

APRIL 2026

# Illinois Field & Bean

A PUBLICATION OF THE ILLINOIS SOYBEAN ASSOCIATION

## The Biofuels Issue

*Where biofuels stand in 2026,  
and what it means for Illinois  
soybean farmers.*

*We're covering the full implementation of  
Illinois' B20 law, exploring ongoing biodiesel  
expansion efforts at Incobrasa and breaking  
down why higher biodiesel blends continue  
to deliver value across the supply chain.*



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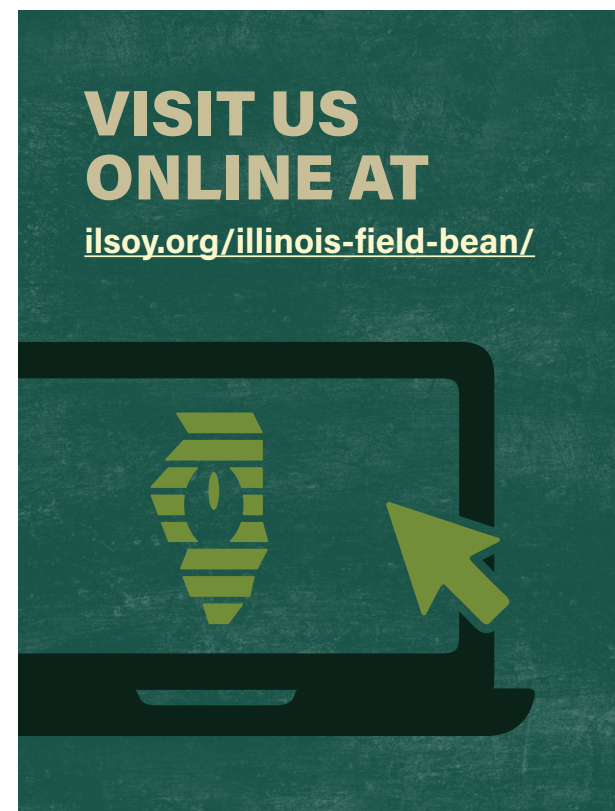
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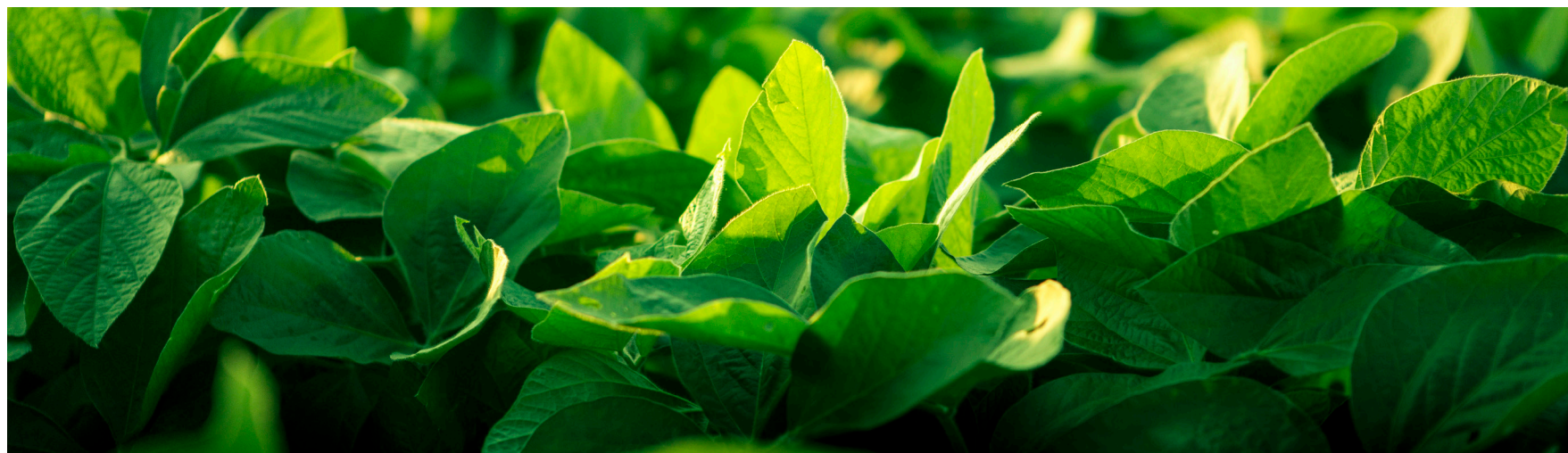
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**COVER:** In this "Biofuels Issue," *Illinois Field & Bean* delivers a comprehensive look at where biofuels stand in 2026, and what it means for Illinois soybean farmers. We're covering the full implementation of Illinois' B20 law, exploring ongoing biodiesel expansion efforts at Incobrasa, and breaking down why higher biodiesel blends continue to deliver value across the supply chain.



## FROM THE BOARDROOM

Funded by the Illinois Soybean Checkoff



**Scott Gaffner**

At-Large Director | Illinois Soybean Association

# It's Sustainably Soy

It's Sustainably Soy is a market-driven program designed to recognize products and companies that use sustainably produced soybeans as a key ingredient. For Illinois soybean farmers, the program serves to connect the work done on the farm with the companies and consumers who rely on soy every day. It highlights the sustainability story of Illinois and U.S. soy and helps ensure that farmers receive recognition for the stewardship practices they have long embraced.

## SUSTAINABILITY IS NOT NEW TO SOYBEAN FARMERS

Illinois farmers and producers across the U.S. have practiced conservation and stewardship for generations. Protecting soil health, managing nutrients responsibly, improving water quality and investing in precision agriculture are all part of daily farm management. These practices help farmers operate efficiently today while preserving land and resources for future generations.

## WHY THE PROGRAM MATTERS TO FARMERS

For Illinois soybean farmers, It's Sustainably Soy helps create demand for Illinois and U.S. soy in competitive domestic and global markets. By recognizing companies that choose soy-based ingredients, the program adds value beyond the farm gate and reinforces the importance of soy in food, feed, fuel and industrial products.

The program also allows farmers to demonstrate that sustainability is already embedded in how soybeans are grown in Illinois and across the country. By strengthening the connection between farmers and end users, It's Sustainably Soy helps ensure that sustainability efforts made on the farm are understood, valued and supported throughout the supply chain.

## A FARMER PERSPECTIVE FROM ILLINOIS

Our family farm in Greenville has been in operation for more than 100 years. As is true on many multigenerational farms, the production practices of the operation's early years would not meet the stringent sustainability standards we've come to expect today. Over time, as technology, research and knowledge improved, our farming practices evolved as well.

We have learned that sustainable practices are closely tied to profitable practices. Improvements in soil health, nutrient management and efficiency are not only better for the land but also strengthen the long-term viability of the farm. As farmers, we strive to be good stewards of what God has created, caring for the land, water and resources entrusted to us so they can support future generations.

## VALUE FOR COMPANIES AND CONSUMERS

It's Sustainably Soy provides companies with a credible, farmer-backed way to communicate their commitment to sustainability. Companies that participate can confidently share that their soy-based ingredients come from U.S. farmers who follow responsible production practices.

Consumers benefit as well. The program cultivates transparency and trust by clearly showing where soy-based ingredients come from and how they are produced. In a marketplace where sustainability claims can be confusing, It's Sustainably Soy delivers a straightforward message rooted in real farming practices.

