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A PUBLICATION OF THE ILLINOIS SOYBEAN ASSOCIATION



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CONTENTS

January 2025

Volume 5 Issue 3

6 Clearing The Path

The feature story of this issue of *Illinois Field & Bean Magazine* explores how St. Lawrence Seaway could get more soy to Europe.

10 Previewing the 2025 Soybean Summit

The 2025 Soybean Summit event is an expanded two-day event designed to provide Illinois farmers with timely updates on issues such as the new U.S. Environmental Protection Agency (EPA) Herbicide Strategy, the farm bill and anticipated infrastructure improvements, as well as the latest on agronomic and sustainability trends. Step inside!

16 The Global Feed Leader

Emma Peters, International Markets Coordinator for the Illinois Soybean Association, explores why U.S. soy is the best choice for animal agriculture worldwide.

20 Monarch Butterfly to Receive Federal Protections

The monarch butterfly, likely the most famous butterfly in North America, will soon receive federal protections under the Endangered Species Act (ESA). In this article, Corey Lacey, ISA Environmental Policy Manager, discusses the implications for Illinois farmers.

24 Global Middle Class Opens Doors For Soy

By 2030, up to 5 billion people are expected to be part of the global middle class. For Illinois farmers, that means a rapidly growing base of potential customers who enjoy eating meat raised on feed made with soybeans.

DEPARTMENTS

4 FROM THE BOARDROOM

5 CEO'S MESSAGE

26 GROWTH BY ASSOCIATION



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COVER: Dive into "The Trade Issue" to explore markets created by the plant-based revolution, discover how St. Lawrence Seaway could get more soy to European customers, and get inside information on this year's 2025 Soybean Summit event.



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Illinois Soybean Growers (ISG) is owner of Illinois Field & Bean, a publication for Illinois soybean farmers, designed and written to provide timely and useful industry information. Illinois Field & Bean is published by the Illinois Soybean Association, 1108 Trinity Lane, Bloomington, IL, 61704. For address corrections, contact Illinois Field & Bean at 1108 Trinity Lane, Bloomington, IL, 61704. Phone 309-663-7692. Web address: www.ilsoy.org. Email: ilsoy@ilsoy.org.

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JEFF O'CONNOR | AT-LARGE DIRECTOR | ILLINOIS SOYBEAN ASSOCIATION

Adapting for Success

After the roar of engines fades and stillness returns to the farmyard, a farmer takes a moment to reflect on a season's worth of dedication and effort. The principle of "planning the work, then working the plan" is now realized by tangible results: full grain bins and detailed data files. Sorting through everything requires not only our own knowledge but that of trusted peers and experts. Some days, it's quite daunting--and leaves me yearning for spring planting season and days in a tractor seat. But not just yet!

Agriculture today is much different than my ancestors knew it to be. They were focused on subsistence farming and maybe a little surplus. As the countryside around them changed, they soon ventured into beef cattle because of demand. Years later, beef gave way to dairy production, then to hog production, as, once again, the marketplace changed. Changing market conditions, available labor and farm mechanization led the farm to transform into a row-crop business.

I've recently thought about those past significant changes to our family farm, and I found myself asking a very serious question: has Illinois agriculture lost some of its willingness to adapt to changing economic signals and thus missed out on real opportunities? Just as my own ancestors were influenced predominantly by their proximity to Chicago, will my own descendants make decisions based on a global marketplace? Time will answer that question. But a larger one seems to be: where will any of us find direction amid all of the market information available today, let alone tomorrow?

I believe part of the answer will come from my own disorganized office desk. On the corner sit several clearly defined stacks of business cards from individuals who have visited the farm this past year. Those cards are reminders of conversations with international buyers, shipping and transportation specialists, government officials and executives from consumer packaged goods companies. One common denominator: everyone who left a card wants access to sustainably grown, high-quality Illinois soybeans.

Even though I personally listened to each visiting individual, every Illinois soybean farmer ultimately had a hand in those meetings, too. Illinois Soybean Association (ISA) staff members, working for Illinois soy producers, put in countless hours arranging for and facilitating these groups. Because our farm has hosted these groups for years, I've come to appreciate greatly the work required just to create a single opportunity, let alone a year's worth of opportunities. Illinois growers are rewarded for this effort when ISA receives a call asking directly for contacts leading to soybean sales. And yes, it does happen!

Annually, the ISA Board and Staff are tasked with identifying as many opportunities as possible in the vast global marketplace. Then, we are challenged with turning possibilities into probabilities. And as I've personally seen in the past five years, this is where the real association work comes in. The work of organizations such as ISA is a testament to the power of collaboration. Together, we can turn ideas into realities that successfully open the doors for Illinois soybean farmers on a global scale. Those successes start at the farm with purposeful listening and leaning into change.

I believe the brightest future lies in the hands of those individuals who trust in their own talents, and management styles, to adapt and take a piece of this changing trade landscape. Not only will they think outside the box, but they'll also first build a bigger box to think outside of. For those willing to walk the path of change, the rewards are more than financial - they're the legacy we leave for the next generation. And that is the greatest opportunity of all.

Growing Supply While Creating Demand

As the new year begins, Illinois soybean farmers face a unique supply-and-demand challenge. On the supply side, 2024 projections show an estimated average yield of 67 bushels an acre across about 10.8 million planted acres. That results in a projected 720 million bushels of production. That projected 11 percent increase over 2023 provides ample reason to push harder than ever for new market demand.

And that's where your Illinois Soybean Association (ISA) is preparing to flex some serious muscle.

In an era of intense global competition, ISA is stepping up with a dual call to action. We always aim to provide you with the tools and resources to help you grow a larger crop, but we're equally committed to creating new market opportunities that bring serious value to your farm gate. From finding new uses and buyers to driving innovation, we're doubling down on strategies to boost demand and keep Illinois soybeans profitable—not just for today, but for the future. We're playing the long game.

Growing Production Insights

Bryan Severs, a soybean farmer from Vermilion County, is Chairman of the ISA Soybean Production Committee. In that capacity, he leads a committee that provides direction to our production team in areas such as investments in innovative agronomic research and education. The committee focuses on helping farmers achieve consistent yields through research partnerships and tackle regional issues such as soil quality, water management and land stewardship. ISA's field trial program provides farmers across Illinois with direct, applicable insights on everything from seed selection to fertilizer management and pest control—a win-win for productivity and conservation.

ISA connects farmers with several partners in the industry that offer programs to implement sustainable production practices. These groups offer data-driven solutions to optimize input applications, improve soil health and produce higher yields. We also provide educational workshops, webinars and field days to ensure farmers have access to the latest research and technologies with an emphasis on the economic sustainability of their operations.

