

IDAHO GRAIN

THE IDAHO GRAIN PRODUCERS ASSOCIATION MAGAZINE

WINTER 2013



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VIEWS

BY CLARK HAMILTON,
PRESIDENT



AFTER a whirlwind of a year, it's now my time to pass the presidency torch on to someone new to lead Idaho's premier organization for our state's wheat and barley farmers. The 2013 Tri-State Grain Growers Conference serves as the IGPA's annual meeting and it will be a time to reflect on the work we've done over the past year and set our compass on a new course for 2014.

As Jimmy Buffet once said, "All the stories we could tell". I have several stories to tell (and some I shouldn't) spanning my year as your president. Four years ago, I was approached by farmer friends of mine who requested I step up as a leader of this organization. While I was a member, I really didn't have a grip on all that the Association did for the Idaho grain industry and what being one of its leaders truly meant.

Needless to say I bowed to peer pressure and was elected as an officer representing District 4, a collection of counties in the upper Snake River Plain area. Being shoved into the limelight so abruptly was somewhat of a trial by fire as they say, and I was certainly a little naïve and apprehensive regarding my duty and responsibility. But my fellow farmer leaders from around the state were quick to get me up to speed and deal with all of my questions.

I've seen a lot, learned a lot and now understand and believe that this Association can really affect change and protect the livelihoods of Idaho wheat and barley farmers. It's a nice feeling to know that wherever you may farm, there are people who go to work every day with the goal of creating an environment to keep you in business and help you earn a profit once in a while.

As I close the book on my year as president, I feel pretty good about our accomplishments. We are very close to passing a new Farm Bill into law. The IGPA's hand in its development started over two years ago, and our organization has spent considerable effort to ensure the ingredients in the mix are favorable to Idaho farmers. From my count, the last two years have meant at least four trips to Washington, DC, an additional six trips to other meetings of our national grain affiliates, and countless conference calls to create a Farm Bill that is responsible to taxpayers and effective for farmers.

In May the IGPA, in partnership with the Idaho Wheat Commission, created an endowed academic scholarship at BYU-Idaho in Rexburg. I spearheaded this project because our industry clearly needs more homegrown professionals in production agriculture and anything we can do to incentivize people to choose that occupation path we should. The first scholarships should be awarded next year.

Just recently the IGPA chose to create our first political action committee (PAC) to support pro-agriculture candidates for federal office. Since 2010 we've had a PAC for state candidates, but never dabbled in the congressional arena. Our experience from walking the halls of Congress told us one thing: we as grower leaders need to control our own destiny instead of letting others do it for us. We created the Idaho Grain PAC in September as a vehicle for farmers to engage directly in the election process.

Finally I'll mention the growth of our state association. As a farmer in eastern Idaho, I've found that the majority of my friends and colleagues are not engaged in their industry outside of their own fence line. Most are aware of groups like ours and our two commissions, but truly have no idea that there is an entire network of people and organizations working to support them. The apathy I often get from growers can be really frustrating. Heck, I was apathetic myself until I was asked to get engaged and finally did.

I've made a point to use my contacts, friendships and other relationships to minimize some of this apathy and to grow the IGPA's reach and strength. I'm hopeful that soon we can establish an organized group of grain farmers in Jefferson County. There are some motivated and interested farmers there. Over the past year, the IGPA's Board of Directors has seen transition to many new and younger faces. It's encouraging to see.

As I close out my presidency at this year's Tri-State Grain Growers Convention in Spokane, Washington, I've definitely learned much and have much to be thankful for. First and foremost, I need to thank my wife Kristi for supporting me in doing this. I've missed a few important events with her and our kids, but we have also got to travel together for my duties and we've had a lot of fun.

I need to thank my neighbors and business partners who I have relied on to take care of my farming duties while I'm on IGPA business, and also those I've put pressure on to sponsor, donate to, or attend various IGPA events. Your time and money was well spent and I hope you continue your support of groups like the IGPA.

Last but not least, thanks to the IGPA. The experience has opened my eyes to the bigger picture and my place in it. I'm proud of this industry and know I will be passing the torch on to dedicated people.

Happy Holidays to you and yours!

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Look for these symbols in headlines throughout the magazine to see at a glance whether an article pertains to wheat issues, barley issues, or both.



WHEAT



BARLEY



WHEAT & BARLEY

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Roots and Shoots

At a recent meeting in Boise of the IGPA Board of Directors, a compelling speech by a past president of our organization left an indelible message in the minds of the farmers sitting around the set of tables.

The past six years has brought significant change to the composition of the IGPA board. Attrition has accounted for a roughly 60 percent changeover in the Board's farmer leaders. It was high time that these shiny new faces fully understood their duties and place in our organization and what our

organization is all about.

Led by association management expert Sara Schmidt, the orientation session served as an orientation of board members to the operations of the IGPA. Prior to the meeting, Sara and I had reached out to IGPA past president Duane Grant to talk about the responsibility of each director and how they can be effective in their role. His fifteen minute speech certainly left an impression on those assembled.

When I asked my Sara to identify a past leader of the IGPA, I immediately thought of Duane, a selfless volunteer on many boards and committees in his career as a diversified farmer and owner of Grant 4-D Farms in Rupert. However even as the thought crossed my mind, I knew Duane's typically hectic schedule would prevent him from coming. Much to my surprise he accepted!

Duane began by congratulating the IGPA on its youthful composition and compared it to his tenure as an executive officer from 1998 to 2002. He explained his philosophy that board members are like "Wikis" (i.e. Wikipedia), basically a collector of knowledge who then dispenses it at board meetings for the benefit of the organization. He added that for board members to be effective, they must be fearless and speak their mind.

What stuck out to me from within Grant's words of wisdom was his metaphoric description of our organization and the leaders of it. He reminded us that our organization is composed of the "grassroots" farmer-members. If our general members are the "roots", then our board directors are logically the "shoots". The shoots are to use what the roots supply them from the ground or base and take those nutrients or knowledge to their highest use or potential.

Boy, that message really hit home for me and I think the entire board. I had not heard of such an apt description as Duane had conveyed. It was right on the money and a great message for our new board members to hear, especially from a peer.

Every day I encounter a farmer base that is independent by culture, busy with work, family and life in general. Really no different than ourselves and our neighbors. In light of the tough demands on our time and talent, Grant's message was simple: the role of a board member is not to be dead weight.

The IGPA is only effective as its board and if members of the board do not embrace their role as a "shoot" from its "roots", then those individuals are not contributing to the organization's success. It was a critical message. One that I think encapsulates the challenge facing American agriculture today.

If farmers do not unite as roots; if the shoots do not collect the "nutrients" from its roots to maximize their potential; then farmers and the agriculture industry will wither and die over time.

I thank Duane for his commitment to the success and progress of the IGPA. He is clearly a root that became a highly successful shoot. I hope other shoots will have the courage to step forward in the years to come.



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Monsanto Fund Shells Out \$55,000 to Idaho School Districts

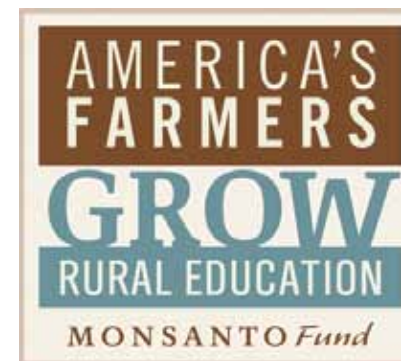
Money to support math and science enrichment

A PROJECT seeking to promote student learning in the sciences is engaging farmers, farm families and their communities by literally paying dividends.

The "America's Farmers Grow Rural EducationSM" (AFGRE) effort recently announced that 181 rural school districts across the country were chosen to receive grants of up to \$25,000. In total, \$2.3 million was distributed to support math and science classrooms.

Sponsored by Monsanto's nonprofit philanthropic arm, the AFGRE program gave farmers in 1,271 eligible counties the opportunity to nominate school districts for a grant to enhance math and science education. More than 73,000 farmers submitted nominations to show community support for their area school districts.

Nominated school districts then completed grant applications in the spring. During the summer, a panel of educators reviewed and evaluated them based on merit, need and community involvement. The strongest submissions were sent to the America's Farmers Grow Rural Education Advisory Council. The Advisory Council, comprised of farmer-leaders with an interest in agriculture, education and community, selected the winning grant applications from this pool of finalists.



Four school districts in Idaho were awarded a combined total of \$55,000 for 2013. Those districts were:

- Caldwell School District #132: Canyon County, Caldwell, ID – \$10,000
- Gooding Joint District: Gooding County, Gooding, ID – \$10,000
- Valley School District: Jerome County, Hazleton, ID – \$10,000
- Parma School District: Canyon County, Parma, ID – \$25,000

"In the program's second year, a record number of farmers actively showed community support for their local rural school districts," said Deborah Patterson, the Monsanto Fund president. "Farmers recognize the importance of education and how math and science skills are used on a daily basis."

As part of a broad commitment by the Monsanto Fund to partner with farmers to strengthen rural communities, Grow Rural Education's goal is to give farmers the opportunity to be community advocates and improve the educational experience of the next generation.

To view a complete list of winning school districts, official rules and America's Farmers Grow Rural Education information, visit www.GrowRuralEducation.com. A list of eligible states, counties and CRDs can also be found on the site.

About the Monsanto Fund
The Monsanto Fund, the philanthropic arm of the Monsanto Company, is a nonprofit organization dedicated to strengthening the farm communities where farmers and Monsanto Company employees live and work. Visit the Monsanto Fund at www.monsantofund.org



The Affordable Care Act – A Primer

By Tricia Carney, State of Idaho Department of Insurance



THE Affordable Care Act (ACA), or Obamacare, has left many people confused about how it affects them. The Idaho Department of Insurance is preparing a series of articles and website links to help consumers understand the implications of the ACA.

“Informed consumers will be better prepared to make the best choices for their individual situations,” Department of Insurance Director Bill Deal said. “We encourage Idaho citizens to learn all they can about the ACA and how it may impact them. We have information and links on the Department website to help consumers wade through the many changes associated with health care reform.”

Although aspects of the ACA were challenged by the states – including Idaho – the impact is that most all Americans are required to have health insurance. Many provisions have already been implemented. More changes will take effect on January 1, 2014, including:

■ **Idaho’s state-based Health Insurance Exchange** – a marketplace for individuals (many of whom will qualify for subsidies or tax credits) and for small employers;

■ **Minimum coverage requirements** – policies will be required to cover an established list of essential health benefits;

■ **Individual mandate** – you will be required to buy health insurance if you don’t have other qualifying coverage such as Medicare, Tricare, Medicaid or employer-sponsored coverage, or be subject to a penalty.

Individual insurance plans in 2014 may look different from current coverages. Costs are expected to increase because of expanded coverage, broadened benefits, changes in how insurers are allowed to calculate premiums, and increased taxes and fees on health insurance required by the federal government.

Insurance rates are affected by the makeup of individuals in the pool of insureds. In a pool comprised of young, healthy insureds, the rates can be lower because risk is lower. In 2014, previously uninsured consumers will become a part of the insurance pool. All consumers will be eligible for health insurance without restriction due to health history or preexisting medical conditions, contributing to an increase in premium rates.

