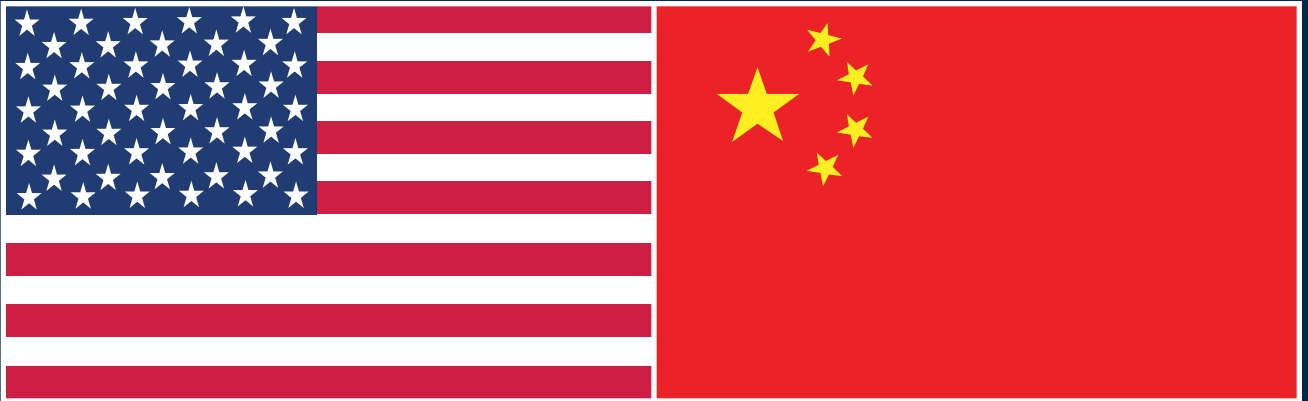


AMERICAN WINTER 2025 soybean

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People. Policy. Profitability.

A PUBLICATION OF THE AMERICAN SOYBEAN ASSOCIATION



USMCA & CHINA PHASE 1

5-YEAR ANNIVERSARY



SOY FACES

The Bean and a Global Trade War

SOY FORWARD

Sons Follow Fathers in Policy Work

ISSUE UPDATE

Eyes On Low Carbon Fuel Standards

INDUSTRY

PERSPECTIVE

China Trade Future


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Editorial Director Wendy Brannen
Managing Editor Jordan Bright
Sponsorship/Ad Sales Michelle Hummel, Erin Glarner
Graphic Designer Andrea McCoy
Contributing Photographers Allison Jenkins
Contributing Writers Alexa Combelic, Allison Jenkins, Jody Shee, Jim Sutter

ASA Staff Leadership
American Soybean Association
 Stephen Censky, Chief Executive Officer
World Initiative for Soy in Human Health
 Gena Perry, Executive Director
ASA Farmer-Leaders
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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 nearly 500,000 soybean farmers.

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ASA leadership corner

The Greek philosopher Heraclitus is credited with saying “the only constant is change,” and that certainly is the case on the policy front in Washington, D.C. At the American Soybean Association, we’ve been preparing for the upcoming changes a new year is most certain to bring by working to position soybean farmers for success, no matter the changes we see in 2025.

Of course, we have a new administration that just recently took office following Donald Trump’s election win in November. Even before the election, ASA was one of several groups that shared U.S. farmer priorities with both the Trump and Harris campaigns. After President Trump’s win, we have met with and provided his Transition Team with a list of issues that is soybean farmer-specific and in which we indicated we hope to work closely with the new administration. Our letter highlighted priorities within three areas, including farm economy, markets, and transportation and infrastructure. We addressed specific issues within those three areas in more detail, including:

- A new farm bill
- Tax policy
- Regulatory issues, including a system that facilitates innovation for biotech, gene editing and pesticidal tools
- Trade
- Biofuels
- Feed
- Food
- Biobased uses

President Trump and his team have an ambitious agenda for the next two years. On trade, we know the president loves tariffs, but we also know he is a dealmaker. We’ve stressed the importance of trade to soybean farmers generally and specifically to key markets such as China, Mexico, Canada, and Europe. For China, our suggested strategy is that the president pursue an enhanced Phase One trade deal with China that addresses the United States’ trade issues with China before resorting to tariffs. Our hope would be to avoid the negative and long-lasting consequences of several years of a trade war before a trade deal is reached. Of course, we also have been putting together ideas for a “plan B” should this strategy not be accepted by the president.

2025 will be a consequential year on tax issues, with Congress and the president aiming to extend the provisions of the Tax Cuts and Jobs Act, which was passed in President Trump’s first term and is expiring the end of this year. We’ve been meeting with the tax-writing committees of Congress to stress the importance of a number of tax provisions important to soybean farmers.

With Congress penning tax legislation, we also see an opportunity to revise and improve the biofuels tax provisions that support soybean oil use in biomass-based diesel (e.g., biodiesel, renewable diesel and Sustainable Aviation Fuel).

Stephen CENSKY



Stephen Censky, ASA CEO

We want to make sure these provisions support domestically produced soybean oil and other feedstocks and are structured in a way that will support robust soybean producing and crushing sectors for farmers.

Heraclitus was right: The only constant in public policy—and life itself—is change. But know that the farmers who lead ASA and your staff are working every day to enable soybean farmer success in a changing and dynamic world.

Survey Highlights Farmer Adoption of Seed Treatment Applications

What is the value of seed treatments to U.S. soybean farmers, and how do they feel about alternatives to seed treatments? A recent survey conducted by the American Soybean Association and the United Soybean Board sought to determine just that.

Seed treatments typically comprise one or more pesticides applied to seeds as a coating before planting—when plants are most susceptible and face the highest pressures—to limit early season risks to pest damage.

Jacquie Holland, an ASA economist who worked on the study, said it was not surprising the survey found seed treatments to be widely used across the country in soybean production: “Seed treatments are a proactive means of ensuring plant health and yield vigor while minimizing environmental impacts. Alternative methods to seed treatments do exist, but few are widely accepted by farmers as feasible options.”

Because seed treatments are broadly adopted by U.S. soybean producers, disruptions to this technology would likely alter on-farm operational strategies and product delivery methods. Holland said this work finds that farmers would likely face lower yields and higher costs without seed treatments.

Josh Gackle, ASA chairman and a soy grower from North Dakota, agreed. “On our farm and farms across the country, soybean growers rely on seed treatments as a cost-effective, reliable and safe method of providing early-season plant



health and pest prevention. Farmers need these tools to help get our growing season off to a good start,” he said.

The survey was conducted in July 2024 and gathered 491 online responses from farmers growing at least 150 acres of soybeans during the 2023 season across the 17 largest soybean-producing states in the United States. On average, 90% of soybean acres in the ASA/USB survey were planted with treated seeds. Only 3% of respondents had never planted any treated soybean seeds. Because seed treatments are so widely used by farmers, the technology impacts farms across the United States.

Without seed treatments, farmers must resort to alternative practices to maintain yield vigor and reduce early season pest pressure within a reasonable cost. These options include higher seeding population rates to account for seedling damage, later planting dates to avoid prime pest pressure, increased starter applications at planting, and more foliar pesticide applications. Increasing seeding

population rates was the preferred alternative, followed by increasing foliar pesticide applications, with later planting the least preferred option. From both a yield and profitability perspective, seed treatments remained the clear preference.

