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SUMMER 2018

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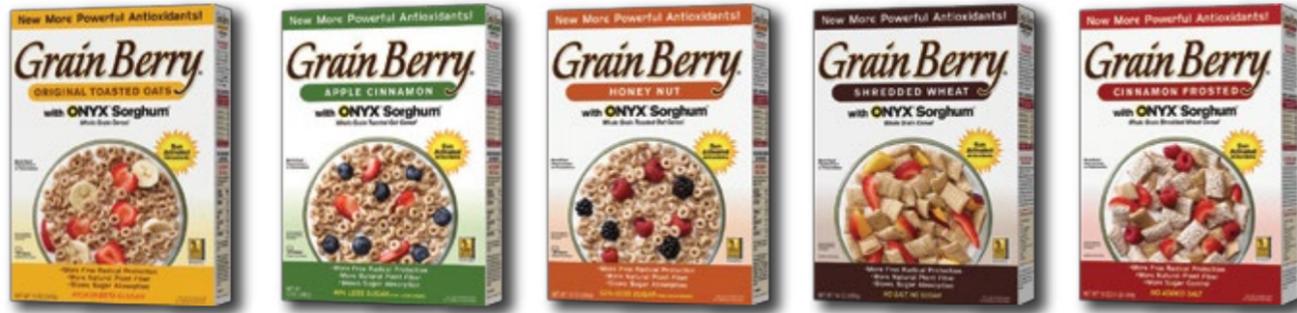
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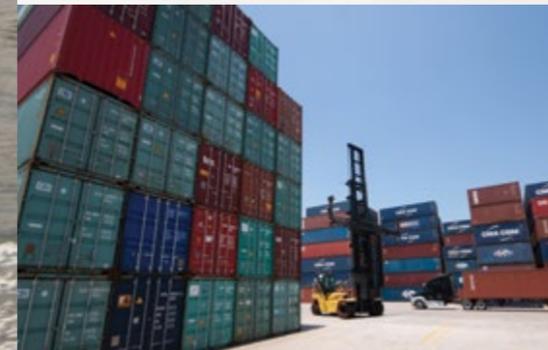
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ON THE COVER: Transportation infrastructure proves crucial to exports of sorghum from across the Sorghum Belt. To make the export business more efficient and competitive on the world stage, Port Houston has employed a five-year plan to expand and update their port. Read more on page 8.

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4201 North Interstate 27
Lubbock, Texas 79403
806-749-3478 (phone)
800-658-9808 (toll free)
806-749-9002 (fax)
www.SorghumGrowers.com

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From the CEO

2018-What a Ride

Most roller coasters don't experience as many ups and downs as sorghum has had in 2018. Going into the start of the year, we had just completed a tax cut bill, knew we likely were setting up for a farm bill and hopefully an immigration bill. But trade wars are never something that you put in your short-term strategic plans.



Sorghum clearly found ourselves at the tip of the spear in the China trade battle. We have spent a tremendous amount of time and resources in the last seven months working to maintain access to our largest market. While we are currently back under a 25 percent tariff with China, we can potentially still trade with that tariff as opposed to the 178 percent tariff that completely stopped all trade this spring.

I am so appreciative of all the friends we have in private industry, in the Administration, on Capitol Hill and individual sorghum farmers who helped us get out from under the anti-dumping tariff in addition to the countervailing duty case. In times like these, you find out who your true friends are, and I am humbled and proud to say sorghum has many.

I would also like to recognize our staff. We have a lot of "farm kids" that work for Team Sorghum, and much like many of your operations this year, "harvest" dragged on for our team for three months with a lot of long days and short nights working to comply with the case dispute process.

NSP leadership was back in Washington, D.C., just a few weeks ago meeting again with the Secretary of Agriculture and the new EPA Administrator as we continue to try to take care of the needs of the industry. If you missed a recent quote from Secretary Purdue, I believe it really catches the spirit of our growers and industry. He said, "[Farmers] are patriots, but they also know that patriotism can't pay the bills."

We will continue to work with this Administration and Congress for long-term trade agreements that are wins and short-term support to keep your operation viable in a tough financial time. Thank you for your support of NSP, and if you are reading this and are not a current member, I would ask that you consider supporting NSP so we can continue to be in Washington, D.C., and other places around the world, representing you.

Tim Lust
CEO

Conference Committee Prepares for Farm Bill

By Jennifer Blackburn

It's August recess, and while Washington can be fairly quiet during this month, it is not all play on Capitol Hill. The clock is ticking, and a Sept. 30 deadline to pass a new farm bill is quickly approaching. Congressional leadership and agriculture committee leaders and their staffs feel it, but farmers and ranchers are particularly on edge, anticipating a bipartisan resolve to assuage the economic uncertainty felt in America's heartland.

The four principals of the House and Senate Agriculture Committees met the last week of July, and the next month will include staff time, clearing as much underbrush as possible in order to distill matters down to a handful of issues, which will require Members to decide.

Both bills are solid for sorghum farmers with stability under the farm bill safety net, attention to resource conserving crops like sorghum in the conservation title, strong crop insurance that preserves the most important risk management tool sorghum farmers have with direc-

tion to improve sorghum specific policies, and a trade title that provides critical funding for the Market Access Program and Foreign Market Development.

There are a number of obstacles to reaching an agreement on a conference report. The handling of food stamps will be key. Money is another issue with a flat line budget and a slew of new needs and wants that have been identified, not least of which is the real need to strengthen the farm safety net under the Commodity Title to help producers contend with the current economic environment.

Then there is time. Leaders are working to finish by Sept. 30, but in reality, striking a deal by the second week of October prior to breaking for elections is critical. If not then, lawmakers may be faced with a lame duck consideration, which is the best guess of many. Though it tarry, wait for it, and between now and then, National Sorghum Producers will continue to advocate for a fair and meaningful farm bill. 🗣️

BY THE NUMBERS

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DEADLINE SEPTEMBER 30

Defending U.S. Sorghum From Trade Retaliations

By Delanie Crist

As National Sorghum Producers began plans for the 2018 year, many big-ticket items were on the agenda for sorghum. Preparations for the 2018 Farm Bill were underway, the sorghum oil pathway was on its way to the Federal Register, and China was on track to reach a billion bushels imported from U.S. sorghum farmers by the end of January. On Feb. 4, NSP added another sizable task to its already extensive lineup when China launched their self-initiated anti-dumping (AD) and countervailing duty (CVD) investigations.

NSP staff, along with other industry associates, quickly went into action, working around the clock. Board members and staff held multiple meetings with Congress, the U.S. Department of Agriculture, U.S. Trade Representative, White House representatives and other officials to raise awareness and ensure sorghum growers were defended.

Working the Case

As NSP worked through the case, China continued their aggressive retaliation against the U.S., placing sorghum at the tip of the spear in an ongoing trade dispute. On April 17, China announced a 178.6 percent anti-dumping deposit—effectively blocking U.S. sorghum exports to China. NSP and partners in the industry, along with NSP general counsel Gary Baise and NSP's trade law firm Hogan Lovells lead by Deen Kaplan, fully cooperated with the investigation and dil-

igently worked to meet all legal requirements to defend sorghum growers.