## STRENGTHENING THE SOY INDUSTRY FOR THE FUTURE

By differentiating Illinois and U.S. soy in domestic and international markets, It's Sustainably Soy supports long-term growth and opportunity for soybean farmers. It helps ensure that the sustainability practices farmers use every day are recognized where it matters most, strengthening the soy industry for the future.



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## CEO'S MESSAGE

Funded by the Illinois Soybean Checkoff



**John Lumpe**

CEO | Illinois Soybean Association

# April in Motion

## Planters Preparing, Biofuels Expanding

Mid-to-late April is the peak window for soybean planting here in Illinois. By now, you've made your decisions on seed, inputs and equipment. You've watched the weather. You've run the numbers. And when the conditions are finally right, you go.

That soybean farmer mindset – preparing and moving with the purpose of planting opportunity – is also how we approach developing a wide range of markets for your soybeans. This month's issue of *Illinois Field & Bean* outlines one specific area of market growth. It's our Biofuels Issue, and it comes at a time when demand is as much about policy education as it is about infrastructure and boots-on-the-ground marketing strategy.

**On April 1, Illinois' B20 law moved fully into effect, increasing the biodiesel blend requirement from B17 to B20. That didn't happen by accident. It took years of education, bipartisan work and steady engagement. In our cover story, David Kubik, ISA's Biofuels and Trade Policy Manager, walks through what the law means and how it is already generating stronger demand for Illinois soybeans. Every additional percentage point of blend represents more bushels pulled through the system.**

In this issue, we also take a closer look at Incobrasa Industries' expansion in Gilman. Incobrasa processes soybeans into animal feed, vegetable oil and biodiesel. As biodiesel use increases, processing capacity must keep pace. Companies are investing because they see long-term stability in biofuels as well as well as in Illinois' nation-leading soybean production. That kind of investment strengthens our basis, local markets and competitiveness.

Have you ever been asked, "Why biodiesel?" We tackle that directly in this issue. From lower carbon-intensity scores to engine performance to farmer profitability, the benefits reach across the supply chain. Higher blends are working for fleets, municipalities and private industry.

Biofuels are not the only demand driver for soybeans, but they are one of the most significant and scalable markets we have today. As discussions continue around a Low Carbon Fuel Standard and as new economic impact data shows the role biodiesel plays nationally, it's clear this market is still evolving. Our job at ISA is to make sure Illinois farmers are positioned to benefit from that growth.

On a more personal note, I've just celebrated my six-year anniversary as your CEO of the Illinois Soybean Association.

When I look back, I don't think about individual milestones. I think about the work we've done together. We've adopted a new strategic plan, restructured committees to be more effective and farmer-focused, and completed a new building, occupied by a world-class staff, that gives ISA a stronger foundation for the future.

Although I am proud of those achievements, they bear the fingerprints of many. They were the result of intentional collaboration between a committed Board and a dedicated staff, all working on behalf of 43,000 soybean farmers across Illinois. We haven't always agreed. We've had tough conversations. We've made a few missteps. But we've learned from those moments and come out stronger.

Earning your trust by implementing the direction of your farmer Board Directors has been my top priority. And I endeavor daily to be worthy of that charge.

Steady progress is a sign of good leadership, just as it is a sign of a successful planting season. You focus on what you can control. You rely on a strong team. And you keep your eyes on the long-term return.

**As you head into the fields this spring, know that ISA is working just as deliberately to build and protect demand for every bushel you grow. Biofuels are a big part of that picture, and the work we're doing today is aimed at making sure the markets are there when your crop is ready.**

Here's to a safe and successful 2026 planting season.



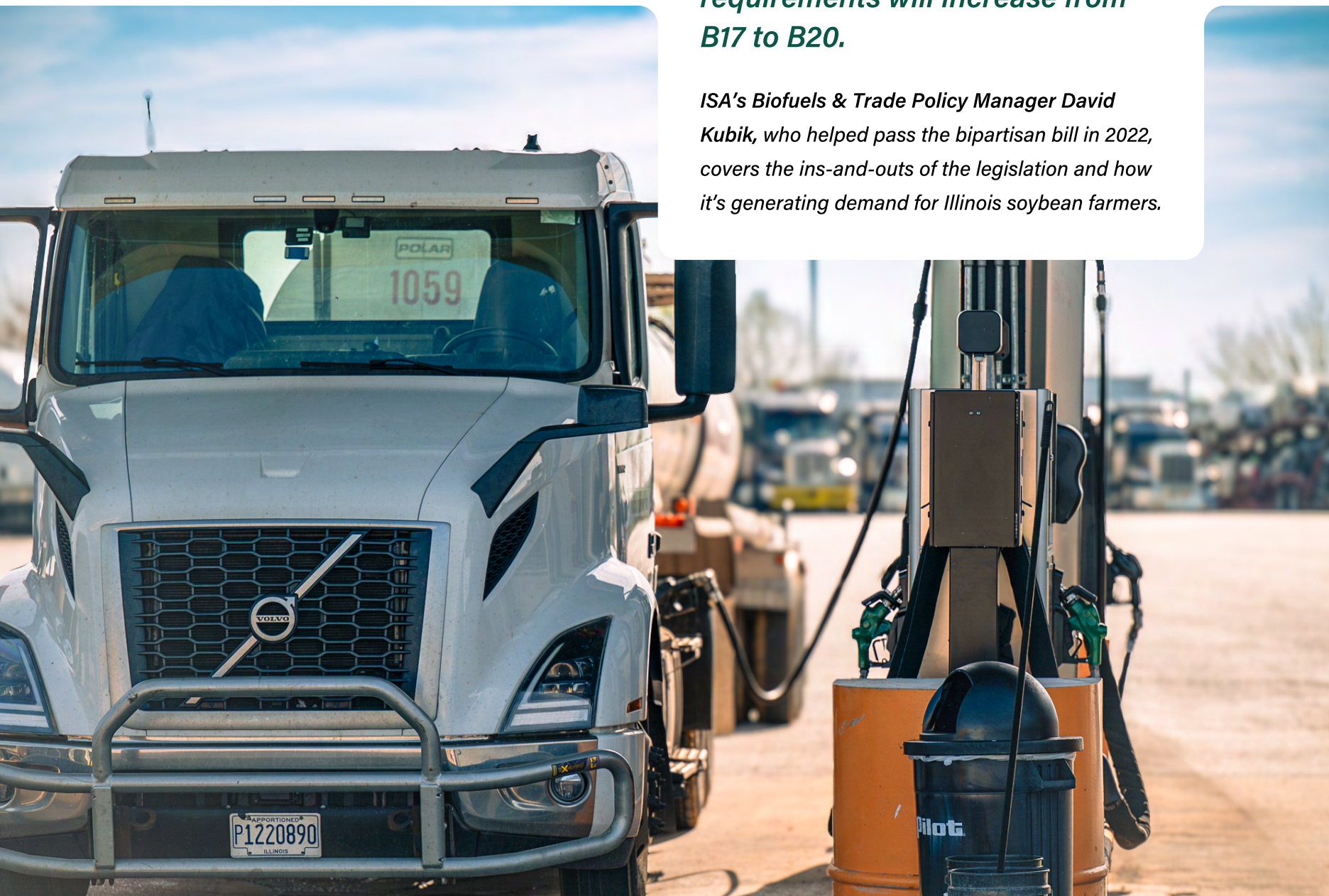
# Illinois B20 Law Moves into Full Effect

By Rob Shaffer, ISA Government Relations Committee Chairman



*On April 1, the Illinois B20 Legislation will move into full effect, meaning biodiesel blend requirements will increase from B17 to B20.*

*ISA's Biofuels & Trade Policy Manager David Kubik, who helped pass the bipartisan bill in 2022, covers the ins-and-outs of the legislation and how it's generating demand for Illinois soybean farmers.*



**In 2022, Illinois passed a historic B20 incentive — the first policy in the nation specifically designed to encourage fuel retailers to blend diesel with 20% biodiesel.** The legislation marked a significant step forward in the state's efforts to support agriculture, reduce emissions and provide economic relief to fuel consumers. It also built upon Illinois' earlier biodiesel policies, demonstrating a long-term commitment to expanding renewable fuel use.

