Sustainability Assurance Protocol, which was introduced about five years ago as an international verification standard.

And as an example of the success of this effort, Sutter said, U.S. soy was recently recognized by the Tokyo 2020 Olympic and Paralympic Games as food that is grown using sustainable practices.

Brand reputation

USB's Ruhland said the organization is working on a soybean brand architecture project to better promote the commodity internationally.

"USB is taking USSEC's soybean branding and expanding it and deepening its roots domestically and internationally," she said. "Brand protection is never over. So, we are working hard to put extra resources toward things such as disputing soy myths."

Another goal of this effort is to differentiate U.S. soy from other origin soybeans in the international market and, more

broadly, against other plant proteins and feed sources.

Collaborative effort

Finally, when asked about the importance of collaboration among the three soy organizations, the CEOs touted it as critical to the success of the U.S. soy industry.

ASA's Findlay: "Whether it's ASA, USB, or USSEC, we are all here to represent soybean farmers, and those farmers care about growing their commodities in a smart, economic way. Together, we are advancing the needs of our industry by driving key issues forward."

USB's Ruhland: "If the three of us stay within our strengths and work together, it's difficult to find an issue with soy that we can't resolve."

And, USSEC's Sutter: "These are big challenges that the U.S. soybean industry is facing. We are lucky to have each of the three organizations doing its own thing while collaborating to have the best results for the soybean industry."

Soy in the Global Spotlight



NBC Nightly News visits ASA Director Rob Shaffer's farm in El Paso, Ill. early in the U.S.-China trade war to gain a soybean grower's perspective. Photo courtesy of Rob Shaffer

Farmers already carry the titles of agronomist, marketer and mechanic, and now many soybean growers can add another moniker—industry spokesperson.

Farm Bill negotiations, a revised trade agreement with Canada and Mexico, and especially a trade conflict with China have thrust the soybean industry and farmers into the media spotlight like never before. Soy industry leaders have become the hot commodity, participating in hundreds of interviews with news outlets around the globe.

"If we have not heard from CNBC, *Wall Street Journal*, Reuters, or another major news outlet by 10 a.m., I have real concerns that I've walked into the wrong office," quipped American Soybean Association (ASA) Director of Policy Communications Wendy Brannen. "One week, the *Wall Street Journal* called three times—three different reporters working on three different stories about the trade tariffs. Organizations sometimes work for years to get on the phone with the *Wall Street Journal* just one time for one sentence in one story."

Brannen said the sheer volume of calls and media placements is nearly impossible to estimate as state soybean offices, the U.S. Soybean Export Council (USSEC) and ASA have all been inundated with media requests.

Media tracking metrics reveal how often the trade war and impact of tariffs on U.S. soybeans was

mentioned in print and online articles. Nearly 10,000 media reports were generated in April 2018, shortly after retaliatory tariffs on U.S. soybeans emerged as a possibility in response to new duties placed on steel and aluminum from China. Print media placements spiked to almost 15,000 in July 2018 when the tariffs became reality—compared to just 800 trade-related articles the year before.

Those reports tallied an estimated 17.3 billion potential views in July 2018 alone, mind-boggling numbers that don't even capture exposures

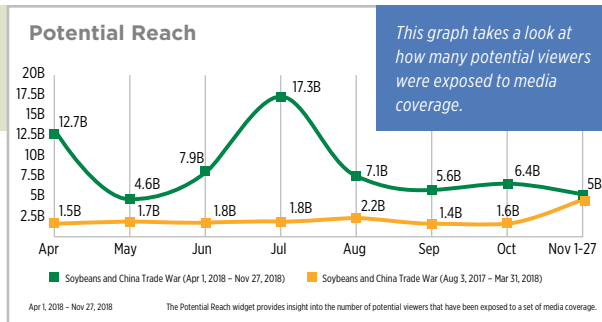
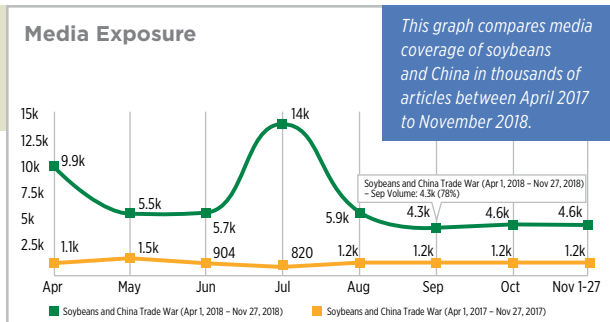
generated by broadcast reports, which are not tallied in ASA's monitoring service.

Farmers were placed front and center in media reports because, "it's important that people getting their information through the media and decision makers in Washington, D.C. hear directly from the growers what this trade war looks like back home on their farms and how it is directly impacting them," Brannen added.



2018 ASA Chairman Ron Moore does a phone interview with CNBC regarding the Chinese tariffs and impact on U.S. soybeans.

Soybeans and China Trade War Media Report Apr 1, 2018 – Nov 27, 2018



Print and online coverage of soy trade year over end jumped remarkably from 2017 to 2018, with these dramatic figures not measuring the additional volume of broadcast television stories.

Source: Meltwater

Farmers out front

ASA 2018 President John Heisdorffer of Keota, Iowa, was a frequent media guest, often with his kitchen counter, tractor cab or combine serving as an impromptu studio. Heisdorffer tallied up more than 150 print and broadcast interviews he's done since the specter of soybean tariffs was first raised. While he and other farmers have been called upon to respond to questions about difficult issues, the attention has presented the opportunity to speak to serious challenges facing the nation's soybean farmers.

"I hesitate to say it's been a good thing," Heisdorffer said, "But we have been able to talk to the media about this plight and how it affects farmers. We've also been able to delve into other issues like biotechnology and not just focus on soy tariffs."



As the issue of soybean tariffs escalated, 2018 President John Heisdorffer gave more than 150 print and broadcast interviews this past year.

Clinton, Kentucky, farmer and ASA 2018 Vice President Davie Stephens—now president—estimated he's done, conservatively, more than 75 media interviews in the past few months. Like many other soybean leaders, Stephens has not shied away from the media glare.

"It's a good thing anytime we can deliver the message of the reality of what's happening in agriculture," Stephens said. "We often hear about what's happening in the automobile industry or in manufacturing, but this gives us the opportunity to let America know what's happening in the agriculture sector."

Beyond agriculture

Farm issue discussions are typically confined to the ag media, but trade issues made agriculture's challenges mainstream news. Soybean farmers have been interviewed by a wide range of news organizations including Reuters, National Public Radio, the *Washington Post*, *New York Times*, Hearst, Associated Press, *USA Today*, *Time*, *Forbes*, Fox News, CNN, CNBC, ABC, CBS, *Wall Street Journal* and dozens of other national, global and local media outlets. Heisdorffer was even quoted in *Rolling Stone* magazine.