Insurers also determine rates based on the age of the insured. Age groups – or bands – are being compressed from five bands to three – resulting in higher costs for those in younger age groups.

Individuals and families without access to qualified health insurance through an employer may be eligible for subsidies to help them pay for

insurance through the Idaho Health Insurance Exchange. These subsidies will be available through the Exchange for people with incomes from 100 percent to 400 percent of the federal poverty level.

Small employer groups with 50 or fewer employees will be eligible to buy through the Idaho Health Insurance Exchange. Groups with fewer than 25 full-time employees may qualify for an employer tax credit.

The Department of Insurance encourages Idaho citizens to visit the website, www.doi.idaho.gov, to learn more about the ACA and to keep abreast of upcoming changes. Consumers may call the Department, 334-4250 in the Boise area or 800-721-3272 toll-free statewide.

About the Department of Insurance
The Idaho Department of Insurance has been regulating the business of insurance in Idaho since 1901. The mission of the Department is to equitably, effectively and efficiently administer the Idaho Insurance Code and the International Fire Code. For more information, visit www.doi.idaho.gov.



Idaho Warehouse Program

State of the Industry

By Dave Ogden, ISDA

MOST reported news is usually BAD in some way. In this article I would like to share what I consider to be GOOD NEWS. As a state regulator of grain warehouses, commodity dealers, and seed buyers, I usually don’t want to overstate the positive and always speak conservatively when giving opinions about how good things are.

Last year Idaho grain buyers added more than a million bushels of new storage capacity in order to serve Idaho producers better. Some unused facilities were acquired and pressed into service. There have been a few new companies licensed and some have new locations. All this reflects the past growth and profitability of the grain and seed business in Idaho. As producers continue to raise the highest quality of crops, the buyers have increased investment in facilities in order to handle the increased volume of production and to better preserve the high quality of the crops delivered to them.

Producers can sell to Idaho licensed buyers with confidence due to the strong financial position of the buyers verified by financial statement reviews and on site financial reviews conducted by Warehouse Program inspectors. In the event a licensed buyer has financial difficulties for some unforeseen reason, producers are protected up to 90% of the value of their crop by the Commodity and Seed Indemnity Funds. The Commodity Indemnity Fund has its maximum value of \$12 million and is the third largest in the country. The Seed Indemnity Fund has \$5.7 million which is a fair amount relative to the risks involved. To have the protection of the funds a producer must sell to an Idaho licensed buyer. You can verify a buyer is licensed by calling 208-332-8660, or by going to www.agri.idaho.gov and clicking under the Warehouse link and listed buyers.

As always we encourage producers to sell to Idaho licensed buyers, most located in Idaho, some located outside of Idaho, and some co-licensed with Washington State. Best wishes on a 2014 growing season.



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IGPA, Other Wheat Leaders Gather in Portland for Fall Meetings

Idaho Grain Producers Association officers joined wheat grower-leaders from around the country at the joint National Association of Wheat Growers (NAWG) and U.S. Wheat Associates (USW) fall meeting held Nov. 4-6 in Portland, Oregon. The annual business meetings included a wide ranging review of financial and policy topics.



represented Idaho's wheat growers in discussions on the Farm Bill, rail transportation, issues impacting the Columbia and Snake River systems, among other topics. Making a special report to Cellan's committee was IGPA past president Wayne Hurst of Burley. Hurst discussed his role representing American agriculture as a member of the federal Surface Transportation Board's Rail-Shippers Transportation Advisory Committee.

Serving as chairman of the NAWG Research and Technology Committee, IGPA Vice President Robert Blair (Kendrick) led a discussion on biotech wheat research, the food labeling ballot initiative in Washington State and several other hot topics.

A member of the NAWG committee on Domestic and Trade Policy, IGPA Secretary/Treasurer Sid Cellan (Soda Springs)

Also representing Idaho's grain producers at the national meeting were IGPA past presidents Scott Brown (Soda Springs) and Joseph Anderson (Genesee). Brown continues to serve on the NAWG Budget Committee which met on Sunday, November 3 and reviewed

NAWG's financial situation.

The NAWG Board of Directors accepted several resolutions from its committees and the two standing joint committees with USW that focus on biotechnology and trade policies. Two new resolutions restated existing policy outlined in the NAWG/USW Biotechnology Position Statement, on biotech food labeling and threshold levels for adventitious presence.

Other resolutions expressed support for ongoing trade negotiations with the European Union; on tariff rate quota utilization for World Trade Organization member countries; and supporting trade promotion authority (TPA).

The NAWG Board also accepted the organization's annual audit, a revised budget and a revised industry partners program, and it encouraged increased support for the Wheat Innovation Alliance.

Washington State Voters Reject GMO Food Labeling Ballot Measure

On November 5, Washington voters rejected a measure to label genetically modified (GM) foods and foods made with GM material.

The ballot initiative known as I-522 failed by an approximately 54 percent to 45 percent margin with about 30 percent of ballots, which are submitted by mail, counted. The measure would have made Washington

the first state to implement GM labeling and sparked a heated debate in the state, as did a similar failed measure in California in 2012.

An estimated \$30 million was spent on advertising and other public messages between the two campaigns. The "No on 522" campaign took issue specifically with exemptions that appeared in the initiative, for instance foods purchased at restaurants, alcoholic beverages and meat and dairy products from animals fed GM grains.

Current IGPA policy expresses support for commercialization of transgenic wheat and barley through public and private research efforts upon customer approval of acceptable tolerance levels.

NAWG and U.S. Wheat Associates policy supports the introduction of biotechnology into the wheat crop and voluntary labeling of food products that is consistent with U.S. law and international trade agreements and is truthful and not misleading.



Farm Bill Talks Optimistic

Congressional agriculture leaders continue to meet in hopes of finding agreement on a new Farm Bill with Democratic agriculture leaders in both House and Senate chambers expressing cautious optimism that a conference product could be ready by Thanksgiving.

The farm bill conference committee met officially for the first time on October 30, allowing the 41 Member group charged with finding an as-of-yet-elusive compromise to make their opening statements and offers.

As was expected, negotiations have



shifted from a public forum to private discussions led by Senate Agriculture Committee Chairwoman Debbie Stabenow (D-Mich.), Senate Ag Ranking Member

Thad Cochran (R-Miss.); House Agriculture Committee Chairman Frank Lucas (R-Okla.); and House Ag Ranking Member Collin Peterson (D-Minn.).

Both Peterson and Stabenow have said in recent press conferences that they seek a deal that would be mostly complete before the Thanksgiving break. Such a timeline would give the five-year legislation the best chance of actually being completed by year's end. That speed of progress, though, is predicated on compromises on several sticky issues, including Title I farm safety net programs and controversial nutrition and food stamp program spending.

Idaho Congressman Concerned Over Grain Inspection Disruptions

In a recent letter led by Washington Congresswoman Cathy McMorris-Rodgers, congressional Members expressed their collective concern to US Department of Agriculture Secretary Tom Vilsack over ongoing interruptions to official grain inspections at the Port of Vancouver in Washington State.

Idaho's own Congressman Mike Simpson added his voice to the chorus who strongly urged Secretary Vilsack to ensure that the Federal Grain Inspection Service develop a plan that would prevent future disruptions at Pacific Northwest grain export facilities so that farmers and agribusiness in the industry is not harmed.

The letter continued stating in part that: "Wheat growers play a significant role in the Pacific Northwest's economy — approximately 80 percent of wheat grown in the region is exported abroad with a significant portion going to Asia via export facilities in the Pacific Northwest. Japan, South Korea, and Taiwan pay a premium



for wheat from the Northwest because they know that not only is it a high-quality wheat, but through the years, the region has provided timely and reliable delivery.

Key trading partners, as well as farmers, grain handlers and exporters from the Northwest, depend upon accurate, timely, and cost-effective delivery of mandated official grain inspection and weighing services administered by FGIS

and its designated and delegated agencies. As such, it is imperative that we continue to assure all of our trading partners that the Northwest will continue to provide a reliable supply of high-quality wheat."

The IGPA appreciates Congressman Simpson's attention and leadership in this important matter and will be monitoring the situation with our grower and industry partners.

IGPA Officer Selected For Wheat Leadership Training Class



Sid Cellan

IGPA Secretary/Treasurer Sid Cellan will join a geographically diverse group of his peers for the 2013 class of the Wheat Industry Leaders of Tomorrow (WILOT) program. The class is set to meet beginning Nov. 16 in St. Louis, Missouri.

The training program, which is generously sponsored by Monsanto, is intended to teach leadership skills to growers who are new to serving in a wheat industry organization. The program's six-day agenda includes sessions on agriculture and food policy, media training, advocacy techniques, understanding the wheat industry organizations, establishing consumer trust, effectively using social media, and new wheat technologies.

"I'm humbled and excited to be selected for WILOT," said Cellan. "I've talked to several other Idaho growers who have participated in the program and they got a lot out of it."

Other wheat growers joining Cellan include: Brian Brooks, Walsh, Colo.; Sid Cellan, Soda Springs, Idaho; Rob Davis,

Larlan, Mont.; Jace Gibbs, Scott City, Kan.; Steven Parsons, Ducor, Calif.; Michael Peters, Okarche, Okla.; Eric Orem, Ione, Ore.; and Shayne Suppes, Scott City, Kan.

Also participating will be NAWG farmer-officers Paul Penner (Kansas) and Brett Blankenship (Washington).

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Idaho Wheat Commission

REPORT

TIMELY June rains on the Northern Camas Prairie and the Idaho Palouse resulted in a 2013 wheat crop in Idaho that was 5-10% larger than it would have been without those rains. Acres were down slightly in 2013 compared to 2012, but higher yields due to the rains accounted for the increase in total bushels.

The 2013 wheat crop tallied in at 101 million bushels, with 62 million bushels of winter wheat and 39 million bushels of spring wheat. Crop quality throughout the state was generally good to excellent. Irrigation water continued to be available throughout southern Idaho for the majority of the growing season. The wheat growing region most impacted in 2013 due to weather conditions was far eastern Idaho where many dry farms received insufficient rainfall and crops came in half or less of normal.

Based on a wheat crop of 101 million bushels, the Wheat Commission has set a FY'14 budget of \$3,137,057. The largest portion of this budget, \$1,664,739 or 53% will be spent on research. This includes variety development, pest management, production practices, capital items for wheat breeding programs in Aberdeen and Moscow, and other research projects.

The second largest budget category, \$729,785, is for grower information and education. This includes Cereal Schools, Direct Seed Workshop, Wheat Quality Workshop, PNW Export Tour, Domestic Education Tour, and scholarship programs for Idaho students in agricultural programs at the University

of Idaho, BYU-Idaho, and Utah State. Funding for Idaho's lobbying efforts through IGPA and NAWG is also part of this budget. The third largest budget category is Market Development and includes funding for U.S. Wheat Associates, Wheat Marketing Center, and PNW cooperative marketing work with Oregon and Washington.

