Soy Protein Priorities
Production Tips for 2020
Supply Chain Reaction
On the Path to Mexico
From researching new uses for soybeans to identifying new markets for U.S. soy, the soy checkoff is working behind the scenes to create new opportunities and increase profits for soybean farmers. We’re looking inside the bean, beyond the bushel and around the world to keep preference for U.S. soy strong. And it’s helping make a valuable impact for soybean farmers like you.

See more ways the soy checkoff is maximizing profit opportunities for soybean farmers at unitedsoybean.org
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KEEPING IT ALL IN PERSPECTIVE

As we head to the fields this spring, we are seeing the world continuing to change around us. Even during times of uncertainty and pandemic despair, people still need to eat. And they rely on farmers to provide safe, nutritious and available food for them. I know Illinois soybean farmers are doing what they can in their communities to provide help to those in need.

The soybean industry will prevail. Soy protein is a bright spot of food and feed growth. Perhaps now more than any time, you don’t have to look too hard to see where soy has found its place among food trends both as a plant-based protein source and as a feed ingredient for animals.

The Kerry Health and Nutrition Institute shared what they consider “mega-trends” for foods in 2020: naturally functional (healthy) and sustainable products. Three of their 10 key trends in food, nutrition and health involve soy: plant-based, protein and meat reimagined categories.

Notes Denise Wilkes, nutrition scientist with the institute, regarding protein, “An adequate protein intake is important for optimal health; however, when we talk about protein, ‘more’ does not mean ‘better.’ The main challenge of the trend is to deliver high-quality protein in convenient formats (without falling into excessive consumption) by providing all of the essential amino acids and good protein digestibility, regardless of whether it is plant- or animal-sourced protein.”

The Illinois Soybean Association (ISA) has long recognized the many values of soy protein as human food and animal feed. ISA’s long-range strategic plan has four focus areas: marketplace, farmer profitability, stakeholder value and organizational excellence. Within marketplace, our goals are to retain and grow animal agriculture in Illinois and in close proximity to Illinois and ensure and grow export markets for meat products.

As part of that effort, we are focusing on the protein content of soybeans. On my farm, I seem to always have below-average protein levels. My yield is going up, but protein content is going down. Through the High Yield + Quality program (HY+Q), ISA stresses that seed selection isn’t just a yield decision. It’s also a quality decision that drives demand for soy protein.

If farmers select high-yielding soybean varieties that have a high livestock feed value score as found in the HY+Q database, livestock feeders can use that information to increase animal performance. It is a change of mindset, but one that can pay dividends for our industry.

So, what can you do? Reserve a sample kit for 2020 at soyvalue.com to learn your livestock feed value score following harvest. It’s free, easy and illustrates your checkoff dollars at work.

This issue of Soy Perspectives shares other soy protein news, along with some practical farming advice from ISA’s recent Soybean Summit. Read on for insight into protein composition research, the global soy protein scene and soy protein uses closer to home.

And as you are in the field this spring, remain optimistic and be safe.

“The soybean industry will prevail. Soy protein is a bright spot of food and feed growth.”

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“Rudy” a soybean variety

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As sure as it is spring, Illinois soybean farmers know the seeds they plant will develop into a harvestable crop by fall. With a few critical inputs at the right time and the cooperation of Mother Nature, farmers can count on their hard work coming to fruition at harvest time even as we face together the unknown that coronavirus could bring to our world.

The same is true of the advocacy seeds we plant. Illinois Soybean Growers (ISG) advocates for and promotes interests of Illinois farmers that enhance soybean production and use. ISG works in Springfield and Washington, D.C. pursuing legislative and regulatory solutions to issues.

Even with today’s unprecedented challenges, ISG is working to see results from the advocacy seeds we have been planting the last few years to improve trade. About six out of every 10 rows of Illinois soybeans are exported. With such a critical demand for our soybeans, Illinois farmers have long valued trade agreements that open markets and reduce or eliminate trade barriers.

We are optimistic the China Phase 1 trade agreement with the U.S. will bear fruit. The pact de-escalates the tariff war that negatively affected the ag economy and Illinois soybean growers for about two years and is a welcome step toward reestablishing strong soybean exports to China.

We also are watching for growth from the U.S. Mexico Canada Agreement (USMCA) advocacy planted seeds. Now approved and once in force, soybean growers can maintain access to two top markets. Mexico is the number two market for our whole beans, meal and oil, while Canada is the number four buyer of meal and number seven buyer of U.S. soybean oil.

In 2020, we will sow legislative and regulatory seeds regarding farm policy. Already, we are starting to collect input for the 2023 farm bill. Every five years, Congress reviews and renews the farm bill to set national policy, and we want to be prepared. We encourage ideas from Illinois soybean farmers on what is working and what is not from the 2018 law. The issues of greatest importance to farmers are the issues the ISG board will pursue on behalf of the state’s farmers.

Other seeds we have planted and continue to nurture include biodiesel tax credits and exemptions at the state and national levels and favorable treatment of biodiesel under the Renewable Fuel Standard. Transportation infrastructure and maintenance, sustainable production practice support and water and soil quality are equally important priorities we pursue with lawmakers.

Are there other advocacy seeds you would like to see planted? We welcome your feedback. Just email us at ilsoy@ilsoy.org and visit VoiceforSoy.org for additional information.
A look at food trends confirms consumers understand and value protein in their diets now more than ever. Whether animal- or plant-based protein, demand is growing worldwide.

VERSATILE HUMAN FOOD
The global plant-based protein market was worth more than $4.6 billion in 2018 and will grow to about $85 billion by 2030, according to Swiss investment firm UBS. And the variety of soy protein products is quickly growing. "Meats" and beverages, including the Impossible Burger, soymilk and soy yogurt, are attracting consumers interested in health, lifestyle and nutrition.

Cordialis Msora-Kasago, MA, RDN, is a registered dietitian in Los Angeles who represents the Academy of Nutrition and Dietetics. She observes soy food products have come a long way.