"A lot of time, ag reports to ag. When we try to deliver our message, we're telling our own industry, not consumers," Stephens said. "This provided an opportunity to let someone besides those in agriculture know what's happening in agriculture."

Media contacts have not been limited to domestic news sources. Soybean farmers have conducted interviews with news outlets from Canada, Japan, China, Hong Kong, England, South Korea, Spain, France, Ireland, Germany, Denmark, Brazil and Finland, to name a few.

"I take it as an opportunity we might not otherwise have had," Stephens added.

Although it would have been easy to avoid the calls and interviews, especially during the hectic fall harvest season, soybean farmers across the country stepped up to the microphone to share their stories.

"This shows ASA in a positive light, that we are working very hard to get issues resolved. It lets farmers know that ASA is out there fighting for them to get the best possible outcome for American soybean farmers," Heisdorffer said.

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Soybeans were a hot topic both at home and abroad in 2018. ASA and North Dakota Soybean Association worked with The Asahi Shimbun reporter Naoatsu Aoyama on a story regarding soybeans piling up as a result of the U.S.-China trade war.

Delivering the message

The media attention given to the nation's soybean farmers offered a platform to drive home the message of trade's importance to agriculture, but also their desired outcome.

“We want to work with the administration to get what’s best for farmers. We appreciate the Market Facilitation Program, but we want our trading partners back,” Stephens said. “We’re asking for the trade tariffs to be rescinded so we can get trade going again.”

In addition to the messages delivered through media outlets, ASA farmer-leaders continue working on many levels to benefit soybean farmers.

“Progress rescinding the tariffs or achieving other steps to offset their impact feels slow, at best, but we have kept the pressure on through the public lens,” Brannen said. “Long term, I believe there is merit to all of the attention. People have a better grasp on how the export market works and the role agriculture and the soybean industry, specifically, plays in that system and the subsequent consequences on our economy.”



ASA President Davie Stephens talks with reporters during the 2018 National Association of Farm Broadcasters (NAFB) Trade Talk event in Kansas City, Mo.

Soy Leaders in Action, Across the States

By Wendy Brannen and Dan Lemke

Their unique experiences and funnies along the way...

It all seems so simple. Just respond to media requests, answer their questions, and move on to the next thing. But as anyone who has tried to respond to reporters working on deadline or do an interview while juggling a dozen other responsibilities can attest, it's rarely that easy.

Farmer-leaders and staff from every soybean-

producing state have been pressed into service to deal with media requests, sometimes under extraordinary circumstances. These examples of behind-the-scenes chaos, craziness, and lessons learned prove growers are willing to do what it takes to share their message and advocate for the industry.

Willard Jack, ASA Director, Miss.

“A Japanese TV station out of D.C. contacted me regarding a story in early September. They flew from Washington to Jackson, Miss., rented a car, and drove one and a half hours to spend the night in Yazoo City to be at the farm by daylight. They spent all day doing interviews and shooting film. They would ask questions in English, translate to a reporter who only spoke Japanese, then he would speak on film. We watched combines work, went to grain elevators, the John Deere store, and a soybean crush plant in Greenwood, Miss. I spent all day with them and took them out to an evening meal. Three weeks later, I got a call saying nothing aired. Some days are like that.

Ken Boswell, ASA Director, Neb.

“I was asked to call in for five minutes to an hour-long call-in program on my local radio station to start a conversation on NAFTA. The host reporter grew up in sugar beet farming and was opposed to NAFTA, where I was pro-trade and supported NAFTA. It quickly became confrontational, and instead of being five minutes, I was on live the full hour promoting NAFTA.

Brad Kremer, ASA Director, Wis.

“I had a news crew from China come out in an historic spring blizzard, multiple phone interviews with CNBC, NPR and local news agencies, and groups visit from Colorado and Maine, also. They were all shocked that we're still in business with the

losses we've taken. A few tried to get political and make me angry, hoping I'd throw Trump or certain lawmakers under the bus, but most were very concerned and just wanted to help.

Rob Schaffer, ASA Director, Ill.

“In March, NBC sent a camera crew to my farm two hours south of Chicago and filmed for one and a half hours for 30 seconds of airtime on tariffs, but at least it aired in three different shows. Later that month, my 11-year-old nephew outlined our tariff talking points to SMG (Shanghai Media Group) and actually made it on TV (and, I made the cutting room floor!). In June, I did a radio interview while I waited for lunch at Legal Sea Foods inside Washington Reagan Airport and then another one 15 minutes later going through security—we've all done lots of airport interviews.



Luke Shaffer, 11, talks tariffs and the impact on his family farm in Illinois with SMG reporter Mei Xing Ren. Photo by Rob Schaffer

(continued on page 18)

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Dean Coleman, ASA Director, Iowa

“During our July Hill visits, we were waiting to see Senator Grassley and my phone rang. It was a local radio station talk show calling to see if I was available for an hour-long show on what was going on with soybeans and any legislation affecting Iowa and U.S. producers.

Don Lutz, ASA Director, Wis.

“The Chinese Xinhua News Agency’s Washington Bureau contacted me in April about flying into Madison that Saturday to discuss soybean tariffs. A colossal snow storm with expected blizzard and white-out conditions was forecasted, and only extreme emergency travel was recommended—but the news crew was determined to come anyway. Our driveway is one-half-mile long, graded flat, and our neighbor had just injected 16,000 gallons of liquid manure to the fields on both sides. By 11 a.m., we already had 12 inches of snow, so the drive was an unmarked sea of white surrounded by soft, spongy field. Thinking I should meet them at the road if they even made it to our house, I decided to blaze a path to the road. Sure enough, I got off the driveway into the field, liquid manure and all, stuck solid about 150 yards from the house with no way to get myself out. Finally, six more inches of snow and several delays later, they were set to arrive, so I got dressed to hike the drive on foot, straight into the wind and blowing snow. After 20 minutes of slogging through a foot and a half of snow, I made it to the road, and for a little over an hour, we did our interview in their van as it rocked with the wind gusts. When the storm was finally over Sunday morning, we had 32 inches of snow. Later, in July, I attended the ASA board meeting in D.C., and I visited the Xinhua office on Pennsylvania Avenue and had a good laugh reminiscing about our experience.

Nancy Johnson, Executive Director, North Dakota Soybean Growers Association

“I think the most challenging part of working with political reporters has been keeping away from political questions. And, then there’s the constant need to talk with multiple farmers in Fargo. I finally started asking how far they were willing to drive before setting up interviews. The few business reporters who dropped into the state were much easier to work with, even if they had no soybean background. It’s been amazing to see the patience



(From left to right) Former North Dakota Soybean Growers Association Board President Jason Mewes and Executive Director Nancy Johnson talk tariffs with Joel Heitkamp of KFGO radio. Photo courtesy of North Dakota Soybean Growers Association

board members have had with the very personal questions and with having to dodge the political answers—even when they spend a lot of time with a reporter, only to get one line in the story.