In fact, roughly two weeks prior to the announcement, NSP had submitted more than 2,000 pages of legal responses demonstrating conclusively that U.S. sorghum was not dumped nor causing any injury to China. It was clear China's tariff decision was influenced by a broader trade dialogue between our two countries.

The vigorous pace of the case was unprecedented. A process that typically takes 12-18 months had taken place in just 73 days. China's retaliatory action against sorghum was the first real blow against U.S. agriculture in ongoing tit-for-tat trade negotiations.

Establishing Relationships

Longstanding relationships with Senate Agriculture Committee Chairman Pat Roberts (R-KS) and House Agriculture Committee Chairman Mike Conaway (R-TX) and routine meetings between NSP leadership and their staff members helped establish

NSP's credibility throughout the investigation.

Through NSP's relationship with the House Agriculture Committee, former NSP Chairman Terry Swanson, a sorghum farmer from Walsh, Colorado, was one of few farmers to meet with President Trump and Secretary Perdue early on in the Administration. This enabled NSP to put a farmer's face with the sorghum commodity prior to China's investigations.



▲ SORGHUM PRODUCER LEADERS meet with House Agriculture Committee Chairman Mike Conaway prior to August recess about ongoing trade concerns.



▲ NSP LEADERSHIP MEETS with Secretary of Agriculture Sonny Perdue following China's anti-dumping and countervailing duty cases on U.S. sorghum. Photo by USDA

Other U.S. officials including Senators Jerry Moran (R-KS) and Deb Fischer (R-NE) and Congressmen Kevin Brady (R-TX), Roger Marshall (R-KS), Jody Arrington (R-TX) and Kevin Yoder (R-KS) were also advocates for sorghum during the trade discussions. Kansas Senators Roberts and Moran, were (and continue to be) champions of sorghum throughout the entire process and repeatedly visited directly with President Trump on the issue, even taking pictures of sorghum piles into the White House for show-and-tell.

NSP leadership also met with USDA, USTR and now former Special Assistant to the President for Agriculture, Trade and Food Assistance, Ray Starling several times before any tariff announcement was made. In the meetings, NSP voiced the concerns over potential harmful action from China, making the severity of the situation known and reinforced how their support would be critical to the process should China make any decisions against U.S. sorghum.

Pressing Forward

The 178.6 percent tariff was startling, but NSP continued to press forward. When China made the announcement, there were multiple U.S. sorghum vessels en route to China, which quickly needed to be rerouted. Rallying as an industry, the U.S. Grains Council and the United Sorghum Checkoff

Program began looking for new locations for those vessels alongside the U.S. grain trade.

While looking for new destinations for U.S. sorghum, the world demand for feed grains and protein remained strong. The USGC took active steps to push grain into countries such as Saudi Arabia, Morocco, Spain, Japan, Vietnam and the Philippines, which you can read more about on page 16.

NSP leadership also brought attention to other international and domestic market availabilities. NSP continued to schedule meetings in Washington, D.C., to address expanded possibilities within international food aid. In the domestic market, we encouraged the

Environmental Protection Agency to approve the sorghum oil pathway to add domestic ethanol value and help ease the sting in the near term.

Being the Voice

NSP continued to advocate on behalf of sorghum farmers to ensure

fair trade policies. Our longstanding industry relationships with congressional leaders from Kansas, Texas and Nebraska were vital and enabled NSP leadership to promote sorghum's concerns throughout the highest levels of government. Through our collaborative efforts, NSP's petitions for trade negotiations were heard.

USDA Secretary of Agriculture Sonny Perdue was a significant champion for U.S. sorghum producers during this time. He released a statement saying there was no

“Our longstanding industry relationships with congressional leaders from Kansas, Texas and Nebraska were vital and enabled NSP leadership to promote sorghum's concerns throughout the highest levels of government.”

basis in fact of these actions and he stood united with the American sorghum industry within the same week of the preliminary anti-dumping ruling. NSP board members Don Bloss, Kendall Hodgson and James Born, along with NSP CEO Tim Lust, later met with the USDA Secretary to further discuss ongoing needs for sorghum farmers as a result of the Chinese trade situation.

A week after China's preliminary decision, President Trump announced several staff members, including U.S. Trade Representative Robert Lighthizer, would soon travel to China for a high-level trade delegation meeting.

Ending the Investigations

China announced it had terminated the anti-dumping and countervailing duty investigations into U.S. sorghum on May 18, following the trade delegation meeting. China also promised to return in full the temporary anti-dumping deposits that had been collected. NSP welcomed the announcement and the quick result, which we viewed as a win for Chinese customers and a win for America's sorghum farmers.

“We owe a great deal of thanks to our congressional champions in both the Senate and the House, and industry partners who have donated time, resources and ensured sorghum's trade needs were met,” NSP Legislative Committee Chairman and board director Dan Atkisson said. “We also cannot forget the farmers who committed time and transparency required by this case and stood up on behalf of the entire industry.”

Looking Ahead

NSP hoped the dismissal of these cases would reflect decreasing trade tensions between the U.S. and China. However, as trade discussions have escalated, China retaliated against U.S. imposed tariffs by placing a 25 percent tariff on multiple U.S. goods, including sorghum, on July 6. While a smaller percentage, the newly enforced 25 percent tariff continues to impact sorghum prices here at home. See page 22 for an in-depth analysis of trade's impact on sorghum prices since February. Demand for U.S. sorghum continues, but uncertainty remains in the current trade environment.

On July 24, Secretary Perdue announced the USDA authorization of up to \$12 billion to assist farmers effected by trade damages from unjustified retaliations. The short-term relief strategy aims to aid farmers as the Trump Administration works on trade deals. NSP responded with a statement saying, “We respect the Administration for following through with their promise to stand by U.S. farmers, and we look forward to working with Secretary Perdue in providing much needed funds to sorghum farmers and other producers impacted by tariffs. NSP fully supports fairer and open trade and will continue to work with officials to achieve long-term trade solutions.”



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PORT HOUSTON TO EXPAND OPPORTUNITY FOR SORGHUM

By Matthew Winterholler

Over 50 percent of all sorghum grown in the U.S. is produced for export markets, making port facilities, and the highways and rail leading to them, increasingly important for the success of sorghum producers up and down the Sorghum Belt.

Because of its importance in the transportation and export process, Port Houston, where 28 percent of all sorghum leaves the U.S., is implementing a five-year plan to improve the port's infrastructure and efficiency.

Wayne Cleveland, executive director of the Texas Grain Sorghum Association, said transportation infrastructures in the U.S. are some of the most efficient systems in the world, and they are only getting better.

"In China, it is cheaper for them to buy grain sorghum from Texas and ship it to China than it is for them to buy their own and grow it locally in northern China and move it to the southern regions where many of the animals are," Cleveland said. "That's a huge testament to how we are able to move grain out."

Cleveland said innovation and demand have allowed grain transportation systems to become better, especially at ports along the Texas coast, like Port Houston.

"Anytime we can broaden our scope as far as markets and the efficiency of getting it there," Cleveland said, "is, I think, why most international markets return to the United States."