Moving Illinois Soybeans Near and Far

With a growing soybean supply, expanding market demand is essential. Brady Holst, a soybean farmer from Augusta, is Chairman of the ISA Market Development Committee. His committee provides direction for all of ISA's market development efforts. Domestically, our top priority is livestock feed, as livestock is the largest end-user of soybeans. Through partnerships with animal agriculture organizations, ISA promotes soy's benefits as a high-quality protein source for livestock across Illinois and beyond. This collaboration is critical for maintaining reliable domestic demand for Illinois soybeans and stabilizing local markets.

ISA is also driving new uses for soybeans in industries such as bioplastics, renewable fuels and household goods. Our Soy Innovation Center is pioneering research and partnerships to incorporate Illinois soybeans into renewable, sustainable products. ISA has partnered with the automotive industry to support the use of soy-based materials such as foams and plastics in car parts. This creates an entirely new demand stream for soy. We are collaborating with companies to develop soy-based adhesives and lubricants, positioning Illinois soybeans as a key ingredient in environmentally friendly alternatives to petroleum-based products.



JOHN LUMPE | CEO |
ILLINOIS SOYBEAN ASSOCIATION

To strengthen our competitive edge globally, ISA's Trade and Exports program connects Illinois soybean farmers with buyers around the world. It focuses on key markets in Europe, Asia and Latin America. This year, the program established partnerships with international companies to increase exports of Illinois soybeans. Each year, we strive to increase new market opportunities by 15 percent.

To keep our soybeans competitive and accessible to foreign and domestic buyers alike, we study and support infrastructure improvements. Illinois' well-connected roads, railways and rivers give us a transportation advantage, but aging infrastructure such as bridges requires attention. ISA advocates for investment in roads, rails and river transportation to ensure a smooth and dependable supply chain from Illinois farms to crushing facilities in our own state and to ports beyond our nation's borders. These efforts, their results and future investments in our continued infrastructure work will fuel a lot of discussion at the upcoming Soybean Summit 2025. (You can read more about the Feb. 10-11 event later in this issue.)

Legislative Priorities

In addition to tracking supply and demand, sharing timely and accurate information on agricultural issues is vital to the success of Illinois soybean farmers. Ryan Frieders, a soybean farmer from Waterman, is Chairman of the ISA Government Relations Committee. This committee serves as a critical liaison between our farmers and legislators, working on your behalf for positive and impactful legislation. Focused on state and federal policy priorities such as the Farm Bill and the EPA's Endangered Species Act and its Herbicide Strategy, your Government Relations Committee stands at the ready to protect your freedom to farm.

Economics of Success

Projections for 2024 suggest an average price of \$11.20 per bushel—down from \$12.55 in 2023—because of global competition, especially from Brazil. ISA's comprehensive support and resources are designed to help farmers weather these cycles by increasing operational efficiency and finding new markets. Our resources and data-driven insights are also available to help Illinois farmers make informed financial decisions.

Our 2025 strategy is straightforward: grow supply responsibly, expand demand creatively, build and strengthen relationships with legislators and support Illinois farmers through every market cycle. Through strong partnerships, timely issue updates, targeted production research and innovative approaches to market development, we're working to make Illinois soybeans a worldwide staple across industries, markets and customers.

Let's get to work, Illinois!



Clearing The Path

How St. Lawrence Seaway Could Get More Soy To Europe

By Eileen Pabst, International Markets Manager, and Tim Rendall, Domestic Markets Manager, Illinois Soybean Association

The convergence of an underutilized transit channel and new deforestation regulations could present a tremendous opportunity for U.S. soybean exports to the European Union (EU). To meet the moment, Illinois Soybean Association (ISA) is proactively organizing international meetings, researching trade expansion paths and assessing the competitive advantages of Illinois soy.

Diversifying exports beyond the Illinois and Mississippi rivers to include the St. Lawrence Seaway north of Illinois offers significant potential benefits. This opportunity, combined with the new EU Deforestation Regulation (EUDR)—now proposed for full implementation by December 30, 2025—could strengthen Illinois farmers' strategic advantage over producers in regions like Brazil.

EU Value Proposition

The EU is an increasingly important buyer of U.S. soybeans, according to data from the U.S. Department of Agriculture's Foreign Agricultural Service (FAS).

The value of soy shipped to this group of 27 European countries totaled \$3.45 billion (6.12 million metric tons) in 2023, the most recent year for which data are available. That's second only to China, to whom \$15.06 billion of soy was exported.

And over the past decade, soy exports to the EU have risen 97 percent, FAS notes.

Factors Driving EU Focus

Although the Illinois and Mississippi rivers help ferry the bulk of Illinois soybeans to the EU via the Gulf of Mexico, there are several reasons to explore additional export channels.

The Mississippi has experienced record low water levels multiple years in a row. This can hamper efforts to transport soybeans in a timely way. And despite planned lock-and-dam infrastructure investments that would enable barges to move more freight, those upgrades—as reported in recent issues of *IL Field & Bean*—will take years to complete.

Buyers in Europe and beyond increasingly want to purchase identity-preserved soy products and soy with a lower carbon footprint compared to

other options. Expansion of containerized shipping in the underutilized St. Lawrence Seaway—which connects the Great Lakes to the Atlantic Ocean—could address these sustainability needs by reducing emissions with a more straightforward transportation route. It could also improve traceability so buyers can pinpoint exactly where commodities originated.

Some of Europe's largest ports could benefit from a preferential trade route via the seaway. Rotterdam in the Netherlands is the largest port in Europe and No. 13 worldwide by volume. Meanwhile, Antwerp in Belgium is the second largest port in Europe. By partnering on trade routes with such ports, ships delivering Illinois soybeans could then backhaul

soy and other ag products from Europe into the Upper Midwest on the return trip.

Heightened use of the St. Lawrence Seaway could open channels to growing areas of soy demand beyond Europe—including the Mediterranean, the Middle East and North Africa.

Illinois Is Ready For EUDR

Another beneficial reason to pursue deeper EU ties is the new EUDR rule, which will prohibit European importers from accepting key commodities such as soy grown on land deforested after Dec. 31, 2020. Negotiations and fine-tuning of the rule are expected to continue through much of 2025.

(See Clearing The Path, page 8)



Increased usage of the St. Lawrence Seaway could open channels to growing areas of soy demand beyond Europe—including in the Mediterranean, the Middle East and North Africa.

Clearing The Path

(continued from page 7)

This could create a window of opportunity for Illinois soybean growers compared to those in countries such as Brazil, where deforestation for production of soy, cattle and other commodities is more prevalent. Data from the EU Forest Observatory identifies global land that has been converted from forest into agricultural production. Its records indicate deforestation that has occurred since Dec. 31, 2020, totaling:

- 5.3 million hectares in Brazil
- 483,690 hectares in Paraguay
- 329,925 hectares in Argentina
- 34,966 hectares in the U.S.
- 17,553 hectares in Spain

• 13,625 hectares in France
It's important to point out that those U.S. figures don't include a single acre of Illinois farmland. And most of the included acres aren't near soybean production regions, according to the U.S. Soybean Export Council (USSEC).