Pam Snelson, ASA Director, Okla.

“One lighthearted moment came during an interview with a Paris, France ag newspaper reporter by Skype from our farm office. It’s a seven-hour time difference, so we were talking early in the morning. Without warning, the office door opened and [my husband] Steve’s 90-year-old father came in and screen-bombed our interview. Coffee in hand, he was telling Steve to, ‘Come on, daylight’s wasting’ without realizing we were doing an interview! ‘Who’s that?’ his dad asked, pointing to the screen and not knowing that Ivan, the reporter, could not only hear, but also see him. Gestures didn’t suffice, so I finally had to turn around and give brief explanation. Ivan took it all in stride, but that’s the last time I conduct a farm office interview without a sign on the door saying, ‘DO NOT EVEN THINK ABOUT COMING IN.’

Kendell Culp, ASA Director, Ind.

“I was on Fox TV for a live interview with the USDA Secretary of Agriculture Sonny Perdue. I had never had makeup on my face before, and after seeing the clip, I can honestly say it didn’t help a bit. I also had the cool experience of meeting with President Trump, Vice President Pence, Secretary Perdue, USTR Chief Agricultural Negotiator Gregg Doud, and USDA Chief of Staff Ray Starling at the West Wing. They confiscated our electronic devices upon arrival, so we

couldn't take photos. A White House photographer did take a few pictures, and we guests took a group photo outside on the grounds, but when I posted it on Facebook, my wife said, 'There really isn't any proof you actually met them since they're not in the picture.' 'Thanks, honey, for your support,' I joked. But, a couple days later Trump posted a photo on his Instagram with me in the background, so I felt exonerated.

In October, a German TV crew came to the farm. The crew interviewed me while I was driving my truck, which felt strange looking at the road and not the camera. But, then they saw my 82-year-old father on the tractor: 'We want his perspective,' they said, and ran after him, cameras rolling, to pepper him with questions: 'Do you support the President's policies? Did you vote for the President?' As a strong Republican and Trump supporter, he had plenty of sound bites to share with them. On to the combine: First, the cameraman wanted to ride on the grain platform, but I said no way, too dangerous. Then he tried to mount a portable camera on the head of the machine with little suction cups. If it'd come loose, it would've fallen in the head and been destroyed. He ended up mounting one on the outside glass facing forward and one inside facing me. It was really weird knowing your every move was being recorded to air on German television the next day.



Kendell Culp outside the White House after a meeting with the Trump Administration to discuss trade issues. Photo courtesy of Kendell Culp

Rachel Peabody, Communications Manager, Illinois Soybean Growers

“When the April announcement hit, Amy (Roady) and I were at a CFI meeting in Orlando. We spent the entire first day in the hallway responding to media requests from just about every outlet in Chicago. Later, we hosted a Chinese media group at the Bloomington office. They took an Uber to Bloomington and booked another Uber to get to Rob Shaffer's farm. He ended up driving them to a neighboring town to get an Uber back to Chicago. That's no small feat in small-town Illinois. In April, we had a Bloomberg reporter out for farm visits, and that one article was picked up by about 30 publications. Illinois is among states that have hosted the world on their farms throughout the season, even during harvest—Austria, China, France, Japan, the Netherlands and more.

Joe Steinkamp, ASA Director, Ind.

“ASA lined me up with NBC Nightly News, which sent a crew from Indianapolis to do a live interview. The next night, my wife and I were out for dinner with three other couples at a microbrewery. We were seated at one end of a 20-person table, and the people at the other end were talking about a farmer from Evansville being on NBC Nightly News. One of the guys with me hollered over to them that it was me, sitting at other end of the table. I had to autograph a napkin for them! Interesting that people do watch the news and it makes dinner conversation. Also, I was surprised how many texts, emails and Facebook messages I got over it.

Ronnie Russell, ASA Director, Mo.

“I remember being scheduled to do a live interview for a noon broadcast on RFD-TV concerning tariff impacts. Being this was a live interview and cell phone service in my part of the country is sketchy, at best, I knew I needed a good signal to ensure the call wouldn't get dropped. I drove around for miles looking for a high hill and watching the signal bars go up and down until I finally got enough signal to confidently take the call.

Doug Monson, Director of Public Relations, Minnesota Soybean Growers Association

“Minnesota is often called 'flyover country,' but not this past year when it came to soybeans and trade. When the tariff announcement came out, no one was fully prepared for the media onslaught. At MSGA (Minnesota Soybean Growers Association) alone we

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had 1,500 media placements by August that included major national and international press from New York to Norway. We've also experienced canceled appearances or growers bumped for breaking news, and a funny, friendly exchange between ZDF German television and BBC. ZDF was interviewing MSGA Director Bob Worth while BBC was trying to line up an interview. The German reporter turns to the MSGA staffer arranging the interview and says, 'Tell the Brits the Germans were here first.'

ZDF (German public television) was interviewing MSGA (Missouri Soybean Growers Association) Director Bob Worth while BBC was trying to line up an interview. The German reporter turns to the MSGA staffer arranging the interview and says, 'Tell the Brits the Germans were here first.'

— **Doug Monson, Director of Public Relations, MSGA**

MSGA President Michael Petefish had to Skype in for a television interview with a Minneapolis TV station during a board meeting once, so we created a makeshift office complete with a cardboard iPhone holder. Most of the media experiences have been positive, but many followed a script: 'Did you vote for President Trump? How do you feel about the President now that he is hurting soybean farmers? If you had a chance to do it again, would you still vote for the President?' This issue is polarizing and political, and we hear from those who don't like our messaging. A voicemail on the 'left' chastised farmers for voting for Trump when they, 'knew he was gonna do this,' and said 'America doesn't want to listen to you whine.' Another on the far right was laced with profanities, including 'There is a lot more going on in this world than @!#\$ing soybeans.'

Christine Tew, Director of Communications & Public Relations, Missouri Soybean Association

“Putting together visits for a national reporter planning to visit Missouri is complex enough on its own. In one case this summer, we discovered that a reporter was working with multiple soy and ag groups—all independently—to schedule interviews with farmers statewide. Circling up our communications contacts via email and coordinating together, we were able to create a three-day tour maximizing efficiency for the reporter and message consistency among farmers, resulting in print, digital and social media coverage. Telling the story of these trade disputes and the impact on farmers and the many other people working across agriculture is definitely complicated, but add in the incredible interest from national and international media and many partners in the soy family and it's really become an incredible opportunity to show how well our communicators, farmer leaders, and the entire soy family works together.

Kevin Scott, ASA Director, S.D.