The B20 incentive did not appear overnight. Illinois previously incentivized B11 blends. The legislation then increased the threshold to B14 in 2024 and B17 in 2025. As of April 1, B20 is now the minimum blend required to qualify for the tax incentive. The policy was structured to scale gradually, allowing fuel suppliers, retailers and end users time to adjust their infrastructure and operations. Lawmakers also included a winter carve-out that permits B11 blends access to the incentive from December through March, ensuring fuel reliability during months when biodiesel performance can be affected by low temperatures.

Importantly, the program was extended for an additional seven years. Originally scheduled to expire in 2023, the incentive will now remain in place until 2030. This extension provides long-term certainty for fuel retailers, biodiesel producers, farmers and major fuel purchasers — a critical factor when businesses are making future investments.

The B20 law achieves several policy objectives

simultaneously. It lowers the effective tax burden on diesel fuel, creates stronger markets for soybean oil-based biofuels, promotes the adoption of lower-carbon energy sources and reduces harmful particulate matter emissions. Few policies manage to deliver economic, environmental and public health benefits in such a coordinated way. This incentive has attracted a broad coalition of support that includes fuel retailers, railroads, truckers, farm groups and environmental interest groups for this incentive.

**"In fact, the policy is beginning to reshape fueling patterns. Because B20 supports corporate decarbonization goals, Illinois has emerged as a "stop state" — a destination where trucking companies and other commercial fleets intentionally refuel to access lower-carbon diesel."**

Illinois applies multiple taxes to diesel fuel. Among them is a \$0.558 per gallon Motor Fuel Tax (MFT), which supports the state Road Fund and helps finance infrastructure improvements. The state also imposes a 6.25% sales tax that contributes to the General Revenue Fund (GRF), the Road Fund and local governments. On average, state sales taxes add roughly \$0.25 per gallon, while municipal and county sales taxes can contribute as much as \$0.16 per gallon.

Under the B20 incentive, retailers who blend diesel with at least 20% biodiesel are exempt from the state sales tax as well as any applicable local

sales taxes. For companies purchasing fuel in bulk — including trucking fleets, railroads, construction firms and agricultural operations — these savings can accumulate quickly. According to the Illinois Department of Revenue, approximately \$250 million in diesel taxes were exempted in 2025 alone. These savings ripple across the economy, lowering operating costs for industries that rely heavily on diesel and ultimately benefiting everyone from farmers to truckers to railroads to marine users.

Illinois' fuel taxes are comparatively high relative to neighboring states, making price competitiveness a longstanding concern. The B20 incentive helps offset this disadvantage by keeping biodiesel blends priced competitively across state lines. As a result, Illinois is increasingly viewed as a practical place to purchase fuel rather than a state to bypass.

In fact, the policy is beginning to reshape fueling patterns. Because B20 supports corporate decarbonization goals, Illinois has emerged as a "stop state" — a destination where trucking companies and other commercial fleets intentionally refuel to access lower-carbon diesel. The combination of reduced taxes and measurable greenhouse gas reductions makes the state particularly attractive to companies with sustainability commitments.

**Illinois consumes roughly 1.5 billion gallons of diesel fuel each year. With the B20 incentive fully implemented, the state's farmers could help supply**

**up to 255 million gallons of biodiesel, a substantial increase from the approximately 165 million gallons supported under the previous B11 incentive. This expansion represents a major opportunity for the agricultural economy.**

Producing 255 million gallons of biodiesel requires feedstock equivalent of roughly 170 million bushels of soybeans. According to the United Soybean Board, approximately 10% of the total value of a soybean is tied to the biodiesel industry, highlighting how closely renewable fuel demand is linked to farm profitability.

Expanding the soy biodiesel market in Illinois over the past few years has insulated the state against soy biofuels policy uncertainty. The Inflation Reduction Act (IRA) rewrote biofuels incentives after the California model and was written to promote imports from China instead of soybean oil from Illinois farmers. Additionally, previous Renewable Fuel Standard (RFS) volume requirements were too low, leaving a smaller demand for biofuels. Those federal policies are on the mend, and we have already seen legislative and rulemaking changes to fix those.

In 2025, we saw U.S. consumption of biomass-based diesel decrease substantially because of federal policy. But at the same time, we saw the consumption of biodiesel increase in Illinois because of increased blend incentives to B17 in the sales tax exemption.

Soybean oil and corn oil remain the primary feedstocks used in Illinois biodiesel production.

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By strengthening demand for these products, the B20 law helps create stable markets for farmers while also contributing to more competitive input prices across the agricultural supply chain. In this way, the policy not only supports renewable energy goals but also reinforces one of Illinois' most important economic sectors.

The legislation drew bipartisan support. Primary sponsors included Representative Eva Dina Delgado (D-Chicago) and Senator Patrick Joyce (D-Kankakee), with Representative Charlie Meier (R-Okawville) serving as the lead Republican sponsor. Governor JB Pritzker incorporated the measure into an end-of-session budget package and ultimately signed it into law. Support for the bill

extended beyond Springfield, as municipalities and private-sector fleets worked together to build coalitions spanning urban, suburban and rural communities.

One notable aspect of the bill is its sponsorship by a Chicago legislator — a reminder that biodiesel policy is not solely an agricultural issue. Reductions in particulate matter were a major motivating factor. Biodiesel can reduce tailpipe particulate matter emissions by approximately 47%, helping improve air quality in heavily traveled corridors and densely populated areas.

Public health organizations have taken notice. The American Lung Association supports expanding biodiesel use because particulate matter from petroleum diesel has

been linked to elevated rates of asthma, respiratory illness and lung cancer. Cleaner-burning fuels represent not just an environmental improvement but a meaningful investment in community health.

**Ultimately, Illinois' B20 incentive demonstrates how thoughtful policy design can align economic growth, environmental progress and public health outcomes. By lowering fuel costs, strengthening**

**agricultural markets, attracting business activity and reducing emissions, the law positions Illinois as a national leader in biodiesel blending.**

Policymakers in Illinois believe that the B20 incentive is more than a tax policy — it is a strategic investment in Illinois' 43,000 soybean farmers providing for the state's energy future, agricultural resilience and economic competitiveness.



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The U.S. biodiesel industry delivers a \$15.2 billion impact on our farm sector and supports over 100,000 jobs nationwide. That's why Illinois Soybean Growers helped pass a bipartisan B20 bill encouraging the use of higher blends of biodiesel.

On April 1, 2026, the exemption will increase from B17 to B20, strengthening demand for soy-based fuel and returns for Illinois farmers.