The survey also looked at farmer safety when handling treated seeds. It indicated occupational exposure risk potential for growers, applicators and farm labor from these sources is limited.

Just over a third of seed treatment users rely on their dealers to treat their soybeans. Only 6% of respondents treat their own soybean seed, with the remainder relying on seed companies or retailers to treat their soybean seed ahead of planting.

Of the producers utilizing treated seed, nearly two out of five reported storing their treated seed in an enclosed storage building. It is worth noting that oftentimes these treated seeds are not stored for long after being delivered to the farm before farmers plant them.

To read the full survey results, visit soygrowers.com.



Caleb Ragland
President
Magnolia, KY



Scott Metzger
Vice President
Williamsport, OH



Josh Gackle
Chairman
Kulm, ND

ASA Elects 2025 Executive Committee, Welcomes 5 New Board Members

During its annual election meeting in St. Louis, the American Soybean Association Board of Directors voted in the executive committee members who will lead the organization through the coming year's top advocacy priorities, including farm bill, regulatory issues, tax policy, markets, biofuels and other top policy issues for U.S. soybean farmers.

Caleb Ragland (KY), who previously served as ASA vice president, will serve as 2025 ASA president. Ragland began serving on ASA's board of directors in December 2017. He farms 4,000 acres of soybeans, corn and winter wheat on his Magnolia, Kentucky, farm.

Immediate past president Josh Gackle (ND) moves to the role of ASA chairman. Former chairman Daryl Cates (IL) rotates off the nine-member executive committee.

The ASA board elected Scott Metzger (OH) as ASA vice president, a role that puts him in line to serve as the association's president in 2026.

In addition, the board elected Dave Walton (IA) as ASA secretary; Alan Meadows (TN) as treasurer; and Heather Feuerstein (MI); Tanner Johnson (WI); Jimmie Lee Shaw (SC); and Jordan Scott (SD) as at-large members of the executive committee.

ASA celebrated the advocacy of and said farewell to several directors who retired this year, including Charles Atkinson (KS); Ken Boswell (NE); Jeff Harrison (CAN); James Hereford (AL); Chris Hill (MN); Jered Hooker (IL); and Mike Petefish (MN).

ASA welcomed five new directors who begin their nine-year terms, including Teresa Brandenburg (KS); Julie Maw (CAN); Geoff Ruth (NE); Bob Worth (MN); and Bryan Severs (IL).

2025 DIRECTORS



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Leland, MS



Jamie Beyer
Wheaton, MN



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Lovington, IL



Steph Essick
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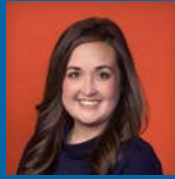
2025 EXECUTIVE COMMITTEE



Dave Walton
Secretary
Wilton, IA



Alan Meadows
Treasurer
Halls, TN



Heather Feuerstein
At-large
Belding, MI



Tanner Johnson
At-large
Prairie Farm, WI



Jimmie Lee Shaw
At-large
Newberry, SC



Jordan Scott
At-large
Valley Springs, SD



Teresa Brandenburg
Russell, KS



Paul Casper
Lake Preston, SD



Daryl Cates
Columbia, IL



John Comegys
Harty, DE



Wade Cowan
Brownfield, TX



Brad Doyle
Weiner, AR



Janna Fritz
Bad Axe, MI



Dennis Fujan
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George Goblisch
Vesta, MN



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Stryker, OH



Adam Guetter
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Morey Hill
Madrid, IA



Kevvin Lemenager
Monrovia, IN



Kody Leonard
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Brad Macauley
Geneseo, NY



Jim Martin
Pontiac, IL



Julie Maw
Courtrigh, ON, CAN



Brady Peek
Athens, AL



Phil Ramsey
Shelbyville, IN



Ryan Rhoades
Radnor, OH



Ronnie Russell
Richmond, MO



Geoff Ruth
Rising City, NE



Luke Sayes
Deville, LA



Roberta Simpson-Dolbeare
Nebo, IL



Fred Sipes
Ekron, KY



Jeffrey Sorenson
Morgan, MN



Robert Stobaugh
Atkins, AR



Pat Swanson
Ottumwa, Iowa



Jimmy Thomas
Timberlake, NC



Bob Worth
Lake Benton, MN



Casey Youngerman
Lexington, TN

EXECUTIVE STAFF

Stephen Censky
ASA Chief Executive Officer





ASA Director Brad Doyle (AR) participated in the “Climate-Smart Solutions for Smallholders: Taking Stock of Progress and Future Opportunities in Agriculture” panel at the 29th Conference of the Parties to the United Nations Framework Convention on Climate Change (COP29). The event represents an important opportunity for USSEC to elevate farmer voices in climate change negotiations; support science, innovation, and productivity improvements as solutions; and support the role of trade as part of the solution to climate challenges.



CLIMATE SOLUTIONS



SENATE MEETING

ASA CEO Stephen Censky and ASA Executive Director of Government Affairs Christy Seyfert met with then-Senate Ag Committee Ranking Member John Boozman (R-AR) and Senate Ag Committee Chairwoman Debbie Stabenow (D-MI) in September. Pictured from left: Seyfert, Boozman and Censky.

During the ASA State Staff Meeting in St. Charles, MO, state and national staff broke into mini roundtables to explore topics like the Endangered Species Act; ASA’s Government Affairs and organization survey results; biomass-based diesel issues; and attracting grower leaders to board positions and helping them better understand their roles as directors.



STATE STAFF



TRADE TALK

Then-ASA President Josh Gackle (ND) and Vice President Caleb Ragland (KY) joined members of the National Association of Farm Broadcasting at the organization’s “Trade Talk” media event in Kansas City, Missouri. Gackle and Ragland conducted numerous interviews, discussing the urgent need for a farm bill, the importance of continued trade expansion, the impact of EPA decisions on pesticides and ESA strategies, LCFS and biofuels tax credits, and other key policy issues shaping the future of U.S. soybean farmers.

ADVOCACY TEAM CHAT

During ASA's December board meeting, ASA Advocacy Team Chairs participated in a fireside chat. The teams cover farm policy; trade and international affairs; conservation and precision agriculture; biodiesel and infrastructure; and regulatory issues.



U.S.-JAPAN MEETING



In Tokyo for the U.S.-Japan Partnership Roundtable Meeting, then-ASA President Josh Gackle (ND), USSEC Chairman Lance Rezac (KS) and USB Director Cindy Pulskamp (ND) participated in a U.S. soy farmer panel. Pictured from left: Gackle, Pulskamp, and Rezac.