Cleveland said trade with those international markets shows how advanced our transportation infrastructure is.

Infrastructure in sorghum export markets, Cleveland said, is often what dictates how U.S. sorghum is shipped.

While sorghum can be shipped by container, much of the U.S.'s sorghum exports are shipped by breakbulk, which is transporting as a loose grain.

"That's how they are able to move it around on a pretty inferior road system," Cleveland said. "A lot of countries we go to, such as Columbia, they discharge those vessels by hand and fill burlap sacks full of grain for transportation out to the country. That is why a lot of it is sold in containers."



▲ A CHINESE TRADE delegation visits Port Houston to learn about U.S. sorghum exports and export systems.

U.S. ports, like Port Houston, remain competitive on the world stage among developing sorghum markets due to proximity, as well.

"In the United States, Texas has about a seven-day freight advantage to Columbia over Brazil," Cleveland said. "That moves a lot of grain into Latin America."

Though the U.S. can outperform competitors, Cleveland said, there is still a great need to keep the infrastructure of the U.S. highway, rail and port systems up-to-date, especially with the recent expansion of the Panama Canal.

"The bottleneck is always with transportation, especially with sorghum," Cleveland said. "We're expanding that bottleneck so that grain can flow out of here in an expeditious manner."

With its five-year plan, Port Houston has answered the call to expand the transportation bottleneck.

Port Houston Senior Manager in Trade Development Ty Reasonover said the improvements will take place in phases.

"Starting from the very beginning, we knew we needed to make these investments," Reasonover said. "As things started to change and growth started to get bigger, especially from the Asia trade, we knew we needed to double-down and make more investments to stay ahead of the demand-curve."

Reasonover said many of the projects are underway and some have even been completed already.

"We completed our \$80 million dredging project to access our container terminals," Reasonover said. "Our container terminals are now authorized at 45-feet deep to accommodate the new generation of Neopanamax vessels."

Reasonover said the Neopanamax vessels are the

ultra-large container ships, which are now able to fit through the expanded Panama Canal.

With an expanded Panama Canal and larger ships able to pass through, costs for companies which export sorghum, like Cargill and Lansing, could be cut.

According to the vessel shipping distance table on sea-distances.org, the use of the Panama Canal results in over 4,500 miles saved in the one-way trip to Shanghai, China.

"Those cost savings could be a great thing for companies that export sorghum from any of the gulf ports, as well as our end-users," Cleveland said.

In order to keep up with the infrastructure expansion at the Panama Canal, Port Houston must also make infrastructure investments to remain efficient.

While most terminals at Port Houston are privately leased, Reasonover said, Port Houston Authority operates two container terminals, which they are improving for a wave of new-generation ships.

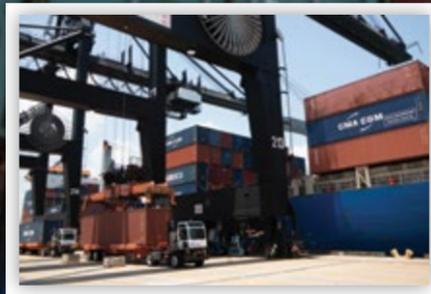
"We are investing about \$1.7 billion in our two container terminals together," Reasonover said.

Reasonover said many of the updates and improvements, which include new cranes and expanding yard space, were not only spurred by the expansion of the Panama Canal, but also huge growth of the port's imports and exports.


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Port Houston is the fastest growing top-10 port in North America, Reasonover said, with 13 percent growth year on year.

For sorghum producers, the growth of the port as a whole could mean more opportunities for international trade.

“We are talking to the ocean carriers to bring more services to Houston,” Reasonover said, “to bring more empty containers by bringing more imports in. As they are bringing more imports in, those get turned around back to the terminals as empty containers and those can be used for more exports like sorghum or cotton.”

Reasonover said along with investments in infrastructure and attracting ocean carriers, Port Houston is looking for ways to diversify their exports.

“At Houston, the main goal is to grow and diversify the types of cargo that go through our facilities,” Reasonover said, “so we’re extremely interested in more sorghum business.”

Investments are not just being seen from the port authority. Many private businesses leasing terminals at the port, like Cargill and Lansing, have taken it upon themselves to improve their infrastructure, as well.

The Sorghum Product Line Manager for Cargill, Bob Vanderloo, said Cargill has invested a lot of money into their facilities at Port Houston.

“We have had an export elevator there since maybe the 60s or 70s,” Vanderloo said. “Cargill has put a lot of money in our elevator and retrofitted it to become an elevator of the future.”

While Port Houston gears up for the future of exports and demand from foreign countries, so too is Cargill.

“Cargill expects to have robust exports and meet the needs of the world,” Vanderloo said, “and I think that’s what the Houston Port Authority is hoping for.”

For Cleveland, the TGSA executive director, the port improvements are an important part of the export process and keeping the U.S. competitive.

“The port is just there to capacitate those shipments,” Cleveland said. “For the most part, they are building a field of dreams, hoping the players will come. In this case, with exports as robust as they are, it’s just putting another grocery store on the street—it makes it easier to get our products out of the United States.”

Cleveland said another concern is other modes of transportation throughout the export process, like railroads.

“We tend to be held captive with rail,” Cleveland said. “By expanding that bottleneck, that should allow more grain to come down from Kansas into Houston.”

Luckily for sorghum producers, Port Houston, Reasonover said, is planning on updating their rail, as well as working with railroad companies to expand services.

“At Port Houston, we have an infrastructure division which has solid relationships with the Texas Department of Transportation and the railroads,” Reasonover said. “We are putting in rail to the Bayport facility soon. We need all

the help we can get from our partners and stakeholders, the railroad, the highway department, and the federal government to give all of us more opportunities to grow.”

Working with the railroads and private companies could potentially lead to a growing market for sorghum at Port Houston.

Looking past infrastructure improvements, Cleveland said filling the world’s demand for U.S. sorghum is another focus of the industry.

The U.S. has a liquidity problem with sorghum, Cleveland said, because export markets have room for more sorghum. Through the Sorghum Checkoff, privatized seed development and agronomic education, Cleveland believes the liquidity of U.S. sorghum can be lifted.

“The world wants our product,” Cleveland said, “it’s a high-quality, efficiently produced product, and the shipping channels absolutely work. We just need to get it to the port and get trade agreements nailed down. Those are our two greatest concerns right now.”

“
At Houston, the main goal is to grow and diversify the types of cargo that go through our facility, so we’re extremely interested in more sorghum business.
”

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EPA Approves Sorghum Oil Pathway

Pathway clears the way for biodiesel plants to produce advanced biofuels from grain sorghum oil extracted at ethanol plants

By Delanie Crist

On July 24, Environmental Protection Agency Acting Administrator Andrew Wheeler approved sorghum oil as an eligible feedstock under the Renewable Fuel Standard. A signing event was held at EPA headquarters in Washington, D.C., with National Sorghum Producers leadership and Senators Jerry Moran (R-KS) and Deb Fischer (R-NE) and Congressman Roger Marshall (R-KS).