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# Biodiesel's Growing Impact

## Why Illinois Farmers Should Be Proud

By Heather Buechter, Director of Communications, Clean Fuels Alliance America

At Clean Fuels Alliance America, our economic impact study is updated every two years. We do that for one simple reason: farmers, policymakers and industry leaders deserve up-to-date facts about what biodiesel and renewable diesel are delivering for our country. The most recent study, conducted by GlobalData, evaluates the economic impact of U.S. biomass-based diesel — meaning biodiesel and renewable diesel — across the entire value chain. That includes everything from raw material production and oilseed processing to fuel production, distribution and the ripple effects throughout rural communities.

For Illinois soybean farmers, the findings should be both

encouraging and affirming. The numbers tell a story many of you already see firsthand: Clean fuels are no longer a niche market. They are essential to the U.S. economy, to farm income and to energy security.

### BIODIESEL AND RENEWABLE DIESEL: BETTER TOGETHER

I'm often asked about the difference between biodiesel and renewable diesel — and whether one is better than the other. The truth is, they're both superior diesel replacements made primarily from the same feedstocks, including soybean oil.

Biodiesel was the first to enter the marketplace with decades of performance history. Renewable diesel has expanded rapidly in the past 10 years. The primary difference lies in how they are produced. Renewable diesel is made in a manner similar to petroleum diesel through a high-heat, high-pressure process called hydrotreating, allowing it to serve as a drop-in replacement.

Biodiesel is made using transesterification, a process that separates glycerol from fat or plant oil and replaces it with methanol to produce a finished fuel that is typically blended with petroleum diesel.

Both fuels meet ASTM specifications and are high-quality, high-performing fuels. Biodiesel improves lubricity and engine longevity. Renewable diesel mirrors petroleum diesel performance. When paired, they can deliver even greater emissions reductions and performance benefits.

Today, biodiesel and renewable diesel together represent about 7% of the U.S. distillate pool, according to the U.S. Energy Information Administration. This is no longer a niche fuel category. Clean fuels are an essential part of America's diesel supply.

### REAL GROWTH, REAL RESULTS

The data confirms that biodiesel and renewable diesel are delivering substantial economic

benefits across agriculture and rural America.

Since our previous study, the industry's economic impact has grown 83% — increasing from \$23.2 billion to \$42.4 billion nationwide. That growth reflects expansion in soybean crush capacity, new and expanded renewable diesel facilities and sustained demand for low-carbon fuels.

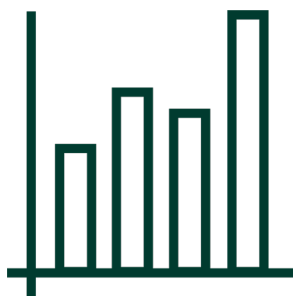
Today, biodiesel and renewable diesel production support approximately 107,000 U.S. jobs. Wages have increased, economic activity has expanded and investment continues to flow into the clean fuels sector.

### ILLINOIS BY THE NUMBERS

Because Illinois is the No. 1 soybean-producing state, we broke out state-specific data. The results are significant.

In Illinois alone, biodiesel and renewable diesel production contribute:

- \$3.2 billion in total economic impact



- 8,124 full-time equivalent jobs
- \$411 million in wages

That is a substantial contribution to the state's economy — and it starts with the soybeans grown in Illinois fields.

Farmers are the backbone of this country. The crops you grow help keep our economy moving. This study reinforces that reality with hard data.

### WHAT THIS MEANS AT THE FARM GATE

When we look at the national breakdown by sector, fuel production supports roughly 41,500 jobs. Oilseed production accounts for about 30,600 jobs. Oilseed processing supports about 8,600 jobs, and the rendering industry adds another 12,700 jobs. For soybean farmers, that translates to tangible value.

The clean fuels industry represents about 10% of the value of every U.S. soybean bushel. As renewable fuels utilization grows, that share of value has the potential to grow as well.

One of the most important things to understand is that biodiesel was originally developed to address surplus soybean oil. In the early 1990s, we had excess oil in the market. The question was: How can we turn that surplus into value? The answer was biodiesel.

### SOY OPPORTUNITIES ABOUND

Today, roughly 20% of soybeans are oil. After food and other industrial uses are met, biodiesel and renewable diesel provide an outlet for what might otherwise be an excess supply. It's added value — using every part of the crop and ensuring nothing is left behind.

When we crush more soybeans domestically, we keep both the meal and the oil here at home. The oil is used in food production and as fuel. The meal supports livestock production or exports. That creates opportunity, stability and return on investment for soybean farmers.

### MARKET STABILITY AND BASIS SUPPORT

Growing demand for biodiesel and renewable diesel strengthens local markets and diversifies marketing channels. The more fuel we produce here on American soil, the stronger the boost to our domestic economy — and back to the farm gate.

A robust clean fuels market creates stability and reliability. It reduces reliance on a single demand stream and helps support basis by increasing local crush demand.

We've witnessed a major investment in crush expansion across the country, including in the Midwest. That infrastructure represents confidence in long-term soybean oil demand. For farmers, diversified demand equals greater resilience.

### THE ROLE OF POLICY

The Renewable Fuel Standard (RFS) establishes a nationwide baseline for biodiesel and renewable diesel demand. State-level clean fuel programs build on that foundation by rewarding fuels with lower carbon intensity. Together, these policies translate environmental performance into market value.

Our study analyzed the expected future capacity of 7.4 billion gallons based on

announced investments in new and expanded facilities. If the U.S. biomass-based diesel industry reaches that capacity, it could support approximately 145,000 jobs and generate \$60.25 billion in U.S. economic activity.

Those projections show policymakers that the industry is prepared and ready to deliver. They demonstrate that investments in crush plants, refining capacity and infrastructure are not speculative — they are real and operational. For Illinois agriculture, that signals long-term opportunity and market stability.

### THE KEY TAKEAWAYS

If there's one thing I hope Illinois soybean farmers take away from this study, it's this: Biodiesel and renewable diesel are essential to farm and food security. You

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should be proud of what you've built.

We are proud to partner with Illinois, qualified state soybean boards and the United Soybean Board. It was your vision that helped get clean fuels off the ground, and it's your continued commitment that keeps these markets growing.

### CLEAN FUELS ARE ESSENTIAL.

Americans depend on diesel, and clean diesel is an increasingly important part of that pool.


The economic impact study confirms your soybeans are doing more than feeding and fueling the world. They are supporting jobs, strengthening rural communities, enhancing energy security and delivering measurable economic returns. That's something to be proud of — and something worth continuing to grow.



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# Fueling America's Farms, Fleets and Future

*Clean fuel production supports  
\$42.4 billion in economic activity.*



Materials supported by United Soybean Board, soybean farmers and their checkoffs.



Clean Fuels  
ALLIANCE AMERICA

The benefits keep growing.

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



# Calcium Clarified: Why Calcium is Vital for Your Soybeans



As growers continue to push the envelope to increase yields and improve ROI on soybean acres, a shift is underway in how the crop is managed, particularly with crop nutrition. The quest for higher yields is no longer just about nitrogen, phosphorus and potassium. It's about a balanced crop nutrition program that includes often-overlooked secondary nutrients like calcium. While calcium often gets overlooked as a primary contributor to yield, it is necessary for developing a healthy and productive soybean crop.