TRADE PRIORITIES

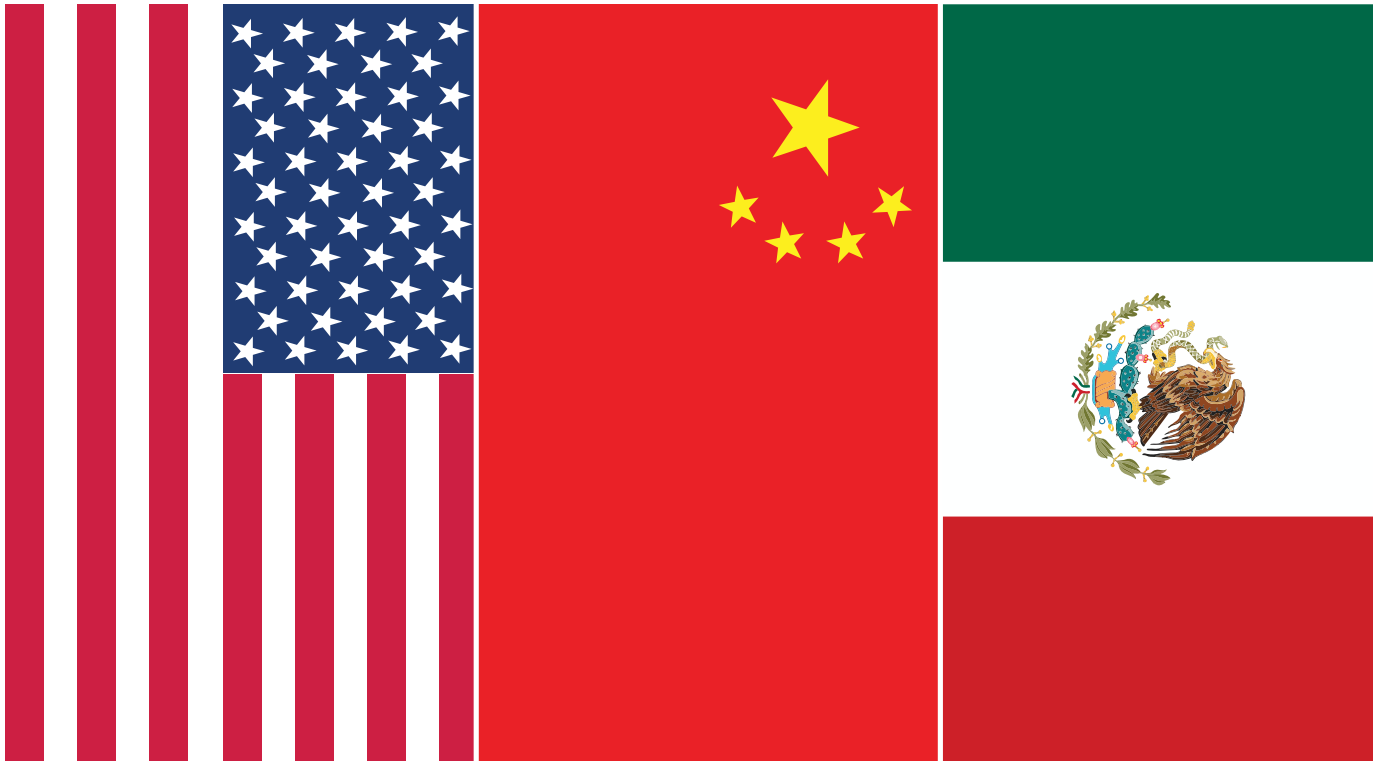


At the 2024 U.S. Agricultural Export Development Council's annual conference, ASA's Virginia Houston spoke on a panel regarding international trade in the farm bill. She touched on the importance of the MAP and FMD programs and shared ASA's trade priorities for the new Congress.



YOUNG LEADERS

The 41st class of the ASA Corteva Agriscience Young Leaders program began its leadership journey in December at Corteva's Global Business Center in Johnston, Iowa. The 2025 class of Young Leaders includes: Tyler Robertson (Canada); Brian and Heather Harrison (AL); Luke Nannemann (AR); Daniel Herriott (IL); Neil and Sandy Kruppen (IA); Jason and Anna Unruh (KS); Cody and Riley Cliff (KY); Grant Mackey (KY); John Paul and Sarah VanMol (LA); Zachary Schaffner (MI); Rebecca Sip (MN); Raymond DeMars (MN); Gentry and Sarah Clark (MS); Rhonda and Orland Oesch (MO); Catherine and Jacob Frerichs (NE); Travis Runge (NE); Donald Stokes (NC); Mark Knutson (ND); Billie Lentz and Tran Zerface (ND); Caden Arbaugh (OH); Matt and Ashley Lutz (OH); Austin Eaddy and Bailee Matthews (SC); Blake Foxley (SD); and Brad Sennhenn (WI).



TRADE TRIUMPHS, TARIFF THREATS

Five years after they were signed, the Phase One China and USMCA agreements have in many ways benefited American agriculture, but their futures remain unclear

By Allison Jenkins

The new year is just beginning, Donald Trump is president, and trade—specifically with Mexico, Canada and China—is a hot topic.

If it seems like déjà vu, that's because we've seen this exact scenario before. In January 2020, during President Trump's first term in office, he signed both the United States-Mexico-Canada Agreement (USMCA) and the Phase One Economic and Trade Agreement with China.

USMCA was an overhaul of its predecessor, the 1994 North American Free Trade Agreement

(NAFTA), which was widely supported by agriculture for providing increased market access to most agricultural producers. However, not all U.S. agriculture exports enjoyed that same access due to certain products falling under in-country supply management schemes. Further, NAFTA was a product of its time, written in the pre-internet and eCommerce era, which led to issues during the rise of the internet. For agriculture specifically, some of the provisions in NAFTA

were no longer up to date with agricultural advancements such as biotechnology and conservation measures, and the agreement needed updating.

The Phase One China agreement was negotiated in response to tensions that had been escalating since early 2018 when the U.S. imposed tariffs and trade barriers on the Asian country due to concerns about Chinese trade practices. During the resulting trade war between the two countries, the U.S. levied tariffs on \$550 billion worth of Chinese



products, and China, in turn, set tariffs on \$185 billion worth of U.S. goods. Agricultural products, and soy in particular, were targeted in Chinese retaliatory tariffs.

Five years after they were put in place, the USMCA and China agreements have successfully addressed many of these issues. The Phase One deal, signed Jan. 15, 2020, included provisions to balance trade, curb intellectual property theft and open access to Chinese markets, particularly for U.S. agricultural products. Some of the deal was less “inked on paper” and more a “handshake agreement” that helped resume soy exports; other parts of the deal—like IP theft—remain dubious as to their effectiveness. However, for soybeans, tangible progress was made: China committed to purchasing additional U.S. goods, including soybeans, and both sides agreed to waive tariffs that had been imposed as part of the ongoing trade war.

The USMCA, signed a couple of weeks later, Jan. 29, 2020, not only continued the free

trade environment developed under NAFTA, but also improved intellectual property rights, labor standards and environmental protections while adding provisions for digital commerce and technology such as gene editing.

These pacts have also played a key role maintaining business among the United States and the signatory countries, which are top markets for agricultural exports, namely soybeans. According to the USDA Foreign Agricultural Service, U.S. soy exports to China fell to 8.2 million metric tons during the low point of the trade war in 2018. In 2020, after Phase One was signed, that number increased to 34.2 MMT.

“We’ve seen exports to Mexico increase during and after the trade war. Mexico is our No. 2 export market for U.S. soybeans,” says Virginia Houston, American Soybean Association director of government affairs. “While Canada is not a major buyer of whole beans, it is an important customer for soybean meal. And all told, China is a success story for U.S. soy. We’ve worked to establish and grow the Chinese market for more than 40 years, cultivating it into the powerhouse it is for us today.”

More tariff talks

As the new Trump administration begins to take shape, however, these agreements may be in question. The president has vowed to levy new tariffs on all goods coming from Canada and Mexico as soon as he enters office unless the two nations stem the flow of illegal immigrants and drugs across the border. One proposal calls for 25% import duties from Mexico and Canada, as well as an additional 10% tariff on all Chinese products as part of an “America First” trade package. Trump has also called for a revocation of Permanent Normal Trade Relations (PNTR) status for China, a move that would certainly trigger retaliatory tariffs.