European buyers who fail to perform the required due diligence with supporting data illustrating their compliance face fines and other penalties, according to a July 2024 analysis published by researchers at the University of Illinois' farmdocdaily website. Illinois, which exports 60 percent of its total soybean crop annually, is well positioned to maintain market access. That's because of the state's ability to ship soybeans in containers and because of continued investments in sustainable production practices.

With this kind of attention to detail, including high-quality

soybeans used in global meal production, soy exports to Europe are expected to keep growing.

More broadly, the EUDR will yield beneficial environmental outcomes for communities worldwide.

"We can all agree that this will decrease deforestation and lead to a path to better sustainability practices globally," says Rosalind Leeck, Executive Director – Market Access and Strategy, USSEC.

ISA Eyes St. Lawrence Seaway

That market expansion won't happen on its own, though. Illinois farmers' investment in ISA is supporting this renewed exploration of EU trade relationships. The ISA team has been busy working multiple angles over the past year, emphasizing the potential of the St. Lawrence Seaway.

The shipping channel is an engineering marvel. Ships en route to their destination are raised a total of 602 feet between the Atlantic Ocean and Lake Superior—the equivalent of transporting a ship up a 60-story building using the gravity of its lock-and-dam system.

The seaway is operational 285 days each year and boasts more than 99 percent system reliability. Because of winter weather that freezes the Great Lakes, its season runs from approximately mid to late March to at least the end of December each year. The seaway helps power the Great Lakes Regional Economy, which, if it were a country, would rank third globally behind only the U.S. and China.

In fiscal year 2025, ISA has funded the St. Lawrence Seaway Trade Revitalization Project. The initiative will take



European trading partners met with representatives of the Illinois Soybean Association and the Specialty Soya and Grains Alliance during meetings in September 2024. The collaboration aims to expand shipping through the St. Lawrence Seaway, reducing the carbon footprint of Illinois soy and helping European buyers meet their decarbonization and sustainable sourcing goals. *Photo Credit: Tim Rendall, Illinois Soybean Association*

place in partnership with the Specialty Soya and Grains Alliance. It will evaluate ways to recharge the Great Lakes-EU trade route.

For example, in September, the two organizations participated in a trade mission to the previously mentioned ports of Antwerp and Rotterdam. Representatives connected with shipping companies, logistics providers and grain buyers to educate them on the advantages of the seaway as a viable and preferential trade route.

Illinois soybean farmers seeking new markets also will benefit from several recent infrastructure investments. Among those upgrades is hands-free mooring technology. Fully deployed across the seaway in 2019, the shipping corridor uses vacuum pads to help ships make the journey, improving safety and efficiency, according to an article in Professional Mariner.

Major agriculture companies are building up capacity. In 2023,

The DeLong Co's Agricultural Bulk Export Facility opened in Milwaukee. Corporate, state and federal funding has enabled additional expansion to handle more grain volume and storage, according to a news release from the company.

Looking ahead, development of an international terminal for sea cargo containers is planned at Ports of Indiana-Burns Harbor. The first-of-its-kind facility on Lake Michigan is scheduled to be constructed in 2025, and shipments are anticipated to begin in 2026, according to an article in The Maritime Executive

Sailing Toward Opportunity

Resilience will be a top priority for Illinois soybean farmers in 2025 and beyond. Investing in expanded market access to places such as the EU, via emerging transit routes such as the St. Lawrence Seaway, will help diversify the industry's approach to meeting customers' needs.



Illinois Soybean Association Board Member Jeff O'Connor speaks during a stop on a September 2024 trade mission to Europe. He partnered with the Specialty Soya and Grains Alliance on the trip. *Photo Credit: Tim Rendall, Illinois Soybean Association*

Developing this shipping corridor will result in a preferential trade route between EU markets and Midwest farms

while mitigating the environmental impact of moving soybeans from Illinois fields to European consumers.

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Start Your Leadership Journey Today!





Resiliency Through Adaptability: Previewing the 2025 Soybean Summit



The Illinois Soybean Association (ISA) Soybean Summit has historically been an agronomy-focused meeting. Today, the meeting's foundation still lies in the latest cutting-edge agronomic research and high-value information for growers. But the Soybean Summit also has evolved into what ISA Director of Operations Dustin Scott likens to a set of gears linked to a transfer case: the event keeps the Illinois soybean industry—and the families who drive it—moving forward.

On top of tackling the traditional topics such as agronomic and market research, this year's summit will feature conversations among leaders, members and other soybean industry stakeholders on a range of other key industry topics. This type of engagement is necessary to drive economic success for the state's soybean growers and everyone who works in what is a massive economic driver for all of Illinois.

On the 2025 ISA Soybean Summit agenda are timely updates on issues such as the new U.S. Environmental Protection Agency (EPA) Herbicide Strategy, farm bill and infrastructure improvements, as well as the latest on sustainability trends.

"We are here to amplify farmers' voices and get more information about changes

coming that can impact their bottom lines," said ISA Government Relations and Strategy Director Andrew Larson. "Everything we do at ISA is connected to farmers' profitability."

Previously a one-day event, this year's Soybean Summit will take place Feb. 10-11 at the I Hotel and Illinois Conference Center in Champaign.

A heritage of evolving service to soybean farmers

Built atop the ISA foundations of maintaining resiliency, enhancing profitability and expanding overall knowledge for the state's soybean farmers, the Soybean Summit has been a key platform for sharing valuable research findings, soybean best management practices and marketplace insights dating back to the organization's earliest days. Sixty years after its first installment, the event continues to deliver the latest research, policy insights and more that combine to raise the tide for all the state's soybean growers and industry stakeholders.

"It's really like gears working together to move the entire industry forward," Scott said. "While we are still maintaining a strong agronomic focus, we're shifting to more of a holistic view to farmers based on the idea of

why things like innovation and sustainability matter to them, from the soil in which they work to the soybeans they are shipping all over the world."

What to expect at the 2025 Soybean Summit

Attendees at this year's Soybean Summit will access exclusive opportunities through a range of activities including:

- **Expert speakers**

Leading agronomists and industry experts will share insights on the latest developments in soybean production.

- **Educational sessions**

Topics will include sustainable production methods, agronomic management strategies and market trends.

- **Networking opportunities**

Growers can connect with peers and industry professionals, fostering collaboration and knowledge sharing.

- **Actionable recommendations**

Practical advice will be provided to help attendees improve soybean yields and overall profitability.

Adhering to a potential new herbicide rule

Released last year, EPA's new Herbicide Strategy Herbicide Strategy will change growers' decision-making on herbicide and pesticide selection and application. Under the strategy

that is in the process of becoming regulation, growers might face limitations on what, where and when they can apply some products based on the presence of "designated critical habitats" under the Endangered Species Act (ESA). Although it's a potential added regulatory burden, it also will enable growers to adopt practices such as integrated pest management. At the Soybean Summit, growers can expect to share ideas and get answers to questions they have surrounding the new strategy.