## The Role of Calcium in Soybeans

Calcium is an important player in numerous physiological processes within the soybean plant. Calcium helps soybeans form healthy nodules on their roots, which are needed to turn atmospheric nitrogen into a form the plants can use. It helps facilitate cell division and elongation to ensure proper growth from the root to the top of the plant. Calcium also contributes to cell wall strength, which is essential for the plant's structural integrity and its ability to withstand environmental stress. Beyond its structural contributions, adequate calcium levels help the plant manage abiotic stress and improve disease resistance. In addition, calcium helps promote better soil structure, which drives nutrient availability and uptake, and increased microbial activity to foster an environment for vigorous plant growth.

## Addressing the Calcium Needs of Soybeans

Today's high-yielding soybeans require more calcium than ever before. However, even when soil tests indicate high calcium levels, it does not guarantee optimal plant availability of the essential nutrient. Therefore, it is often necessary to provide soybeans with a supplemental calcium source to meet the crop's nutrient needs. Supplemental calcium sources can also vary in plant availability. Choosing a plant-available calcium source helps ensure nutrient uptake is maximized during crucial periods of growth and development, in turn delivering a stronger ROI on the fertilizer application.

## Get More from Every Acre with SUL4R-PLUS

Modern high-yielding soybean varieties demand more calcium than ever before. However, even when soil tests indicate high calcium levels, the nutrient isn't always readily available to plants. In many cases, less than five percent of the calcium measured in a standard soil test is plant available. This knowledge is important because soluble (plant-available) calcium is often a very small percentage of the overall total calcium reported on a soil test. Field test results illustrated in Figure 1 show soluble calcium only ranged between 1% and 2%.

## % Plant-Available Calcium

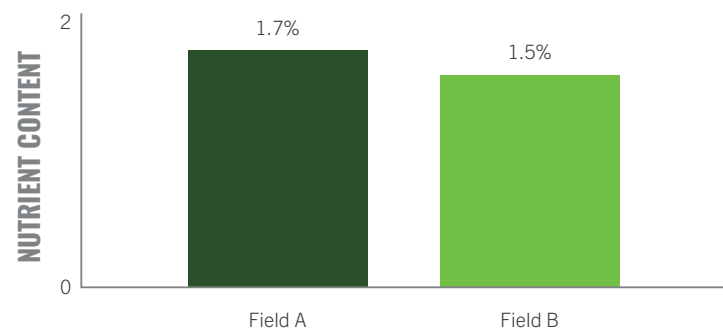


Figure 1.

With a controlled-release, water-soluble formulation, SUL4R-PLUS provides immediate availability and season-long uptake of calcium and sulfur to help crops maximize yield potential. Recent trial data demonstrates SUL4R-PLUS can increase soybean yields up to 12.2 bu/ac, depending on application rate, compared to the untreated check (Figure 2).

## Grain Yield

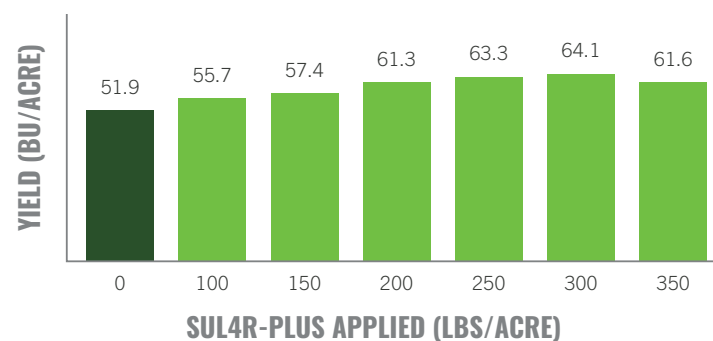


Figure 2.

## Secure SUL4R-PLUS from HELM

HELM, a trusted leader in agricultural logistics and distribution, is the exclusive distribution partner of SUL4R-PLUS to ensure efficient delivery to growers across North America. Together, HELM and SUL4R-PLUS are committed to offering innovative solutions that boost productivity and contribute to soil health and sustainability.

To secure your SUL4R-PLUS for the upcoming growing season, contact your local retailer.

**Discover more about SUL4R-PLUS at [sul4r-plus.com](http://sul4r-plus.com).**



# Update on Incobrasa's Expansion Efforts

By Ashley Rice Haddon, Lead Writer, Illinois Field & Bean

**In the heart of Illinois sits a major soybean processing and biodiesel manufacturing company—Incobrasa Industries Ltd. Located in Gilman, Incobrasa is in the process of expanding and effectively doubling its biodiesel production capacity, up to 150 million gallons per year. Reaching that number is contingent on demand.**

## EXPORT OUTLOOK

Is China purchasing U.S. soybeans? What's going on with tariffs? What's the status of overall U.S. soybean export levels? These are all valid questions that have been top of mind for many people this past year. But Joe Waldbusser, Head of Trading at Incobrasa, noted there's something else

going on that producers should be aware of.

"The bigger picture is we're slowly losing our soybean export market everywhere because of Brazil," said Waldbusser. "To compensate for that, we need to have a domestic soy processing industry to pick up the slack."

In the current political environment, U.S. soybean farmers have access to China as an export market sometimes and other times not. In reality, China's demand is not growing to meet the growing soy production in Brazil—a trend that's expected to continue.

Brazil has even begun tapping into other U.S. historical-export markets including, most recently,

Mexico. Brazil is expected to continue to increase its soybean and corn production area for the foreseeable future, adding to the competition.

A growing U.S. domestic soybean market could help offset declining exports, something Incobrasa is responding to via its expansion efforts.

## INCOBRASA'S EXPANSION

Incobrasa's overall expansion investment of more than \$300 million will increase its vegetable oil and animal feed production capabilities. Overall, the growth will more than double its soybean crushing production, up to 98 million bushels per year. The rest of the expansion

includes:

- Upgrading the soybean oil refinery from 40 million to 98 million pounds per month
- Building a new biodiesel plant, which can produce up to 240,000 gallons per day
- Building a new soybean oil extraction plant, which can process up to 300,000 bushels per day
- Building a new soybean preparation plant, which can process up to 300,000 bushels per day
- Adding a new grain receiving and storage facility, with capacity for up to 90,000 bushels per hour
- Building a new rail loop with capacity for 400 railcars
- Adding a new electrical substation
- Adding a new solar array

**To meet the increased production capacity, Incobrasa will also expand its soybean supply radius from 50 miles to 80 miles. This increased radius will reach to the Illinois River to allow access to more beans and meet the demands of the market. The vast majority of soybeans will still be sourced from Illinois.**

The first phase of the project, which includes the new soybean oil extraction plant, will be fully operational this spring, while the biodiesel plant, depending on demand, will be operational this fall. The rest of the project is targeted to be finished by 2030.

"We always get questions about the food versus fuel argument," said Kerry Fogarty, Quality Manager at Incobrasa. "We are not taking oil away from the food industry. Biodiesel was developed as a use for excess soybean oil from crushing beans. And when soybeans are crushed, we add animal feed to the market that ultimately lowers the cost of meat on the store shelf. In the end, biodiesel increases domestic markets for U.S. soybeans and lowers food costs."

### MOVING FORWARD

Since expanding from Brazil to the U.S. in 1995, Incobrasa has built up its Gilman site from a facility strictly focused on soybean crushing to the major soybean processing and biodiesel manufacturing facility that it is today.

"It's important that we have a strong biofuels market and overall market for soybean oil in the U.S. so that we can guarantee a better price for U.S.

soybean farmers," said Aluizio Ribeiro, Chief Executive Officer of Incobrasa.