“We are aggressively monitoring everything President Trump is saying about tariffs,” Houston says. “There are still a lot of unknowns, but we’re trying to position ourselves to make sure that whatever happens has the least negative impact possible on our farmers.”

Reversing direction on amiable trade relations with China, Mexico and Canada would no doubt be detrimental to U.S. agriculture, says Dr. Scott Gerlt, American Soybean Association chief economist.



Members of the ASA board of directors from five states attended the USMCA trade agreement signing ceremony at the White House in celebration of the new treaty in 2020. From left: Then-ASA president Bill Gordon (MN), ASA Treasurer Brad Kremer (WI), USDA Deputy Secretary Stephen Censky and ASA Governing Committee Members Bret Davis (OH), Brad Doyle (AR) and Daryl Cates (IL).

(continued on page 12)

(continued from page 11)

“Mexico and Canada are critical markets for U.S. agriculture, soybeans in particular, so it’s very important to retain trade access there,” he says. “If we were to see a renewed trade war with China, we would not want to lose other key markets at that same time.”

American farmers suffered tremendous losses during the last U.S.-China trade war, which included tariffs on U.S. imports that reached as high as 80% to 100% on some farm commodities. From mid-2018 to the end of 2019, USDA ERS reports U.S. agricultural exports dropped by more than \$27 billion, with China accounting for about 95% of the value lost. Soybean exports accounted for the largest annualized losses with China, totaling \$9.4 billion.

“China is a great example of the work it takes to build a market and how long that investment takes, but also an example of how you can lose such a critical market overnight, which is what happened in 2018,” Houston says. “As a matter of policy, regardless of administration, we oppose the use of tariffs as a negotiating factor because of the negative impacts they can have on both commodity prices and input costs. We feel tariffs are a lose-lose for our farmers. ASA has been active both with the Biden administration and the incoming Trump administration about our association’s position.”

Under the Phase One agreement, China committed to purchasing an additional \$200 billion in U.S. goods over two years, with a large portion dedicated to commodities including soybeans. However, China struggled to meet its ambitious purchase commitments, as the agreement specified that purchases were to be made at “market prices based on



Then-ASA president Bill Gordon (third from right), along with Sen. Joni Ernst, South Dakota Gov. Kristi Noem, Ambassador Terry Branstad, USB leaders and NCGA leaders attended the U.S. China Phase One signing at the White House in January 2020.

commercial considerations.” In addition, many of the deeper issues were left to be addressed in “Phase Two,” which with the pandemic and change of administration has yet to be defined.

“Phase One, in many ways, gave us a chance to resume more regular trade with China by allowing both sides to declare victory and continue doing business with one another,” Gerlt says. “While we have not seen China buy U.S. soybeans at the same levels it did before the trade war, the agreement helped us reclaim some of those export volumes. Where we go from here remains to be seen, but with the incoming president’s talk of tariffs, I think there’s a chance to look at a Phase Two version of the agreement.”

One reason for the sluggish

rebound in U.S. soybean exports is the fact that China found alternate sources during the trade war. As a result, Brazil became its primary supplier, reaching a peak of 82% soybean exports going to China in 2018. Today, around 70% of Brazil’s soybean exports remain directed to the Chinese market.

“Brazil expanded its soybean production during the trade war, and that production in Brazil has continued to expand, which means there is more competition for the U.S. internationally,” Gerlt says. “At the same time, China’s population is no longer growing. If we gain more market share in China for soy, it is largely going to be because they’ve made a political decision to purchase more U.S. commodities and not because of actual increases in growth in the market itself.”

Uncertainties abound

As for the future of Chinese trade relations with the United States, “uncertainty” is the only way to describe the road ahead, Houston says.

“There has been chatter since Trump was reelected in November about what the next phase of China trade looks like. Is it Phase Two? Is it Phase 1.5? Is it something completely new?” she says. “We do expect that there will be tariffs. He has made no bones about his desire to use tariffs as a tool—as a stick rather than a carrot—but there are question marks about what is actually going to happen.”

Likewise, the fate of the USMCA also may be up in the air. During the 2024 election, Trump campaigned on a pledge to renegotiate the pact, which is up for review regardless in July 2026. Under an unprecedented clause included in the original agreement, the United States, Mexico, and Canada are required to hold a “joint review” to confirm whether to continue the agreement.

This review provision was

controversial during USMCA negotiations. Typically, free trade deals are indefinite unless one of the signatory countries wishes to pull out, but this clause essentially provides a mechanism to change the deal’s terms in a less disruptive way than threatening outright withdrawal.

“We are starting to see the three governments gear up for that review,” Houston says. “This is the first time a free trade agreement signed by the U.S. has had a review clause, and there are a lot of unknowns about what that will look like. Overall, we feel USMCA has been very helpful for soy growers, and we want to see it maintained.”

Whether it is China, Mexico, Canada or other international market, Gerlt says there is one indisputable fact about U.S. agricultural trade: It is crucial to U.S. farmers’ success.

“If we did not have strong global trade, we would only need about half the soybean acres we currently have in production; fifty percent of our production is bound for exports,” Gerlt says. “U.S. farmers are very good at

producing bountiful crops on existing farm acres, so we are able to supply soy to food-deficit areas around the world. This means soy trade is vital not only to ensure our farmers have markets for their products but also for global food security.”

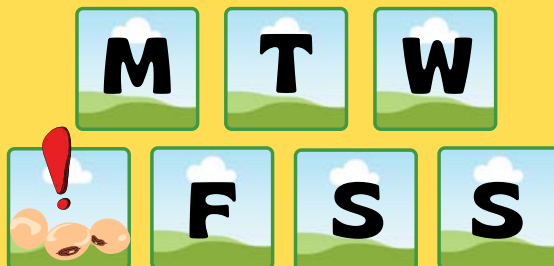
Editor’s Note: Since this article was written, Trump has directed USTR, Treasury and Commerce to complete a comprehensive overview of all trade agreements and laws the U.S. is engaged in to identify any deficiencies, unfair practices or negative impacts on the U.S. The president requested reports on the country’s annual trade deficits; antidumping and countervailing duties laws; establishing an External Revenue Service to collect tariffs, duties and other foreign trade-related revenues; the impact of USMCA; the China Phase One deal; and the results of the four-year necessity review of the China 301 tariffs, among others. The reports are due to the president by April 1. Notably, USDA was not included in the list of agencies to engage in this review.



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ISSUE update

By Alexa Combelic, ASA
director of government affairs

California Air Resources Board & the Low Carbon Fuel Standard

While all eyes continue to focus on the future of federal biofuels policy, states on the West Coast have been developing a network of Low Carbon Fuel Standard programs. These LCFS programs are rapidly shifting the landscape of biofuel consumption and feedstock preference at a national level.

This past autumn, biofuel policy focus shifted specifically to California, as its Air Resources Board—the administrator of the state LCFS program—worked to develop amendments to address both decreasing prices in its credit market and newer, ambitious carbon intensity benchmarking. ASA began engaging with CARB nearly three years before the final LCFS amendment vote in November 2024. At the time, this was new territory for a policy organization that traditionally focuses on the federal level, but there was no doubt the developments in California could have wide-reaching effects throughout the domestic biofuel value chain.