“A walk through the grocery store highlights the increased varieties of soy and soy-containing products in the U.S.,” she says. “From edamame and soy nuts to tofu, tempeh and soy sauce, it is evident Americans find numerous ways to enjoy it. Store refrigerators feature soy turkey, soy chicken, soy sausage and even soy hot dogs, which indicate soy’s versatility in American diets.”

Msora-Kasago says edamame and soy nuts are great nutritional alternatives to high-fat, high-sodium snack foods. In addition, soy’s nutrient density makes it a healthful, affordable replacement to milk and milk products. Compared to other plant-based beverages, soymilk boasts an impressive nutrient profile at eight grams of protein per eight-ounce serving.

Reason supports the soy solution. Mark Messina, PhD, with Nutrition Matters of Pittsfield, Mass., is a recognized expert on soy’s health effects and says it is unique among legumes.

“For one, it provides more protein and a higher-quality protein than other legumes,” he says. "It is also a source of both essential fatty acids, including the omega-3 essential fat alpha-linolenic acid. And, it provides ample amounts of isoflavones which are a group of naturally occurring compounds being widely studied for their health benefits. The low-carbohydrate content of soybeans means that many soyfoods easily fit into diets restricting carbohydrate intake.”

CRITICAL ANIMAL FEED RATION
Soy protein has been used in feed rations for a century but has become critical the last 50 years.

“If you look at a graph of how the poultry and swine industries have evolved over that time, it parallels the production of soybeans and soybean meal,” says Hans Stein, PhD, Illinois. “You could argue that soybean meal has been the prerequisite for our success in pork and poultry production.”

Stein adds that soy’s unique combination of amino acids is key to its functionality and success. When blended with corn, soybean meal easily meets swine and poultry protein requirements.

Consumption trends support this. Broilers, layers and turkeys in the U.S. account for nearly 64 percent of U.S. soybean meal use, while hogs consume more than 24 percent, according to the United Soybean Board’s (USB) most recent 2018 Soybean Meal Demand Assessment. (See the article, A Perfect Protein, page 10 for detail.) There’s growth in other poultry markets, too.

Worldwide, farmed animals consume 90 percent of soybean meal.

“Poultry sector gains in Egypt and Pakistan are leading recent growth in U.S. soy consumption,” says Keenan McRoberts, PhD, USB vice president of meal strategy. “Global growth has occurred across species over time with poultry leading the charge. U.S. markets are more uncertain, especially for swine. Alternatives, such as synthetic amino acids and dried distillers grains with solubles (DDGS) affect soybean meal use in monogastric diets.”

Challenges aside, the amino acids in soybean meal make a nutritional powerhouse and Stein sees fresh opportunity in soy’s energy.

THE GLOBAL PLANT-BASED PROTEIN MARKET WILL GROW TO ABOUT $85 BILLION BY 2030.
“The energy part of soybean meal has been overlooked,” he says. “The concentration of energy it provides to pigs is underestimated. We need more research to fully evaluate this opportunity. There also are some indications that soybean meal helps younger pigs if they’re slightly sick.”

That work is underway. Stein says University of Illinois researchers recently started a trial that they hope will demonstrate what the exact energy value is.

To capitalize on global opportunity, USB recently launched Choose U.S. Protein First, a campaign that promotes consumption of U.S. soy, beef, pork and poultry worldwide.

“This initiative is a unique, pre-competitive collaboration to ensure all forms of U.S. protein remain the preferred global choice to help meet future demand and nutritional requirements of a growing population,” McRoberts says. “U.S. soy will reinforce the critical role that U.S. farmers serve in global food and economic security.”

**NATURAL FIT FOR FISH**

Soybean meal has become the most-used protein source in aquaculture feed worldwide. Its high protein density and ease of digestion make it a near-perfect feed ingredient for nearly all cultured fish and shrimp species. Plus, the World Food Bank and United Nations predict fish farms may produce up to two-thirds of the global fish supply by 2030.

PezCo Aquafarming is a family owned, fully integrated company that produces certified sustainable, fresh and frozen tilapia and rainbow trout. Its hatcheries, farms and processing operations are in Colombia, South America. U.S. headquarters are in St. Petersburg, Fla. Colombia and Honduras are the top two suppliers of fresh tilapia filets to the U.S.

“Aquaculture is perfect for Colombia,” says Juan-Carlos Libreros, chief operating officer. “With our location just above the equator, we can farm 365 days a year. Plus, tilapia is a fish that, when provided the right conditions, rewards us with great performance.”

Feed conversion rate (FCR) for tilapia is 1.3. For every 1.3 pounds of feed consumed, a healthy fish returns a pound of weight. FCR for trout is similar. There are plenty of fish to feed the ration of mostly soybean meal, some corn and a small amount of fish meal, Omega-3s and vitamins.

“For tilapia filet production, we have 11 farms,” Libreros says. “Four farms supply red tilapia and nine produce rainbow trout. We have a network of 600 employees and farm owners.

“We feed about 1,000, 40-pound sacks of feed per day at the 11 farms for filets, and about 250, 40-pound sacks each daily to the red tilapia and trout,” he adds. “In addition to being an efficient feed for the fish, there’s little waste with soy.”

While not taking place at Pezco, Libreros acknowledges work the U.S. Soybean Export Council has underway with in-pond raceway systems in Columbia.

“They’re looking for ways to help our producers be more efficient,” he says. “They’re not just interested in selling soy, but helping producers be more effective at using soy.”

It is clear opportunities are growing. Aquaculture continues to contribute more to the food supply and will need more soybean meal. And the combined work of soybean, livestock and poultry industry campaigns can spur growth in new and emerging markets, while food company innovators match soy products to any lifestyle. Such discoveries and market opportunities ensure soybean farmers can help feed diverse protein products to a projected 10 million people by 2050. ■
SOLVING THE SOYBEAN RUBIK’S CUBE

Researchers Seek Solutions to Boost Protein Composition

> BY BARB BAYLOR ANDERSON

Puzzle solvers know that a Rubik’s Cube requires multiple moves to match like colors on each of its six faces. Every twist of the 3-D cube puts completion further ahead or further behind.