“The first time I did a CNBC-TV interview from home by phone, I didn't anticipate there would be such a large delay from when a question was asked to when it would show up on the screen. I said something lighthearted and was watching for a smile and got nothing. Then, when I had moved on to a more serious response, the smile came. I had to quit watching the monitor because it was really messing me up. Another time, the *New York Times* quoted me as saying to President Trump, 'Wow, man, you are really messing up my market.' Of course, I would never talk to the President that way, but sometimes the writers have a story they want to tell and occasionally embellish a bit. Once, a local TV reporter wanted video of equipment running in the field. It had rained two inches the day before, so I told her she could come out and get a shot of the tractor, but it was too muddy to do any work. She cajoled me into driving about 30 feet, which is all I could move it, and they got their shot, but that next month I took a lot of grief from local farmers for trying to plant in such poor conditions, as the video showed my tires full of mud and me making a huge mess. The things a guy gets talked into doing to get the story! Even I had to shake my head.”

Wendy Brannen, ASA Policy Communications Director

“Our July ASA board meetings were the week of July 9 in D.C. To give perspective, China’s 25 percent tariff took effect Friday, July 6. At least a couple of directors joked that they were dodging me in the hallways because we were lining up interviews in such rapid succession, plucking them out of the meetings in rotation to take interview calls and appear on camera. But, in actuality, they were very agreeable; they realize this is a major issue for them with direct and serious consequences—both immediate and long term—and have bent over backwards to advocate for our industry. There are times you can hear the tiredness and frustration when they’re trying to beat the clock in the fields and you call to ask about the nth request from CNBC, but they don’t complain, they just get off the combine, find a quiet place, and do it.

Ron Moore, ASA Director (2018 Chairman), III.

“My story is less ‘crazy’ and more a learning moment. I took a call from a Fox 32 producer in Chicago wanting to come out to the farm to do an interview. At the prescribed time, an unmarked black Chevy Suburban pulled up. I worked with the producer, reporter, and camera man to get the story done that afternoon, but later realized I had gotten no business cards or no last names—they could have been anyone! I anxiously searched Google, and thankfully the reporter turned out to be legitimate, but the lesson learned was to do more homework ahead of time and carefully vet any media calling me directly.

Davie Stephens, ASA 2019 President (2018 V.P.), Ky.

“My favorite was doing an interview at 11:30 at night after leaving my house at 5:30 the same morning!

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ASA/WISHH Launches Aqua Feed Program in Cambodia

Connecting trade and development

The American Soybean Association's (ASA) World Initiative for Soy in Human Health (WISHH) program is building on its successful track record in aquaculture development by launching the Commercialization of Aquaculture for Sustainable Trade (CAST) – Cambodia. CAST will connect trade and development by accelerating production of high-demand fish species for the Cambodian market and developing a lasting aquaculture industry that recognizes the value of soy protein in feed.

As a result of an extensive competitive proposal process, the U.S. Department of Agriculture (USDA) selected WISHH to implement CAST under the USDA Food for Progress Program. WISHH is currently implementing the USDA-funded AMPLIFIES Ghana project that improves Ghana's poultry feed production capacity and increases efficiency in poultry value chains.

"CAST is an exciting affirmation of WISHH's ability to connect trade and development," said WISHH Chairman Daryl Cates, an Illinois soybean grower. "WISHH is a trailblazer for trade through CAST, which will improve agricultural productivity and expand trade of agricultural products through commercial aquaculture sector growth in Cambodia."

The Southeast Asian country's Gross Domestic Product (GDP) has increased by more than 7 percent per year since 2011, growing the demand for animal



Jim Hershey, who leads WISHH's CAST project, and local consultant Sambath Sak work with Cambodian fish hatchery entrepreneurs. Photo courtesy of WISHH

and aquaculture-sourced protein. CAST's anticipated local economic impact exceeds \$300 million over the life of the project, and Cambodia's aquaculture industry demand for soybean protein is projected to reach 100,000 metric tons per year by 2030.

WISHH committee members have traveled to Cambodia and are eye witnesses to the potential for U.S. soy in the country.

"I had the opportunity to represent Missouri soybean farmers on a trade mission to Cambodia last year," said soybean grower David Lueck of Alma, Mo., who also serves on the WISHH Program Committee. "The Cambodian feed sector is growing rapidly, and they are increasing their consumption of U.S. soy."

North Dakota soybean grower Matt Gast also serves on the WISHH Committee and joined WISHH staff in a variety of meetings in the region.

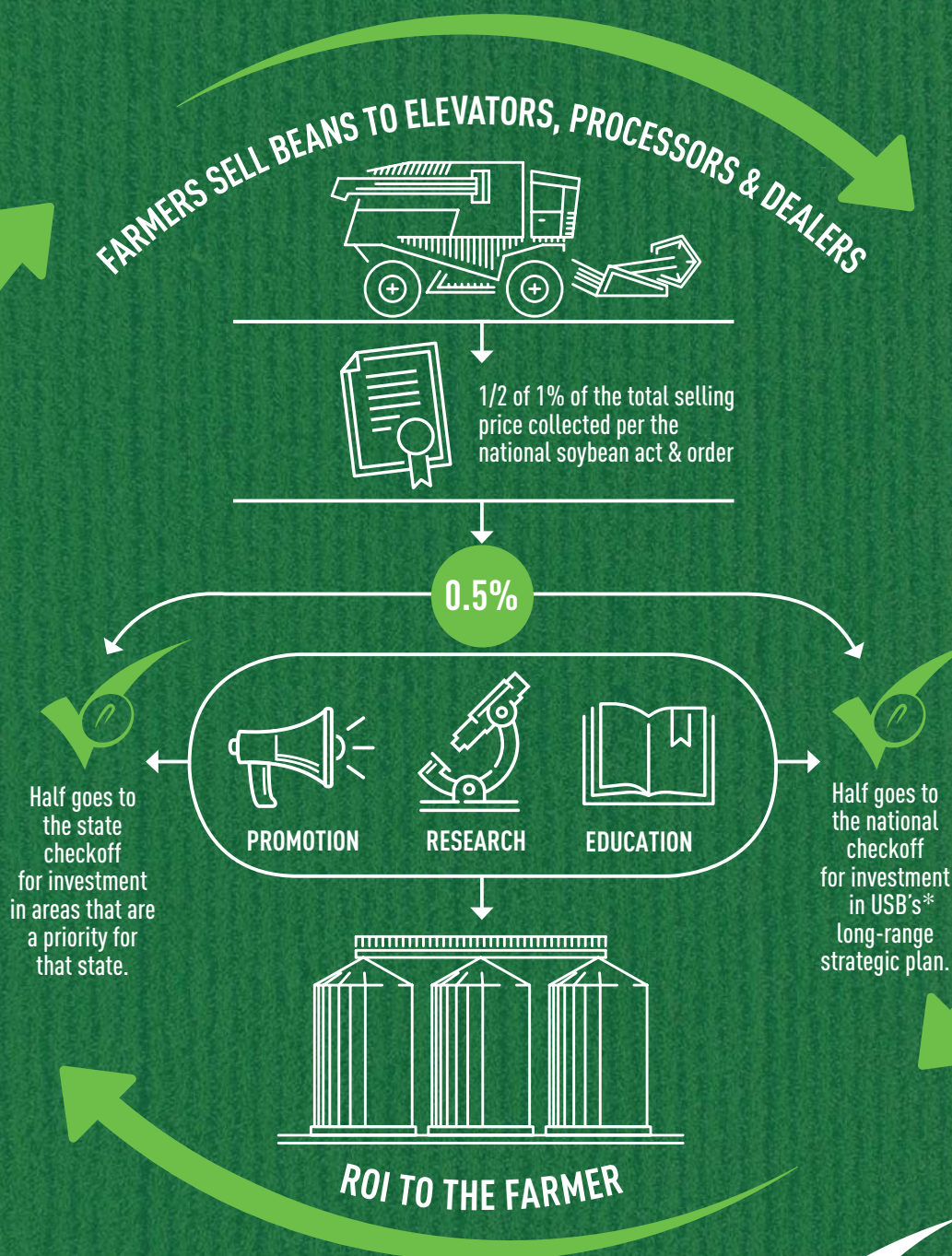
"Aquaculture is really taking off in Cambodia, and soy protein demand will grow with it," Gast said. "An importer of U.S. beans is building a brand new fish feed plant in Phnom Penh!"