"Illinois soybean farmers will have opportunities to employ best practices and emerging technologies that can both work well agronomically and ensure products are used responsibly and sustainably," Larson said. "The EPA strategy aims to support long-term viability of both our environment and soybean production in general by promoting responsible herbicide use and enhancing effective resilient production systems."

Spotlighting the transportation infrastructure issue

Heading into a year of much uncertainty about numerous policy issues facing soybean farmers and others in the value chain, the 2025 Soybean Summit will feature abundant discussion

(See Previewing the 2025 Soybean Summit, page 12)

Previewing the 2025 Soybean Summit

(continued from page 11)

about issues such as infrastructure, regulation and federal policies, including the possible shape of the next farm bill.

ISA leaders will frame up sessions in the context of updates necessary to maintain Illinois soybean farmers' geographic advantage to domestic and global soybean buyers. They will

discuss the natural tie between strengthening the state's transportation infrastructure and maintaining access to global market terminals. At a time when many of the state's roads, bridges and river transportation infrastructure are in dire need of updating, discussions about this key issue will create heightened awareness among everyone who attends the Soybean Summit.

"Infrastructure is a competitive advantage for Illinois producers. You need to get your soybeans to market and the barges that get them to global buyers. Right now, the need to update our infrastructure is an obstacle to getting soybeans sold," Scott said. "We're not in the bridge-building

business, but we understand the economic impact of bridges in our state. So we are focused on raising awareness among farmers on this issue so our lawmakers know it is a priority and a major economic driver for our state."

An ISA study released in November painted a clear picture of that economic impact and the need for action. It showed every dollar invested in maintaining the state's bridges—65 percent of which are in "fair or poor" condition—creates almost \$5 of economic activity. In the state's top 13 agricultural counties alone, investing in bridge updates will have a positive \$5.63 billion economic impact. Although infrastructure improvements are a

statewide issue that will benefit all Illinois residents, the agriculture industry will be especially reliant on such upgrades. That makes the Soybean Summit the ideal time and place to begin raising even more awareness of the critical issue.

"We want Illinois soybean growers to know ISA has their back on this issue, both immediately and in the long term. With how much soybean production is expected to increase over the next 25 years, we need to figure out how to continue meeting market demand in what's a global system," said ISA Market Development Director Todd Main. "I want soybean farmers to know the issue and that we're on the job



Rural connectivity and sustainability are among the issues on the agenda at the 2025 Soybean Summit.

and anticipating any challenges that come up as we take on the infrastructure challenge.”

Meeting soybean demand depends on good infrastructure

About 60 percent of the soybeans raised in Illinois are destined for use overseas every year. Many of those global destinations are half a world away from the state’s soybean fields, and reaching them requires overcoming the infrastructure obstacles throughout the supply chain.

Overseas buyers depend on Illinois soybeans. That means the infrastructure issue is about more than just the trucks and barges moving soybeans to the export market. It’s also about market prices and the ability to cost-effectively meet demand for the crop and sustain those prices over time, another big topic at this year’s Soybean Summit.

“We can get our goods to market anywhere efficiently and inexpensively,” Main said. “We can’t really compete on price. We will have to have a different kind of transportation system to reach new destination markets. We know we will have soybeans going to Indonesia, India and Sub-Saharan Africa based on population growth. Maintaining our competitive advantage in Illinois and continuing access to the markets that contribute to our prices will ultimately depend on getting our infrastructure updated to meet evolving global demand.”

Sustainability and rural connectivity issues

Just as questions about the state’s infrastructure needs remain top of mind, so too do questions continue to swirl about the development “carbon economy,” what it could mean to biofuels production in Illinois and the specific value of carbon as a commodity and how that value translates to farm-level practices to capture it. That will be another focus at the 2025 Soybean Summit, as it’s an area of both

challenges and opportunities for Illinois soybean farmers. The carbon economy is something Larson said he’s watching closely, namely because of its implications for producers at the farm level and in the biodiesel sector.

“As an organization, we’ve been monitoring the carbon economy closely because some programs and ideas billed as helping farmers don’t go far enough when it comes to mandates,” Larson said. “The establishment of the carbon economy could redefine biofuels policy in a way that puts Illinois biodiesel at a disadvantage, and we want to make sure that our state’s 300-million-gallon-plus market demand isn’t negatively impacted by low carbon standards. We don’t support a cap-and-trade system and there needs to be a value attached to carbon so our farmers realize if they’re being asked to integrate practices to generate carbon credits like no-till or cover crops — which we’re big fans of — it pencils out and they’re not incurring new costs and losing opportunities to generate profits. It’s our job to make sure farmer profitability is involved in the carbon conversation.”

As the carbon economy continues to evolve, so too does work to provide rural connectivity across the state. With around \$1 billion in federal funding coming soon to advance that effort.

Main said rural connectivity will be another issue to be addressed by ISA leaders at the 2025 Soybean Summit. Although rural connectivity is not directly soybean-related, its influence on the state’s rural communities that soybean farmers call home makes it an issue of even greater importance.

“We’ve started a program to educate members at the county level about what it takes to plan rural broadband development for their counties. If we don’t engage and have a plan, we will basically get whatever the dominant provider’s going to

Find out more about the 2025 Soybean Summit at ilsoy.org/event/soybean-summit-2025/, or contact us by phone at (309) 663-7692 or email at ilsoy@ilsoy.org.

give us, and that’s likely to be based on how they serve larger population centers,” Main said, adding ISA has a curriculum to train rural community leaders on securing grant funding for rural connectivity. “Making sure our small towns have connectivity contributes to rural community vitality by better enabling residents to participate in the information economy.”

Maintaining resiliency through adaptability

In all, the range of topics explored at the 2025 Soybean Summit will arm Illinois soybean farmers with the knowledge they need to make informed decisions in the new crop year and beyond, from the field to discussions with decision-

makers. The event’s valuable networking opportunities for growers are part of why this year’s event was expanded to two days, Whitmer said. But like discussions about agronomy and industry issues, topics during the 2025 Soybean Summit all ladder up to the same idea.

“The Soybean Summit is all about the practical application of ideas and the resiliency of Illinois soybean farmers,” Scott said. “The learning growers take away from it all has something you can take back to your farm and do. It’s not like putting a book on the shelf. Growers who attend are going to learn something more than they thought they’d take away from the event.”

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Navigating through the emotions of grief and sorrow during a loss can feel incredibly challenging. Our grief support groups offer a confidential space for individuals to openly express their feelings, engage in discussions, find solace and extend comfort to those who have lost a loved one.

UPCOMING DATES
Jan 27 | Feb 24 | Mar 31 | Apr 28 | May 26
7-8 pm | Virtual

To register or for more information, contact **Rachel Brown** at 217.718.6315 or rachelbrown.lpc24@gmail.com.
Link to join will be sent upon registration.