Similarly, researchers who have tried to solve the soybean protein composition puzzle for years know that generally increasing protein content reduces soybean yields. The national soybean checkoff is addressing this continuing conundrum by funding projects that may lead to increased protein content and more consistent quality with no yield penalty. Better meeting the needs of U.S. soybean buyers supports long-term environmental and financial sustainability for farmers.

One recent project, “Effect of a Mutant Danbaekkong Allele on Soybean Seed Yield, Protein and Oil Concentration” was led by University of Tennessee research associate Mia Cunicelli.

“We were interested in a specific gene, Danbaekkong, which is known for increasing protein content in soybeans. We wanted to find out if the gene was present and if it could increase protein concentration while maintaining oil concentration and yield,” says Cunicelli. “This is a difficult task because of the negative genetic correlation of protein with both oil and yield.”

Three of the lines identified by the multi-year study funded by the United Soybean Board (USB) and Tennessee soybean checkoff had the high protein Danbaekkong gene and no statistically significant differences in yield from wild type lines without the Danbaekkong gene. Those three lines were used as parents last summer in hopes of creating lines with the Danbaekkong gene for high protein and other valuable agronomic and seed quality traits. Cunicelli says work with the lines will take 7-10 years to become registered varieties and commercially available.

“Increasing the protein concentration in soybeans can lead to an increase in soybean value, because the higher quality protein with a better amino acid profile is available for livestock,” she says. “This can cut the cost of supplementation to livestock farmers.”

PUMPING UP PROTEIN WITH RELATIVES

Similarly, Rouf Mian, research geneticist with USDA-ARS leads a group of 16 public soybean scientists from across the nation who are using genetically diverse cultivated soybeans and wild soybean relatives to develop new germplasm and varieties with consistently elevated protein and yields comparable to commercial varieties. The project in the current fiscal year is jointly funded by USB and the Foundation for Food and Agriculture Research (FFAR).

“The goal of our research group is to develop U.S.-adapted soybean varieties and germplasm that combine high seed protein (more than
36 percent) with high yield and more than 48 percent meal protein,” says Mian. “Using this unorthodox approach and the power of the latest genomic and DNA technologies, we are demonstrating measurable progress in solving the intractable problem of combining high seed protein with high seed yield in soybeans.”

Agreeing with Cunicelli, Mian says U.S. soybeans with such low meal protein is a disadvantage in the international market. The USB Value Task Force Report estimates if no changes were made, the projected 2030 meal protein content could drop to 45.5 percent. This is well below the minimum meal protein value of 47.5 percent required by the marketplace.

Mian cites a study from USB that indicates just a one percent increase in seed protein in soybeans without any loss in seed yield or seed oil may add an estimated $3 billion to the value of the U.S. soybean crop. U.S. soybean varieties with improved meal protein and high yield will be more competitive with the soybean crop from South America, he explains, which will contribute to higher demand and market prices for U.S. soybeans in the international market.

“This is an ongoing project to solve an intractable problem,” he says. “However, our group has released more than 10 varieties and germplasm with more than 48 percent meal protein contents in maturity groups 0 – VII during the last two years. These lines are highly competitive with commercial cultivars in seed yield in their respective maturity groups.”

The majority of lines are already available for licensing to private companies for breeding so they can develop new cultivars with improved protein. However, Mian explains the time it takes to place the research’s benefit in private commercial cultivars depends on companies concerned. Some varieties are being commercialized by regional companies serving niche markets.

“The highly diverse genes and genetic materials from this project are mostly unique,” says Mian. “They will definitely be the foundation for further research and development on genetic diversity and improvement of the seed protein found in soybeans.”

“A $3.2 million investment between the United Soybean Board and the Foundation for Food and Agriculture Research is enhancing the U.S. soy industry’s competitive advantage, driving opportunities for American soybean farmers. This partnership specifically funds research to improve the protein content and quality of U.S. soybeans while protecting yield.”

“Leveraging USB funds in this manner with other public and private collaborators extends the reach and potential impact of USB investments, as well as increases buy-in from key value chain partners,” says USB Vice President of Meal Strategy Keenan McRoberts. “USB will continue to seek and act on opportunities like this to amplify the soy checkoff’s investment reach, impact and returns through critical partnerships and leveraged funding sources.”

USB and FFAR are co-funding soybean research to support four projects, including Rouf Mian and colleague’s work with diverse soybeans and wild relatives. Here is a look at three more:

- University of Nebraska-Lincoln’s George Graef is leading an interdisciplinary team to improve genetic diversity, seed composition and yield using highly productive genetic resources, breeding, genomics and biotechnology to identify and understand key genes involved in soybean seed protein composition. The project includes developing soybeans with 48 percent protein meal and 11 pounds of oil per bushel, with good amino acid balance and yield that meets or exceeds elite varieties in the 0-V Maturity Groups.

- USDA-Donald Danforth Plant Science Center researcher Doug Allen is identifying novel amino acid composition genes in a mutant variety and taking advantage of a new analytical method to create more nutritious soybeans. Soybean meal, the gold standard of protein sources, contains an inadequate amount of sulfur amino acids. Earlier research found soybeans with enhanced sulfur-containing amino acids in a mutant variety.

- USDA-Donald Danforth Plant Science Center scientist Yong-Qiang An is looking for genes that result in elevated protein and using them in commercial soybean variety breeding efforts. The identification and validation of these genes has the potential to create a more nutritious soybean for consumers and a more profitable one for farmers.

Learn more about these efforts at: https://foundationfar.org/2020/01/16/new-usb-ffar-partnership-boosts-protein-in-soybeans/.
Protein plays critical roles in health, developing structure and promoting growth and regulation. High-quality, nutrient-dense protein sources improve diets and strengthen food security. Soy, as a complete protein, contains all nine essential amino acids. That makes it a primary protein source for human nutrition and animal feed.