NSP Chairman Don Bloss, Vice Chairman Dan Atkisson, and directors Kody Carson and Bobby Nebalek provided remarks, expressing how the pathway is welcomed news for our industry and marks a significant step toward leveling the playing field for ethanol plants extracting oil from grain sorghum.

"This is a great day for U.S. sorghum farmers and their partners in the ethanol and biodiesel industries," said NSP Chairman Don Bloss, a sorghum farmer from Pawnee City, Nebraska, after the event. "NSP has worked tirelessly for over two years to make this happen. A pathway for sorghum oil opens new markets for ethanol plants extracting oil from sorghum and ultimately adds value to the grain farmers produce."

The EPA's approval of the pathway will result in near-immediate

introduction of a monthly increase volume of grain sorghum oil biomass-based diesel and advanced biofuels into the stream of commerce. NSP estimates an additional 20 million bushels per year will be absorbed with new market access for the crop. Senator Moran said now, more than ever, farmers need every available market for the sorghum they produce.

"Approval of the sorghum oil pathway will increase the incentive for ethanol facilities to uti-

lize sorghum," he said, "meaning higher prices for farmers. Several ethanol facilities have already installed the technology necessary to separate sorghum oil from distiller's grain. With sorghum oil now approved to produce biofuels, sorghum will no longer be at a price disadvantage compared to other crops with approved pathways."

Congressman Marshall added his optimism for additional markets for Kansas sorghum producers and its benefits reaching beyond the farmer.

"This pathway is crucial to not only our sorghum producers, but also our biofuels plants, and our rural economy," Rep. Marshall said. "Farmers can use all the relief they can get in the midst of growing uncertainty in global markets. I look forward to seeing the positive impact this pathway will have in the Kansas First District."

For over two years NSP worked closely with the EPA to establish a biofuels pathway for grain sorghum oil in the RFS. The process officially began when NSP submitted a full petition in July 2016 with almost 300 pages of documentation from nutritionists and construction companies.

In December 2017, the EPA released a notice of proposed rulemaking (NPRM)

concerning renewable fuels produced from grain sorghum oil under the RFS program followed by a 30-day comment period. NSP submitted supplementary documentation in January and March 2018.

EPA's final analysis shows biodiesel produced from grain sorghum oil has greenhouse gas (GHG) emissions savings of 82 percent, giving ethanol plants extracting oil from grain sorghum access to sell into the biodiesel market.



▲ EPA ADMINISTRATOR WHEELER signs the grain sorghum oil pathway at EPA headquarters in Washington, D.C., with sorghum, farm bureau and congressional leaders.

Sorghum Win out West CARB Fix on the Horizon

By John Duff

Sorghum farmers are on the brink of a \$31 million victory in a key environmental market. When the readopted California Low Carbon Fuel Standard (LCFS) takes effect in January 2019, sorghum ethanol will have a carbon intensity (CI) score similar to that of corn ethanol. Competitive CI scores are essential as they directly impact an ethanol producer's ability to bid for grain. NSP worked with the California Air Resources Board (CARB), the Argonne National Laboratory, Conestoga Energy Partners, White Energy, Western Plains Energy and a number of other stakeholders for the last four years to level the CI playing field for sorghum farmers.

Aimed at reducing the CI of fuels used in California by 10 percent between 2011 and 2020, the LCFS incentivizes low CI fuel using a system wherein fuels with low CI scores generate carbon credits. The lower the CI, the more credits the fuel generates. Historically, sorghum ethanol had a small CI advantage relative to corn ethanol under the LCFS, and this advantage translated into a couple cents per bushel. However, in mid-2015, CARB made changes to its CI calculations, and the advantage was turned into a disadvantage. Soon, ethanol producers had difficulty bidding for

sorghum as this disadvantage coupled with soaring prices for carbon credits translated to a \$0.51-per bushel penalty for using sorghum.

The problem was a shift to a greater reliance on USDA Agricultural Resource Management Survey (ARMS) nitrogen fertilizer data. Due to significant budget constraints, ARMS is not conducted as often in smaller crops such as sorghum. Accordingly, sorghum data was collected in four years out of 27 as compared to corn data that was collected in 18 out of 27 years. Three of these four sorghum years saw drought conditions in the Sorghum Belt, and this greatly reduced yields and overstated nitrogen fertilizer application. Given nitrogen fertilizer application comprises over three-fourths of the portion of CI attributable to farming activities, this shift to ARMS data significantly lowered the value of sorghum ethanol sold in California and thus the amount ethanol producers were willing to bid for the grain.

With carbon credit prices projected to continue rising (today the average credit price is over \$180 as compared to the average price of \$20 in the early days of the LCFS when sorghum ethanol's advantage amounted to a couple cents per bushel), NSP led an exhaustive effort to supply better nitro-

gen fertilizer data for CARB's calculations. In February, these efforts were rewarded when a draft version of CARB's newest calculations showed sorghum ethanol's CI score improving enough to wipe out the vast majority of the penalty. When these calculations became part of the readopted LCFS when it takes effect in January 2019, sorghum ethanol sold in California should be much closer to its historical value and sorghum will be back on a more level playing field with corn ethanol.

At a time when trade negotiations are causing historic levels of uncertainty-driven price decline, this CI change is a substantial win for farmers and ethanol producers looking to add value to sorghum.

Incentivizing Low Carbon Fuels

LCFS carbon credit prices over time



USGC HELPS DIVERSIFY SORGHUM MARKET DURING U.S.CHINESE TRADE DISPUTE

MARKETS MOBILIZED

By Julia Debes, U.S. Grains Council

Even in the toughest of times, the on-the-ground presence around the world and rapid response by U.S. Grains Council (USGC) staff can turn a crisis into an opportunity to build lasting markets.

Twenty vessels of U.S. sorghum were in transit to China when the country announced an immediate 178.6 percent preliminary anti-dumping duty on U.S. sorghum on April 17, 2018. The Council, as the export market development organization for the U.S. sorghum industry, went immediately to work – fielding calls by members and international customers looking for alternative markets for these sorghum shipments.

Buyers responded just as quickly to the situation and vessels were re-routed, albeit at a significantly discounted price, to markets including Spain, Saudi Arabia and many others.

“The intense efforts of the Council’s global network to find alternative markets for U.S. sorghum demonstrates how responsive we are as an organization,” said Deb Keller, USGC chairman and farmer from Iowa. “This work is emblematic of who we are and what we have done since the organization was founded in 1960.”

The Council’s long history working in China prepared the organization for the threat of another market shutdown. As a result, when China announced investigations against U.S. sorghum in February 2018, the Council

had already laid the groundwork and immediately sprang into action to find potential alternative markets.

The Council worked with the Texas Grain Sorghum Producers Board and Association and the Texas Department of Agriculture to immediately redirect a trade team of U.S. farmers and agribusiness members to Spain from their originally scheduled visit to China. In March 2018, the team of six engaged with Spanish importers and end-users to promote the return of U.S. sorghum to the Iberian Peninsula. The delegation included a sorghum farmer from the Texas Panhandle and grain traders, as well as representatives from farm cooperatives, the ethanol industry and the Texas Department of Agriculture.