Ribeiro emphasized that a strong biofuels policy is needed to support the continuance and expansion of the market.

"Incobrasa is going to be ready for more expansion if the market still exists," said Ribeiro. "If the state of Illinois and the federal government keep incentivizing biofuels, especially soybean oil-based biofuels, we should be able to keep growing. It will be a big win for the farmers in our area because that will keep growing the demand."

**"In the current political environment, U.S. soybean farmers have access to China as an export market sometimes and other times not. In reality, China's demand is not growing to meet the growing soy production in Brazil—a trend that's expected to continue."**

### BIOFUELS IN ILLINOIS

In 2022, Illinois passed a historic B20 incentive — the first policy in the nation designed to encourage fuel retailers to blend diesel with 20% biodiesel. This built on the state's earlier B11 incentive and gradually increased over time. As of April 1, B20 blends are now available, with a carve-out in place that allows for B11 blends in the winter.

"Under the new B20 incentive, Illinois farmers could help supply up to 255 million gallons of biodiesel — a significant increase from the 165 million

gallons supported under the previous B11 incentive," said David Kubik, Biofuels and Trade Policy Manager, Illinois Soybean Association.

Illinois applies several taxes to diesel fuel, including a \$0.558 per gallon Motor Fuel Tax that supports the Road Fund for infrastructure improvements. The state also charges a 6.25% sales tax that helps fund the General Revenue Fund, the Road Fund and local governments. Plus, state sales taxes add about \$0.25 per gallon of fuel.

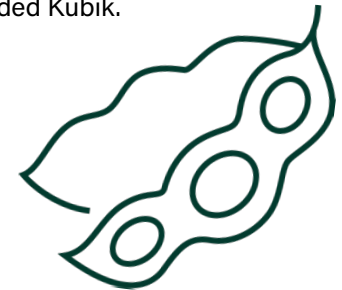
In total, Illinois consumes roughly 1.5 billion gallons of diesel each year.

Under the B20 incentive, retailers who blend diesel with 20% biodiesel are exempt from the state sales tax and any

applicable local sales taxes. For companies purchasing fuel in bulk, these savings can add up quickly.

The policy also supports corporate decarbonization goals, making Illinois a "stop state" and more attractive to companies seeking reliable access to lower-carbon diesel blends.

"With soybean oil and corn oil being the biggest feedstock of biodiesel, this new B20 law will pay dividends to farmers by creating markets for their crops and lowering input prices," added Kubik.



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# Crushing It:

## What Domestic Soy Oil Expansion Means For Your Soybeans



Domestic soybean crush capacity has surged in the past few years, reshaping where and how your soybeans are used. For Illinois farmers, the shift means more beans are staying stateside, more oil is flowing into renewable diesel and more demand is reshaping the economic landscape.

"We've seen an unprecedented expansion in soybean crush capacity across North America, on the order of 20% to 25%," explains Matt Hopkins, Vice President of North America Soy Crush at ADM and an Illinois soybean farmer himself. "That's a meaningful shift in a relatively short period of time."

At the center of it all is a powerful driver: biomass-based diesel demand and the oil derived from your crop.

### WHY MORE BEANS ARE STAYING HOME

For decades, roughly half of U.S. soybeans were exported whole. Today, that balance has shifted.

"Now, the majority of them are staying here and being crushed in the U.S.," Hopkins says.

Several forces converged to create this kind of structural change. Supportive U.S. biofuels policy and the rapid expansion of renewable diesel have combined to significantly strengthen demand for soybean oil. At the same time, protein demand domestically and globally remains solid.

In short, demand for the full-circle package of U.S. soy benefits has grown at a healthy clip.

"In the end, it's both. It all works together," Hopkins says. "Biodiesel and renewable diesel are growing drivers, but the industry is ultimately driven by the combined value of both meal and oil. It's the total demand that matters."

That combined value is what crushers watch closely. As oil demand has accelerated, it has pulled crush expansion forward, helping to maintain a steady supply of meal.

"As the increase in oil demand has driven growth, that growth also helps keep meal prices lower. That means cheaper protein in the U.S.," Hopkins notes.

This diversified demand creates added resilience for you as an Illinois soybean farmer. It means you can meet the needs of multiple buyers including biofuels producers, livestock producers and international customers.

### HOW RENEWABLE DIESEL CHANGED THE GAME

If there's one development that has reshaped the crush landscape more than any other, it's renewable diesel.

"When we think about the wider biofuels market, the biggest change has been the introduction of renewable diesel," Hopkins says.

Petroleum refineries on the West Coast and Gulf Coast have converted to renewable diesel production, creating entirely new demand channels for soybean oil. That demand has accelerated investments across the crush sector, coupled with its scalability and compatibility with existing fuel infrastructure.

A focus on environmental stewardship at ADM and across sectors reinforces this outlook.

"Sustainability is the core driver of our growth strategy," Hopkins points out. "Our entire industry is innovating to meet growing demand for sustainably sourced, bio-based products. The expansion of renewable diesel is a perfect example of how that demand is creating new market opportunities for farmers and our entire value chain."

## COLLABORATION AND COMPETITIVE ADVANTAGE DRIVE INNOVATION

ADM has been investing alongside these shifts in the crush landscape.

"Since biodiesel and renewable diesel have continued to become more mainstream over the last decade, we've continued to invest so we can meet evolving demand across markets," Hopkins says.

One example is Green Bison Soy Processing, a joint venture between ADM and Marathon Petroleum in Spiritwood, N.D.

"We built that plant — the first soybean crush facility in the state — to meet demand driven by renewable diesel while also producing meal for feed markets," Hopkins explains.

Further east, Illinois is particularly well-positioned within this evolving system.

"Illinois is uniquely positioned between eastern and western crush facilities, as well as export channels," Hopkins says. "That allows Illinois soybeans to easily satisfy demands both domestic and foreign. And we continue to be in just the right place as the market evolves and grows."

In other words, your crop isn't locked into a single pathway. Illinois is famous for its infrastructure, including river access and rail, giving you options as you market your crop. That helps buffer your operation in an unpredictable global economy.

"Increased domestic demand helps reduce reliance on foreign demand and trade flows, which can be unpredictable," Hopkins says. "Stable local demand is always going to be beneficial to farmers."

## TOTAL DEMAND DRIVES CRUSH CAPACITY HIGHER

As crush capacity expands, what should you monitor? Hopkins points first to international factors.

"Farmers should continue to watch broader global market dynamics, including foreign trade flows and overall global demand trends," he says.

At the same time, domestic developments tied to energy markets and structural shifts in biofuels will continue to influence oil demand.

"But in the end, the biggest thing is always going to be total demand," Hopkins emphasizes. "A strong domestic crush sector combined with export opportunities creates a more stable and diversified demand base for Illinois soybeans."

Policy discussions will remain part of that picture, and Hopkins believes farmers have a meaningful role to play.

"Policymakers and the broader public trust farmers," he explains. "They value what farmers do and what they have to say. And one of the best ways to get or stay engaged and active is through industry organizations like Illinois Soybean Association. They can help make sure your voices are heard."

For Hopkins, the expansion of soy crush capacity offers a hopeful and straightforward signal.

"It's an opportunity for farmers," he says. "More demand is good for all of us, and more capacity to meet it is a sign of the health of our industry."

Hopkins has worked for more than 20 years in the soybean industry spanning exports, global trade and crush operations, and he sees alignment across the value chain.