About 85 percent of the world’s soybeans are crushed to separate the protein and oil. Another six percent feed people directly. In both forms, soy provides high-quality protein for diverse uses.

Most soybean meal becomes high-quality, cost-effective protein feed for livestock, poultry and fish that convert it into bacon, ribs, wings, turkey legs, shrimp, fish fillets and more.

Global soybean meal use has been relatively constant over the past three years. China uses the most, followed by the U.S. and European Union. All of these regions have large, efficient pig and poultry industries, although the impact of animal and human diseases could impact the 2019-20 projections and influence trends in 2020-21 and beyond. (See article on page 18.)

As incomes rise in developing countries, so do appetites for high-quality proteins like chicken, pork and fish. The U.S. produces meat and poultry very efficiently, and production practices in developing regions of the world are evolving to mirror that efficiency. Decades of research have optimized soybean meal inclusion rates in livestock and poultry feed. If similar rates were to be adopted globally, the potential demand growth for soybean meal would be significant.

Aquaculture has the most potential for soy protein inclusion rates to grow both in the U.S. and around the world. Inclusion rates for many species have not yet been fully researched, and many operations have yet to adopt soy as a sustainable, renewable feed option.
SOYBEAN MEAL COMPARISON CHART

Soybean meal delivers ideal ratios of essential amino acids for many animal diets at competitive prices. Other protein sources may require synthetic amino acids to reach the appropriate balance. Soybean meal has high protein and low fiber content, which better supports digestibility.

<table>
<thead>
<tr>
<th>INGREDIENT</th>
<th>CRUDE PROTEIN</th>
<th>LYSINE</th>
<th>THREONINE</th>
<th>METHIONINE</th>
<th>CRUDE FIBER</th>
<th>CRUDE FAT</th>
<th>ADDITIONAL DETAILS</th>
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<tbody>
<tr>
<td>soybean meal</td>
<td>48.27%</td>
<td>3.02%</td>
<td>1.85%</td>
<td>.67%</td>
<td>3.49%</td>
<td>3%</td>
<td>Highest ileal digestibility, or availability of amino acids in the last section of the small intestines.</td>
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<td>distillers dried grains (DDGs)</td>
<td>27.5%</td>
<td>.84%</td>
<td>1%</td>
<td>.55%</td>
<td>7.62%</td>
<td>9.9%</td>
<td>Very cost-competitive, especially near ethanol plants. High phosphorus content, reducing need for mono- or dicalcium phosphates.</td>
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<tr>
<td>canola meal</td>
<td>37.7%</td>
<td>2.09%</td>
<td>1.5%</td>
<td>.73%</td>
<td>10.15%</td>
<td>3.5%</td>
<td>Price competitive in Northern Plains. Higher methionine and cysteine content.</td>
</tr>
<tr>
<td>cottonseed meal</td>
<td>39.92%</td>
<td>1.49%</td>
<td>1.25%</td>
<td>.55%</td>
<td>13.4%</td>
<td>2.9%</td>
<td>Price competitive in South. Low lysine digestibility limits use in chicken feed.</td>
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<tr>
<td>meat and bone meal</td>
<td>51.42%</td>
<td>2.74%</td>
<td>2.74%</td>
<td>.72%</td>
<td>7.91%</td>
<td>2.8%</td>
<td>Very high in nutrients and digestibility.</td>
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<tr>
<td>synthetic amino acids</td>
<td>NA</td>
<td>100% of needed amino acid</td>
<td>NA</td>
<td>NA</td>
<td></td>
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<td>Very cost-competitive.</td>
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Source: 2018 Soybean Meal Demand Assessment, Decision Innovation Solutions, September 2018.

FEEDING PEOPLE

Long before current food trends became fashionable, soy was the plant-based standard. It’s a complete protein with a Protein Digestibility Corrected Amino Acid Score (PDCAAS) of .99, with 1 being a perfect score. Decades of research have also shown that soy is very functional, versatile and efficient. That’s why it is used in everything from traditional soy foods like tofu and tempeh to plant-based alternatives like soy milk and the Impossible Burger.

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THE GLOBAL SOY FOOD MARKET IS EXPECTED TO GROW 5.6% PER YEAR FROM 2017 TO 2025

SOURCE: Hexa Research, February 2019

BUILDING INDUSTRIAL MARKETS

In addition to its nutritional value, soy protein offers a sustainable, renewable option for adhesives, coatings and binding agents. It replaces less sustainable ingredients in many products.

DUST is a soy protein-based lubricant that replaces graphite and talc to promote seed flow in planters.

Soy flour adhesives replace formaldehyde and phenol-based resins that are targeted for removal from wood materials. They require less drying time, use less water and produce less waste than conventional plywood glues.
THE LEADER IN CONVENIENT AG INPUT PURCHASES

CommoditAg leverages our farm roots with e-commerce expertise to offer the selection, convenience and accessibility you need.

Visit CommoditAg.com to order today.
The 2020 Soybean Summit drew a crowd of 260 soybean farmers, crop advisers and industry representatives at the Crowne Plaza in Springfield, Illinois, March 10. Industry experts shared agronomic practices, ag technology and agribusiness management information.

Speakers included John McGillicuddy, McGillicuddy Corrigan Agronomics; Sara Wyant, Agri-Pulse Communications; and breakout session experts in agronomy, agtech and agribusiness management. A panel of farmers and Certified Crop Advisers discussed challenges and solutions for industry volatility. Farmers Ron Moore of Roseville and Garry Niemeyer of Auburn joined with Todd Steinacher, AgriGold and Brendan Marshall, West Central FS in agreeing there are still major production and business hurdles caused by the late 2019 harvest to overcome.
“I appreciated the variety and relevancy of topics. I’m much more aware of the importance of focusing on grain marketing and learned a lot from Matt Bennett’s breakout session that I will take back to my own operation.”

- Roberta Simpson-Dolbeare, Nebo, IL

“I attended the succession planning breakout session and took away a lot of great information that will help me start to have these conversations on our farm. This is the second Summit I’ve attended and both times I’ve come away with information to implement on my farm.”