The outcomes of the final amendment vote were disappointing for the domestic agricultural biofuels feedstock industry. From using outdated modeling for soybean production to capping agricultural feedstock allowances for credit production to requiring new sustainability reporting for domestic feedstocks, domestic soybeans will theoretically be receiving a triple penalty in terms of carbon intensity.

While it may not seem like it at the outset, the CARB chair's resolution, which was adopted during the amendment vote, shows our early engagements have helped ASA keep the door open with CARB. While not an outright win, the resolution created explicit engagement



Photo Credit: Allison Jenkins

opportunities in California as the state updates its scoring for soybeans and brings ASA and others to the table while developing its new sustainability reporting requirements.

Sentiment in California does not necessarily mirror the national narrative, especially when it comes to state LCFS policies. There are extremely vocal factions in the state that strongly oppose liquid biofuels broadly but target agricultural feedstocks most harshly. There are others who attack the program for increasingly costly fuel prices in the state. And there are those who criticize CARB for its lack of action to improve public health in heavily polluted industrialized areas with marginalized communities. What is most important to understand is that actions against soy-based feedstocks are not necessarily directly targeted but rather symptoms of the political ethos in California.

Through our engagement with CARB, we learned how important it is to educate West Coast policymakers about the intricacies of soybean farming, processing, and the entire biofuel value chain. This is an audience that is unfamiliar

with the soybean industry, which means sharing our sustainability story was incredibly important. We have made substantial progress over the past several years, which is why opportunities remain for ASA to shape policies in California.

Many argue that LCFS programs are inherently negative for feedstocks that carry a moderate carbon intensity like soy, as the programs continuously reduce those carbon intensity targets over time, eventually pushing these feedstocks out of the market. There is no question the biofuel consumption boom in California helped drive overall demand in the market the past few years, even with shifting feedstock preferences more recently. As more states in non-soybean growing regions deliberate the concept of developing their own LCFS, soybean growers must continue to focus on soy's sustainability story—through additional improvements in carbon intensity scoring and delivering a narrative about the benefits of a homegrown, renewable energy feedstock.



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Five years ago, the Phase One agreement and additional negotiations between the U.S. and China helped restore significant soybean exports to our #1 export market. Before that was a prolonged period of not only uncertainty but also extreme concern among soy farmers whose sales to the more than 40-year-old U.S. market they worked so hard to establish had abruptly halted.

With that widespread angst—and the curiosity of a “bean” being a significant bargaining factor in a global trade war—came great interest, not just from agriculture trade media and U.S. consumer media, but from the world stage. Here, a retrospective on that time, as originally told six years ago in the winter 2019 issue of *American Soybean* from those who experienced it.

By Dan Lemke

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.

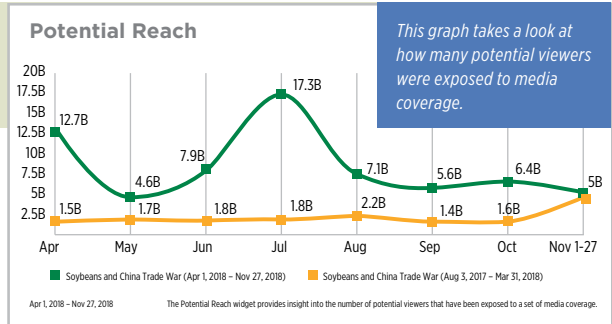
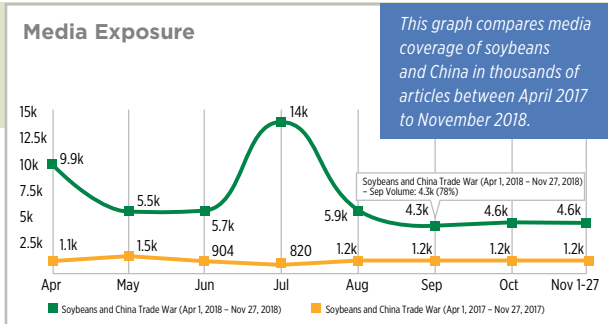
Those reports tallied an estimated 17.3 billion potential views in July 2018 alone, mind-boggling numbers that don’t even capture exposures

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.



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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日刊新聞 2018年8月10日 朝刊 2ページ 東京本社

1面から続く 勝者なき通商紛

米国内で大豆がたふついで価格が下れば、農家は収穫した大豆を貯蔵庫に置いておくしかない。

「貯蔵余力ない」
ノースダコタ大豆生産者協会のナンシー・ジョンソン氏によると、そうした事態に備えて一部の農家は貯蔵施設を増やし始めた。

しかし、米国の中国などの鉄鋼、アルミ製品にも高関税措置を發動した影響で貯蔵施設の資材費が高騰。ジョンソン氏は「誰かが施設を建てる余裕があるわけではない」と心配する。

世界の国々の経済が互いに深く結びついているため、米国の輸入減に備えた手当てが必要だ。

中国東北部の穀倉地帯にある吉林省蛟河市公安村、広大なトウモロコシ畑のわきで、わずかに置えられた

大豆へ中国報復関税 振り回される米中農家

大豆の葉が風に揺れる。政府は4月、「トウモロコシから大豆栽培に切り替えれば10当りの補助金を出（約1万円）の補助金を米農家に通知した。米国の圧力を受けていた中国は、米国産大豆への報復関税の発動を想定し、国内での増産を求めたのだ。

「増産通知遅い」
だが記者が8月初めに大河を訪れると、大豆畑は斜面など農機が入りにくい場所に点在するだけ。大規模に栽培できる平地はトウモロコシ畑のままであった。

農家の一人は「増産通知があった時にはトウモロコシの種を賣っていた。通知が遅すぎた」と話す。生産者の反応は鈍く、政府は大豆の供給を確保するためにインドなどからの関税をゼロにせざるを得なかった。

米国の製造業にも通商紛争の影響は始まっている。




◎広大な畑で大豆を栽培するスコット・ゴースローさん
◎大豆を集め、列車に積み込む施設＝いずれも7月31日、米ノースダコタ州リッチランド郡、青山直馬撮影

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 Shaffer, 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 Shaffer

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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

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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.”

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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!



Gold Rush for SoyPAC

Join ASA for the 2025 SoyPAC Auction in the “Mile High City,” Denver. This year’s theme: **Gold Rush: Go for the Gold!** Be part of the auction’s Gold Rush excitement. Attendees are encouraged to wear fun and flashy gold attire and accessories.

“Go for the Gold!” at this gala in the West to benefit ASA’s SoyPAC.

Monday, March 3, 2025
6:00 – 9:30 p.m. MT
Hyatt Regency | Denver, Colorado

Register to attend the SoyPAC auction at soygrowers.com/soypac/

The ASA SoyPAC Auction is held annually during Commodity Classic.



SoyPAC funds raised are for the benefit of political candidates and activities on a national level that support the soybean industry. Contributions to SoyPAC are voluntary and you have the right to refuse to contribute without reprisal. Your contribution to SoyPAC must be personal – not corporate. Maximum annual individual contribution to SoyPAC is \$5,000. Contributions to SoyPAC are not deductible as charitable contributions for federal income tax purposes. Any suggested amounts are suggestions only and not enforceable; more or less than the suggested amount may be given; the amount given by the contributor, or the refusal to give, will not benefit or disadvantage the person being solicited. Federal law requires us to use our best efforts to collect and report the name, mailing address, occupation and name of the employer of individuals whose contributions exceed \$200 in a calendar year. Under federal law, only U.S. Citizens and Lawful Permanent Residents (i.e., green card holders) may contribute to SoyPAC.