The delegation spoke during two conferences in Barcelona and Madrid, providing the Spanish audience real-time information on the U.S. sorghum crop and the outlook for prices.

“Spain knows U.S. sorghum,” said Alvaro Cordero, USGC manager of global trade, who participated in the overseas mission. “We wanted to make sure they were fully aware of the market opportunity and ensure, when prices were right, Spain would be the first country to buy U.S. sorghum.”

The Council continued to monitor developments and provide information to Spanish grain buyers after the trip concluded. When the sorghum tariff was announced by China, Spanish customers were among the first the Council contacted. Since the ini-

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tial announcement, 250,000 tons (6.3 million bushels), valued at approximately \$48.8 million, of U.S. sorghum have been discharged in Spanish ports.

Elsewhere in the world, Cordero and Ramy Taieb, USGC regional director for the Middle East and Africa, were on the ground in Saudi Arabia the week the new tariff was announced. Building on existing engagement in the market, the pair met with buyers to discuss the distressed sorghum vessels and how U.S. sorghum could help meet Saudi Arabia’s growing feed demand.

After the meetings in April, four Panamax shipments of U.S. sorghum, equaling about 280,000 tons (7.1 million bushels) valued at approximately \$54.6 million, were re-routed to Saudi Arabia and discharged in Dammam port. The major feed mills that purchased these shipments continue to show significant interest in sorghum – not only due to price, but also as an alternative coarse grain these companies can use and easily adapt to their processes.

In addition to these large markets, the Council continues to highlight the economic and nutritional advantages of U.S. sorghum to buyers. The Council has

distributed the latest feeding guidelines for sorghum from the United Sorghum Checkoff Program and is talking candidly and frequently with customers to promote the coarse grain.

Back in the United States, representatives from the Council and the National Sorghum Producers are in ongoing conversations with the Office of the U.S. Trade Representative (USTR) and USDA’s Foreign Agricultural Service (FAS) on responses to Chinese duties and new programming that could mitigate its long-term impacts on the sorghum industry. The Council continues to monitor the trade

environment between the U.S. and China and is prepared to defend sorghum shipments – whether to China or elsewhere – as a means of supporting the nation’s farmers.

The cumulative results of these direct conversations and information-sharing with end-users as the Chinese sorghum tariff situation continues to unfold embodies the work the Council does 24 hours a day, seven days a week, 365 days of the year, on behalf of U.S. farmers and agribusinesses – to develop markets, enable trade and improve lives.✂

“ This work is emblematic of who we are and what we have done since the organization was founded in 1960. ”

NEWSLETTER

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SUMMER TRADE TEAMS STRENGTHEN TRADE RELATIONSHIPS

The Sorghum Checkoff works in conjunction with the U.S. Grains Council each summer to develop and expand global markets for sorghum by establishing a number of trade missions. Approximately 30 trade teams comprised of more than 200 visitors from Australia, China, Columbia, Egypt, Japan, Korea, Mexico, Morocco, Saudi Arabia, Spain and Taiwan have visited the U.S. to learn more about sorghum.

U.S. sorghum industry representative teams selected by the U.S. Grains Council also visit other countries and seek to grow international marketplaces by strengthening existing trade relationships and to foster new ones with potential buyers. With the U.S. being the top exporter of grain sorghum, accounting for nearly 75 percent of global trade, these collaborations help promote the value of U.S. sorghum across the globe and contribute to an increase in market demand, ultimately strengthening producer opportunities.

MEXICO

This year's domestic trade missions kicked-off June 18-22 with a visit from several young Mexican feed-millers and importers to the U.S. The team visited parts of Kansas and Texas to explore leading areas of sorghum production and learn more about export logistics. Members of this team represented the upcoming generation of sorghum end-users in Mexico from the National Association

of Food Manufacturers for Animal Consumption (ANFACA) and companies in central and northern Mexico, including the state of Jalisco, the number one livestock producing state in the country, and Michoacán and Sonora. Mexico is the fourth largest producer of livestock feed worldwide, accounting for 33.87 million metric tons of feed. Of this total, Jalisco, Sonora and Michoacán contribute to a combined 31 percent of overall production in Mexico.

The tour included visits to sorghum suppliers and producers, feed mills, elevators, a rail facility, an ethanol plant and the Port of Houston.

The visit focused on educating Mexican buyers about U.S. sorghum production, marketing and accessibility.

"Touring the Sorghum Belt and visiting sorghum farms allows the

international buyers to learn current information on not only the U.S. crop condition, but also the global market situation," said Shelee Padgett, Sorghum Checkoff regional director. "Meeting face-to-face with the farmer helps the buyer better understand the opportunities and challenges for our crop and provides an environment to build lasting relationships."

The country of Mexico accounted for \$103 million in exports of U.S. sorghum, equating to 568,254 metric tons (22.4 million bushels), during the 2016-2017 marketing year. Mexico remains one of the chief importers of U.S. sorghum, only second to China in purchases.

"MEETING FACE-TO-FACE WITH THE FARMER HELPS THE BUYER BETTER UNDERSTAND THE OPPORTUNITIES AND CHALLENGES FOR OUR CROP.."



Mexico Trade Team members stand atop grain storage facilities at Mid-Kansas Coop in Milan, Kansas



Sorghum Checkoff staff visit with Chinese buyers at Joe Wilder's farm in Snook, Texas

CHINA

Following the Mexico team visit, a team of seven Chinese end-users made stops in Texas, including two sorghum farms, a multi-facility grain company, the Port of Houston and a global merchant for agriculture commodities. After they visited Texas, the team headed to Kansas where they toured multiple sorghum farms, an ethanol plant and an enterprise with feed milling and a livestock operation.

The team learned about sorghum production, buying strategies and developed relationships with U.S. sorghum suppliers at all levels of the value chain as sorghum demand from China rebuilds following trade challenges in early 2018.

"U.S. farmers pride themselves in maximizing production quantity and quality of their sorghum crop," said Florentino Lopez, Sorghum Checkoff executive director. "In the same way, end-users work to exceed expectations of their final products made from U.S. sorghum."

SORGHUM CHECKOFF SPONSORS FIRST DIETITIAN FARM TOUR

The Sorghum Checkoff sponsored the first ever dietitian sorghum farm tour during the Today's Dietitian Symposium May 20-22 in Austin, Texas. The tour was led by renowned dietitian and Sorghum Checkoff partner Sharon Palmer, an award-winning registered dietitian nutritionist, author and blogger. Nearly 50 dietitians from across the U.S. gathered to learn more about sorghum production practices and sustainability with James Kamas at his farm in central Texas. Wayne Cleveland, Texas Grain Sorghum Association executive director, and his wife Kathy treated the group to

"These programs allow end-users and producers to share common values and create lasting relationships supporting long-term growth in export markets which can be seen by our increased export commitment now exceeding 50 percent of total sorghum production."

China became a top customer for U.S. sorghum during the 2013-2014 marketing year, obtaining a value of \$1 billion in sales since then. These trade missions hosted by the Sorghum Checkoff and the U.S. Grains Council aid in maintaining this invaluable market and help facilitate continued trade with countries around the world.