- Michael Moore, Roseville, IL

**1** ALLOCATE RESOURCES WHERE THEY WILL MAKE THE LARGEST DIFFERENCE TO YOUR BOTTOM LINE.

Plant nutrition, time, money. John McGillicuddy, McGillicuddy Corrigan Agronomics, says all of these are necessary for producing a profitable soybean crop, but the resources aren’t unlimited. Prioritize finite inputs and evaluate how they can impact soybean yield.

Many different philosophies on maximizing yield exist, including ideas for increasing flowers, nodes and/or pods, but the most important philosophy is the one that increases soybeans on a specific farm. That’s why farmers are encouraged to perform on-farm research. What works for some may not be the best strategy for others. Evaluating how new ideas work in specific fields is key to achieving better yield and profitability.

**2** PREPARE TO OVERCOME THE MANY CHALLENGES 2020 HOLDS.

Sara Wyant, president of Agri-Pulse Communications, notes unforeseen market impacts, consumer perceptions, workforce development, unpredictable growing climates and many more challenges face soybean farmers in 2020. The key to overcoming these obstacles is to remember that while farming is a lifestyle, it is also a business. Marketing, succession planning and agronomic plans must encompass this fact. Profitability is the name of the game. The way to expand it is to view all transactions through the lens of return on investment and moving your business forward.

**3** START CLEAN, STAY CLEAN.

The easiest weed to control is the one that never emerges. GROWMARK’s David Powell says weed management is becoming more difficult. A major concern for soybean farmers should be waterhemp. Waterhemp can germinate during the spring, summer and fall and produce a large amount of seed that can be resistant to herbicide treatments. This particular weed can show up in new locations already resistant to herbicide treatments.

To control waterhemp, use a residual herbicide prior to planting and then use an effective post herbicide that works with the planted soybean trait. Also use multiple modes of action in the tank for best control (pre-groups 3, 5, 14 and 15, post-groups 4 and 10).
“I really enjoyed the grain storage session. I’m a big believer in on-farm grain storage and learned a lot from the folks at GSI.”

- Ed Murphy, Farmersville, IL

“David Powell shared very pertinent material in the herbicide breakout session. Everyone is concerned about waterhemp and I took away management tips to control weeds on our farms.”

- Jim Martin, Pontiac, IL

**CONDUCT ON-FARM RESEARCH.**

Is the latest product going to give you extra bushels? How will it impact your return on investment? The best way to answer questions like these is to conduct on-farm research. Every field and situation is unique, so what may—or may not work—could be different.

McGillicuddy says set up a test trial on 10-20 acres to try a different fertilizer, weed management strategy or new product. Capture the data necessary to evaluate the ROI on the farm. It’s also important to replicate these tests in a few different geographies or in a few different years before expanding the agronomic practice to the entire operation. Find details about setting up successful trials from Todd Steinacher at ILSoyAdvisor.com.

**SURROUND YOURSELF WITH A TRUSTED TEAM.**

Whether it is a banker, lawyer, agronomist or seed dealer, or all of the above, farmers should build relationships with experts they trust to provide input regarding difficult management and agronomic decisions. A trusted team of advisers can offer different perspectives and experiences that will be valuable to each individual operation.

The ISA Soybean Summit has become a popular checkoff-funded annual event for the state’s soybean farmers to better prepare for the season ahead.
THE ROAD TO MEXICO

> BY RACHEL PEABODY

MEET BROCK WILLARD.

He’s a soybean, corn and hog farmer that operates with his grandfather and uncle outside of Griggsville, Ill. He’s also one of the Illinois Soybean Association’s (ISA) Soy Ambassadors, a leadership program sponsored by ISA checkoff and membership programs.

During the two-year Soy Ambassador experience, participants gain leadership expertise, industry exposure and global perspective. Willard and his classmates traveled to Mexico in January 2020 to follow a unique journey for Illinois soybeans – the path from Illinois soybean fields and Illinois-fed hogs to the meat markets of Mexico.

FROM ILLINOIS FIELDS & BARS...

Willard and his family contract finish more than 10,000 pigs annually in Pike and Adams counties. They have a 5,200-head capacity they turn over twice a year. They are a wean-to-finish operation, meaning pigs come in at around 13 pounds and are finished to 280-290 pounds. From there, the majority of their hogs are delivered to the Farmland Foods facility in Monmouth, Ill.

For Willard, the hog industry is in his blood.

“My grandpa started raising pigs in a farrow-to-finish operation. We moved over to contract finishing in the mid-to-late 1990s during a tougher economic time for hogs,” says Willard. “We’ve kept with it because we like the economics and it’s a good equity builder. It’s allowed my uncle and me to come back to the farm. We expanded the hog operation again in 2015.”

As a soybean farmer, Willard understands that it takes good protein to grow good protein.

“On average, soybean meal makes up 200 pounds per ton of the swine ration,” says Bart Borg, director of nutrition for Standard Nutrition Services.

That’s why Willard values quality soybean meal as a main component of his feed ration. In fact, 92 percent of the soybean meal fed in Illinois goes to pork and poultry rations, reinforcing why ISA promotes to others that chickens and pigs are the top customer of soybeans.
...TO MEXICO’S MEAT MARKETS

“Typically, Mexico is the number one importer of U.S. pork by volume,” says Andrew Larson, ISA’s public affairs and marketing manager. “According to the Pork Checkoff, Mexico purchased 1.56 billion pounds of U.S. pork in 2019, underscoring why maintaining that market is so important. ISA’s relationship with the U.S. Meat Export Federation (USMEF) in Mexico allows for us to work on increasing product demand there.”

According to USMEF, the most popular imported pork product from the U.S. is bone-in hams, and second to that, variety meats like tripe. Leticia Flores, communications specialist for USMEF Mexico, says the country has potential to increase pork consumption per capita.