In FY'13 the IWC provided \$90,000 in funding toward a cookie-cracker line at the Wheat Marketing Center, in cooperation with Oregon and Washington. The FY'14 budget includes an additional \$61,500 toward the cookie-cracker line. This new piece of equipment will allow additional products to be developed for the Asian market which uses soft white wheat from Idaho, Oregon, and Washington.

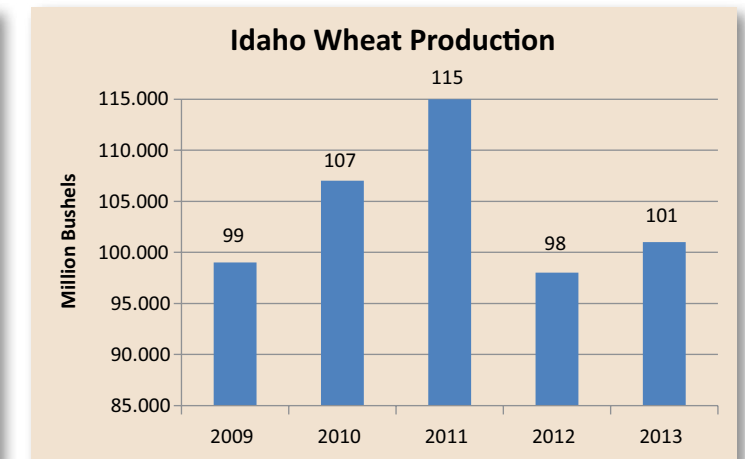
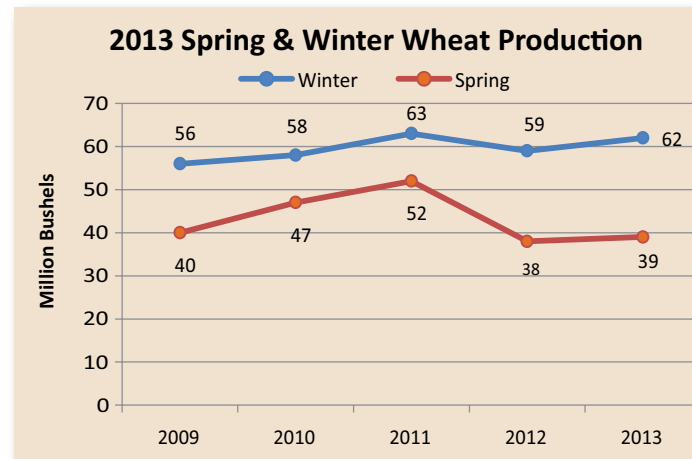
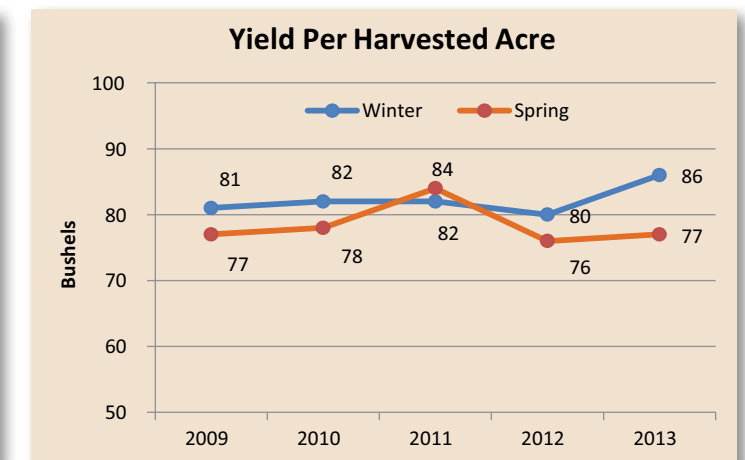
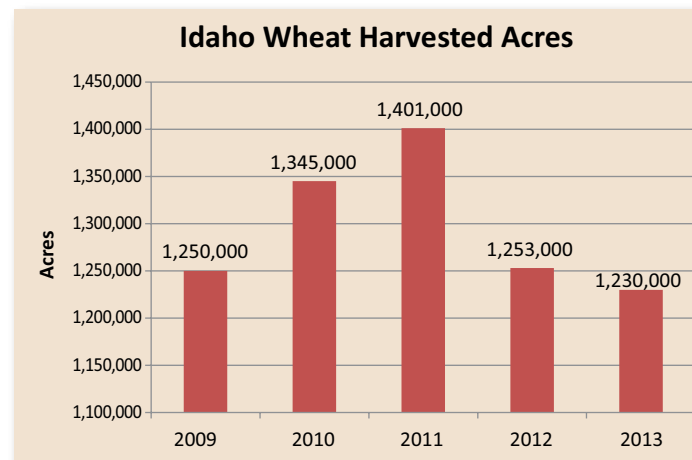
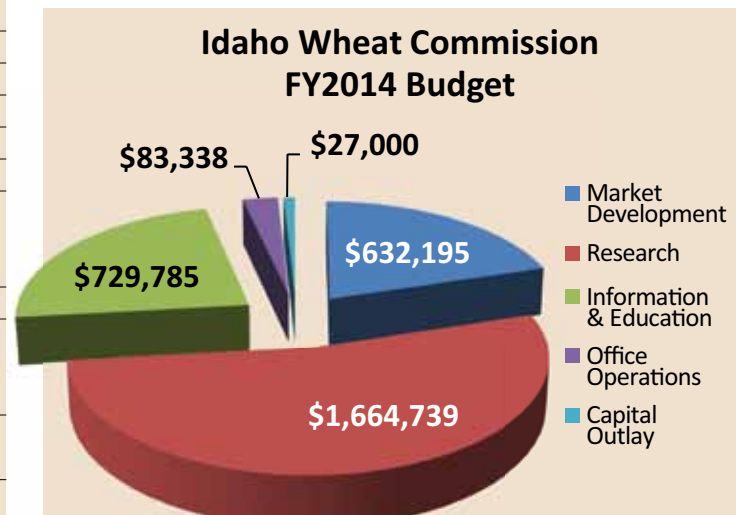
A new joint marketing initiative between Idaho, Oregon, and Washington for FY'14 is the hiring of a milling consultant to promote the sales of PNW soft white wheat into Latin American markets. Most tortillas are made with 100% hard red winter wheat, but research has shown that 20-30% soft white wheat flour blended with hard red winter flour results in a higher-quality flour tortilla. The blending consultant will convert customers to this blended tortilla product and the result will be more sales of soft white wheat from Idaho, Oregon, and Washington into the west coast markets of Mexico, Colombia, Peru, Ecuador, and Chile.

The University of Idaho/Limagrain/Idaho Wheat Commission wheat breeding partnership in Moscow is beginning to yield results. Several new varieties are working their way through the channels and are expected to hit the market in 2014 and 2015. Limagrain has also negotiated the marketing rights to UI Stone, a new soft white spring wheat with fusarium resistance developed by the Aberdeen breeding program.

Idaho has been a leader in educating growers on the benefits of direct seeding of wheat. The IWC will host its sixth annual Direct Seed Workshop in Idaho Falls on March 6, 2014. Attendance at this grower education event continues to grow illustrating the strong interest in the topic and the quality learning that is provided.

Having a grower voice in Boise and Washington, D.C. as legislation is created that affects the well-being of wheat farmers is important. A portion of the IWC budget goes to help fund NAWG for their D.C. lobbying and IGPA for their Boise efforts. One of the key lobbying tasks currently is renewal of a Farm Bill.

Idaho Wheat Commission FY2014 Budget		
CATEGORY	2013 Approved	2014 Approved
MARKET DEVELOPMENT	\$ 571,761	\$ 632,195
FOREIGN MARKET DEVELOPMENT INCLUDES ALL USW PROJECTS & TRADE TEAMS	294,000	286,800
DOMESTIC MARKET DEVELOPMENT	10,000	10,000
TRANSPORTATION	22,400	22,400
ADDITIONAL PROJECTS	139,870	204,771
SALARY/TRAVEL/EXPENSES	105,491	108,224
RESEARCH	1,671,605	1,664,739
VARIETY DEVELOPMENT — U of I	446,086	486,882
PEST MANAGEMENT — U of I	94,429	98,989
PRODUCTION PRACTICES/TECH	51,141	69,905
CAPITAL OUTLAY	72,000	83,411
ENDOWMENTS	150,000	300,000
ADDITIONAL PROJECTS	712,375	477,555
SALARY/TRAVEL/EXPENSES	145,574	147,997
INFORMATION & EDUCATION	716,006	729,785
PRODUCER INFO & EDUCATION	540,700	552,700
CONSUMER INFO & EDUCATION	48,100	45,000
SALARY/TRAVEL/EXPENSES	127,206	132,085
OFFICE OPERATIONS	76,383	83,338
OFFICE OVERHEAD	36,300	41,350
SALARY/TRAVEL/EXPENSES	40,083	41,988
CAPITAL OUTLAY	128,500	27,000
TOTAL BUDGET	3,164,255	3,137,057



Don't Take Our Word For It.....

Ask A Producer

Eric Odberg

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This Exactrix 8 year TAPPS No-tillage field represents the new best bet to drive No-till development into massive acres in the PNW.

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Perspective on the Soft White Wheat Market

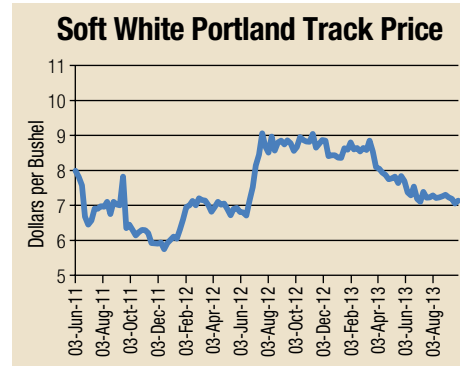
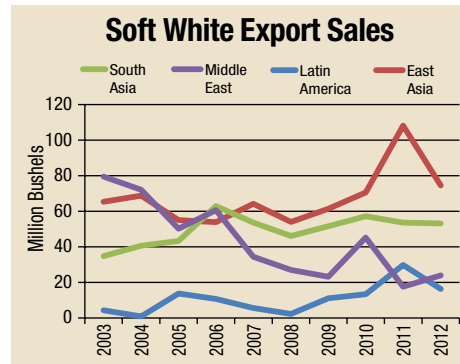
By Shawn Campbell, Assistant Director, US Wheat Associates West Coast Office

As final turn is made, the header on the combine raises, and with that, yet another Pacific Northwest wheat harvest comes to a close. Overall, farmers should be pleased by the quality of the crop they have just harvested. The crop's average protein level is reported at 10.1 percent, slightly higher than last year but equal to the five year average, and damage levels are reported as being low. There have been some reports of low falling number levels in eastern Washington, and while most definitely devastating to some farmers, it appears to be fairly localized. In fact, overall average falling number levels for soft white are higher this year than last year.

While the quality of this year's crop is high, and supplies are projected to be lower than last year's, farmers may be disappointed by the lower prices they receive. Over the past few years the soft white market has benefited a great deal from high corn prices which resulted in a large amount of high quality soft white sold as feed wheat to domestic feed mills, as well as Japan and Korea. In 2011/12 nearly 75 million bushels of soft white were sold as feed, 25 percent of the total use and 22 percent of exports. In 2012/13 soft white sold as feed dropped to nearly 30 million bushels, equal to 12 percent of the total use. These amounts would have likely been even higher if it were not for competition from cheap wheat supplies from India and Australia.