"When farmers have a strong, competitive market environment, that's good for ADM," he explains. "When ADM builds a new crush plant in North Dakota, that's good for farmers. Biodiesel and renewable diesel are good for all of us ... and what's good for all of us is good for our rural economies, for jobs and for our futures. We're proud to be in this together."

As renewable diesel demand continues to scale, Illinois farmers remain central to the world's — and increasingly North America's — fuel future.

Matt Hopkins is an Illinois soybean farmer and Vice President of North America Soy Crush at ADM who's served in leadership roles with the U.S. Soybean Export Council and the North American Export Grain Association. He's spent most of his career in exports and global trade, and he sees domestic crush as a way to bring the ag industry closer together to meet rapidly growing demand for fuel and feed. "Those experiences have taught me how interconnected our industry is, and how our interests really are aligned," Hopkins explains. *Photo Credit: ADM*



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MMT**



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billion**



Source: USDA, Global Agricultural Trade System (GATS), January 2026



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# Enhancing the Profitability of Wheat-Soybean Double Cropping: What Have We Learned?

By Dr. Jessica Rutkoski, Associate Professor, University of Illinois

Advancements in technology and crop genetics continue to push the boundaries of what farmers can achieve within a single growing season. This is especially true for wheat-soybean double cropping. Successfully producing two crops in the same growing season requires each crop to be more efficient to maintain yield with fewer days of sunlight and less-than-ideal growing conditions.

On the wheat side of the double-crop equation, varieties must be high-yielding and early-maturing while also demonstrating strong scab resistance, standability and test weight. The University of Illinois wheat breeding program makes hundreds of new genetic combinations and evaluates thousands of candidate varieties each year to identify those that meet these criteria.

With funding from the Illinois Soybean Checkoff program, we have been leveraging our skills and testing capabilities to help farmers make more informed wheat cultivar selection decisions. Each year, we test about 100 commercial wheat varieties for yield performance across six locations in Illinois as part of the University of Illinois Variety Testing program. At two of these locations, we evaluate when each variety begins jointing and when it matures.

The timing of jointing in early spring matters because earlier jointing puts wheat at greater risk

for freeze damage. The timing of maturity is critical because it determines when the double crop soybeans can be planted. For each day of later wheat maturity, farmers lose about one-half bushel of double-crop soybean yield because of delayed soybean planting. Ideally, we want to see normal or late jointing and early to medium-early maturity combined with excellent grain yield, scab resistance and test weight.

All the data we collect on commercial wheat varieties is summarized and provided online at <https://varietytesting.web.illinois.edu/wheat/> to support decision-making. Summaries of variety performance by region for all the important traits are available. With the growing amount of data and traits to consider, wheat variety summary tables can be challenging to digest. Therefore, we developed a wheat variety testing browser that allows growers to filter and sort the data in different ways to more quickly identify varieties of interest. The browser is currently accessible online at: <https://jrut.shinyapps.io/ILWheatExplorer/>. We welcome feedback or suggestions for improvement, as we are still actively making updates.

We are excited to see companies bringing more ultra-early wheat varieties to market. One of the earliest wheat varieties introduced in central Illinois was planted this fall at the Illinois

Soybean Association Agronomy Farm in Heyworth alongside a second variety with average maturity. This will demonstrate to growers the range in wheat maturity timing that currently exists and how it can affect overall success of the wheat-double crop soybean system.

Our wheat breeding program at the University of Illinois specializes in developing ultra-early varieties, some of which have been commercially successful. We continue to push the boundaries of wheat genetics to improve yield while

maintaining early maturity. One of our research projects in that area is examining patterns of senescence, or how the wheat plant dies. We have made some interesting findings that suggest varieties that start senescence earlier and lose greenness gradually tend to yield more than those that start to senesce later and then lose greenness rapidly. If we confirm these findings next season, we can use this knowledge to make faster progress in the breeding program and share this information with other breeding programs to help improve wheat more broadly.

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# Q&A with Illinois Soybean's David Kubik

By Ashley Rice Haddon, Lead Writer, Illinois Field & Bean

David Kubik has served as the Biofuels & Trade Policy Manager at Illinois Soybean Association (ISA) since 2021.

During his tenure, Kubik has spearheaded the B20 initiative, which led to the passage of legislation extending the biodiesel sales tax exemption for blends over 10% and increasing those blends to over 20% starting in April. This will increase Illinois' biodiesel market to an estimated 300 million gallons a year. On the federal side, Kubik was one of the first biofuels policy leaders to fight back against Indirect Land Use Change (ILUC) and Carbon Intensity (CI) penalties in the 45Z tax credit—leading to changes that promote soy feedstocks in the 2025 reconciliation bill.

In this Q&A, Kubik discussed the complex state of biofuels on the state and federal level with Illinois Field & Bean's Lead Writer Ashley Rice Haddon.

## CARBON INTENSITY SCORES

**Field & Bean: What are CI scores?**

**Kubik:** CI scores measure the total amount of greenhouse gas (GHG) emissions associated with producing and using fuel. Rather than focusing only on tailpipe emissions, CI scores account for the full lifecycle of fuel, including growing soybeans that pull carbon from the

atmosphere. The lower the CI score, the smaller the overall total lifecycle GHG emissions.

**Field & Bean: Are CI scores beneficial to soybean-based-biofuels?**

**Kubik:** Basing incentives on CI scores makes the biofuels industry much more complicated, and unfortunately, soybean oil has been devalued due to ILUC penalties that appear to give soy a higher CI score.

ILUC significantly increases the CI score assigned to soy-based biofuels. The theory is that if more soy oil is diverted to biodiesel production, additional cropland somewhere in the world might be brought into production to replace displaced food or feed supply.

In contrast, fuels made from "waste" feedstocks such as used cooking oil or animal fats are generally assigned little or no ILUC penalty under lifecycle models. These dynamic disadvantages soy-based biofuels in carbon policies. This drives incentives toward imports from China, Brazil and Southeast Asia. Importantly, ILUC has encouraged passing imported virgin soy and palm off as used cooking oil.

## LOW CARBON FUEL STANDARD

**Field & Bean: What is a Low Carbon Fuel Standard (LCFS)?**

**Kubik:** It is a fuel policy that requires the CI of transportation fuels to decline over time. Instead of mandating a specific fuel (such as ethanol or biodiesel), it sets a carbon reduction target, and fuel producers must meet it.

**Field & Bean: Is an LCFS good for farmers?**

**Kubik:** An LCFS can be good for farmers when it expands overall biofuels demand and rewards crop-based fuels. However, the enacted California-style LCFS is focused on electrification, discounts farmers and increases ILUC penalties.

At this point in time, no enacted LCFS truly rewards farmers, their feedstocks, nor their sustainable ag practices.

## IMPORTED VS. DOMESTIC FEEDSTOCKS

**Field & Bean: Why are there concerns about imported oil?**

**Kubik:** Used cooking oil imports from China to markets such as the U.S. have grown dramatically — from under 200 million pounds in 2020 to over 3 billion pounds in 2023, with over half from China. This spike has raised suspicion because verification systems often rely more on paper audits than physical testing, making it vulnerable to fraud.

**Field & Bean: Why are imports being incentivized?**

**Kubik:** California's CI scores for soybean oil-based fuels tend to be higher primarily because of how the state models ILUC and upstream agricultural emissions under the LCFS. California imposes a large ILUC penalty on soybean oil, which drives it out of the marketplace.