“ISA has been a tremendous partner in helping us develop new markets, in new regions and to encourage more use of U.S. pork,” says Flores. “Some of the ways we are doing this are by executing various communications strategies that promote U.S. pork consumption, like in the form of sales seminars, influencer marketing campaigns, YouTube campaigns and brand activations in baseball stadiums to name a few.” (See related story on page 23.)

Changing the perception of pork in Mexico is another goal of USMEF in Mexico.

“For many years, pork was considered just an ingredient, but we are working on changing that. We are working hand in hand with importers to add more value to these pork products so we can make it the center of the plate,” says Flores. “Bottom line is that we are giving more value to the U.S. pork carcass, and that benefits everyone along the value chain.”

KEY TAKEAWAYS FROM AN ILLINOIS SOYBEAN & HOG FARMER

With a boots-on-the-ground approach, Willard credits the trade mission as an experience that helped him understand the full circle of the soybean-pork relationship with Mexico.

“It was reassuring as a producer to see that they have a good market. The demand is there and one of their main concerns to me as a farmer is that we wouldn’t have the future supply for them,” says Willard. “They view the U.S. meat seal as an indicator to the consumer of a higher quality product. I’m reassured that Mexico’s appetite for pork is only increasing.”
After a spring of cancellations and closures, the world feels smaller. An interconnected economy links countries and industries. Major events spread ripples widely, even to the soybean industry.

A novel strain of coronavirus, COVID-19, first appeared in Wuhan in east-central China. But it’s not the only recent disease with an epicenter in China to disrupt the global soy supply chain.

African swine fever (ASF) was a known threat in Africa and Europe. But in August 2018, it was detected in domestic pigs in China, likely spreading from Russia, according to the World Organisation for Animal Health. Its rapid spread through Asia and further into western Europe in late 2018 and throughout 2019 required significant culling of pig herds, especially in China.

And while deadly to pigs, ASF is not a risk to human health.

ASF SHIFTS CONSUMPTION PATTERNS

But it does impact human protein consumption.

“Pig numbers are down about 30-35 percent year-to-year based on official data from China,” says Larry Shonkwiler, senior commodity analyst for Advance Trading, Bloomington, Illinois.

That significant decrease in the world’s largest swine herd pressured meat demand.

“High pork prices have the natural effect of rationing, reducing demand,” explains Xiaoping Zhang, director in China for the U.S. Soybean Export Council (USSEC). He is based in Beijing.

“Chinese household pork consumption in Tier 1, 2 and 3 cities was less impacted because it is a smaller portion of diets and less price sensitive,” he says. “The biggest change was in the hotel, restaurant and institutional (HRI) sector, which turned to poultry.”

Shonkwiler cites available data supporting those observations.

“Pork demand in China was down just one percent in 2018,” he says. “But in 2019, after ASF spread, pork demand dropped 12 percent. At the same time, poultry demand increased 11 percent in 2019. There was an increase in aquaculture as well, but that is more difficult to track.”

Soybean demand adapted to the shift in protein demand. According to Shonkwiler, China’s soybean needs dropped 11.6 million metric tons from 94.1 million metric tons in 2017-18 to 82.5 million metric tons in 2018-19, a change of 12 percent. Soybean crush volumes decreased just five million metric tons. During this period, China imposed higher tariffs on soybeans, so U.S. exports to China dropped much more dramatically than overall Chinese soybean demand.

China’s rebounding soybean demand for 2019-20 is forecast at 88 million metric tons.

“My understanding is that ASF impacted China’s backyard pig operations the most,” he says. “Those rations included more scraps than soybean meal.”

Zhang adds, “The Chinese pork industry is trending towards large-scale farms and groups that integrate breeding through finishing operations.”

Those pork production systems do rely on soybean meal in feed. But as demand for poultry and seafood increases, soybean meal use has shifted to feed those growing sectors, explaining the dip and recovery in demand.

ASF spread to other countries in Asia with pork production, including Laos, North and South Korea and Vietnam, with a less noticeable impact.

“Soybean meal use in Southeast Asia increased 600,000 metric tons in 2018-19,” Shonkwiler says. “In 2019-20, it’s projected to increase 800,000 metric tons. The growth may have been less than planned, but it’s still positive. It will be another 18 to 24 months until a new normal for the pork industry in Asia—especially China—is established.”

CORONAVIRUS DISRUPTS SUPPLY CHAIN

China houses critical supply chain links for most global industries. Each year, the country essentially shuts down for the Lunar New Year celebration, and businesses worldwide adjust to compensate for the annual closure. This year, the Chinese New Year was scheduled to last from January 25 to February 8, 2020.

But on January 23, 2020, Chinese authorities imposed a strict lockdown in Wuhan. Because the timing correlated so closely to traditional New Year celebrations, millions of Chinese were traveling to be with family. This expedited spread of the virus throughout the country, and lockdowns expanded to businesses, schools and even ports across China.
“In response, ports developed protocols to manage bulk vessel shipments,” says Eric Woodie, trade analyst for ISA. “That caused delays before and after the celebrations for bulk soybean shipments at all major ports. Once shippers and ports learned to manage the protocols, delays faded. Those learnings applied fairly universally to ports as coronavirus affected other regions.”

However, container shipments tell a much different story.

“Containers reach many more ports with completely different handling processes,” Woodie explains. “Many container shipping routes stop in multiple countries, usually including China.”

Chinese factory closures extended well beyond the planned New Year celebration, so fewer goods were shipped via containers. Fewer containers returned. Shippers were unable to secure space on as many container vessels on typical routes and containers, and space to ship them became harder to find.

“Typically, shippers have to manage dealing with one or two blank sailings per week during the Chinese New Year,” he says. “This year, they had three to four times that many blank sailings. To adapt to the changing protocols established by ports and vessels, container shipping lines redeveloped many routes.”

Given the container availability crunch, U.S. ag exporters reduced their sales of container shipments proportionally during the next couple of months, but anticipate normal activity by summer, according to Doug Grennan, vice president of international trade for Scoular.

“Fortunately, U.S. farmers and elevators can store soybeans until the right time to sell,” says Woodie. “Other countries, like Brazil, can’t do that.”