CAST benefits from the trade and development insight of Jim Hershey, who concluded 26 years of regional and global market development leadership in October when he retired as WISHH Executive Director. Hershey accepted the assignment to be CAST's Chief of Party.

The CAST project also benefits from the expertise of key partners, including the U.S. Soybean Export Council (USSEC), Kansas State University, Auburn University and local universities in Cambodia. Importantly, Cambodia's local private-sector feed mills and hatcheries and the Cambodian Ministry of Agriculture, Forestry and Fisheries are all collaborating with WISHH to implement CAST.

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.

unitedsoybean.org



SOYcheckoff news

Soy Checkoff Sets Strong Course for Future with New Leadership and Continued Focus

United Soybean Board (USB) farmer-leaders elected Keith Tapp, fifth-generation soybean farmer from Sebree, Ky. as chair at the annual meeting December 5, 2018. In addition, 16 directors, appointed by Secretary of Agriculture Sonny Perdue in October, were sworn in by the USDA.

“Our soy checkoff has proven itself by developing new products and markets for U.S. soy for decades,” said Tapp. “Our job is to continue this progress through wise and strategic investments, which is more important now than ever.”

USB leadership is tasked with guiding the activity of the national soy checkoff in accordance with the strategy outlined by the entire board. USB continues to focus on

three priority areas for investment: meal, oil and sustainability.

At the annual board meeting, USB also elected nine directors to serve alongside Tapp on the Executive Committee.

- Jim Carroll, Vice Chair – Arkansas
- John Dodson, Secretary – Tennessee
- Dan Farney, Treasurer – Illinois
- Gregg Fujan – Nebraska
- Woody Green – South Carolina
- David Iverson – South Dakota
- Meagan Kaiser – Missouri
- Tom Oswald – Iowa
- Mark Seib – Indiana

Three farmer-leaders were also elected to serve on the Strategic Management Committee: Rochelle

Krusemark, Minn.; Ralph Lott II, N.Y.; Doug Winter, Ill.

USB’s 73 farmer-directors work on behalf of all U.S. soybean farmers to achieve maximum value for their soy checkoff investments. These volunteers invest and leverage checkoff funds in programs and partnerships to drive soybean innovation beyond the bushel and increase preference for U.S. soy. That preference is based on U.S. soybean meal and oil quality and the sustainability of U.S. soybean farmers. As stipulated in the federal Soybean Promotion, Research and Consumer Information Act, the USDA Agricultural Marketing Service has oversight responsibilities for USB and the soy checkoff.

NEW LEADERSHIP



United Soybean Board farmer leaders and executives. Back row, left to right: Tom Oswald, Dan Farney, David Iverson, Mark Seib, Gregg Fujan and Lewis Bainbridge. Front row, left to right: Meagan Kaiser, Keith Tapp, Jim Carroll, John Dodson, Polly Ruhland. Not pictured: Woody Green. Photo courtesy of USB

Soybean Farmers Invest in Soy Research and Promotion

The global appetite for soy is growing. Soy consumption has more than doubled since 2000.¹ U.S. soybean farmers have helped meet this demand, thanks in part to the soy checkoff.

What is the soy checkoff?

Farmers grow soybeans throughout the United States. Soybean farmers individually contribute .5 percent of the price they receive for each bushel of soybeans they sell. Then they collectively invest these funds—the soy checkoff—in research and promotion to develop and grow product markets. Other agricultural commodities such as beef, dairy and eggs also have checkoffs.

Half of each farmer's contribution goes to the farmer's state soybean board, called Qualified State Soybean Boards, for local research and marketing. The other half goes to the national level, the United Soybean Board (USB).

What is the soy checkoff used for?

Soybeans are comprised of protein-rich meal and versatile oil. Most soybeans, whether used domestically or exported, are crushed to separate those components to be used in countless ways. The soy checkoff grows and creates markets for soy products and helps farmers meet customer needs through research to improve soybean production and prove soy functionality. The soy checkoff also promotes use of soy products.

How does the soy checkoff work?

The soy checkoff efforts are directed by 73 volunteer farmer-leaders who make up the United Soybean Board. These leaders from around the country are nominated by state soybean boards and appointed by the U.S. Secretary of Agriculture. They set research and marketing goals and approve projects to benefit all soybean farmers.

For more information on the United Soybean Board, visit www.unitedsoybean.org.

Sources and Additional Resources:

¹ *A Growing World Population Wants More Soybeans*, analyst John Baize, based on USDA data.

² *United Soybean Board Market View Database*.

³ *Field to Market 2016 National Indicators Report for Soybeans*.

⁴ *Another Record Year for U.S. Soybean Exports*, United Soybean Board.

CHECKOFF GOALS

What are the soy checkoff's goals?

1. Capture the full value of U.S. soybean meal.

The protein portion of soybeans is meal that can be used in feed, food and industrial applications. Animal agriculture consumes nearly 97 percent of soybean meal used in the U.S.

Chickens, pigs, turkeys, cattle and fish need high-quality protein to thrive. Soybean meal provides high levels of protein, amino acids and digestible energy. The soy checkoff encourages nutritionists around the world to use the nutrient density of U.S. soybean meal to help feed and grow their herds and flocks.