However, it appears that the boom in feed wheat sales is coming to an end this year. The USDA is projecting a record corn crop, and the resulting drop in corn prices has given soft white prices room to move downward as well. Soft white Portland track prices dropped sharply this year between March and July, falling by over 15 percent during that period. Since July soft white prices have remained stable, with only minor movements up or down. Corn has provided a floor price for wheat over the past few years, but with that floor now gone, wheat is left to its own fundamentals.

Wheat fundamentals aren't exactly supportive of soft white wheat prices either. The USDA is projecting a record world wheat crop this year, over 26.0 billion bushels. The world is literally awash with cheap wheat. Canada, the European Union, the Black Sea Region, and India have all harvested bumper crops. Australia, which has only just recently started harvesting, is also expected to have a large crop. All of these exporters



are geographically closer to many overseas markets, giving them a distinct advantage when selling based on price alone. There is even increased competition for soft white exports from within the United States. Soft red winter production this year is the highest it has been since 2008/09. Taken all together it is hard to find many analysts, if any, who are willing to project soft white prices going significantly higher any time soon.

There are some bright spots in the market. It is highly doubtful that the European Union and Black Sea Region can keep up their current pace of exports indefinitely, their tight beginning stocks won't allow it. This might make soft white more competitive into some markets later in the marketing year. As well, this year has seen the re-emergence of price premiums for club wheat and lower protein soft white, both of which represent marketing opportunities for a farmer to squeeze the highest value possible out of their crop.

Soft white has always been a wheat sold into two very distinct types of markets. On one end of the spectrum, it has a reputation for being the highest quality soft wheat available on the world market. On the other end, soft white tends to be relatively lower priced compared to other US wheats, largely thanks to its higher yields. This

results in soft white often being sold for its price, rather than its quality, when market conditions result in cheaper alternatives being unavailable. Two examples of this would be increased exports to Egypt when drought hits the Black Sea Region, and increased feeding of soft white when corn prices get too high.

The soft white market has changed a great deal over the past decade. Ten years ago a significant portion of soft white exports went to Egypt, Pakistan, and other Middle Eastern countries. They purchased soft white because it was the cheapest wheat available at the time. The fact that it was also high quality was just an added bonus. When a new supply of cheap wheat became available thanks to the emergence of the Black Sea Region as a major wheat exporter, soft white exports to the area dropped. Today the only consistent large buyer of soft white in the Middle East is Yemen.

Market development by US Wheat Associates for soft white has become increasingly focused on more quality oriented markets over the past decade as it has become harder to compete solely on the basis of price. These are markets that are willing to pay a premium for soft wheat because they view it as having higher value. Historically the largest markets for soft white (Japan, Korea, and Taiwan) fit into this category. However, these three countries are heavily developed with declining populations, and demand for soft white has been largely stagnant and may even decline in the future. Instead, the focus of future soft white export growth is on developing regions like Latin America, Southeast Asia, and China.

Latin America has risen to a small but growing market for soft white wheat. Guatemala, El Salvador, and Chile are all major buyers, and work is being done to increase exports to Costa Rica, Panama, Colombia, Ecuador, and Peru. While early work by US Wheat Associates focused on using soft white for traditional soft wheat products, efforts are now also being undertaken to promote soft white as a blending wheat in the region to help millers and bakers cut costs. This has included numerous trade teams visiting the United States and the utilization of milling and baking consultants to directly educate potential buyers.

Southeast Asia has been one of the largest growth markets for wheat demand in the past decade and is expected to continue to be in the future. While markets like the Philippines and

PNW Soft White Supply and Demand

Million bu.	2008	2009	2010	2011	2012	2013*
Production	199.9	198.0	234.0	264.2	220.1	209.4
Total Supply	220.8	239.5	281.8	320.7	255.7	238.8
Domestic Use	44.8	48.1	48.9	74.9	59.9	55.1
Exports	134.1	144.0	176.0	213.8	166.1	154.3
Total Use	178.9	192.2	224.8	288.8	226.0	209.4
Ending Stocks	41.5	47.8	56.6	32.0	29.8	29.4
Portland Price	6.24	4.91	6.76	6.69	8.08	N/A

SOURCE: USDA AND WASHINGTON GRAIN COMMISSION *Projected

Thailand have been long time consistent buyers of soft white, new markets like Indonesia, Malaysia, and Vietnam are all growing importers. US Wheat Associates have been very hands on in these markets, helping to introduce soft wheat products for the growing middle class and promoting the use of soft white wheat. This has not been without its challenges. Australia for a time was selling poor quality cheap wheat into the market that was

being blended into soft white, lowering the quality of the end products. US Wheat Associates helped introduce better rheological tests to the baking industry, forcing the millers to stop this practice.

Exporters have long seen China as a source of huge potential soft white exports, but efforts have always been stymied by government import quotas and concerns over TCK fungus. US Wheat Associates has been working with the three Pacific

Northwest wheat commissions to undertake TCK surveys of the soft white crop to help alleviate these concerns. US Wheat Associates has also been working with the private milling industry in China to help boost quota levels. Demand for soft white in China is so high that imports by the private milling industry have been growing since 2008/09. In 2012/13 soft white imports by China reached 4.4 million bushels, and are expected to be even higher this year.

Of the six US wheat classes, soft white has always relied the most upon exports with 75 percent of the crop exported each year. The soft white market of today looks very different than it did ten years ago, and the wheat market of tomorrow will likely look very different from today. Thanks to the efforts of the US Wheat Associates, Idaho Wheat Commission, Oregon Wheat Commission, and Washington Grain Commission farmers can rest assured that overseas markets will be looking for their high quality soft white wheat both in the present and in the future.

MARK YOUR CALENDAR • March 6, 2014 • Idaho Falls, Hotel on the Falls

South Idaho Direct Seed Workshop

The South Idaho Direct Seed Workshop held each year in March is tailored to address the educational needs of growers utilizing direct seed practices. Topics and speakers are chosen from feedback received from attendees.

Past topics have included fertility management in direct seeded grain, value of residue, equipment information, cover crops, chemical fallow and pest control options.



SAVE THE DATE!

More information on this year's agenda will be available soon. The Workshop is sponsored by the Idaho Wheat Commission. Contact Teresa Waterman, ts@idahowheat.org for more information.

Need for Increased Transmission Capacity

BY CINDY SNYDER



WALK through any Idaho farm home or office and you'll see a faint glow from devices recharging. Cell phones, tablets, laptops, computers, portable media players keep us connected with family and a plethora of production data on a field-by-field basis while increasing our dependence on the power grid. And that's had profound impacts on the utilities that provide electricity.

"It's not just the new business that starts or the new home that is built that impacts demand," said Margaret Oler, Rocky Mountain Power spokesperson, "it's also how electricity use has changed for our existing customers."

That's why Idaho Power is partnering with Rocky Mountain Power, Bonneville Power Administration and PacifiCorp to build approximately 1,300 miles of new high voltage power transmission lines from eastern Wyoming to northeast Oregon. The lines will pass over federal, state and private lands.

These proposed projects are the first major updates to the power transmission system in nearly three decades even though demand has increased by 25 percent over the same time. But critics say that according to Idaho Power's own long-term plan, the capacity isn't needed to service Idaho customers for another 20 years.

NOT ART

That new transmission lines often spark heated discussions is a trite statement, but nonetheless true. Paul Kjellander, president of the Idaho Public Utilities Commission, admits that no one would describe a transmission tower as a piece of art. However, high capacity, high voltage transmission lines are the means for providing the energy needed for economic development.

He's attended many public meetings regarding proposed transmission lines in which

concerned citizens express some version of the sentiment: "Yes, we know the line is needed but don't put it in my backyard."

Driving home after one of those meetings, Kjellander wondered just how close the nearest high voltage transmission line was to his own backyard. He was surprised to find a 345-kilovolt (kV) line just a block-and-a-half from his own back door.

"It's hard to say, 'You will begin to accept this and eventually ignore it,'" said Kjellander but he's seen it firsthand as he drives along the high voltage line near his home and sees new housing developments sprouting under the wires. "If we don't have the capacity, we will burn up the lines and no one has power. We don't want that."

SITING IS BIGGEST CHALLENGE

While concerns about property values and questions about how the presence of a transmission line will impact agricultural operations below are important, the biggest challenge for utilities when siting new lines is getting permission to cross federal lands.

That process actually begins with the utility's integrated resource plan that evaluates all aspects of power from generation to transmission to demand management programs. Idaho Power's plan, for example, is updated and published every two years.

Once the need to update the grid has been identified through the planning process, then the lengthy permitting process begins. Lynette Berriochoa, a spokesperson for Idaho Power, used the proposed Boardman to Hemingway line as an example.

Although the need to pursue Pacific Northwest transmission upgrades was first mentioned in 2000, the roughly 300-mile Boardman (OR) to Hemingway (ID) line

wasn't identified as a potential transmission path until 2006. The project is a joint effort with the Bonneville Power Administration and PacifiCorp.

While planning for the 500 kV line began in 2007, a draft Environmental Impact Statement from the Bureau of Land Management isn't expected until the spring of 2014 and the final statement may take several more years.

BLM is charged with heading up the National Environmental Policy Act (NEPA) process which pulls together all the land management agencies with jurisdiction along the proposed routes. It's not a process that is well-suited to multi-state projects. Planners are often frustrated that agencies are not held accountable to meet a schedule.

"It's a lengthy process," Berriochoa said.

Ideally, since transmission lines are a public good, those lines would cross public lands; especially in Idaho where 60 percent of the land is federally owned. However, public land that is identified as habitat for an endangered species or a species of concern is no longer accessible for a power line project.