Visit siumed.org/farm to learn more about the **Farm Family Resource Initiative**



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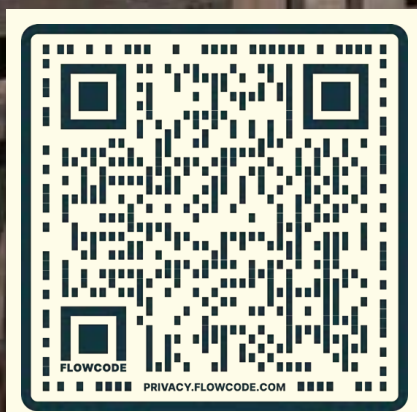


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The Global Feed Leader

Why U.S. Soy is the Best Choice for Animal Agriculture Worldwide

By Emma Peters, International Markets Coordinator, Illinois Soybean Association

Are you still buying feed based on crude protein? You're likely not only paying too much but also over- or undersupplying nutrients in animal diet formulations.

Although much of the world still relies on crude protein as a purchasing driver for feed, experts and leading formulators know that smart and effective animal nutrition selection goes far deeper. Factors such as amino acid profiles and nutrient composition impact overall digestibility and signal the true value of soybean meal for formulators and for animals.

U.S. soy delivers improved feed formulation consistency, better animal performance and superior overall value to the bottom line. For swine, poultry, aquaculture and more, U.S. soybeans provide an overall advantage compared to other origins like Brazil and Argentina. Time and again, formulators see the results in whole soybean quality, processing consistency, amino acid profile, digestibility and more. In comparative studies and research, U.S. soybean meal has proved to be the most sustainable, highest quality choice.

Ideal Amino Acid Profile

Animals need at least five essential amino acids for optimum health, and U.S. soy has an advantage for the main five not only in composition but also in consistency, with less variability over time.

Nutritionists look for consistency of ingredients in many forms: composition, nutritional value, physical description, quality and uniformity. That consistency

is a key differentiator that U.S. soy can provide.

But it's more than that. Soybean meal value is also based on digestibility—and U.S. soy excels there, too.

Superior Digestibility

Amino acid digestibility depends on many factors: anti-nutritional factors, genetics, heat treatment, moisture, processing methods, and storage. Growing conditions and climate also impact digestibility, and soy originating from the U.S. has an advantage in swine and poultry feed over soy from Argentinian and Brazilian competitors.

When compared based on digestibility coefficients and the digestible content of five essential amino acids (Cysteine, Lysine, Methionine, Threonine and Tryptophan),

U.S. soy is superior in both the content of SID amino acids and the SID digestibility of each amino acid. (SID, or Standardized Ileal Digestibility, is the most accurate measurement of amino acid digestibility for poultry and swine.)

More Quality, Less Damage

Quality and consistency also impact digestibility, and U.S. soy excels there, too. This is shown in comparative studies of the four processing indicators nutritionists most commonly use to evaluate soybean meal quality: KOH solubility, protein dispersibility index, reactive lysine to total lysine ratio and trypsin inhibitor activity. In each, U.S. soy has an advantage.

Other regions harvest

soybeans at a higher moisture content than the sub-14 percent target used for U.S. soy. This not only impacts overall quality but also requires heat treatment to dry whole beans for storage. In turn, the damage rate for soybeans from Brazil, for example, is much higher than in U.S. soy. In monthly export testing samples, Brazilian soybeans had four to six times more damage than U.S. soybeans, and total moisture content for Brazil was 12 percent higher than for U.S. soy. This year, we are seeing an increased number of complaints and reports of high heat damage in Brazilian soybeans.

Overall, U.S. soy provides less variability and a more uniform, predictable product, critical for formulating animal diets.

Sustainability at Our Roots

As preferences evolve, public consciousness increases and companies and countries implement more regulations around sustainable sourcing and greenhouse gas emissions reduction, ingredient origin takes on new importance. For generations, farmers in Illinois have relied on sustainable practices to produce soy and continue the legacy of their farms.

And the results show their commitment to sustainability. U.S. soy has the lowest carbon footprint compared to soy from Argentina and Brazil and other plant proteins such as peas, chickpeas and broad beans, as well as other sources of edible



(See The Global Feed Leader, page 18)



Sustainability in Action

SINCE 1980, U.S. SOY FARMERS HAVE:

- Reduced greenhouse gas (GHG) emissions per bushel by 42%
- Improved irrigation water use efficiency by 61%
- Increased land use efficiency by 47%
- Improved energy use efficiency by 45%
- Improved soil conservation by 35%
- Increased soy production by 130%

The Global Feed Leader

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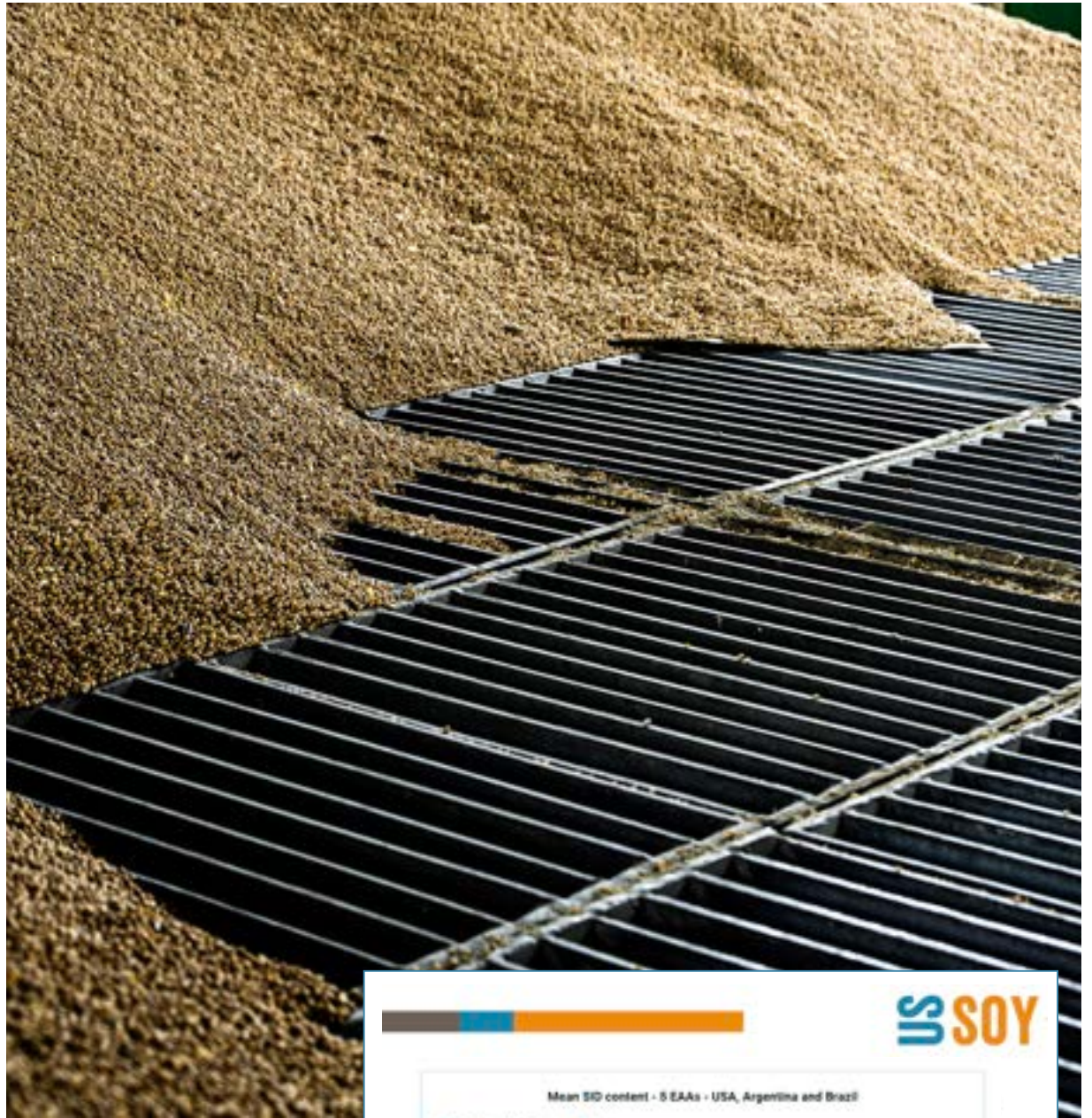
oil such as rapeseed oil, palm oil and sunflower oil, according to Blonk Consultants Agri-footprint.