2. Build preference for U.S. soybean oil.

About 61 percent of the soybean oil used in the U.S. goes into the food industry for frying, baking, sauces and more.² The neutral taste and flexibility in food preparation makes soybean oil a popular ingredient choice. The rest fills many non-food needs.

For example, in the 1990s the soy checkoff launched the biodiesel industry as a cleaner-burning, renewable alternative to petroleum diesel. Made from soybean oil and other renewable sources, the market for biodiesel grew from nothing to nearly 3 billion gallons per year, according to the National Biodiesel Board.

The soy checkoff also helped develop high oleic soybean oil, an advanced oil crushed from high oleic soybeans. High oleic soybeans naturally produce oil with a profile very similar to olive oil. High oleic soybean oil performs well under high heat stress, making it ideal for frying and cooking.

3. Enhance and share U.S. soy sustainability performance.

Customers who use soybeans have their own sustainability goals; farmers grow soybeans and manage natural resources to meet those goals. Analysis of U.S. Department of Agriculture data shows that since 1980, soybean farmers have decreased soil erosion by 47 percent, demonstrating soil conservation and improving soil health.³ They have also cut energy use per bushel by 35 percent, reducing greenhouse gas emissions.

The U.S. exports about 60 percent of its soybean production.⁴ For global customers, the soy checkoff helped create the U.S. Soybean Sustainability Assurance Protocol, or the SSAP, that verifies the sustainability of U.S. soy products. According to the U.S. Soybean Export Council, 95 percent of U.S. farms currently participate in the program and meet the sustainability criteria.



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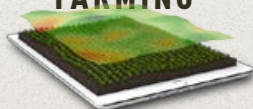
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INDUSTRY

perspective

By Joe Scott

Soy Leadership Programs Foster Strong Ag Advocates

Whether it's advocating for good farm policies or positive trade agreements, or correcting misperceptions about farming methods or products, agriculture has always needed strong leaders.

The American Soybean Association (ASA) and its corporate partners have committed to training leaders who can take up the challenges farming's future has to offer. Past participants in ASA training programs have gone on to serve on state associations and national boards, been elected to local, state, and federal positions, and served in regulatory capacities.

Following are four opportunities for leadership training offered by ASA and its corporate co-sponsors.

Leadership At Its Best



Leadership At Its Best participants discuss how to address legislative issues, interact with the media, manage diverse communications styles, plan and strategize for the future, and improve productivity.

This program is for current directors or committee chairs of state soybean associations who have a strong desire to assume top leadership positions.

The training sessions cover advanced leadership, agricultural issues, communications and media

training. Part of the training takes place in Washington, D.C., and includes Capitol Hill visits. Many states have a selection process to determine who will represent their state at the Leadership At Its Best program.

Syngenta partners with ASA to sponsor and lead the training sessions. Laura Peterson, head of federal government and industry relations for Syngenta, said there are many opportunities where growers may advocate for their farms, whether it's speaking on government issues, talking to the media, or engaging with people who share different viewpoints.

"With a little training, they will be more equipped and confident to handle situations and changes we see across the ag food chain. They'll do what they do best—provide impact on legislative, regulatory and societal issues by being a greater voice for agriculture," Peterson said.

She added that farmers are some of the best advocates on these tough issues. "They're running their businesses, they're close to the ground, they're involved in so many decisions and moving parts such as soil and water quality issues, agronomy, legal and tax questions, short and long-term planning, marketing, and using digital tools—they're on the forefront of technological advancements. They're truly handling many issues at once," Peterson said. "Growers' credibility is very high because they are so hands-on."



Ag Voices of the Future students learn more about the regulatory process during a presentation by Sheryl Kunickis, director, Office of Pest Management Policy at USDA in Washington, D.C., during their training.

Ag Voices of the Future

This training program is targeted at young people who want to improve their understanding of major policy issues impacting soybean farmers.

"The idea is to bring young people to Washington, D.C., and talk about agricultural policy or regulatory policy, discuss the issues being faced in agriculture," said Jeff Smith, industry affairs manager for Valent U.S.A. "The end goal is to get them to participate in political discussion and decision making at a federal level."

Valent is the ASA's corporate partner for Ag Voices of the Future.

While the program targets college students ages 18-20, older students also are considered for the Ag Voices program.

"There are only a few members of Congress who have any connection to agriculture," Smith explained. "Most of them are two or three generations removed from the farm, but they're telling farmers how to grow crops and

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they pass regulations farmers have to abide by. If we get more people with farming backgrounds who help make decisions about farming, the better off we'll be."

During the training, participants meet with their legislators and do some lobbying. Smith said the program helps prepare students to become legislative aides, U.S. Department of Agriculture or Food and Drug Administration employees, or legislators.

The students aren't forgotten once they leave the program. Smith said they monitor those who complete the program for the next three to four years. "We'll help them along in their careers, recommend them for internships, provide references, write them letters of recommendation," Smith said.

Advocacy Communications Team (ACT)

This training program seeks soybean farmers with a passion for interacting with consumers and the media to spread accurate messages about modern agriculture. ACT teammates are spread across 30 soybean-growing states and help the ASA respond to issues at national, regional and local levels.

Lee Hall, industry relations lead for Bayer Crop Science, said the ACT program is not only an important media tool, but also a way to help support the entire ag industry. Bayer is ASA's co-sponsor for the training.

"We offer participants media training, going over some of the best practices on how to engage media or talk one-on-one, whether it's with a neighbor or someone sitting side-by-side with them on an airplane, or speaking with a representative from their state or a larger audience on social media," Hall said. "We help them make sure their message is on point, clear, concise, and delivered in a way they can be proud of. That takes practice."

During the program, the training team interviews participants on camera and demonstrates on video how the participants improve as they progress through the training. Hall said the training helps participants shore up any weaknesses they may have and helps them get their message across during an interview, focusing on their talking points.

Participants represent a wide range of age and experience.

"We see technically-savvy participants help mentor the less experienced participants on social media," he said. "It's nice to see a millennial showing someone how to put a tweet together or how Instagram works. The more mature, experienced participants may have more in terms of content they can share with younger participants."

Young Leader Program

This training, co-sponsored by Corteva Agriscience, is a two-part educational program for individuals and couples who are active farmers. The Young Leader Program is ASA's longest-running leadership program, founded in 1984 to find and train new leaders. Participants commit to attend two training sessions.

The program is leadership focused with components on communications and issues

information. Networking is also a strong aspect of the program.

The participants are in an environment where they are with other growers and can talk about their farming operations and learn from each other. The program often results in many new friendships developing.

In addition to individual farmer participants, the program also is open to couples who farm together.

One of the key advantages of recognizing and training both partners at the same time is that there is not an information gap. They are each experiencing the training firsthand, which means they are then able to take those skills and what they have learned and, working together, find ways to apply it to their operation.