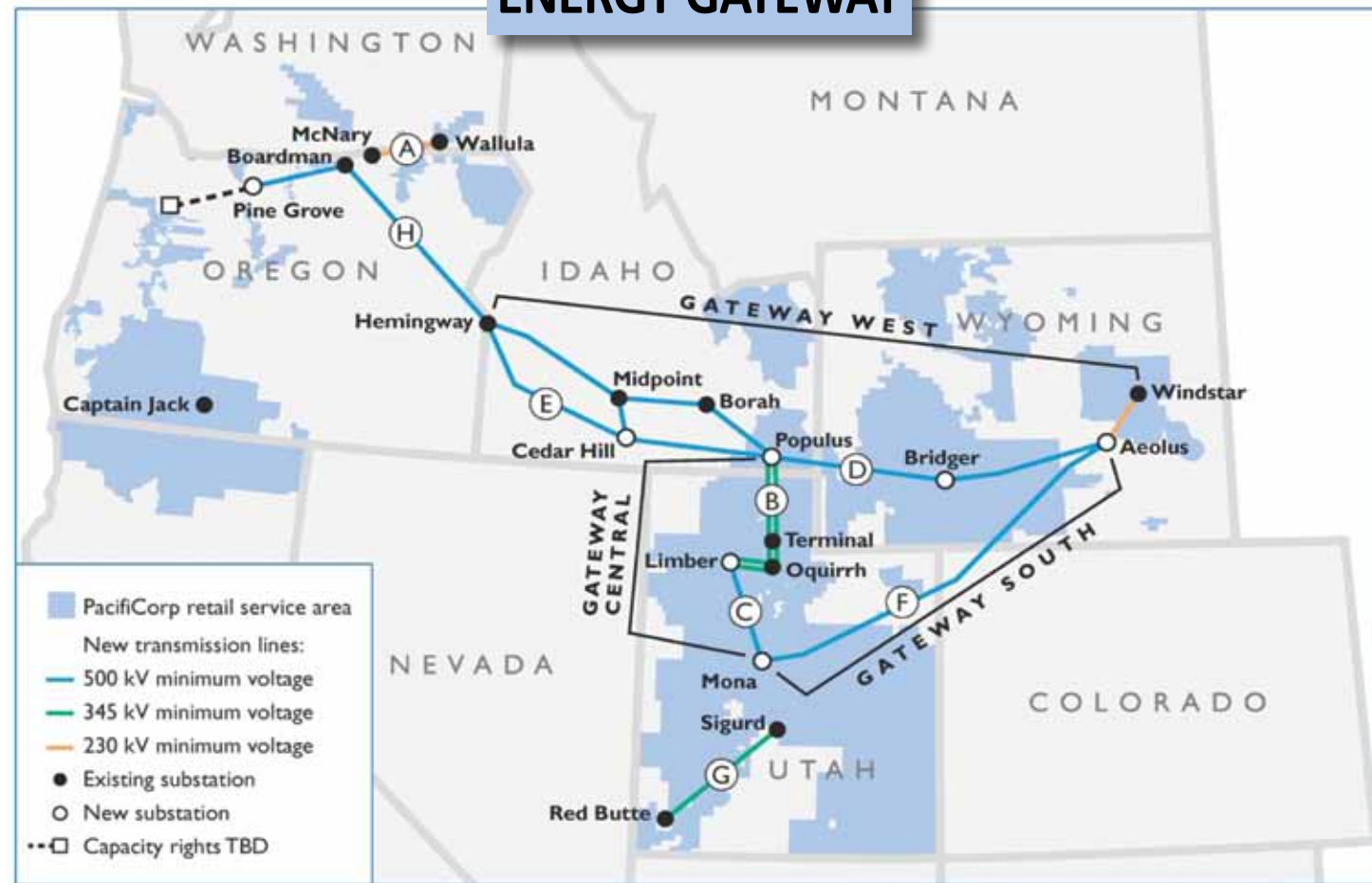
Cordell Kress is under the path of the proposed Gateway West transmission line, an approximately 1,000-mile long line running from Wyoming to southwestern Idaho. The Rockland grain producer is frustrated that

the needs of sage grouse are being put ahead of people's homes, land and livelihoods.

While the process is still preliminary, he expects to have towers constructed every one-fifth of a mile across two to three miles of his farmland. It's a narrow swath of land, but the power companies are also asking for an access road along the entire power line. Since his fields are 1,000 to 1,500 acres in size, he assumes the road will cut through at least part of his fields. As a dryland farmer he doesn't have

These proposed projects are the first major updates to the power transmission system in nearly three decades even though demand has increased by 25 percent over the same time.

ENERGY GATEWAY



to worry about the towers impeding an irrigation system, but the power lines will impact aerial applications.

"The footprint of the ground they are taking is not large," Kress said. "But the cost of farming around the towers is."

He finds it somewhat ironic that he will have a 500 kV transmission line running over his house and yet when he turns the air compressor on in his farm shop the lights in the house dim thanks to the single-phase line that was installed in the 1940s.

"I would be more forgiving of the deal if I thought it would benefit Idaho residents and if they were willing to put it in places where it was the least impactful," he said.

Local governments are listening to the concerns of people like Kress whose private property is in the path of the proposed projects. Some counties are changing the permitting process to create overlay districts, transmission corridors and restrictions on structure height or voltage class.

That adds to the cost and the time to complete the permitting process, and can also lengthen a proposed line. At a cost of \$1.5 to \$3 million per mile to construct a high

voltage transmission line, any extra miles add up quickly.

LOW COST RESOURCE

Utilities must balance the need for power with the ability to be reimbursed for the cost of providing that power.

"The real issue for us when it comes to regulatory oversight, is that a project makes sense in terms of the cost recovery shouldered by customers," Kjellander said.

He uses the Populus Substation, near Downey, as an example. From the regulators point of view, the substation was overbuilt and Rocky Mountain Power was not allowed to recover all costs in the beginning. As the company could prove the power was needed and being used, it recovered more of the cost. "That was a gamble they took," he explained.

From Rocky Mountain's point of view, the Populus Substation had to be upgraded to handle a new 345,000-volt transmission line that was later built between the substation and Terminal Substation near the Salt Lake City Airport, about 135 miles away.

Both projects are considered segments of the Energy Gateway Transmission Expansion,

which includes the approximately 1,000-mile long Gateway West line.

Rocky Mountain's Oler compares the process to putting a jigsaw puzzle together. "We want to put a project into place at the right time to deliver electricity when it's needed," she said.

PARCEL BY PARCEL

Although BLM released the final EIS for the Gateway West project last April, construction is not expected to begin until 2019 and won't be completed until at least 2023. Rocky Mountain and Idaho Power will spend the next five years securing state and local permits, and working with private landowners like Kress.

"The process starts out very big, but ultimately it comes down to individual parcels," Oler said. "We're not quite to that point yet (for the Gateway West project)."

While Kress waits to find out exactly where the high voltage line will cross his property, he continues to wonder why his land is even being considered. "If the power line is for public use and public good, I don't know why they're not using public land or existing power corridors to build it on."



Voices of a New Generation

Idaho Wheat Producers Invest in Tomorrow's Leaders

If you listen in at coffee shops and grower meetings around the Northwest, you'll hear a frequent lament: "Where is the next generation of agricultural leaders?" Ag businesses across the region are scrambling to find young talent to fill entry-level positions. Expanding companies seeking to add more personnel are finding a dwindling pool of candidates to draw from.

Idaho Wheat Commission leaders are addressing this challenge by making "Encouraging a new generation of Ag leadership" a key plank in their strategic plan. One approach is to help undergraduate students who express an

interest in studying Agriculture. This fall, six undergraduate scholarships and a student internship stipend were awarded across three regional universities with distinctive approaches to agricultural education. University of Idaho received three \$1,000 scholarships for students enrolled in College of Agriculture and Life Sciences programs that will prepare them for a career in agriculture.

Students from southeastern Idaho often find Utah State University a natural choice for their agricultural education. USU's College of Agriculture and Applied Sciences received three \$1,000 scholarships

for Idaho students enrolled in programs that would prepare them for a lifetime in agriculture as producers, business leaders and researchers.

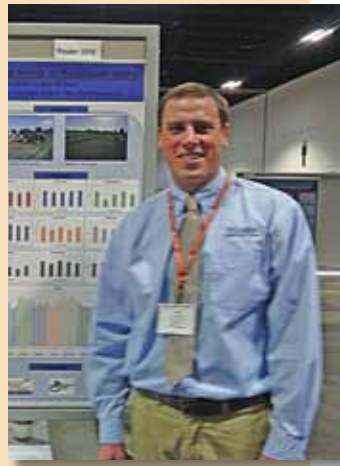
BYU-ID, known regionally for its applied approach to Ag education, prepares students for a professional position in the Ag world. The Idaho Wheat Commission facilitated a collaborative program bringing together the field trial experience of University of Idaho Extension and BYU-ID's student internship program with financial resources of Idaho wheat growers, creating the context for Mentored Student Research experiences for BYU-ID students.

VOICES OF TOMORROW'S LEADERS

JONATHAN B. BLAKELY grew up in a small community near Heise, ID on a working cattle and farming operation. He comments, "Since a very young age, I have been involved in agriculture and the wheat industry. My goal after school is to return and expand the family business. I plan on raising grain and am committed to help that side of the industry grow and continue to provide food for the world." A junior at Utah State University, Jonathan is studying Animal Science and Agribusiness. Growing up, he gained experience in tilling, planting, irrigating, fertilizing, harvesting and storage. When he was older he worked for some larger farms as hired help and at local elevators during grain harvest. Jonathan has taken a heavy class load while working night shifts to pay his educational expenses. Despite his busy schedule, he still finds time and energy to serve as an officer in the Animal Science Club and to attend workshops and seminars offered by the College of Agriculture and Applied Sciences. He says, "A college education can be a very hard road to go down without the support of people who care enough to lend a helping hand. This scholarship will not be taken for granted. You have helped me down that road more than you can imagine. Thank you for investing in my future."



KYLE MERRILL recently wrote the IWC to say, "I am getting ready to head down to Tampa, Florida to attend the Agronomy meetings and present my research." Kyle was the student intern lead in a seeding rate study designed to provide a mentored student research experience for BYU-ID students. BYU-ID contributed land for the trials along with a faculty member to supervise the research plots and oversee the students and their labor. UI Extension pitched in by helping to conceive the research question and design the research protocol. IWC provided the student intern with a summer stipend. The result was a seeding rate trial that produced quality data worthy of presentation at a national meeting, along with a story in the *Capital Press* and so much



enthusiasm among local growers that the project will be followed with a winter wheat seeding rate trial this fall. BYU-ID student **EMILY TOLLY**, one of the student helpers in the 2013 trial, has been chosen as the student intern lead for the 2014 seeding rate trial. "I'd like to thank Idaho Wheat Commission for helping me to be the intern for this seeding rate study. I appreciate this wonderful experience!"

DEREK GERRATT's father started the family dairy farm seventeen years ago with Derek at his side. Derek loved the different kinds of work necessary to keep the dairy going; there was never a dull moment. He recalls, "During the day we might have to be doing grunt work and then later our efforts would be put to making good business decisions." The Gerratts began to feed more wheat as corn prices rose but they had to be careful because wheat can cause acidosis in the rumen of the cow. Derek is interested in returning to the family's 500 acre farm and expects to grow wheat to feed their cattle. It seemed a clear choice to Derek to go to USU since he wanted to learn more about properly feeding wheat to cattle and about Agribusiness in general. Keeping tradition was important too: Both his mom and



dad were Aggies. Wrestling is another passion of Derek's. He has won a number of state championships. "This sport has really taught me about true character and persistence. There is no throwing in the towel in the third round with this sport...I stuck it out to the very last whistle. In like manner...I look forward to finishing what I started (at USU)." Derek did a two-year mission with his church after completing his first year of college. Fall 2013 will be his first semester back at USU. "I am honored that I have been awarded this scholarship," Derek offers. "I am proud of my rural roots and I am excited about being able to have a future in agriculture. Thank you for helping me down the road."

By investing wheat assessment dollars in the education of outstanding young men and women, Idaho wheat producers are promoting agriculture as a way of life and offering a positive, proactive response to our common concerns for the future. Where is the next generation of agricultural leaders? They are right here among us!