ALWAYS LEAVE IT BETTER THAN YOU FOUND IT.

Through the soy checkoff, U.S. soybean farmers are investing in new production practices to continuously improve their sustainability while protecting the air, water and soil for generations to come.

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Farmers Align with Value Chain to Address Land Use Change and Protect Natural Resources

A new Land Use Change Initiative (LUCI) is leading efforts to resolve inconsistencies in definitions, metrics and methodologies for quantifying land use change. Funded by the United Soybean Board in partnership with Carbon A List, this multistakeholder initiative seeks to unite every step of the value chain in developing a unified solution to these challenges. Farmers play an essential role in protecting our land's natural resources through sustainable farming and conservation planning.

"Farmers have often been left out of conversations regarding land use change and its collective impact on agriculture. We weren't at the table, so we had to build our own table through this land use change initiative," said Steve Reinhard, USB Chair and Ohio farmer who presented keynote remarks at LUCI's Land Use Change Summit in August. "North American agriculture and the nearly half-million soybean farmers who represent 90 million acres can have a huge impact on climate solutions. Progress is a priority on our farm not only when it comes to conservation but improving land management. For example, the grids for monitoring our fields started at 5 acres, then dropped to 2.5 acres, and now we're seeing it down to the acre and even half-acre to make input adjustments for soil health and crop productivity."

LUCI started two years ago



Nancy Kavazanjian (second from right with microphone), a United Soybean Board farmer-leader from Wisconsin, served on a panel at the Land Use Change Summit and encouraged the value chain to "look at the farmer as your partner and bring us along the way" when it comes to understanding land use change that's more representative of today's farming practices.

to proactively drive collaboration and advance sound science. The goal aims to achieve a better understanding of land use change that's more representative of today's farming practices, the role of grasslands in our agricultural system, and ensuring system resilience.

Examples of farmers' commitment to land use change and sustainable farming include:

- Through LUCI, convening key players across the agriculture, environmental science, corporate sustainability, academia, and government sectors to coordinate land use calculations that preserve farmland and native and

natural ecosystems.

- Spearheading Farmers for Soil Health in collaboration with the corn and pork commodity groups, and the National Fish and Wildlife Foundation, to provide a cost share and technical assistance to farmers in 20 states aiming to double cover crop acres to 30 million acres by 2030.
- Investing in research to enhance seed genetics that can withstand drought and flooding, in addition to using genomics to accelerate the development of new soybean varieties, improving soybean protein and amino acid composition.

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- Researching and educating farmers on new biological products for pest management, fertilizer, and fungicides.
- Investing in communications and science translation to reach farmers and stakeholders across the value chain.

“Land use change is evolutionary, not revolutionary. Farmers are trying our best to do what we think is right for our land. And change is not always going to happen overnight, so please be patient with us. Look at the farmer as your partner and bring us along the way,” said Nancy Kavazanjian, USB director and Wisconsin farmer. “Not only are we losing grasslands, we’re losing productive farmland to urbanization and acres being converted to warehouses, residential developments, and wind and solar farms.”

David Wessel, USB director and Illinois farmer additionally shares, “Right now, it is difficult to compete with our worldwide competitors on production alone. A consistent land use change model would make for a more even playing field, giving U.S. products the advantage we need to gain market share in an environmentally friendly marketplace.”

Last summer, LUCI hosted its inaugural in-person Land Use Change Summit at McDonald’s International Headquarters in Chicago, sponsored by USB,

McDonald’s, Carbon A List and Fulton Market Group. Gathering nearly 100 experts across the food and agriculture value chain, the summit set out to accomplish three goals: 1) find common ground 2) set a strategic course, and 3) prepare to engage. Several presentations, panels, breakouts and even remarks from Robert Bonnie, Under Secretary for Farm Production and Conservation at the U.S. Department of Agriculture, grounded this group on the task at hand. LUCI participants narrowed consensus on definitions, consolidated data sources, increased the accuracy of land use change estimation, and chartered next steps for a path forward.

To receive updates or get involved, visit carbonalist.com/ and the Land Use Change Initiative webpage where you can find a white paper that describes critical issues and gaps, and identifies where the opportunities exist for implementing change, in addition to a primer report and proceedings report prepared for LUCI’s workshop sessions.

About United Soybean Board: United Soybean Board’s 77 volunteer farmer-leaders work on behalf of all U.S. soybean farmers to achieve maximum value for their soy checkoff investments. These volunteers create value by investing in research, education, and promotion with the vision to deliver sustainable soy solutions to every life, every day,

across the three priority areas of Infrastructure & Connectivity, Health & Nutrition, and Innovation & Technology. 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. For more information on the United Soybean Board, visit unitedsoybean.org.

About LUCI: The Land Use Change Initiative (LUCI) is a collaborative effort funded by the United Soybean Board. LUCI aims to develop unified solutions to the inconsistent land use change estimates and definitions, impacting crucial resource management decisions. By bringing together a diverse range of stakeholders, LUCI strives to enhance the understanding and management of land use change.

Source: United Soybean Board



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Executive Director

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info@farmersforsoilhealth.com

SPOTLIGHT

on Soy Policy

By Jody Shee

How ASA Shapes the Future of Farming

Soybean farmers face a complex landscape and ever-changing variety of domestic and global issues while doing their jobs and answering the call of agricultural needs across the world. ASA's mission is to advocate for U.S. soy farmers on policy and trade and ensure that, to complete their jobs successfully, our growers' interests and needs are voiced in Washington, D.C.

Throughout 2025 in each *American Soybean*, we're breaking down the basics of ASA's priority policy issues and why advocating for them is so important. This quarter, we explore farm policy, particularly the farm bill; tax policies that benefit the unique nuances of farming; and crop protection strategies that expedite and safeguard production.

Farm Policy

Farm policy is the regulatory backbone of U.S. agriculture and its rural communities. It's highly dependent on the multi-year farm bill, which provides tools to help farmers manage risks while ensuring they can produce the food, feed, fuel, and biobased products that power the industry and livelihood of farmers.

As an ASA policy manager, Joe Prosser is the liaison to ASA's Farm Policy advocacy team, which comprises soy farmers from across the growing region and oversees, among other farm policy topics, farm bill issues. One of these is the Title I Farm Safety Net, which provides financial support to farmers to help them manage risks from factors beyond their control, such as bad weather, market

fluctuations or trade disruptions.

The last-minute spending package passed in December included a one-year extension of the 2018 Farm Bill. Plans to develop and pass the next five-year farm bill remain a top priority of ASA. Thus, next up for the Farm Policy advocacy team will be educating and relationship building with new members of Congress on farm bill policy matters that affect most, if not all, of their constituents, Prosser says.

"My portfolio covers financial services including credit, Commodity Futures Trading Commission (CFTC) and Securities and Exchange Commission (SEC) issues, biobased products, solar and broadband, as well as assisting with tax issues," he adds. While not all these topics fall under "farm policy," per se, they are all important to soy's success.

Going forward, Prosser says priorities related to farm policy will include a focus on continued funding for the Market Access Program (MAP) and also the Foreign Market Development Program (FMD), which he says

"has been historically one of the highest returning investments as far as supporting American agriculture abroad and marketing domestically."

ASA has other advocacy committees, including one that focuses specifically on trade. Funding for these vital market development programs will, as Prosser noted, be a major priority for the Trade Promotion and International Affairs advocacy group this year.