Maintaining an open line of communication with buyers and end-users of the U.S. crop remains a priority of both the Sorghum Checkoff and industry partners such as the U.S. Grains Council. A better understanding of U.S. sorghum production assists in building future sales and increasing buyer trust. ✓

lunch with a menu featuring a variety of sorghum items, including charcuterie with sorghum crackers, corn and sorghum tortillas, sorghum molasses glazed chicken pops, pearled sorghum tabbouleh and sorghum lime cookies. Sorghum Checkoff staff also shared sorghum's nutritional and culinary benefits with the group.

"With the advent of the buy local mantra from consumers, this event was a great way for us to connect directly with the experts who make nutritional decisions for many such consumers," said Doug Bice, Sorghum Checkoff market development

director. "Based on the positive response from the dietitians on the tour, this type of event is another successful avenue to bridge agriculture and consumers."

Following the tour, the Sorghum Checkoff hosted a booth at the Today's Dietitian Symposium where staff shared information and samples of a Watermelon and Arugula Sorghum Salad and Wondergrain's Three Bean Salad. The farm tour and exhibit at Today's Dietitian Symposium provided new opportunities to showcase sorghum's benefits from field to plate. The Sorghum Checkoff will continue to seek momentum-increasing opportunities to share the sorghum story with this important audience. ✓



GLOBAL SORGHUM CONFERENCE: SORGHUM IN THE 21ST CENTURY

The Sorghum Checkoff participated as a core sponsor for Sorghum in the 21st Century, an international sorghum conference, in Cape Town, South Africa, on April 9-12. More than 400 attendees from over 40 countries in the global sorghum research community gathered for the conference. Eighty-five attendees represented the United States. Justin Weinheimer, Ph.D., Sorghum Checkoff crop improvement director; Brent Bean, Ph.D., Sorghum Checkoff director of agronomy; Jennifer Blackburn, Sorghum Checkoff external affairs director; and Martin Kerschen, Sorghum Checkoff board director from Garden Plain, Kansas, attended the event. The overarching theme for the conference was "Food, Feed and Fuel in a Rapidly Changing World."

The program was the first of its kind in more than 20 years and held talks on five cross-cutting themes:

- Accelerating progress in advanced breeding for improved crop adaptation to climate risks
- Improving productivity and increasing profitability to expand opportunities across global markets
- Enhancing resilience in the face of biotic and abiotic challenges
- Tackling key issues in food security and farming systems for improved livelihoods for the small-holder farmer
- Exploring the future of the value-added nu-

trition, biofuels and feedstuffs for evolving consumer demands.

These five themes were explored through topical sessions, and a multitude of professional development opportunities were offered to attendees throughout the conference.

GLOBAL CONNECTIONS

The conference convened in Africa because it is the country of origin for sorghum. Sorghum originated in Ethiopia around 7,000 years ago before it spread to use throughout the rest of the world. Representatives brought perspectives from every continent where sorghum is now grown.

"We believe that it is time for the world's sorghum community to come together around research, industry and opportunity," said Timothy Dalton, director of Feed the Future Inno-

vation Lab for Collective Research on Sorghum and Millet and conference organizer. "The need for cross-border collaboration and exploration of cutting-edge technologies and developments has never been greater."

The Sorghum Checkoff interacted with the global research community to discuss potential collaborative opportunities to bring value to U.S. growers. Understanding the opportunities for global collaboration ensures the Sorghum

Checkoff has access to all available assets and information needed to solve issues faced by U.S. sorghum farmers.

"Many farmers look to sorghum as a key part of their cropping rotation, and to continue that, sorghum needs to maintain its vibrancy and its ability to offer new opportunities for farmers," said Sarah Sexton-Bowser, managing director at the Kansas State University Center for Sorghum Improvement. "Having a pipeline full of robust new discoveries is critical to fill this need, and this conference has empowered us to deliver results in a relevant and informed way."

Attendees of the conference were encouraged to identify global priorities and look to advance sorghum by gathering a synopsis of where the industry is today and how to improve through the lens of making an impact at the field level. Sorghum in the 21st Century provided a global context for those at the conference to gain a deeper understanding of challenges faced internationally.

"Researchers were able to learn their value to the farmer on a broader scale," said P.V. Vara Prasad, Ph.D., Kansas State University professor and director of Crop Ecophysiology and Sustainable Intensification Innovation Lab. "Many innovations have developed in the sorghum industry since the last global meeting held around 20 years ago, so this conference was very timely."

STUDENT ENGAGEMENT

This year's conference also placed emphasis on engaging the next generation of sorghum researchers and industry professionals. Graduate students from all over the world attended the conference and presented their research.

Scholarships were awarded and mentorship was established between the upcoming generation and the more seasoned sorghum professionals.

"Allowing students to showcase their research promotes an environment for interaction between the current generation and upcoming generation of young professionals in our global sorghum community, said Vara Prasad. "Events like this are crucial in motivating students to continue in higher education and to make contributions to the sorghum communities because they are the future of the crop."

LOOKING TO THE FUTURE

Researchers across the globe are dedicated to sorghum improvement programs and their minds are aimed at creating opportunities through discovery for sorghum. Sorghum in the 21st Century created an outlet for exchange of ideas and a way to generate improved outcomes for the farmers who feed and fuel the world.

Discussions were held on crop improvement, genetic advancements, consumer needs, market development and much more. Research networks were formed and will serve as a beneficial resource as the sorghum industry takes next steps together.

"Sorghum has great genetic diversity and recourse, and we are beginning to explore it in a new way with more opportunity than we have in the past," said Mitch Tuinstra, Ph.D., Professor of Plant Breeding and Genetics at Purdue University and Scientific Director of Plant Science Research and Education Pipeline. "The crop holds a lot of promise and the future is bright for sorghum all across the board thanks to great minds in the global sorghum community." ✓



Watch our conference recap video at https://youtu.be/KADGmX3_8wg

SORGHUM INDUSTRY EVENTS

Sept. 3 - Labor Day Holiday
Office Closed

Sept. 5-7 - Leadership Sorghum Class IV
Session 1
Lubbock and Amarillo, Texas

Sept. 17-19 - National Grain & Feed Assoc. -
Pet Food Institute Joint Conference
St. Louis, Missouri

For more events, visit sorghumcheckoff.com/calendar

CONTACT US



Shalin Pinkerton
Communications Manager
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SORGHUM CHECKOFF MISSION

To efficiently invest checkoff dollars to increase producer profitability and enhance the sorghum industry.

Trade Dispute Deals Blow to Sorghum Farmer Profitability

By John Duff

Every dollar counts in the current economic environment. With the U.S. average sorghum price declining from a high of \$6.33 per bushel in the 2012/13 marketing year to around \$3.20 per bushel today, sorghum farmers cannot afford another blow. Unfortunately, ongoing uncertainty surrounding the trade negotiations with China has already cost sorghum farmers as much as \$1.36 per bushel or \$92 per acre in lost value and opportunity.