**STAYING HOME IMPACTS SOY DEMAND**

“The HRI (hotel, restaurant and institutional) sector suffered the biggest consumption change caused by COVID-19,” says Shonkwiler. “Because people were afraid to or not able to go out to eat, the sector’s protein demand—including soy-fed pork, poultry and seafood—and vegetable oil demand dropped dramatically.”

USSEC’s Zhang describes what happened in China as the first to experience the coronavirus.

“COVID-19 damaged the HRI sector severely, shutting down restaurants, cafeterias, fast food chains, shopping malls, amusement parks, events, gatherings, cinemas, schools and more,” he says. “January and February should be peak season for this sector, but not this year. There was literally no HRI demand here in February. People staying at home consumed less food.”

The Chinese government prioritized food supply, he adds. Policies ensured supply and affordable prices. Highway tolls for food transportation and revenue taxes were waived for a time.

“By March, we saw food businesses coming back as factories and offices reopened,” he says. “That trend continued as schools reopened in late-March to mid-April, and as more industry events are allowed in May. By June, the food supply chain can be nearly recovered.”

A similar pattern repeated around the world as countries and regions battled the spread of the coronavirus. HRI demand for food, including soy, meat and vegetable oil, dipped significantly.

“With many factors related to the coronavirus recovery still unknown, I estimate it will take regional HRI sectors six to nine months to recover,” Shonkwiler says. “But the potential for a global recession is very real, and that would result in less discretionary income, less eating out and less demand for high-quality protein. How the supply chain adapts remains to be seen.”

As in China, he emphasizes the priority to maintain integrity of the food supply chain. Globally, multiple points of origin for staples like soybeans reduce the potential for major delays.

“Food is a necessity that isn’t easy to cut back compared to industries we can better manage without,” he adds. “The food supply chain is a high priority to maintain during events like this.”

It is a small world, and soybeans link people, countries and industries. ASF and COVID-19 reinforce connections between soybean production and global customers, and the ability of the industry to adapt in the face of serious challenges. •
A new millennium. 9/11. Introduction of the iPhone. Devastating earthquakes and hurricanes. Think about how much our world has changed since the year 2000 when visionary soybean farmers from Illinois led the cooperation with other state soybean organizations to launch the American Soybean Association’s (ASA) World Initiative for Soy in Human Health (WISHH).

Twenty years ago, U.S. soybean farmers got it right when they anticipated global trends that protein plays an essential role in human nutrition.

We thank them for taking action to establish WISHH as U.S. soy’s catalyst in emerging markets. WISHH’s role within the U.S. soy family is to connect trade and development to strengthen agricultural value chains. The innovative leaders who founded WISHH recognized the potential to build U.S. soy trade through improved health, nutrition and food security in emerging markets.

I am excited about how much growth we see in the economies where WISHH works. Illinois soybean farmers Stan Born, David Droste, Doug Winter and I joined nine other U.S. farmers as WISHH’s January 2020 trade team to deliver four key soy protein messages to current and prospective customers in Cambodia and Myanmar. Protein demand is rapidly growing there for aquaculture and livestock feeds and for human foods.

By 2030, Asia will represent 65 percent of the global middle-class population.

It’s amazing to see new skyscrapers being built and growth in their cities. It will be very exciting for us in the future. This development will lead to a bigger middle class and a better diet with protein. They will use more soybean meal to feed fish, chickens and hogs. We can capitalize by shipping meal to them. They also have growing demand for food-grade soy for tofu and more.

Our trade team’s first message was that U.S. soy is high-quality protein. Second, we shared with emerging market leaders that the United States is a reliable supplier of sustainable soy to meet their protein needs. Third, we emphasized U.S. soy is delivered in containers, bags and really however they want it. Finally, we reinforced the message to Cambodia and Myanmar’s leaders we will help maximize U.S. soy value through WISHH’s multifaceted technical assistance.

WISHH’s team initiated these customer relationships long before we farmers arrived, and they continue to work on our behalf to connect trade and development. Importantly, WISHH coordinates closely with U.S. soy exporters. A follow-up survey shows six of seven U.S. exporters on this WISHH trade team yielded new sales leads.

Twenty years ago, we had not yet met entrepreneurs like Rady Chea who leads AgriMaster, Cambodia’s first mill to manufacture aquaculture feeds. He purchases U.S. soy. We didn’t know Keo Yada who uses her fish hatchery as a demonstration site for feed and training for farmers. Both joined a new Cambodian aquaculture association supported by one of WISHH’s USDA-funded projects to build sustainable demand for U.S. soy through a better aquaculture industry.

Now, through WISHH, Rady and Keo are our customers, and we share a common goal to make more protein available to their countries.
SEE THE DIFFERENCE WHERE IT COUNTS.

Control the toughest diseases in your fields with an exclusive, novel premix.

Keep frogeye leaf spot and other strobilurin-resistant diseases out of your fields with Lucento® fungicide from FMC. Lucento fungicide combines two modes of action: flutriafol, a systemic triazole for curative control, and bixafen, a next-generation SDHI for broad-spectrum, residual control you can trust to protect your fields and yields.

In fact, Lucento fungicide surpassed industry-leading fungicides in both disease control and crop yields in recent trials.*

Lucento fungicide is one of 40+ products eligible for the exclusive Performance Assurances and Product Financing with the FMC Freedom Pass program.

Visit your FMC retailer or FMCAGUS.COM/LUCENTO to learn more.

*Research from development and university testing across many locations. For a list of such studies, please contact your FMC representative.
Economic Study Quantifies Return on Soybean Checkoff Investment

According to a recent independent economic study, the soybean checkoff continues to translate farmer investments into significant benefits for U.S. farmers. The results of the 2019 return-on-investment (ROI) study, which is required by USDA, found that U.S. soybean farmers received $12.34 in added value for every dollar they invested in the checkoff. The study analyzed the demand- and supply-enhancing activities funded by the checkoff between 2014 and 2018 and was conducted by Harry Kaiser, Cornell University ag economist. In addition:

- Every dollar invested in international promotion produced $17.95 in return value.
- Investments made in demand research and promotion returned an average $18.18.
- Collaborative checkoff investments in production research that leverage industry and academic partners returned an average value of $9.42.