KELSIE HODGES has been around horses, cattle, and the newspaper business all her life. Kelsie, a sophomore at the University of Idaho, grew up on a ranch while also hanging around the family newspaper business (the *Recorder Herald*) in Salmon, ID. She relates, "Agriculture is very near and dear to my heart; throughout high school I actively participated in FFA, receiving my American Degree." At UI, Kelsie is studying agriculture education in hopes of becoming an agriculture teacher so she can pass on her passion about agriculture to future agriculturalists. She is also pursuing her interest in public speaking as an intern in the Extemporaneous Speaking CDE. On campus, Kelsie enjoys participating in

Collegiate FFA and the Student Idaho Cattle Association. She connects her future to wheat saying, "I may educate students about agriculture...inspiring a student to pursue the passion of agriculture. One of those students could very well be from a family of wheat growers."



At first, **SHEILA MCCOLLUM** had a hard time deciding what to study in college. "Growing up in the small town of Weippe, ID, where the logging industry is people's way of living, I wasn't exposed to all of the career opportunities the world has to offer." That changed when she took a course entitled "Plants and People" at Lewis-Clark State College. "It was the first class I ever enjoyed going to," she recalls. "I was so excited...I knew that I wanted to have a career involving plants." Now a junior in the Sustainable Crop and Landscape systems program at the University of Idaho, Sheila is still excited about plants. She adds, "You have made a tremendous impact for me financially. I sincerely appreciate this scholarship and your willingness to help me achieve my goals."



JAMISON JONES, a freshman at USU, grew up in Oakley, ID, admiring "the older men around town who seem to know how to handle every situation life has thrown at them." He is studying crop science, focusing on understanding and application of knowledge, with less concern about grades. Jamison believes that knowledge bestows power. Maybe knowledge is why "nothing seems to faze these old boys—they take everything in stride." Jamison says that the IWC scholarship he received has relieved some of the stress of paying for college, adding that "your generosity has inspired me to help others give back to the community."



AYLA NEUMEYER developed a deep appreciation for agriculture while growing up around a cattle operation in Bonners Ferry, ID. In high school, she was involved in FFA, Student Council, and Yearbook, and she enjoyed being an advocate for her high school community. Now a sophomore in the Agribusiness program at the University of Idaho, she is still involved in FFA, serving as a state officer. She also serves as a Peer Mentor and as a member of the CALS Alumni Relations Board. All these activities are preparing Ayla to achieve her goals of being a life-long advocate for agriculture. She hopes to begin this adventure as an agricultural lobbyist working to "keep the United States a place where farmers and ranchers can continue to meet the needs of the growing world population."





Taiwan Flour Millers Sign \$484 Million Wheat Deal in Idaho



THE Taiwan Flour Mills Association (TFMA) signed a letter of intent in Boise, Idaho Sept. 16, to purchase up to 62.5 million bushels (1.7 million metric tons) of U.S. wheat, worth an estimated \$484.5 million, over two years between 2014 and 2015.

The signing ceremony was held at the Idaho State Capitol with Governor C.L. "Butch" Otter, Celia Gould, Director Idaho State Department of Agriculture, Idaho Wheat Commission Chairman Ned Moon and commissioners Bill Flory and Jerry Brown. Taiwan Flour Mills Association (TFMA) was represented by Executive Director Wei-Chang Chang and Director General Andy Chin of the Taipei Economic and Cultural Office in Seattle.

"Export markets are critical to Idaho's economy and to Idaho wheat growers," said Governor Otter, "We met with the Taiwan Flour Mills Association during my trade mission to Asia in April and greatly appreciate their loyalty as an Idaho customer. This visit will continue to foster further sales opportunities for our state."

"Taiwan and Idaho also enjoy a close trade relationship. In 2012, Taiwan was Idaho's third-largest export market; Idaho exported US\$755 million to Taiwan in that year," said Mr. Wei-Chang Chang, Executive Director of the TFMA. "Taiwan's consumers have long appreciated high-quality Idaho-grown wheat."

The U.S. wheat industry has had an excellent working relationship with Taiwan for more than 40 years. The Taiwan Flour Millers Association imports 60,000 metric tons (2.2 million bushels) of wheat, every three months which is distributed among all of the millers. The TFMA continues to be one of Idaho's best customers year-after-year, coming in as one of the top 5 wheat importing trade partners.

The importance of maintaining trade relationships with valued customers

was one of the objectives when Idaho Wheat Commission Chairman (IWC) Ned Moon traveled to Taiwan in April as part of the Governor's Trade mission to Asia, where he meet with the Taiwan Flour Millers Association. "These millers are some of our most sophisticated and progressive customers," said Moon. "They like to buy U.S. wheat because they know exactly what quality of wheat they're getting in contrast with buying wheat from other countries that have lower grading standards. We enjoyed meeting with TFMA during their stop in Idaho and thank them for their commitment to purchase Idaho wheat."



U.S.-Taiwan Partnership in Wheat

Taiwan is the sixth largest market for U.S. wheat, purchasing 520 million bushels (14.2 million metric tons) since 1998, worth an estimated \$3.27 billion. USW Country Director Ron Lu and his Taipei-based staff have an excellent working relationship with Taiwan Flour Mills Association and the Taiwan baking industry.

TFMA imports wheat on behalf of all 26 Taiwanese flour mills. U.S. wheat represents nearly 80 percent of Taiwan's total imports, an estimated annual value of about \$280 million. Heavy use of hard red spring (HRS) reflects a need for strong gluten flour for breads, rolls and frozen dough products as well as for blending with hard red winter (HRW) flour to make traditional Chinese flour foods and noodles. Soft white (SW) imports, including western white, help meet growing demand for cake, cookie and pastry flours.

Recognizing an opportunity to increase bread consumption, USW and other U.S. cooperators, with excellent support from USDA Foreign Agricultural Service (FAS) staff posted in Taiwan, developed a Global Broad-Based Initiative project under the Market Access Program in 2010/11. USW, the California Raisin Administrative Committee, the U.S. Highbush Blueberry Council and U.S. Grains Council are working with the Taiwan Bakers Association and the China Grain Products Research & Development Institute (CGPRDI) to develop new healthy, whole wheat breads and high fiber noodle products to professional bakers and noodle makers. USW and the other cooperators are also helping the commercial bakeries and processors introduce the products to consumers through events including a news conference co-sponsored by the Taiwan Baking Association at a popular Taipei shopping mall.

Additionally, USW helps provide technical assistance and education to millers and bakers to help them produce better quality, better tasting whole wheat products.



UI Stone: Solid as a Rock!

THE University of Idaho and the Idaho Wheat Commission have adopted a totally new approach to the marketing of the newly released soft white spring wheat variety UI Stone. The U of I already has a close collaboration with the breeding team at Limagrain Cereal Seeds – and this has now been extended to include the marketing of UI Stone – the first Idaho variety to be released under Limagrain's "LCS" Brand.

"We are delighted to be working so closely with the University and the IWC," said Frank Curtis, Chief Operating Officer at Limagrain Cereal Seeds. "We believe UI Stone is the perfect variety to launch in today's wheat market – grain prices are below previous highs, but still attractive – so growers are

looking for a variety with low production costs that will minimize risk. UI Stone does exactly that."

Aberdeen-based breeder Dr. Jianli Chen agrees. "UI Stone has complex resistance to multiple fungal diseases, consistent yield performance in diverse environments, and excellent end-use quality for a soft white spring wheat," said Dr Chen. These features make UI Stone cheap to grow, reliable from year to year, and attractive to grain buyers in the region.

"We chose the name and photograph very carefully," added Curtis. "We needed an image that would convey the solidity and reliability of the variety, because UI Stone can be the 'cornerstone' of a wheat grower's acreage - and the picture of a



Solid as a Rock: New UI Stone is graphically represented by a granite millstone.

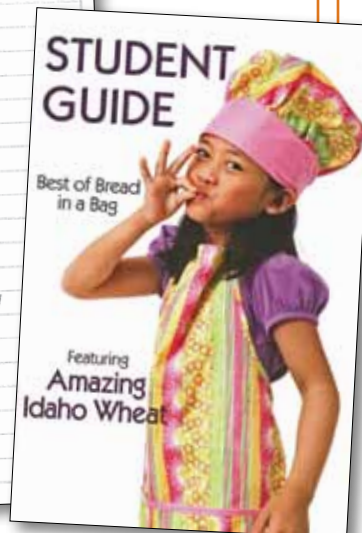
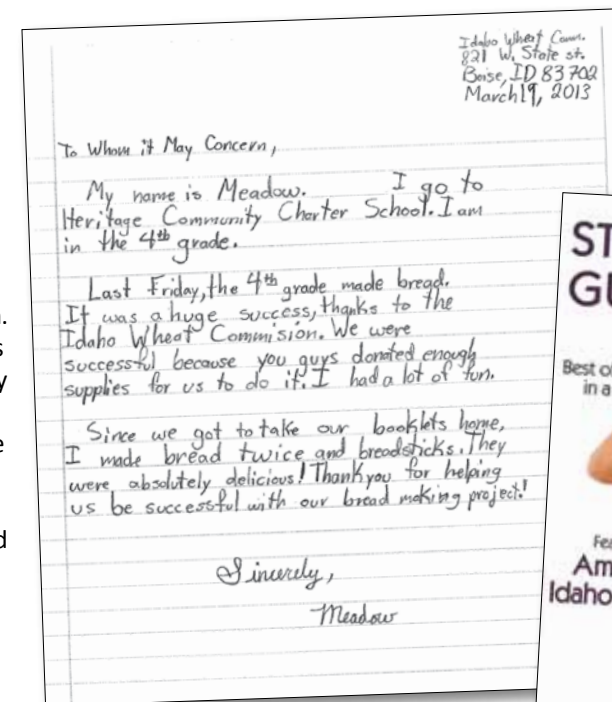
millstone links nicely to the wheat industry as well!"

Registered seed of UI Stone is available for spring 2014. Licensed seed producers wanting to get involved in the variety are invited to contact Limagrain Cereal Seeds for licensing details.

Thank You Idaho Wheat Growers!

FOR almost 30 years, Idaho wheat growers have sponsored the *Bread in a Bag* program, an educational, fun, hands-on activity which allows 4th grade students to make their own wheat food product (bread, pizza, pretzels, tortillas) from scratch. The wheat food product can be baked in the school's cafeteria, or at home while students learn the history of wheat, its nutritional importance, and the economic benefits of Idaho's wheat industry to the state of Idaho.

The Bread in a Bag program continues to be an amazing avenue to teach young students where food comes from and how farmers care for their land. If you would like a teacher in your home town to learn about the Bread in a Bag program, contact Tereasa Waterman at the Idaho Wheat Commission (208) 334-2353 or ts@idahowheat.org.