Since 1980, U.S. soy farmers have reduced greenhouse gas emissions per bushel by 42 percent, and their sustainability goals include an additional 10 percent reduction by 2025.

Between 1997 to 2017, U.S. forest land increased by 742,000 hectares while crop land decreased by 3.6 million hectares, according to the U.S. Department of Agriculture's. Natural Resources Conservation Service (NRCS) Natural Resources Inventory conducted in 2017. And approximately 15 percent of U.S. farmland is currently set aside for conservation, forest development and wildlife habitat.

Sustainability is at the root of every feed ingredient produced from U.S. soy as we learn to do more with less.

From its optimal nutritional bundle to the superior animal performance that comes with feeding it, U.S. soy is the premier choice for animal nutrition worldwide.



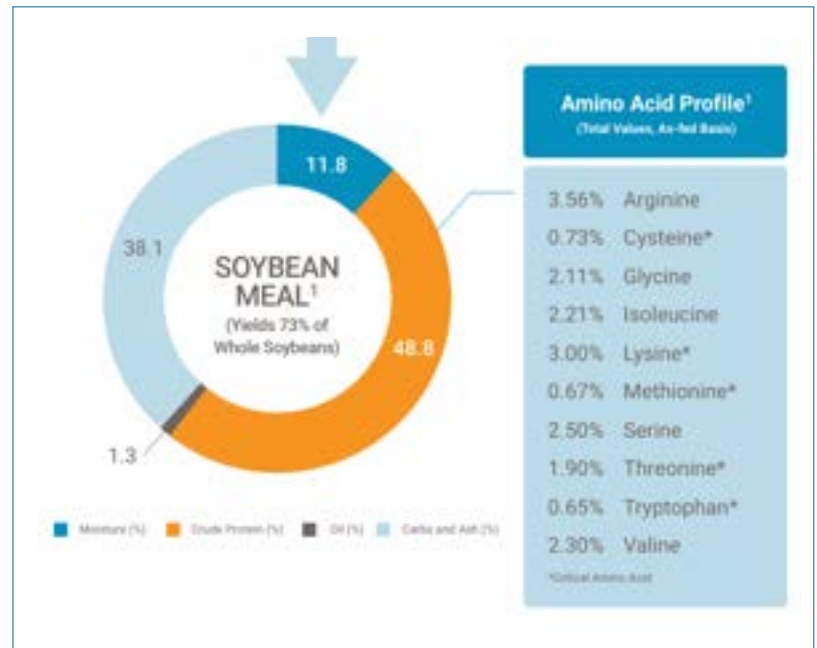
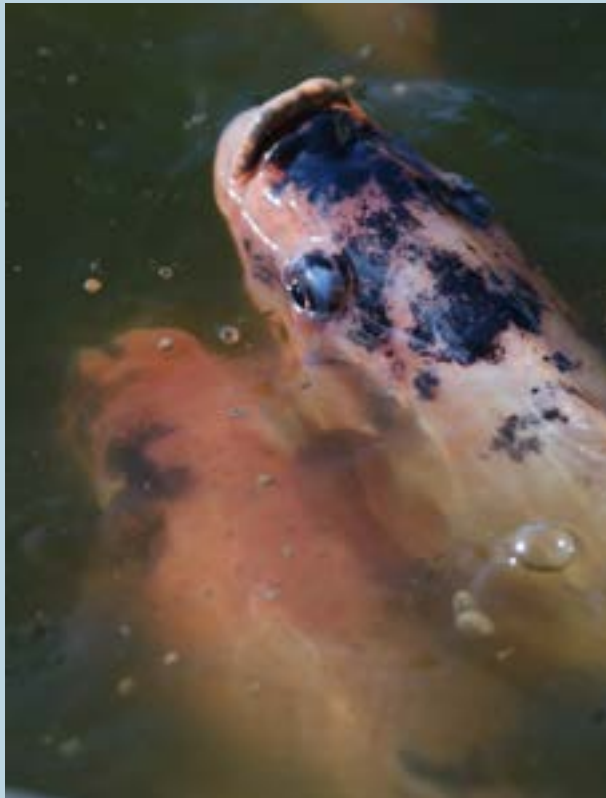
Outstanding in Aqua

As a feed ingredient and fishmeal replacement, U.S. soy excels for the aquafeed and aquaculture industries, two of the fastest-growing agriculture segments worldwide. Aqua nutritionists value soy for its amino acids, phospholipids, protein, unsaturated fats and high digestibility. Recent comparative studies by Wittaya Aqua prove out the superior performance of U.S. soy in aquafeeds.

At Soy Connex 2024, Dr. Flavia Damasceno, Feed Formulation and R&D Specialist, reported that in species such as tilapia and whiteleg shrimp, U.S. soy supports higher fillet yields, better feed efficiency and improved growth rates, contributing to higher profitability.

A bio-economic analysis showed a profit margin for U.S. soy of 13.4 percent compared to just 9.5 percent for Argentina and 4.9 percent for Brazil.

As Damasceno said, "U.S. soy stands out as a cost-effective and sustainable choice, offering superior profitability in aquaculture operations compared to soy of other origins."





Monarch Butterfly

TO RECEIVE FEDERAL PROTECTIONS

Photo Credit: Thomas Dunkerton (USFWS)

By Corey Lacey, Ph.D., ISA
Environmental Policy Manager

The monarch butterfly, likely the most famous butterfly in North America, will soon receive federal protections under the Endangered Species Act (ESA). In December, the U.S. Fish and Wildlife Service (FWS) decided that listing the monarch under the ESA as a threatened species was warranted, proposing a rule to list the species in the Federal Register on December 4.