Meantime, Prosser and the Farm Policy advocacy committee will work hard on the next (hopefully 2025) farm bill, including tax policy within the farm bill.

Tax law outside the scope of farm bill is, of course, also a major concern.

Tax Law

Sensible tax laws play a fundamental role in ensuring the long-term success of all soybean farmers. To this end, lawmakers on Capitol Hill rely on the strategic engagement of ASA to communicate the essential needs and challenges of agriculture.

Soybean farmers face a complex landscape and ever-changing variety of domestic and global issues while doing their jobs and answering the call of agricultural needs across the world. ASA's mission is to advocate for U.S. soy farmers on policy and trade and ensure that, to complete their jobs successfully, our growers' interests and needs are voiced in Washington, D.C.



ASA continues to tackle the challenges facing soybean farmers by focusing on farm policy that helps manage risks; tax policies that help sustain generational farms; and science-based pesticide policies.



“My main job is to make sure the tax policies that Congress sets in place are ones that will help keep farmers sustainable and farming into the next generation,” says Virginia Houston, ASA director of government affairs. “There have been a good number of proposals that would negatively impact agriculture,” she adds. “Tax policy is a little different for farmers than for individuals or corporations.”

A key issue on the horizon is the expiration of the Tax Cuts and Jobs Act (TCJA) of 2017, set to occur at the end of 2025. This legislation has been highly beneficial to farmers, particularly through its substantial federal estate tax (commonly known as the death tax) exemption. However, these provisions could change under the new administration. ASA is proactively engaging with the House Ways and Means Committee, which oversees tax legislation, to advocate for soybean farmers ahead of any new tax package. “We feel that the current exemption levels under the TCJA are really needed,” Houston says.

Additionally, the Clean Fuel Production Credit, also known as 45Z, is a farmer-friendly tax boost that was part of the Inflation Reduction Act passed in 2022. The tax incentive is for the domestic production of clean transportation fuels like soy biodiesel. ASA advocates not only for the continuance of the tax credit, but also for additional assurances that

will support further market growth for soybean farmers.

Taxes serve as a rallying pole for all agriculture allies, which is why ASA is heavily engaged with other farm-centric coalitions, like the Tax Aggie Coalition. “There’s a good number of the other major commodity groups and agribusiness trade associations that get together to advocate with one unified voice on behalf of agriculture,” Houston says.

Pesticides

ASA’s pesticide engagement with legislators and regulators aims to ensure that agriculture has science-based policies on pesticides to maintain access to tools while protecting farmers, consumers and the environment. Advocating for this is Kyle Kunkler, ASA director of government affairs. “Our goal is to make sure our farmers have sufficient tools to protect crops and support conservation efforts such cover crops and no-till,” he says. The tools in nearly every farmer’s toolkit includes pesticides, such as herbicides, insecticides and fungicides.

A significant challenge in pesticide access involves legal actions by anti-pesticide groups exploiting the Environmental Protection Agency’s struggles to effectively implement the Endangered Species Act. “The goal of that act is well intentioned to not jeopardize endangered species or adversely modify

critical habitats,” Kunkler says. He adds that EPA lacks the manpower to oversee the law with respect to every active ingredient in every chemical as applied to every listed species.

“It is critical that EPA follows the law in every regard. If not, there are groups out there adversarial to pesticide use that are happy to use non-compliance as a way to sue the agency and seek to terminate pesticide registrations through the federal court system,” he says.

Kunkler is working with EPA, urging improvements in how the agency regulates pesticides so it works more efficiently, uses the best available science and protects endangered species without creating unnecessary hardships for farmers.

In addition, ASA advocates on the use of biotechnology in agriculture, which also has its foes. Biotech policy was thrown into flux in December 2024 by a U.S. District Court ruling that vacated the SECURE Rule, put in place in May 2020 to modernize USDA’s approach to biotechnology regulation. Like with pesticides, the environmental groups that brought the lawsuit sued on numerous legal grounds.

“The whole approach to biotech has changed from one court ruling,” Kunkler summarizes, underscoring the need for and nature of ASA’s ongoing advocacy for defensible, science-based regulation.

ASA continues to tackle the challenges facing soybean farmers by focusing on farm policy that helps manage risks; tax policies that help sustain generational farms; and science-based pesticide policies. With their voice in Washington, farmers can count on support where it matters most.

INDUSTRY

perspective

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

Successful Ag Trade with China Shows What's Possible

As we look forward to the future of international exports, I'm thinking about the intent and beneficial trade opportunities of the U.S.-China Phase One agreement that was successfully negotiated and signed January 15, 2020—five years ago this week, as noted by the *American Soybean* theme this issue.

Although the full scope of the Phase One agreement was sidelined by the COVID-19 pandemic and never fully delivered on its promises, the agricultural purchase commitments and removal of non-tariff structural barriers that were negotiated in the agreement led to two consecutive years of record-setting U.S. agricultural product exports to China. Indeed, China was the largest purchaser of U.S. agricultural goods in 2023, buying \$33.7 billion worth of U.S. farm-produced agricultural commodities¹. It was a good step in dealing with the thorny balance of trade situation.

The Phase One agreement laid a foundation for mutually beneficial cooperation and recognized the significant opportunity of the China export market. Starting in the early 1980s, ASA established and grew the U.S. soy market with China for nearly 25 years, and that work has been continued by USSEC since 2006. During this now 40-plus year relationship with China, the soy industry has worked to create a preference for U.S. soy in the Chinese marketplace by differentiating

the nutritional and sustainability advantages of U.S. soy, building trust, and fostering relationships with our Chinese trade partners.

In the 2023-24 marketing year, less than 40% of U.S. soy exports went to China, down from a high of 60% five years ago². Both the U.S. and China are diversifying their soy sales and purchase programs—but given China's role as the largest soy importer in the world, the U.S. does not want to say goodbye to this market.

China is a good example of a country that has learned to use imports of soybeans as an important tool to help ensure nutrition security for its citizens. This example of the economic principle of comparative advantage in action is something we highlight and encourage other countries to consider.

For U.S. soybean farmers, the Chinese export market is an important destination to keep in the overall portfolio of customers. Many factors impact markets and create shifting market trends. With rising per capita income and continued urbanization, China's growing demand for U.S. soy represents significant opportunity and should remain a consistent importer. China currently leads the world in the production of feed, pork, eggs and aquaculture produced with soy-based products.

Frankly, China wants and needs the high-quality, sustainably



Jim Sutter, USSEC CEO

produced agricultural products the U.S. has in abundance. A renewed trade conflict could erode the reputation of U.S. soybeans as a reliable food supply, making it difficult for U.S. farmers to regain this market. Rather than risk this relationship, let's capitalize on it for the greater good by looking at the agreement that was signed five years ago and using it as a template for a new agreement.

Even as we acknowledge the significant issues that exist between the two largest economies in the world, let's remember that the U.S.-China agricultural trade relationship has clearly proven to be a long-term, win-win collaboration for global nutrition security and a greener, more resilient supply chain.

¹ USDA Economic Research Service

² Calculations for soy complex (whole beans, meal and oil) based on USDA GATS data.

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Leveling Up Tortillas!



Sergio O. Serna Saldivar, Ph.D., appears on assignment for WISHH. Serna recently presented his groundbreaking research on soy protein's role in improving tortilla production.