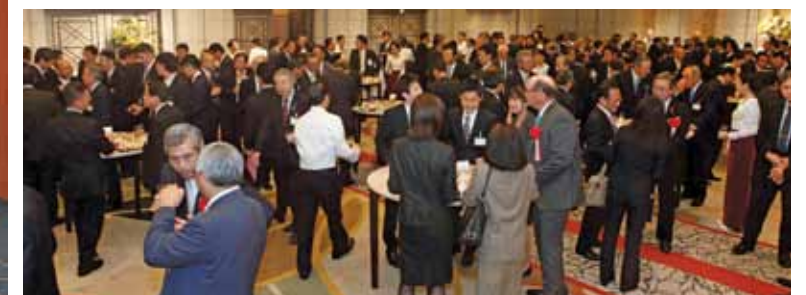


U.S. Wheat Sales to Taiwan 1,000 Metric Tons							
Crop Year (June - May)	HRW	HRS	SRW	SW	Durum	HW	Total
2013	97	233	0	36	0	0	366
2012	323	588	0	129	0	0	1,040
2011	244	518	5	129	0	2	898
2010	115	694	1	109	2	3	922
2009	310	419	1	114	0	2	846
2008	189	425	11	83	0	9	717
2007	312	605	3	102	0	36	1,058
2006	269	592	9	117	0	19	1,007
2005	265	522	2	109	0	11	910
2004	275	587	0	103	2	6	973

Data current through August 22, 2013
One metric ton = 36.74 bushels



OVER 300 people helped commemorate the Japan Baking Industry Association's 50th Year Celebration held at Hotel Okura Tokyo on October 17, 2013. Idaho Wheat Commissioner Bill Flory represented Idaho wheat growers in thanking Japan's Baking Industry for their loyalty in purchasing soft white wheat from the Pacific Northwest.





U.S. WHEAT ASSOCIATES REPORT ON ACTIVITIES

BUILDING DEMAND, FACING CHALLENGES

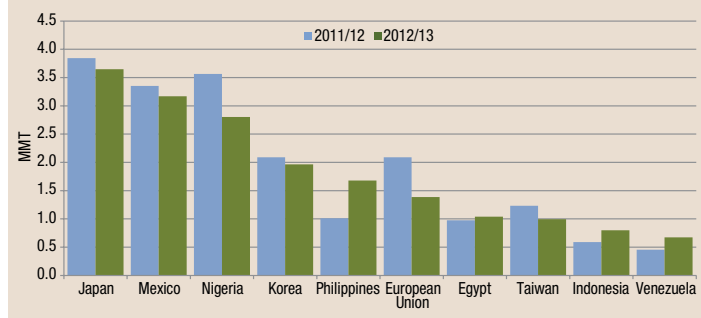
US. Wheat Associates (USW) helped maintain strong demand for U.S. wheat in marketing year 2012/13 (June-May) that continued into 2013/14. Political delays in funding for the export development programs from USDA's Foreign Agricultural Service and the discovery of isolated wheat plants with an old, experimental biotechnology trait in the past year presented difficult challenges. Yet with impressive support from our state wheat commission members, combined with expert technical assistance and trade servicing from the USW staff, the United States once again led world wheat trade with total commercial export sales exceeding 27.4 million metric tons* (MMT) in 2012/13. And, as that marketing year ended and 2013/14 began, Brazil and the People's Republic of China turned aggressively to U.S. wheat because they were informed about our plentiful supply, excellent quality and efficient supply chain.



As the industry's export market development organization, USW promotes all six U.S. wheat classes: hard red winter (HRW), hard red spring (HRS), soft red winter (SRW), soft white (SW), durum and hard white (HW). Funding for this work is provided by checkoff dollars, goods and services from 19 state wheat commissions and cost-share grants from the USDA's Foreign Agricultural Service. This report reviews USW activities in 2012/13 and looks ahead to 2013/14. For more information, please visit www.uswheat.org/success, e-mail info@uswheat.org.

Our work and the positive influence our market development activities have on farm gate prices would not be possible without your support. Thank you for your commitment to expanding U.S. wheat exports.

Top 10 Customers for U.S. Wheat



Japan, Mexico and Nigeria remained the top three U.S. wheat importers in marketing year 2012/13 (ended May 2013). Sales to Korea and the Philippines remained strong. That line up will likely be quite different at the end of 2013/14 because China and Brazil are purchasing U.S. wheat this year at remarkably strong paces.

RECORD DEMAND PACES WHEAT SUPPLY

Weather and lower prices coming out of 2011/12 contributed to a significant drop in world wheat supply for 2012/13. Global demand hit a record high, however. Planted area increased and production rebounded by eight percent for 2013/14. USDA expects another year of record demand ahead with world supply expected only to match demand. Supplies of Black Sea, European and Canadian wheat will be very competitive with U.S. wheat in 2013/14.

While U.S. wheat export sales in 2012/13 were about five percent less than 2011/12, as of late October 2013, USDA expected U.S. wheat sales to rebound by nine percent to 29.9 MMT.

Here are ways USW supported 2012/13 sales and is fostering demand growth in 2013/14 – and how the industry responded to significant challenges.

*1 metric ton = 36.74 bushels

FACING NEW CHALLENGES TOGETHER

USW and the entire wheat value chain faced a surprising challenge in May 2013 with the discovery of volunteer wheat plants in a fallow field in eastern Oregon that carried a genetically modified trait to resist glyphosate. An on-going investigation by the Animal and Plant Health Inspection Service (APHIS) quickly confirmed that this event posed no food safety risk, that it was isolated and that none of this material had entered commercial production or sales.

Out of extreme caution, however, Japan and Korea suspended new purchases of Western White (a blend of SW and up to 20 percent club wheat). USW, NAWG, state wheat organizations, U.S. grain handlers and exporters, and USDA officials, together with Monsanto, spared no resource and these critical markets re-opened within several weeks. Sales have steadily increased and, as of early November, 2013/14 SW sales were equal to sales at the same time in 2012/13.

This event was clearly unexpected and APHIS had not issued its final assessment when this report went to press. Ultimately, this situation demonstrated that the system for managing events like this functions well in the United States. It also proved that the entire U.S. wheat value chain works in harmony for the benefit of farmers, suppliers and their customers.

Yet record global demand shows the world's farmers may not be able to produce more and better wheat for a growing world in the face of climate change and an increasingly loud call for improved agricultural sustainability without the full benefit of scientific research. That is why USW, NAWG and many other organizations remain united in their commitment to foster innovation in a responsible way. To read more, visit www.uswheat.org/biotechnology.

TARGETING CANADIAN DOMINANCE IN LATIN AMERICA

THE Canadian Wheat Board (CWB) used to dominate wheat sales to Ecuador with monopoly pricing. We now compete fairly there but it is against a lingering preference for Canadian spring wheat among millers and bakers. With USW demonstrating the



Baking tests using flour blends made from U.S. wheat classes demonstrated superior results to Ecuadorian bakers who want to improve end-product quality to meet the changing needs of more affluent consumers. An added bonus: U.S. wheat blends are less expensive than Canadian spring wheat.



Consumer demand for baked goods is booming in China. USW sponsored demonstrations of western style end-products position U.S. SW, HRW, HRS and SRW as the high-performing, high-quality choices.

RELIABLE SUPPLIER TO BRAZIL, CHINA

IN the last five years, combined sales to Brazil and China never exceeded 4 percent of total U.S. wheat exports. Today, the story has changed.

USW has worked with millers, bakers, food processors and government officials in the People's Republic of China for more than 25 years. The seemingly relentless increase in Chinese demand for commodities extends to imports of high quality U.S. wheat which jumped in 2011/12 and exceeded 29.3 million bushels of HRS, SW, SRW and HRW in 2012/13. China needed to bolster its high-volume strategic wheat stocks after seeing a poor 2013 crop headed for government bins. With favorable prices and knowledge of the U.S. wheat crop and marketing system, China has turned to the United States. As of early November 2013, five months into the 2013/14 marketing year, China had purchased nearly 1.5 billion bushels of U.S. wheat, including SRW, HRS and SW. That represents more than 19 percent of total commercial wheat sales to that time for the marketing year.

benefits of SW, HRW and SRW through milling and baking demonstrations and through a trade team visit to the United States, U.S. wheat is making a comeback. In 2012/13, Ecuador purchased almost 7.6 million bushels of U.S. wheat, valued at \$56.73 million, up 52 percent from 2011/12. Sales in 2013/14 are on a similar pace. That is possible because USW has funding from Idaho Wheat Commission, the Washington Grain Commission, and USDA's Market Access Program.

A few years ago, price advantages for wheat sold by the CWB monopoly and for Argentine wheat made it challenging to boost U.S. wheat sale in Chile. But USW recognized that Chilean baking customers needed new flour products to expand their product lines in this growing market. Trade team visits, together with milling and baking demonstrations, are helping convince more Chilean millers to replace Canadian spring wheat with significant quantities of dark northern spring, HRW and SW from Pacific Northwest ports while still sourcing up to 45 percent of its total U.S. wheat supply from the Gulf. Chile purchased 19.8 million bushels of U.S. wheat in 2012/13 or about 37 percent more than it purchased in 2011/12. In the first five months of 2013/14, Chile bought more than 14 million bushels of U.S. wheat or 50 percent more than what it had imported at the same time in 2012/13.

STATE COMMISSIONS STEP UP

WHREAD farmers generously share checkoff dollars with USW through their state wheat commissions. This qualifies USW to compete for additional export market development funding from USDA's Foreign Agricultural Service (FAS). Membership dues and state-funded special projects for USW's fiscal year 2013 that ended June 30, 2013, was about \$5 million. As a result, USW received more than \$11.7 million from FAS. Looking at it another way, in 2012/13, USW federal funding added \$2.30 for every \$1.00 contributed by farmers.

The \$5 million in farmer-funding is significantly more than state commissions provide on average. No U.S. farmer can forget that the federal farm program, which was locked up in late 2012, extended and still has not been finalized because of the partisan budget battles in Washington, DC. Together with innovative efforts by FAS, state wheat commissions helped tide USW over a funding crisis until farm bill spending was reauthorized.

Sadly, USW faces a similar challenge in 2013/14. Our hope as of early November 2013 is that agricultural export market development funding will be reauthorized at least at current levels in a new Farm Bill. USW wants to thank our state commission members for their help and our colleagues at the National Association of Wheat Growers as they work on Capitol Hill.



Filipino flour millers recently visited USW Headquarters in Arlington, Virginia (above) and several states to inform U.S. trade officials about unfair flour dumping from Turkey. The Philippines has been a loyal U.S. wheat customer for more than 50 years.

OPENING TRADE BARRIERS

USW also invests grower and federal funds to identify and remove increasingly important trade barriers to U.S. wheat exports. A most striking example is USW's support for our long-term and loyal flour milling customers in the Philippines who are facing what we consider to be unfair "dumping" of Turkish flour into that market. Only one other country imports more U.S. HRS and SW than the Philippines. But Turkish flour sold there at a price that is less than flour costs in Turkey. Now, USW is publicly supporting the millers' call for an anti-dumping tariff on Turkish flour and helping them seek redress at the world trade organization and build international opposition to the Turkish dumping scheme. USW is taking this action because an estimated \$70 million in lost wheat sales to the Philippines in 2012/13 is on the line for U.S. wheat farmers.