ASA, BASF Award Illinois Student with 2020 Soy Scholarship

Emma Kuhns of Mason City, Ill., is the recipient of the 2020-21 Soy Scholarship award, sponsored by BASF and the American Soybean Association (ASA). The $5,000 award is presented to an exceptional high school senior who excels in academics and leadership and plans to pursue an agriculture degree at an accredited college or university. Kuhns is involved in FFA and 4-H, currently serving as president for both her FFA and 4-H chapters. She commits time to the Illinois Pork Producers Association, American Junior Hereford Association, and has been involved in school organizations, including student council and National Honor Society. She will major in agricultural economics/pre-law at the University of Illinois this fall.

Report Shows Climate Change Conversation to Shift Dramatically

Most Americans engaging online about climate change are mired in the debate as to whether it exists. However, the focus of the conversation will shift dramatically in the next two years, according to research from The Center for Food Integrity (CFI). In addition, the report finds no evidence consumers associate consumption of animal protein to climate change. CFI’s digital ethnography report, which uses a research tool that analyzes millions of conversations online in real time, shows that while the climate change debate is only expected to grow 3.6 percent in the next two years, the conversation on causes is expected to grow 260 percent and solutions 202 percent. The dialogue is focused on “what’s next,” and CFI believes that provides opportunity for the food industry to communicate its successes and its commitment to addressing climate change via technology. Read the report at www.foodintegrity.org. ISA is a member of CFI.

Illinois Scientists Engineer Shortcut to Boost Crop Growth

Photorespiration in plants drastically suppresses yield potential. But researchers from the University of Illinois and USDA have confirmed crops engineered with a photorespiratory shortcut are 40 percent more productive in real-world agronomic conditions. The study is part of Realizing Increased Photosynthetic Efficiency (RIPE), an international research project engineering crops to photosynthesize more efficiently and sustainably increase worldwide food productivity. Over two years of replicated field studies in tobacco, scientists found engineered plants developed faster, grew taller, and produced about 40 percent more biomass, most of which was found in 50-percent-larger stems. Now, the team is translating the findings to boost soybean yields. However, practical application may be more than a decade away.

Illinois Waterway Consolidated Lock Closures Start in July

The Illinois Waterway, which provides a navigable connection between Lake Michigan and the Mississippi River via eight lock and dam sites, will resume scheduled closures this summer. To facilitate repairs, the U.S. Army Corps of Engineers Rock Island District says closures will take place simultaneously to lessen impact to commercial navigation. Closures include:

- LaGrange Lock and Dam – full closure July 1-Sept. 30
- Peoria Lock and Dam – full closure July 6 - Sept. 30
- Starved Rock Lock and Dam – full closure July 1-Oct. 29
- Marseilles Lock and Dam – full closure July 6-Oct. 29

DIFFERENCE MAKERS

For example, growth in Mexico’s convenience store sector has led to a demand for innovation. Convenience chains need affordable alternatives and good quality meat products for sandwiches and other items. USMEF works with meat processors to introduce new products in the stores to give customers more alternatives, including healthy options with U.S. pork.

What types of new products are you promoting?

We have two big categories of new products. The first is generic new cuts and the second is specific branded items that include value-added cuts like marinated, portioned and cooked pork. German-style sausages, dried meat sticks and a revitalized image for hams and loins are among the items developed to expand trade, retail and consumer demand for U.S. pork in Mexico.

Has this type of product innovation worked in other parts of the world?

Yes. In the United States there is a lot of development and innovation when it comes to new pork products. The U.S. meat industry has the capacity for new product development, as well as for meeting needs of consumers wanting alternatives that are practical, convenient and innovative.

How are Illinois soybean farmers assisting with this effort?

Illinois soybean farmers provide checkoff support year after year, together with our other funding sources. This is of great importance to us, since it allows us to be close to end consumers and to provide them with complete solutions to their needs. For example, ISA is helping fund the Ideal U.S. Meat Case Program where we identify U.S. pork at the point of sale.

What is the measurable goal of success with this effort?

We are looking for increased consumer shopping experiences through more product options at the point of sale and increased volume of exports to Mexico of pork products besides ham.

Javier Garcia Gonzalez has worked with USMEF in Monterrey, Mexico, for 11 years and leads its retail sector work. Previously, he worked for Soriana, the second largest retailer in Mexico, as a meat buyer. More information is found at www.usmef.org/international-markets/mexico/.

Adding Value to Meat in Mexico

What is USMEF doing in Mexico to bring new U.S. pork products to market?

USMEF is working together with our members and business partners in Mexico to launch new products in the marketplace. We provide the opportunity to consumers to familiarize themselves with these products by allowing them to taste them and receive information about their attributes and uses. We hold workshops for processors and put an emphasis on creative ways to sell and serve pork. This speeds up the adoption process of new products in the Mexican market.

For example the last two years, we grilled and served pork in two of Mexico’s major urban centers on Superbowl Sunday to fans of American football. We introduced pork dishes that go well with these types of gatherings, including U.S. pork belly, sausages and pork barbecue.

Why are you implementing this new product strategy?

Since roughly 63 percent of the pork imported by Mexico is ham, we are looking to expand the variety of products sold to our business partners there. We are always looking to maximize the business profit of our members and business partners by marketing higher value products, as well as providing better shopping experiences to end consumers with innovative options.
Whether shipping by river, road or rail, the soy checkoff is committed to ensuring America’s infrastructure is a significant advantage for U.S. soybean farmers. We’re looking inside the bean, beyond the bushel and around the world to keep preference for U.S. soy strong. And it’s helping make a valuable impact for soybean farmers like you.

See more ways the soy checkoff is maximizing profit opportunities for soybean farmers at unitedsoybean.org.