This decision comes a decade after initial efforts by environmental groups (among them, the Center for Biological Diversity, the Center for Food Safety and Xerces Society) petitioned the agency to list the butterfly in 2014 and provided data about the decline of the monarch population. With Illinois included in much of the monarch's migratory range, many challenges might face Illinois soybean farmers once this rule is finalized. A top concern is

how the U.S. Environmental Protection Agency (EPA) will interpret the listing in light of recent changes to pesticide policy, such as the Vulnerable Species Action Plan, the Herbicide Strategy and other expected pesticide strategies the EPA is set to release in the next 12 to 24 months. Further, the listing, will require federal agencies to consult with FWS to avoid actions that might harm the monarch, meaning there could be unforeseen implications for farmers partic-

ipating in programs from the U.S. Department of Agriculture and other federal agencies.

Threatened Listing

A species listed as "threatened" receives federal protections under the ESA similar to those of "endangered" species. However, under section 4(d) of the ESA, the FWS has the flexibility to create species-specific rules that include exceptions that minimize disruptions to

(See Monarch Butterfly, page 22)



The U.S. Fish and Wildlife Service has 12 months to finalize the monarch's listing as a threatened species. During this period, Illinois soybean producers can share their opinions regarding the decision, stressing the importance of balancing conservation needs with economic implications for farmers.

Monarch Butterfly

(continued from page 21)

agriculture. For example, the proposed rule includes exceptions for activities like habitat management (mowing and haying) and routine agricultur-

al activities (plowing, disking, drilling, mechanical manipulation of the land). Concerningly, the FWS did not include an exception for agricultural pesticide use. Instead, they requested public comments specifically about whether the rule should include pesticide-specific restrictions or exceptions, and if the EPA's

current efforts are sufficient to protect the species from pesticide exposure.

The Role of Farmer Voices

The proposed listing and 4(d) rule have not been finalized. Following the announcement, the FWS opened a 90-day (Dec 12 to March 12) period for public comment.

Farmers can read the proposed rule details, documents, and submit comments at www.regulations.gov by searching under docket number FWS-R3-ES-2024-0137. Farmers looking for advice or guidance in offering public comments can contact me directly (corey.lacey@ilsoy.org) with questions. FWS has at least 12



Milkweed is vital for monarch caterpillars, while nectar-rich flowers support adult butterflies. Planting both provides essential habitat and can be done in field borders, near buildings or in other unused areas.

months to collect and review public comments, analyze additional science and engage in discussions with stakeholders. Throughout this period, Illinois farmers can share their perspectives about the listing decision and rule, stressing the need for the agency to balance conservation needs with economic implications for farmers. State associations such as Illinois Soybean Growers will be working hard to understand and communicate the implications of the proposed listing to our farmers and relay those stories back to the FWS. It's important to also share success stories illustrating how farmers already are working to conserve monarch butterflies and other pollinators on their farms.

What Can Soybean Farmers Do

While these rules are being finalized, there are some things Illinois soybean farmers can do:

1. Plant Milkweed and Nectar Plants: Milkweed is essential for monarch caterpillars. Planting native milkweed species provides critical habitat for their growth and development. Adult monarchs need nectar from flowers. Planting a variety of nectar-rich flowers supports adult butterflies throughout their lifecycle. Plantings can be made in field borders, near buildings and in other out-of-the-way areas.

2. Pesticide Use: Illinois farmers should stay up to date on pesticide label changes as ESA mitigations begin appearing on labels moving forward.

3. Speak Up: Farmers can participate directly in public comment periods, webinars and listening sessions hosted by the FWS over the coming months. They can also become members of organizations such as Illinois Soybean Growers, which actively engages policymakers on behalf of Illinois farmers on this and other issues.



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Global Middle Class Opens Doors for Soy

Here's a staggering statistic worth noting: By 2030, up to 5 billion people are expected to be part of the global middle class, according to McKinsey Global Institute. For Illinois farmers, that means a rapidly growing base of potential customers who enjoy eating meat raised on feed made with soybeans.

"It is likely that Bennett's law will prevail, regardless of current efforts to reverse the global protein transition and replace desirable animal proteins with manufactured plant-based foods," writes researcher Adam Drewnowski of the Center for Public Health Nutrition at the University of Washington in a February 2024 article for the journal *Current Developments in Nutrition*.

Bennett's law refers to the idea that as more people enter the middle class, they eat fewer starches and more high-quality protein from animals.

"It may take decades for LMIC [low- and middle-income countries] to reach the peak meat consumption that is currently the privilege of some countries that are farther along the economic scale," Drewnowski continues. In particular, he predicts the global middle class to eat more chicken, pork and dairy.

Countries To Watch

Some regions such as Asia and Southeast Asia will assume big chunks of the middle-class pie. For example, China is expected to have up to 1.2 billion middle class residents by 2027, according to a 2020 report from The Brookings Institution titled, "China's Influence On The Global Middle Class." That would represent about a quarter of all middle-class members globally.

Factor in India, and those two nations alone will command about two-thirds of the world's middle class, a NASDAQ analysis notes.

Yet other regions will contribute impressive growth, as well. By 2030, Africa is expected to have 43 percent more middle-class households than it does today, while the Middle East is anticipated to see growth of 39 percent. Those data points from Visa Navigate, an insights division of Visa that analyzes trends across Central and Eastern Europe, the Middle East and Africa (CEMEA). These regions will also boast one in four of the world's Gen Zers compared to the one in 10 who will live in North America.

"Simply put, it has the working people to support supply, and the households that will have new power to spend," states Mohamed Bardastani, a Visa



CEMEA Economist, in a Visa Navigate report. “This is a region with opportunity ahead of it—and it is poised to seize it.”

All of that increased growth will create opportunities for Illinois soybean farmers to meet demand while continuing to lead in addressing pressing needs for environmental stewardship.

“The scale of the expanding consumer class, while a driver for economic development, is going to increase demand for food, water and energy substantially in parallel, bringing resource and environment challenges in the long run,” cautions the European Commission. It has labeled global middle-class growth as a megatrend—“a long-term driving

force that is observable now and will continue to have a global impact in years to come.”

Soybean Potential and Challenges

All that expansion of the world’s middle class is expected to bring good news for soybean producers.

By 2031, the global soybean industry is projected to reach a value of \$278 billion, up from \$155 billion today, according to an August 2024 article titled “The rise of Soybean in international commodity markets: A quantile investigation,” published in the open-access online journal Heliyon.

Yet global growth brings with

it the reality of global complexity that can shape demand and prices for soybeans in a hurry. The Heliyon article analyzed the effect of shocks such as COVID, U.S.-China trade conflict and the Russia-Ukraine war on commodity prices.