The 35-year-old program has evolved over time and continues to provide strong agricultural leaders.

There have been people who have gone through the Young Leader training and later run for political office or served in state governments, as is the case with the current director of the Nebraska Department of agriculture and the governor of South Dakota, both of whom participated in the Young Leader Program.



Young Leaders attend Phase II of their training in conjunction with Commodity Classic, which provides another opportunity for networking with other leaders in the soybean industry. Photo by Joe Murphy

Leadership Programs Polish Rough Edges

ASA's leadership programs turn growers into skillful soy ambassadors—many of whom have gone on to greatness

Practice makes perfect. That's what soybean farmers who participate in American Soybean Association (ASA) leadership programs find as they learn new skills and expand their knowledge about the industry. And, they say such training is the springboard to greater service.

Learn to share industry benefits

Belinda Burrier didn't grow up on a farm and never anticipated she would promote agriculture to consumers. But she married a farmer and got a taste of leadership through his experience. Her husband David served on the Maryland Soybean Board, and Belinda drove him to meetings.

"I got familiar with the soybean checkoff and began to see the value of David's role with the board," Belinda said. She and David have been raising soybeans, corn, wheat and grass hay for the horse industry since 2000 near Union Bridge, Md.

David has since become a director of the Mid-Atlantic Soybean Association, while Belinda now sits on the Maryland Soybean Board and is also a United Soybean Board (USB) director.

"Had it not been for the ASA DuPont Young Leader Program in 2011, I may not have decided to go



into leadership," she said. Belinda also attended ASA's Leadership At Its Best Program in 2012-13, and she and David were 2018 Northeast Region Conservation Legacy Award winners.

"Leadership programs really opened my eyes to legislative issues and to soybean promotion," she said. "Visiting Washington, D.C., gives you a feel for how hard it is to influence legislation. Visiting with neighbors is an opportunity to share checkoff benefits and to promote agriculture."

Belinda says the number one take-home from her leadership

Belinda Burrier, a grower from Maryland, says leadership programs opened her eyes to soybean legislative issues and she encourages all farmers to participate in some sort of leadership program. Photo courtesy of Belinda Burrier

training has been learning to work with the media to get a point across. "It takes practice," she said. "I encourage all farmers to take advantage of leadership training opportunities. Go for it, even if you learn just one thing."

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Become a confident public speaker

Hunter Grills was sometimes hesitant to speak in public prior to leadership training. The ninth-generation farmer from northwest Tennessee works in partnership with his dad and two brothers, growing corn, soybeans, triticale, wheat, milo, oats and a commercial beef cow herd.

"In 2012, my seed sales rep suggested I fill out the ASA DuPont Young Leader application," Hunter said. "I was accepted and later got involved with the Leadership At Its Best Program and attended Soybean Leadership College. All of these programs were good learning opportunities that pulled me out of my comfort zone and gave me new purpose to make a difference."

Following training, Hunter attended the Tennessee Farm Bureau annual "Discussion Meet." "I thought there was no way I could do that," he said. "But after the Young Leader program, I decided to give it a try. I was runner-up two years and won the next year, then got to compete at the national level and was a national runner-up, as well. I attribute my success with public speaking to the Young Leader program."

Hunter has since gotten involved with the Tennessee Farm Bureau Young Farmers and Ranchers Committee and is state chairman. He is also active on the ASA Advocacy Communications Team.

"I was nervous at first, but I got good exposure to issues and



Hunter Grills (left) says ASA leadership programs forced him out of his comfort zone and gave him confidence to speak publicly for ag policy. Photo courtesy of Hunter Grills

could see a need for advocacy," he said. "We all are busy and live in a social media world with lots of options. But when you participate in leadership training, you gain a skill set you can use in all areas of your life."

Develop effective communication skills

Caleb and Leanne Ragland from Magnolia, Ky., participated in the ASA DuPont Young Leader program as a couple. They feel strongly about advocating for their livelihood. The Raglands grow corn, soybeans and wheat and have a 4,000-sow farrow-to-wean operation.

"There are fewer farmers today. We have to be willing to stand up and correct consumer misunderstandings," Caleb said. "We consider participating in ASA leadership programs as a tool in

our toolbox that helps us be more effective communicators."

In addition to the Young Leader program, Caleb was part of Leadership At Its Best in 2015-16 and now sits on the ASA board. Leanne is on the ASA Advocacy Communications Team.

"The approach ASA takes is to challenge you to think in different ways and think on your feet," Caleb said. "You get good practice. I was reserved about speaking out until the training, and now I have confidence when I speak and am not afraid to share my stance."

Caleb also notes he probably would not have sought out an opportunity to serve on the ASA board without the training. "It is just a continuation of what I have learned and now put into practice. We are so grateful for the opportunities to return back to our industry."



Caleb and Leanne Ragland consider participating in ASA leadership programs to be a tool in the toolbox that helps them be more effective communicators. Photo courtesy of Caleb Ragland

The Raglands urge other farmers to set aside time to get involved. "It does take time to participate, but you get back more than you contribute," Caleb said. "You get to interact with the movers and shakers of our industry, advocate for what farmers need and learn how effective ASA and the checkoff really are in helping us to be better farmers."

Build a foundation for future leadership

Nebraska Director of Agriculture Steve Wellman says ASA leadership programs helped shape the foundation for his future leadership roles.

Steve is a third-generation farmer from Syracuse, Neb. As a young farmer, he joined the Nebraska Soybean Association and participated in the ASA DuPont Young Leader Program, Leadership At Its Best and Soybean Leadership College. He engaged with soybean associations at the local, state and national levels, which led to serving as the 2012 ASA President.

"Using skills developed from training has a positive impact on agriculture, your family and you personally," said Steve Wellman, a past ASA president and current Nebraska Director of Agriculture.

"Leadership programs really laid the foundation for much that happened in my life connected to leading associations and being involved with policy work and international trade," Steve said.

"Training was a great way to improve my skills to lead, communicate and interact with people," he continued. "The best spokesman on farming and agriculture is the farmer. Policy development and trade are areas where farmer engagement can have positive results."

Steve says the leadership training equipped him with confidence and also how to prepare for media interviews, presentations, trade missions and lobbying visits.

"Agriculture needs as many farmers engaged in public policy, trade and local issues as we can get," Steve concluded. "Using skills developed from training has a positive impact on agriculture, your family and you personally."

Recent achievements

Last November, two graduates of the ASA DuPont Young Leader Program achieved notable leadership positions. Kristi Noem, a 2003 Young Leader Program graduate, was elected first woman governor of South Dakota. Another graduate of the 2003 class, Bob Worth, was re-elected to a second term as mayor of Lake Benton, Minn.