Trade has always been an important component of sorghum demand. NSP was a founding member of the U.S. Grains Council, and sorghum farmers long relied on Mexico as their largest trading partner. In April 2013, trade grew even more important with the entrance of China into the market for U.S. sorghum. Chinese poultry, swine and dairy producers quickly became the crop's largest end-users, purchasing 75 percent of total production in the 2015/16 marketing year. Mexico and others joined China to import over 90 percent of that year's crop—a new record in both share of production and total volume exported.

Five years—to the day—after the U.S. Department of Agriculture reported the first purchases of U.S. sorghum by China, the country levied 178.6 percent tariffs based on alleged findings that U.S. farmers had sold sorghum below their cost of production. This halted trade immediately, and the more than 60 million bushels of sorghum already en route to China had to be redirected. Had redirection not occurred, total tariffs would have approached \$500 million or about twice as much as sorghum farmers have made from the Chinese market since 2013. The 178.6 percent tariffs were dropped in May, but the 25 percent tariffs levied in retaliation for the Section 301 intellectual property investigation remain in effect.

As a result of the ongoing uncertainty, U.S. sorghum farmers continue to experience severe economic pain. Since the original investigation that led to the 178.6 percent tariffs was initiated, prices paid to sorghum farmers have fallen precipitously. This decline has lowered the average sorghum basis across the U.S. by up to \$0.74 per bushel or \$50 per acre. Furthermore, corn futures have declined by as much as \$0.62 per bushel or \$42 per acre. Together, the total impact is as high as \$1.36 per bushel or \$92 per acre.

The average sorghum farmer raises crops on less than 1,300 acres, of which approximately 600 are planted to sorghum each year. Accordingly, the trade war has cost each farmer as much as \$55,000 in lost opportunity. Although

some are also employed off the farm, some have cattle or other value-added enterprises, and some have spouses that work off the farm, sorghum is the primary source of income for thousands of families across the Sorghum Belt. For these families, losing \$55,000 could have disastrous consequences.

Sorghum farmers are keenly aware of the inequities currently working against U.S. industries engaging in international competition. Their industry is vibrant today in large part because of the opportunities provided by exports over the last six decades, and most believe other industries should have the same opportunities. However, U.S. agriculture is comprised of family farmers who cannot stand to lose markets. With this in mind, NSP will continue to advocate vocally for fair trade practices while urging lawmakers to stand by farmers during these discussions.



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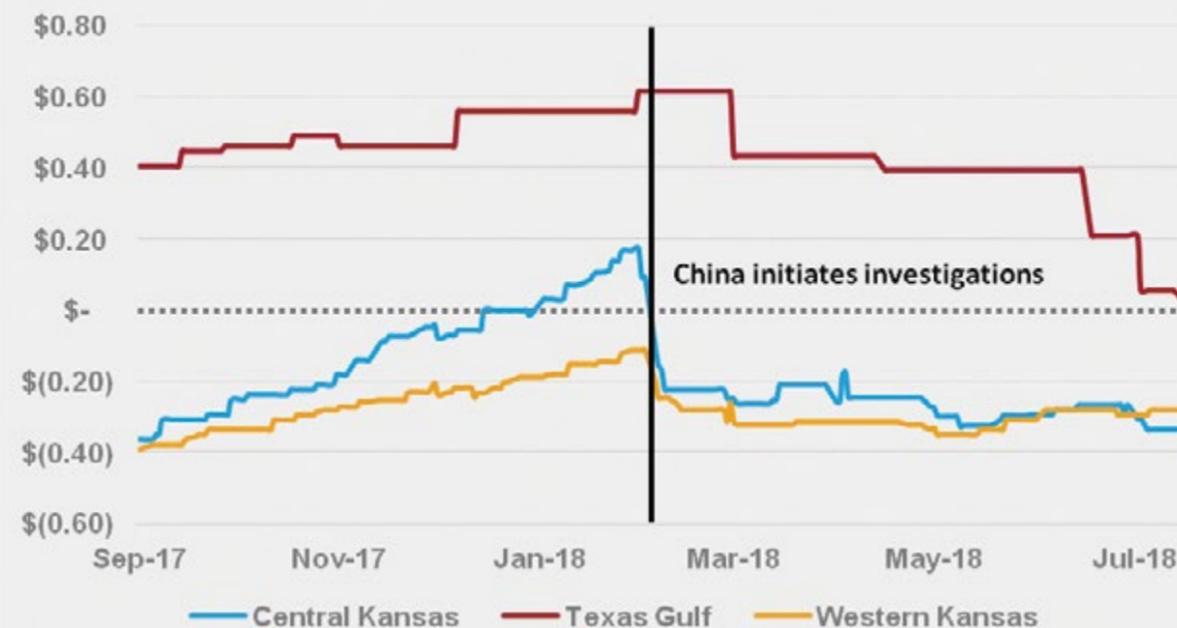
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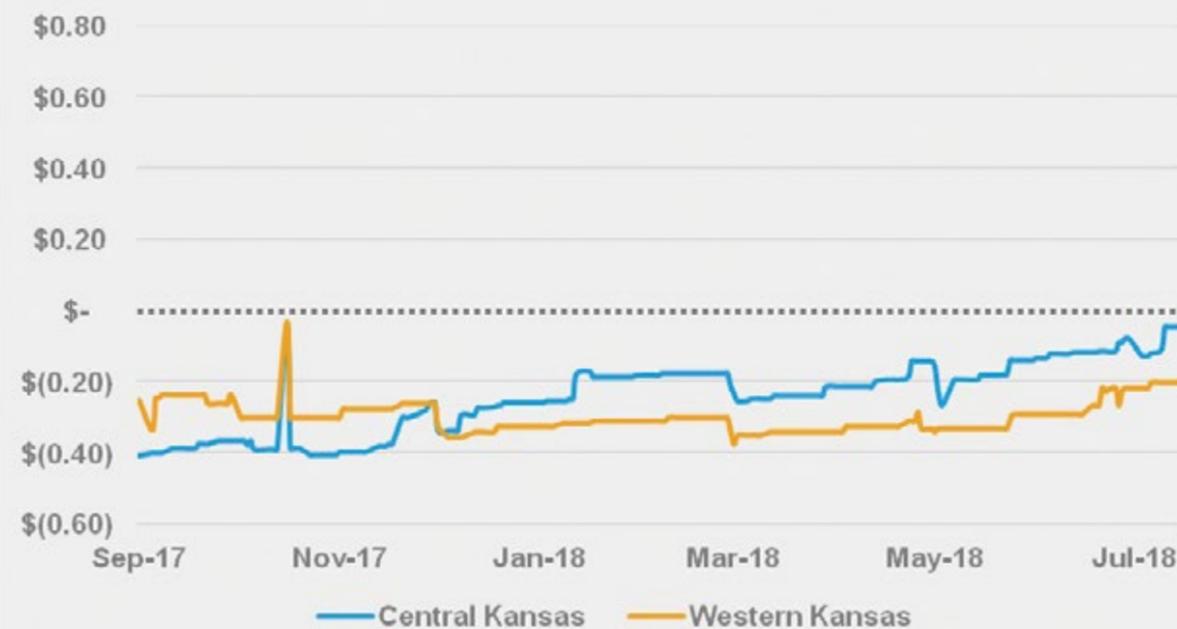
A Hard Hit to the Bottom Line