“These events underscore the importance of understanding and managing interconnectedness and risk spillovers in an increasingly complex and unpredictable global market,” the authors note.

Prioritize Sustainability

Continuing investment in environmental stewardship amid a changing climate and severe weather risks also will bring added value for farmers.

Countries around the world increasingly prioritize stewardship when procuring soybeans.

Among the recommendations of researchers in a February 2024 report from the International Institute for Sustainable Development titled “Soybean prices and sustainability” are:

- Improved crop production strategies
- Introduction of climate-resilient cultivars capable of handling extreme heat and water stress
- Boosted nutritional value and reduced input dependence via biotechnology solutions
- Diversified crop rotations
- Heightened soil fertility through reduced tillage and biologically sound management practices

Illinois Soy Looks Ahead

Several national and state-level initiatives aim to help Illinois soybean farmers meet the needs of the growing global middle class. For example, the U.S. Soy Sustainability Assurance Protocol (SSAP) provides customers with confidence, data, and insights on the sustainable production practices used to grow the soybeans they buy.

In Illinois, ISA’s Market Development team keeps track of metrics illustrating the inroads in reaching new and expanding markets. Among those metrics, available for review on ISA’s website, are:

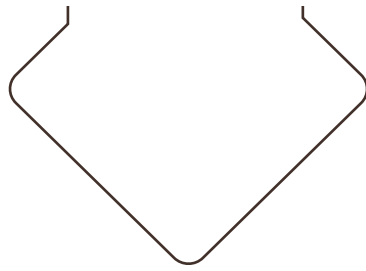
- Increase Illinois soybean bushels exported to existing and new markets by 15 percent annually
- Establish 300 annual touchpoints with existing domestic and international buyers
- Establish 25 annual touchpoints with new domestic and international buyers

As more people around the world begin to experience new economic capacity and choice, ISA’s leadership and farmer-members will continue leading by example. This includes:

- On-farm hosting of international buyers to Illinois operations prioritizing the sustainable, high-quality product that international buyers demand
- Trade missions to emerging global markets to listen and better understand what’s needed to satisfy—and even exceed expectations—for Illinois soybean customers
- Continued investment in achieving the sustainability expectations of buyers
- Ongoing research to improve the quality and nutritional value of soybeans, among other customer-facing benefits

At the end of the day, the U.S. soybean industry can be confident in its approach to meeting the needs both of animal agriculture and of alternative protein providers. In turn, those buyers’ efforts will meet the growing middle-class appetite for high-quality protein.

“The soy checkoff partners with the American Soybean Association to support the U.S. Soybean Export Council to build customer preference, improve value and enable market access for U.S. Soy,” notes United Soybean Board on its website. “Progress made by these organizations affirms the U.S. soybean industry’s position as a preferred supplier despite increased global export options from other soybean-producing countries.”



Global Markets, Local Impact

In today's volatile agricultural markets, Illinois soybean farmers face challenges that demand resilience and strategic action. Global competition, fluctuating demand and political dynamics can all create obstacles for soybean exports. Yet trade remains a cornerstone of the Illinois soybean economy. Farmers here produce nearly 600 million bushels of soybeans annually, with over half destined for export markets. During tough times, advocating for robust trade policies and promoting the value of Illinois soy can make a world of difference—not just for individual operations, but for the entire agricultural community.

The Importance of Trade and Exports

Global markets are crucial to Illinois soybean farmers' success. Soybeans are in demand worldwide and serve as a vital ingredient in livestock feed, biofuels and human food products. Key trading partners, such as China, Mexico and Southeast Asian nations, provide reliable demand for U.S. soybeans and soybean meal. Without access to these markets, the economic pressure on local farms increases, with a ripple effect across rural communities.

Exports also create value for soybeans by connecting Illinois farmers with customers who depend on high-quality soy. In recent years, however, trade disputes and logistical challenges have highlighted the importance of strengthening existing trade relationships while seeking new opportunities.

Advocating for Trade

Soybean farmers are not just producers—they are a voice for an industry that feeds and fuels the world. Education can take many forms, including engaging conversations with policymakers and participating in trade missions and farm visits that showcase the excellence of Illinois soy. Here are three ways farmers can strengthen their advocacy efforts:

1. Share Your Story:

Share how trade impacts your farm's success and your community's well-being. If you are a farmer willing to share, the Illinois Soybean Association (ISA) would love to hear from you! Each year, ISA hosts over 250 individual customer from around the world. We use these farm visits as an opportunity to share our story, explain how our soybeans get to their table and learn what their challenges are so we can improve our relationship. We would love for our farmers to host trade teams, write letters, participate in media interviews or use social media platforms to amplify their voices and educate others on the importance of trade.

2. Engage in Discussions:

Joining organizations such as ISA offers farmers a platform to influence trade policy. By engaging with other trade organizations, farmers can contribute to conversations that shape international agreements and export priorities.



EILEEN PABST | INTERNATIONAL MARKETS MANAGER | ILLINOIS SOYBEAN ASSOCIATION

3. Support Infrastructure Improvements:

Here in Illinois, 60 percent of our soy is exported, and a strong supply chain makes those exports move as efficiently as possible. ISA strongly supports investments in transportation such as railroads, river systems and port facilities to ensure Illinois soy reaches international buyers competitively. Farmers can collaborate with trade organizations and industry groups to prioritize these critical infrastructure projects.

Turning Challenges into Opportunities

Although tough markets test even the strongest farming operations, they also present opportunities for growth. Illinois soybean farmers can lean on their industry's reputation for quality, consistency and innovation to stand out in global markets. By addressing sustainability concerns and producing soybeans with higher protein and better digestibility, Illinois farmers have the tools to meet evolving market demands. Illinois farmers should be proud of the standard they bring to the table from sustainability to protein to yields. Illinois is also situated in a great location for producing specialty soybeans. This includes soy that is food grade, non-GMO and more. I would recommend reaching out to your local grain buyer to understand premium priced options in your area.

Partnering for Success

Organizations such as ISA play a critical role in opening markets and supporting farmers through resources and advocacy. By connecting with such organizations, farmers can access programs that promote Illinois soy globally, including trade missions and marketing campaigns. Many of our strongest relationships with global partners have resulted from farm visits with customers or trade shows around the world. In one location, we can meet with customers from several of our top importing countries. From those conversations, we gain trust and share knowledge that leads to the purchase of Illinois soybeans. ISA offers guidance for soy users looking to buy from Illinois as well as for farmers looking to sell.

A Strong Future for Illinois Soy

In challenging times, Illinois soybean farmers have always risen to the occasion, leveraging their innovation and tenacity to secure new opportunities. By advocating for trade and exports, they not only protect their livelihoods but also contribute to a stronger agricultural economy that benefits everyone.

Now more than ever, farmers must champion their role in the global supply chain and ensure that Illinois soy remains a staple in markets worldwide. Together, through promotion, engagement and innovation, Illinois soybean farmers can turn challenges into a thriving future.



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