**FEDERAL POLICY WINS**

**Field & Bean: What recent 45Z federal tax policy wins will benefit biofuels?**

**Kubik:** Recent wins include disqualifying from tax credits foreign waste oils, such as imported used cooking oil, which keeps demand for U.S. soy higher. In addition, ILUC penalties on agricultural feedstocks were removed.

**Field & Bean: Looking ahead, what do you anticipate for biodiesel and Illinois farmers?**

**Kubik:** The last couple of years have brought dramatic uncertainty to the soy-biodiesel space. However, once you layer new record Renewable Fuel Standard

volumes, a domestic-focused 45Z tax credit and our State's B20 incentive, Illinois farmers are well-suited going into the future. ISA believes that all those policies will fall into place this spring and bring some certainty back to domestic soy biofuel markets, and promoting market expansion.



# Illinois Biodiesel Economic Impact Study

By David Kubik, Biofuels & Trade Policy Manager, Illinois Soybean Association



The Illinois Soybean Association (ISA) Government Relations team recently commissioned a first-of-its-kind study to examine the impact of biodiesel on the Illinois economy. Although national research has outlined biodiesel's economic benefits in the U.S., there has been little Illinois-specific data to fully quantify what the biodiesel industry provides for our state. Until now.

**The Illinois Biodiesel Impact Study, completed by Higby Barrett, provides a comprehensive look at Illinois biodiesel production rates, feedstock usage, economic contributions and environmental impact. In the coming months, we'll share more detailed findings from the report. For now, one key takeaway stands out: the measurable economic impact of Illinois' biodiesel sales tax incentive — even before it has gone into full effect.**

You've read in this issue about the biodiesel tax incentive, often referred to as the B20 Law. Since its passage in 2022 and implementation over the past three years, the policy has continued to generate demand for Illinois soy and strengthen in-state biodiesel production.

According to the study, "The sales tax has had a noticeable impact on the biodiesel economy in Illinois. In a nation where the blend rate for biodiesel is typically between 4% to 5% on average, the blend rates are much higher in Illinois." According to

Illinois Department of Revenue data, the 2025 blend rate was just over 15%. With federal uncertainty surrounding renewable fuels policy, successful legislation such as Illinois' B20 Law reinforces confidence in the future of biofuels use.

Higher blend rates translate into real dollars for Illinois communities. In 2024 alone, the biodiesel industry contributed \$58.1 million in state and local taxes. These revenues stem from the business activity the industry supports, including production, transportation and retail sales.

Illinois biodiesel plants are also expanding and modernizing. Over a four-year period, Illinois experienced an

average investment of \$70.25 million in biodiesel-related infrastructure and equipment. Much of that impact comes from construction activity and equipment manufacturing, industries that support additional jobs and economic output.

**Also important to note is the incentive's environmental impact. The study found that carbon emissions in Illinois have been reduced by more than 4.1 billion pounds of CO<sub>2</sub>. In addition, total biodiesel production in Illinois is equivalent to removing 433,792 cars from the roadways. This means the citizens of Illinois have less particulate matter being emitted to the air, improving lung health.**

This study confirms what Illinois soybean farmers have long known: Biodiesel is not only a demand driver for your crop but also a powerful economic engine for our state. Soon, we'll dig deeper into the numbers behind

production, feedstock use and long-term economic growth.

**For now, the message is clear: Illinois' biodiesel policy is working for both farmers and citizens.**



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# Biofuels Policies Provide U.S. Soy Stability



Ongoing tariff and geopolitical uncertainty continue to challenge U.S. soybean farmers, emphasizing the importance of a strong domestic biofuels market to provide stability and long-term demand. At the American Soybean Association (ASA), we are advocating for exactly that — policies to strengthen domestic soy demand and provide farmers with greater certainty in an increasingly volatile environment.

We have been focused on two policy issues to address these concerns: the Section 45Z Clean Fuel Production Credit and the Renewable Fuel Standard (RFS) renewable volume obligations (RVOs). Clear guidance aligning with recently enacted amendments to the 45Z tax credit will help determine the economics of producing

**“As the EPA turns to future RFS volume requirements, these improvements to the 45Z credit provide an important foundation for continued growth in domestic biofuels production.”**

low-carbon fuels, while RVOs for 2026 and 2027 will establish the level of biofuel blending required under the RFS. Together, these policies directly shape demand for soybean oil and influence investment decisions across the biofuels value chain.

To strengthen the foundation of the 45Z credit, ASA led advocacy efforts as Congress developed the tax code changes in the One Big Beautiful Bill Act (OBBBA). These efforts resulted in the removal of the indirect land use change (ILUC) penalty on agricultural biofuels feedstocks and addressed the surge of

imported feedstocks entering the biofuels production value chain through new limitations on tax-credit eligibility. As a result, the 45Z credit is now better aligned to prioritize biofuels feedstocks produced in North America.

Through months of education on the impacts of agricultural ILUC penalties, ASA helped secure a doubling of the 45Z credit rate for soy-based biofuels. The removal of the ILUC penalty means the carbon intensity of soy is now based on its direct impacts, rather than a modeling framework that unfairly penalized U.S.-grown crops for agricultural practices outside the U.S. These changes represent a meaningful step forward for soybean farmers and reinforce the role of domestic agriculture in delivering lower-carbon energy solutions.

By targeted engagement and coalition advocacy, ASA secured a North American ringfence in the final 45Z Clean Fuel Production Credit, permanently limiting eligible feedstocks to North American origin for the life of the tax credit. This provision addresses the surge of imported used cooking oil and other feedstocks, as well as provides long-term certainty for farmers, processors and biofuels producers while reinforcing domestic supply chains.

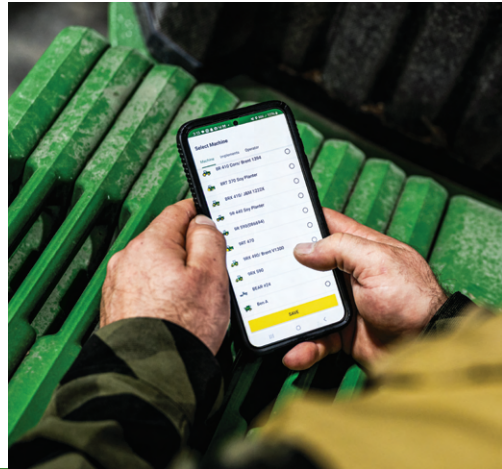
As the EPA turns to future RFS volume requirements, these improvements to the 45Z credit provide an important foundation for continued growth in domestic biofuels production. The RVO rule for compliance years 2026 and 2027 will lead to an increase in blending volumes for biomass-based diesel. Proposed by EPA in June 2025, it represents the strongest proposed RVO to date and reflects the impact of sustained advocacy with the administration.

Previous RVOs released in 2023 underestimated industry capacity and failed to reflect expansion in biofuels production and soybean crush, weakening demand for soybean oil. The proposed 2026 volumes represent an increase of more than 2 billion gallons over 2025, a historic increase. ASA continues to push for higher targets to stabilize the market and secure long-term growth.

Although we continue to advocate for the soy community, we remain engaged with policymakers and federal agencies to advance durable biofuels policies that strengthen domestic markets, support rural economies, and provide soybean farmers with the certainty they need to plan for the future.



*Editor's Note: Your checkoff dollars are not used for legislative efforts. Membership dollars are what make ASA and Illinois Soybean Growers (ISG) impactful.*



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