Update from the Idaho Barley Commission

ENDOWED BARLEY AGRONOMIST

The Idaho Barley Commission board voted unanimously on July 1 to finalize an **Idaho Barley Research Endowment with the University of Idaho (UI)**, to be funded over a period of five years. This one million dollar endowment will enable the University of Idaho to create a dedicated Barley Agronomist / Soil Fertility Professorship (70% applied research and 30% extension) to be located at the UI's Aberdeen Research & Extension Center. Recruitment for this new agronomist began in mid October and will conclude in late November. UI intends to have the new scientist in place by the 2014 growing

season. In order to achieve this \$1 million investment over the next five years, the IBC board voted to **raise the Idaho barley assessment from the current rate of \$.02 per hundredweight (less**

IBC Chairman Pat Purdy, Picabo, champions this joint IBC/UI effort to strengthen Idaho's barley research capacity, noting that in an era of declining public budgets we can't expect to maintain a high level of independent scientific research without grower involvement.

"As an Idaho barley grower we are constantly faced with new challenges that are putting pressure on our bottom line profit. These include rising input costs such as fuel, seed and fertilizer and diseases such as Fusarium Head Blight and pest pressure like wire worm. To help growers face these challenges, we need the research efforts and field work that only a dedicated barley scientist with the University of Idaho can provide, and this endowment will guarantee that such a position is permanently in place."

than 1 cent/bu) to \$0.03 per hundredweight (1.4 cents/bu), effective July 1, 2013. This barley check-off increase will sunset after 5 years unless a future IBC board votes to continue the \$.03/Cwt. rate.

The UI is committing an equal or greater investment, including 100% of the cost of a new scientist's salary and some technical support **immediately and up until the 5-year period when adequate funds are generated by the IBC's endowment investment.** The UI also agrees to help cost-share this scientist into perpetuity, guaranteeing that this research position will NOT be eliminated in the face of future state funding cuts.

Food barley initiative paying dividends

In recent years the IBC launched a multi-pronged strategic initiative to expand food barley acreage in Idaho. This effort is now paying dividends. Key elements include: variety development at ARS Aberdeen; marketing promotions to potential domestic and Asian food manufacturers; and development of barley products and recipes suitable for use in school breakfasts and lunches. A targeted trade mission to Asia last fall resulted in 2013 production contracts worth nearly \$1 million. Interest in expanding food barley use in cereal manufacturing has grown significantly in the past year, with a focus on barley's unique health benefits, most notably soluble fiber. This growing interest prompted the IBC to launch an effort during the 2013

growing season to increase seed of the new ARS food barley variety Transit that will be available for 2014 commercial production. We want to thank several partners who helped the IBC in this campaign: eastern Idaho growers Scott Brown, Kent Clegg, Phil Yost, Gordon Gallup, USDA ARS, Scoular Grain, Ririe Grain and PNW Farmers Cooperative.

Risk management education in 2014

IBC continues to offer a wide spectrum of risk management education, supported by competitive grant funding the commission receives from the Western Center for Risk Management Education (\$18,500 grant awarded in 2014 and more than \$156,000 in grant funding since 2001).

CURRENT GLOBAL GRAIN MARKET OUTLOOK, NOVEMBER 2013

Key Market Drivers

- **Investment money flow continues to fluctuate widely** based on global economic growth prospects, currency, fiscal and monetary policies and geopolitical risks, increasing **VOLATILITY** in commodity futures markets.
- **BIG RECOVERY in 2013 grain production and carryover stocks** – Global and US grain production recovered substantially in 2013, expanding carryover and pressuring global grain prices.
- **U.S. beer demand has weakened in the first three quarters of 2013, after increasing 1.3% in 2012.**
- **Chinese corn imports continue to be a WILD CARD.** China has purchased 4.45 MMT of U.S. corn so far this year, compared to 2.45 MMT for all of last year. Projections show

MY 2013-14 USDA Nov 8	World Barley	U.S. Barley	World Corn	U.S. Corn	World Wheat	U.S. Wheat
Output	141.4 MMT + 9%	4.7 MMT - 1%	962.8 MMT + 12%	355.3 MMT +30%	706.4 MMT + 8%	57.9 MMT - 6%
Carryover	22.8 MMT + 12%	1.7 MMT + 3%	164.3 MMT + 22%	47.9 MMT +130%	178.5 MMT + 2%	15.4 MMT - 21%
Stocks / Use	16%	33%	18%	15%	25%	23%

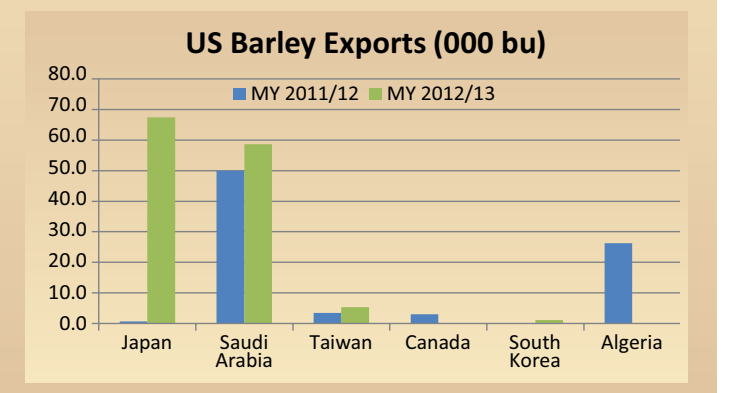
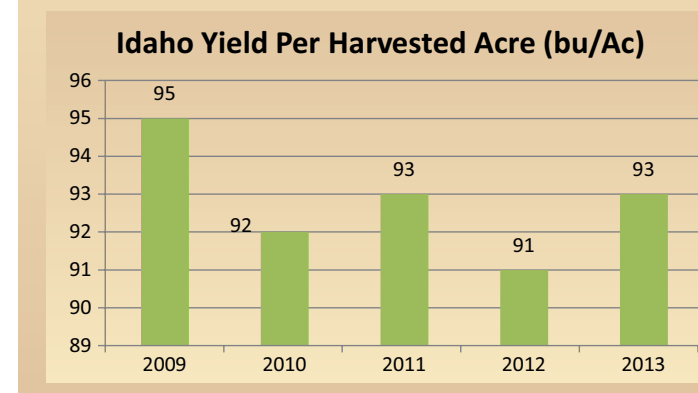
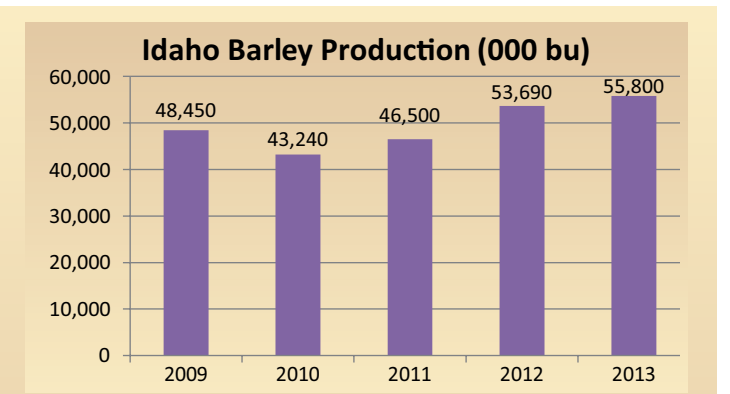
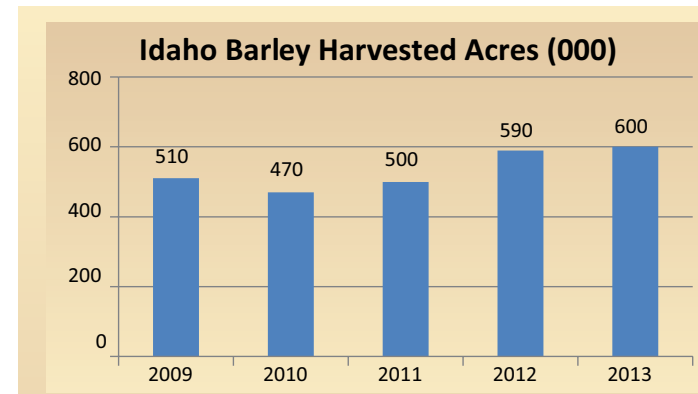
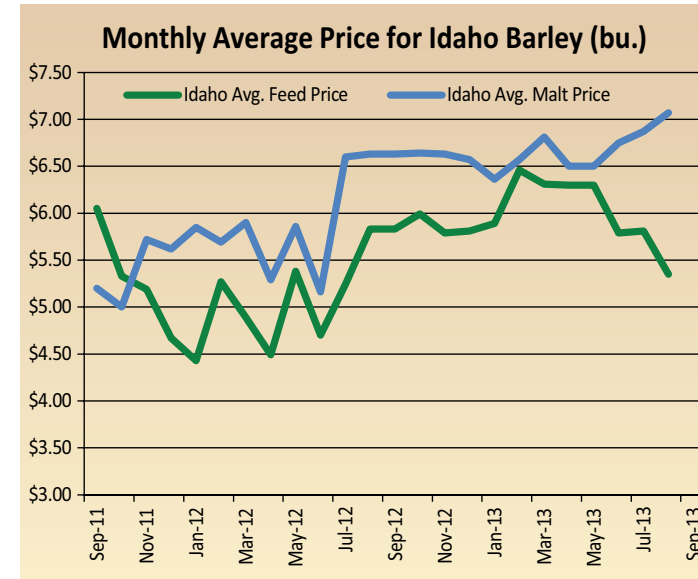
Chinese corn production increasing this year to at least 211 MMT, up 2%, but still falling short of rising domestic demand.

• **U.S. ethanol demand** – Ethanol production fell 7% last year due to record high corn prices. This trend has reversed recently on lower corn prices, with USDA now projecting ethanol use will rebound 5% this year. But the **fate of the Renewable Fuels blending mandate**

could greatly impact future corn demand. EPA announced on Nov. 15 that it was proposing to scale back the 2014 RFS from 18.5 billion gallons set in law to 15 to 15.5 billion gallons. The conventional corn blending mandate would be cut to about 13 billion gallons, below the 2013 mandate of 13.8 billion gallons and below actual 2013 production of 13.2 billion gallons. A final ruling is set for spring 2014.

	BARLEY		CORN		WHEAT	
	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14
Carryin	22.6	20.4	132.5	134.9	199.4	175.6
Production	129.9	141.4	862.7	962.8	655.5	706.4
Total Supply	152.5	161.8	995.2	1,097.7	854.9	882.0
Export trade	19.8	19.3	99.7	109.2	147.4	152.1
Total Usage	132.1	138.9	860.3	933.4	679.3	703.5
Ending Stocks	20.4	22.8	134.9	164.3	175.6	178.5
Stocks / Use	15%	16%	16%	18%	26%	25%

	BARLEY		CORN		WHEAT	
	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14
Harvested Acres (mln)	3.2	3.0	87.4	87.2	48.9	45.2
Carryin	60	80	989	824	743	718
Production	220	215	10,780	13,989	2,266	2,130
Imports	23	25	162	25	123	150
Total Supply	304	320	11,932	14,837	3,131	2,998
Food, seed & industrial	155	155	6,044	6,350	1,018	1,023
Ethanol			4,648	4,900		
Feed	59	75	4,333	5,200	388	310
Exports	9	10	731	1,400	1,007	1,100
Total Usage	223	240	11,108	12,950	2,414	2,433
Ending Stocks	80	80	824	1,887	718	565
Stocks / Use	36%	33%	7%	15%	30%	23%





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