Renowned Scientist Helps WISHH and U.S. Soy Drive Soy Protein Innovation in Popular Latin American Cuisine

ASA's World Initiative for Soy in Human Health program and U.S. soy are driving innovation in global nutrition through the integration of soy protein commonly eaten in Latin American cuisine. At a Tortilla Industry Association technical conference in September, WISHH technical adviser Sergio O. Serna Saldivar, Ph.D., presented his groundbreaking research on soy protein's role in improving tortilla production. Supported by the United Soybean Board, Serna highlighted that his findings show how food innovation with U.S. soy can advance nutrition and health worldwide.

Serna's research demonstrates how soy protein enhances the nutrition, cost-efficiency and yield of corn and wheat tortillas. Fortifying tortillas with as little as 6-8% soybean meal, 4-5% soybean concentrate, or 3-4% soybean isolate significantly boosts protein quality and quantity. These advancements make U.S. soy an ideal solution to combat protein malnutrition and improve health outcomes, particularly in Latin America.

"There is overwhelming scientific information about the improvement of the nutritional value, health benefits and health-promoting properties of soybean-fortified corn tortillas," Serna emphasized during his presentation. Serna noted that compared to cereals, U.S. soybeans offer 4-9 times more protein.

Serna's complete scientific paper describes how cereals are the main source of calories and protein for practically all inhabitants of the planet. These grains provide more than 60% and 50%, respectively, of the total caloric and protein intakes for an average person. Dependence on cereal grains increases with the level of poverty, so low socioeconomic groups normally consume 80% of their calories and proteins from cereal-based foods.

Serna has more than 30 years of experience in this field and was recently recognized for his achievements while accepting Mexico's national science award. Professor Serna's home country praised his "excellent track record of research, innovation and training in the areas of food engineering, biotechnology applied to the development of foods with high nutritional quality, and drugs to combat chronic-degenerative diseases." WISHH has leveraged Serna's valuable expertise: He has advised and trained Central American food companies that are WISHH strategic partners wanting to capture the nutritional and health benefits of soy protein in a wide array of products.



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



wishh.org

Picking Up the Policy Torch

By Jody Shee

Stepping into a board leadership position at the American Soybean Association is a significant responsibility, especially when following in the footsteps of a parent who played a pivotal role in ASA's governance, including serving as president. Two current ASA board members have picked up the leadership torch shaped by the previous exemplary dedication and hard work of their fathers. As these sons take up that flame, they are prepared to contribute their fresh ideas and skills while bringing new energy to their advocacy efforts and moving soy forward.

Geoff Ruth

Though Geoff Ruth, from Rising City, Nebraska, was just elected to the ASA board, he isn't new to leadership. He is the seventh generation working a 2,800-acre family farm and has held various leadership positions,

including serving on the Nebraska Farm Service Agency State Committee and nine years on the board of the Nebraska Soybean Association, including as president.

When Geoff was a high school senior, his dad, Bart Ruth, was ASA president (2001-02) and helped pass the 2002 Farm Bill, one of his greatest accomplishments in Geoff's eyes. He also recalls his dad spending much time in China and Southeast Asia on trade missions as soybeans were becoming a hot global commodity.

As a father of three himself, Geoff reflected on his father's frequent long business trips during his youth and mindfully took a seven-year break from industry leadership after leaving the Nebraska Soybean Association to spend more time with his family. "I kind of stepped away from it a while to see my kids somewhat grow up," he says. Today, his

children are 10, 14, and 15. "I don't think I'd trade that time off for the world."

Now as Geoff kicks off his tenure on the ASA board, he's reenergized and ready to get busy. "Getting a new farm bill passed will certainly be at the top of my priority list," Geoff says, as he kicks off his tenure on the board. He also plans to help broaden the international soybean market beyond China. "Hopefully I'll work with our politicians to make sure that whatever tariffs get put in place don't hurt the American soybean economy."

While Geoff anticipates a steep learning curve in his new board position, he adds that at least in international marketing and policy, a lot of it is just relationship building. "I've always felt like I've been a pretty decent relationship builder," he says.

Jordan Scott

Encouraged by his father, Kevin Scott, Jordan Scott joined the ASA board in 2022. This year he was elected to the nine-member executive committee.

A fifth-generation farmer operating his family's Valley Springs, S.D., farm, Jordan has also served many years on the South Dakota Soybean Association board, including two years as president.

Growing up, Jordan admired his father's achievements. "I remember him coming back from trips and hearing about the conversations he'd had with highly powerful people in our country and abroad, and it was pretty



Geoff Ruth (left) is bringing "soy forward" while following in his father, Bart's, (right) footsteps as an ASA leader.



Jordan Scott (right) was inspired to get involved in soy leadership by his dad, Kevin, (left) and his policy work as an ASA president and director.

impressive to me,” he says. Kevin, who served as ASA president in 2021, played a key advocacy role in the passage of the 2021 Infrastructure Investment and Jobs Act. He was also instrumental in helping establish ASA’s Washington, D.C., office.

Jordan sees international trade as one of his personal priorities. “I’ve focused on trade throughout my ASA career, and I will continue to do that as vice chair on the trade policy and international affairs committee,” he says. He also aims to tackle regulatory issues surrounding pesticides. “I’ll work on educating and telling our story and why we need certain products,” he adds.

Although he used to engage actively in storytelling on his own YouTube channel, Jordan now focuses on a more subdued style of advocacy. “I’m working at doing policy, not politics,” he says.

Make Your Voice Heard for Soybean Farmers!

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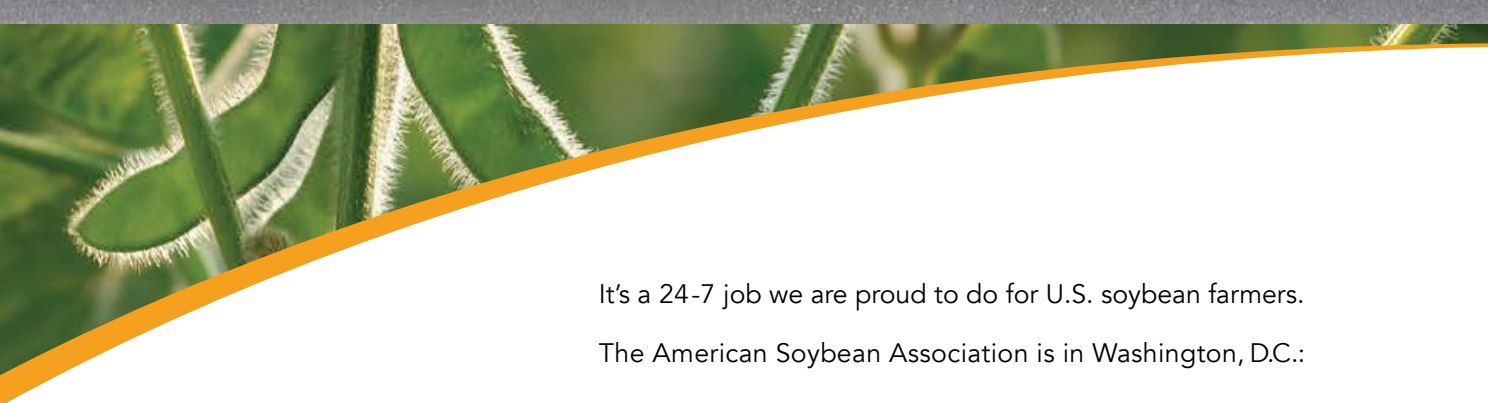
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