Sorghum basis (cash price less futures price) in key locations before and after China initiated its investigations



Holding Steady

Corn basis (cash price less futures price) in key locations in the 2017/18 marketing year



Sorghum Tabbouleh SALAD with GRAPES

Make this recipe

WHAT YOU'LL NEED:

Salad:

- 1 cup whole grain sorghum
- 4 cups water
- 1 cup halved green grapes
- 2 cups diced English cucumber
- 2/3 cup chopped flat leaf parsley
- 1/2 cup chopped dill
- 1/4 cup chopped mint
- 2 tablespoons extra virgin olive oil
- 2 tablespoons lemon juice
- 1 teaspoon lemon zest
- 1/4 teaspoon sea salt
- Freshly ground pepper to taste

DIRECTIONS:

- 1 Rinse and drain the whole grain sorghum.
- 2 Bring 4 cups of water or stock to a boil in a small saucepan.
- 3 Add 1 cup of whole grain sorghum. Cover with a tight-fitting lid and bring to a boil. Reduce heat to medium and let simmer for 45 minutes or until tender.
- 4 Fluff the sorghum with a fork and transfer to a medium mixing bowl to cool.
- 5 Once the sorghum is cool, combine the grapes, cucumber, herbs, oil, lemon juice and zest, salt and pepper.

For this recipe and more, visit:
SimplySorghum.com



Sorghum Update

Brought to you by the Kansas Grain Sorghum Commission

Kansas Infrastructure Important to Sorghum Crop

With another fall harvest ahead of us, it is important to review the logistics of grain sorghum movement within the state as well as shipping it abroad.

The United States relies on multiple transportation modes to ensure delivery of grain sorghum to domestic markets as well as deliveries to other countries. According to the Aug. 24 USDA Grain Transportation Report, the predominant mode of transportation is trucks, hauling about 74 percent of the total grain sorghum tonnage annually. Over the same time span, railroads transported about 20 percent, and river barges account for roughly 6 percent.

In more recent years, rail lines are crucial to the Kansas grain sorghum crop. Having the ability to move massive amounts of bushels from the Kansas plains to southern export facilities is dominated by rail. Texas received over 80 percent of Kansas sorghum shipments in 2014. The shipments to Texas reflect domestic use, direct rail shipments to Mexico and export shipments out of the Gulf.

Grain sorghum is the fourth largest crop harvested for grain in the United States, and contributes a smaller, yet important, share of the nation's grain transportation demand. Thankfully, Kansas farmers have a network of modern and innovative facilities at their disposal. AgMark, LLC, for example, plays a vital role in sourcing grain throughout the country, as well as globally. AgMark services 12 counties in north-central Kansas, allowing our producers access to a multitude of potential sorghum buyers. They handle, on average, 20 million

bushels of grain sorghum annually, which is 50 percent of the total production in that area. Eighty-two percent of AgMark's grain sorghum is shipped by unit trains out of its Concordia and Glen Elder locations to the Texas Gulf for export, the balance of which primarily goes to local ethanol production.

Over time, use by export and industry has expanded, while the amount used for domestic feed production has declined. Exports, an important market for Kansas sorghum producers, have generally expanded in recent years, typically accounting for more than half of the state's annual production.

Kansas continues to lead the nation in sorghum production and innovation. Our industry has seen its fair share of struggles in the past. However, with a surge in demand the last five years and expansion into new markets, Kansas grain sorghum remains vital to the global grain portfolio.

For more information about the Kansas Grain Sorghum Commission, visit our website at www.ksgrainsorghum.org.

or contact your commissioner. District 1 – Lonnie Wilson, Colby; District 2 – Greg Graff, Marienthal; District 3 – Mike O'Brate, Ingalls; District 4 – Stephen Bigge, Stockton, Chairman; District 5 – Clayton Short, Assaria, Vice-chairperson; District 6 – Jay Zimmerman, South Haven; District 7 – Nathan Larson, Riley, Secretary / Treasurer; District 8 – Kevin Kniebel, White City; District 9 – Gary Kilgore, Chanute, or contact us at admin@ksgrainsorghum.org, www.ksgrainsorghum.org.





Sorghum Shortcuts

National Sorghum Foundation-BASF Joint Scholarship

Apply for the National Sorghum Foundation-BASF Scholarship for the 2018-2019 school year. The scholarship will include a \$2,500 award for tuition as well as the recipients' cost to attend the 2019 Commodity Classic in Orlando, Florida, February 28 – March 2, 2019. Applicants must be pursuing an undergraduate or graduate degree in an agricultural-related curriculum. Students must be a child or grandchild of a NSP member, and undergraduates must be entering at least their second year of study by the 2018-2019 academic year. Applications are available at SorghumGrowers.com and must be postmarked by December 1.

For questions or to submit application materials, please contact National Sorghum Foundation Director Larry Lam-bright at larry@sorghumgrowers.com or 806-773-1328.



Upcoming Yield Contest

Each year the National Sorghum Producers Yield Contest provides sorghum farmers with the opportunity to showcase their sorghum crop, competing with farmers across the Sorghum Belt. This contest allows our industry to recognize some of the best growers in the U.S. and helps farmers to grow and learn from one another.

In this year's yield contest, entries will be divided into east and west regions with the dividing line following the eastern state borders of North Dakota, South Dakota, Nebraska, Kansas, Oklahoma and Texas. Changes were also made to the division categories. The 2018 Sorghum Yield Contest divisions are Irrigated No-Till, Irrigated Tillage, Dryland No-Till, Dryland Tillage and Food Grade. A Bin Buster award will be awarded to the

grower with the highest yield. The Go For 250 honors are still up for grabs and will be given to growers with 250 bushel per acre yield or more. Only one national award will be given in the Food Grade division. Harvest Report forms and Management Information forms must be completed and returned to the NSP office by the Dec. 1, 2018, deadline. Visit SorghumGrowers.com/yield-contest to learn more.

NSP Hires New Industry Relations Director, Administrative Manager

Jamaca Battin has joined the National Sorghum Producers staff full-time as the Industry Relations Director. Battin will play an integral role in developing new relationships that will allow for greater sorghum representation in D.C. and will lead the efforts of the Industry Partner program.

Battin joined NSP part-time as Sorghum PAC Coordinator in November. Prior to her position at NSP, she owned her own business, while also working for the USDA Farm Service Agency in Kansas for 10 years. Battin and her husband have been long-time supporters of NSP and the sorghum industry. Battin started her position June 4. She can be reached at jamaca@sorghumgrowers.com.

On June 4, Amanda Flores joined NSP staff as the new administrative manager. Flores will assist with day-to-day administrative operations for both NSP and the United Sorghum Checkoff Program. You can expect a new, cheerful voice when you call our office! Flores can be reached at amanda@sorghumgrowers.com.



Jamaca Battin



Amanda Flores

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Huskie® postemergence broadleaf herbicide gives sorghum growers a highly effective strategy for weed control.

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EVERY SEED IS THE TOTAL PACKAGE



Eric Blakeslee
Pioneer Sales Associate

Lee Pifer
Grower

Ryan Harms
Pioneer Territory Manager

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