#soySOCIAL

Advocacy Communications Team Takes Ag Policy to Social

Advocating for soybean issues on social media is only growing in importance as Congress and the Administration quickly adapt and use various platforms to create a new level of contact between constituents and their representatives. The American Soybean Association's (ASA) Advocacy Communications Team (ACT) is a leadership program providing additional tools, training and resources for growers who are passionate about sharing their story and actively advocating on social media platforms.

This year, ACT participants have ramped up their social efforts and used their voices to bring national attention to critical policy issues impacting U.S. soy growers. See some examples on this page.

Trending

#RebuildRural
#ModernAg
#TradeNotTariffs
#DevelopingDemand
#Classic19

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Amanda Heilman, a soybean grower from Maryland, joined ASA's #FacesOfTariffs social campaign last summer, bringing personal stories from U.S. soy growers to the forefront of the U.S.-China trade war.



While posting about Market Facilitation Program (MFP) payments to offset the trade tariffs, Minnesota grower Jamie Beyer reminded her Twitter followers of the impact farmers can have when they become members of policy organizations like ASA.



Lynn Rohrscheib, an Illinois soy grower, participated in the #NeedNAFTA Twitter storm last fall, which encouraged growers to post on the importance of the U.S. trade relationship with Canada and Mexico.



Jenny Rohrich discussed the benefits and misconceptions about glyphosate and popular breakfast cereals on Facebook this summer. Jenny received several comments, and she engaged with followers who had questions.



Dave Walton extended his in-person advocacy on Twitter last summer after he and other Iowa growers met with Acting Environmental Protection Agency (EPA) Administrator Andrew Wheeler, Iowa Gov. Kim Reynolds and Rep. David Young to talk Waters of the U.S. (WOTUS), Renewable Fuel Standard (RFS) and more.




Josh Gackle's harvest Tweet about multiple generations at work on the farm was picked up by local media.



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soy FORWARD

By Liz Hare

An Innovative Program Builds Demand and Drives Future Trade

Almost 20 years ago, farmer leaders from 10 states formed the American Soybean Association's (ASA) World Initiative for Soy in Human Health (WISHH). These visionary leaders knew that if they wanted people to consume more protein in 20 years, they had to start right away.

Jim Hershey, who retired as executive director in October 2018, led the program since its inception. Hershey began with the ASA in 1992 as division director for Central Europe, the former Soviet Union and Middle East/North Africa. In 2001, he accepted the assignment as executive director of the newly-formed WISHH program, a Qualified State Soybean Board (QSSB)-funded program housed at ASA to promote increased trade in soy protein in foods and human diets in developing countries.

Over the next 10 years, Jim, a growing staff, and the farmer-led WISHH Committee expanded the budget from \$1 million per year to close to \$10 million per year, thanks to its first U.S. Department of Agriculture (USDA)-funded Food for Progress project.

Since that time, WISHH has expanded into feed and animal agriculture-oriented strategies that connect trade and development among the U.S. soy industry, U.S. government development programs and business links in emerging markets. WISHH's support base of 10 founding QSSBs in 2001 has doubled to 20 QSSBs allocating soybean checkoff funds to WISHH.

Ryan Findlay, ASA CEO, rightly stated, "Jim has been the steady hand guiding WISHH since its inception, and his commitment to the soy family is to be commended." Hershey has accepted the assignment to be ASA/WISHH's Chief of Party (CoP) for the newly-launched USDA Food for Progress-funded Commercialization of Aquaculture for Sustainable Trade (CAST) project in Cambodia. CAST will connect trade and development by accelerating production of high-demand fish species for the Cambodian market and developing a lasting aquaculture industry that recognizes the value of soy protein in feed. Hershey and his wife will move to Phnom Penh within the next few months.

I've had the pleasure of serving as ASA/WISHH's executive director since October, building on my multiple WISHH roles that began in 2011. Now is an extremely exciting time for WISHH, as the need for new markets for U.S. soy is critical.

As a trailblazer for trade, WISHH grows markets for U.S. soy farmers, and at the same time, improves lives and economic opportunities in developing countries. From its position at ASA, WISHH has the ability to advocate for and drive policies in emerging markets that will help ensure these countries become sustainable trading partners in the future.

WISHH lays the foundation to ensure that the markets we service have resilient agricultural value chains in place. In other words: Is



Liz Hare is executive director of the World Initiative for Soy in Human Health.

there storage capacity to protect raw materials for feed production? Is there an adequate cold chain to ensure end products meet food safety requirements by the time they reach markets? Are farmers using best management practices for feeding their fish and chickens?

If established agricultural value chains are not in place in the emerging economies where WISHH works, their resiliency factor goes down, meaning that trade disruptions or price fluctuations could have dramatic impacts on the long-term potential for the growth of U.S. soy exports into these markets. WISHH is helping ensure sustained trade growth for U.S. soy while improving local economies and delivering to meet the protein needs of growing populations. I look forward to continuing to work with this innovative organization committed to forming capable food systems for healthy people and driving trade.



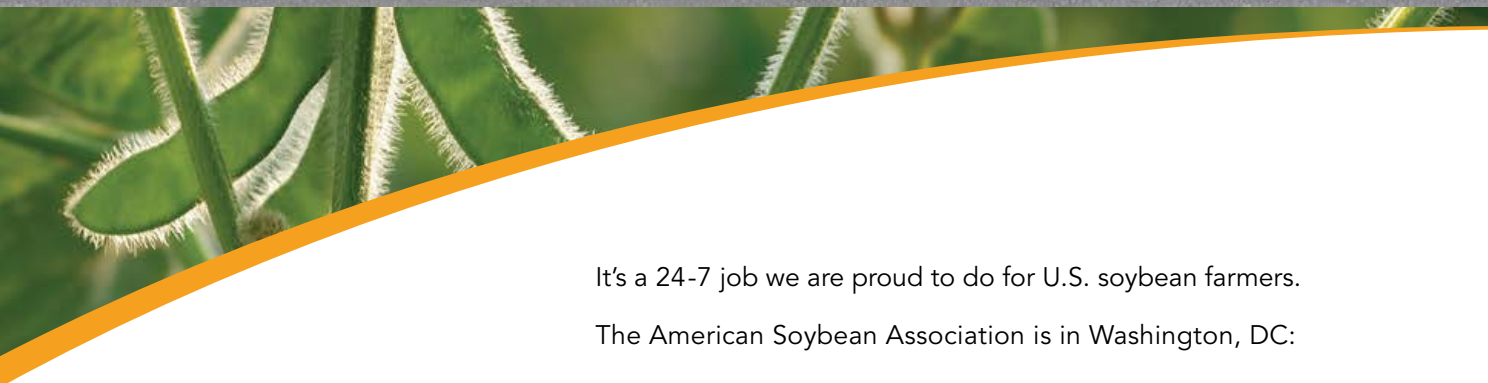
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