

Newsletter December 16, 2016

Thank you for your commitment to the future of agriculture and our membership.

Draft State Plan to Achieve Permanent Conservation Measures Released

On Nov. 30, the Department of Water Resources (DWR) and four other State agencies, including the State Water Resources Control Board (SWRCB), California Public Utilities Commission (CPUC), and California Department of Food and Agriculture (CDFA), and California Energy Commission (CEC), released a draft plan for achieving permanent conservation measures, as directed by Governor's Executive Order B-37-16.

On May 9, 2016 the Governor issued Executive Order B-37-16 that aims to bolster California's climate and drought resilience. Built on the temporary statewide emergency water restrictions, this Executive Order directs five State agencies (collectively, the EO Agencies) to establish a long-term water conservation framework that will enhances the resiliency of California communities as a whole against climate and drought. The resulting actions and implementation will help to achieve a top priority in the Governor's California Water Action Plan - to "Make Conservation a California Way of Life".

According to the <u>joint press release</u> from Department of Water Resources and the State Water Board, the draft plan represents a shift from statewide mandates to a set of conservation standards applied based on local circumstances, including population, temperature, leaks, and types of commercial and industrial use. For example, communities in hotter and drier climate zones will receive irrigation allowances that reflect evaporation levels.

Key water conservation efforts included in today's plan include:

- Permanent bans on wasteful practices, such as hosing driveways and excessively watering lawns.
- Technical assistance and financial incentives for water suppliers to implement leak prevention, detection, and repair programs.
- Collecting information about innovative water conservation and water loss detection and control technologies.

- Requiring agricultural water suppliers to quantify water use in their service areas and describe measures to increase water use efficiency.
- Full compliance with water use targets for urban water suppliers by 2025.
- Planning and preparing for continued and future drought and water shortages.

Some of the actions described in the draft plan will require working with the Legislature on new and expanded State authority, while others can be implemented under existing authorities. All recommendations aim to achieve the main objectives of the Governor's Executive Order B-37-16 : use water more wisely, eliminate water waste, strengthen local drought resilience, and improve agricultural water use efficiency and drought planning.

In addition to taking action to implement this long-term water conservation plan, State agencies recognize the reality that most of California potentially faces a sixth year of historic drought. Therefore, in January the State Water Board will also consider whether it must extend its existing emergency water conservation regulations, as required by Governor Brown's recent executive order. The State Water Board has already taken action to maintain mandatory reductions in communities that could not verify they have enough water supplies to withstand three more years of severe drought.

The draft plan, Making Water Conservation a California Way of Life, Implementing Executive Order B-37-16, is the result of extensive community and stakeholder engagement across California. The plan was prepared by the Department of Water Resources, the State Water Resources Control Board, the Public Utilities Commission, Department of Food and Agriculture and the Energy Commission. For more information on the development of the draft plan, visit http://www.water.ca.gov/wateruseefficiency/conservation/.

The State encourages the public to submit comments on the draft plan. Comments should be submitted to wue@water.ca.gov no later than December 19, 2016.

USDA Awards \$3.4 Million for Research to Increase Wheat Yields

USDA National Institute of Food and Agriculture sent this bulletin at 12/15/2016 05:22 PM EST

NIFA announcement

USDA Awards \$3.4 Million for Research to Increase Wheat Yields

Media contact: Kelly Sprute, 202-720-3137

WASHINGTON, Dec. 15, 2016 - The U.S. Department of Agriculture (USDA) National Institute of Food and Agriculture (NIFA) today announced the award of \$3.4 million for research into the development of new wheat varieties that are adapted to different geographical regions and environmental conditions. The seven projects are funded through NIFA's new International Wheat Yield Partnership (IWYP) program, part of the Agriculture and Food Research Initiative (AFRI).

"Wheat delivers a significant amount of daily nutrients for American families and people around the world, "said NIFA Director Sonny Ramaswamy. "As demand for wheat grows with the population, wheat research plays a vital role in meeting that need. These grants help support agricultural researchers developing new wheat varieties with greater yield and help us improve global collaboration on wheat research."

Grants announced today include:

University of California, Davis, Calif., \$1,696,000
University of California, Davis, Calif., \$300,000
University of Florida, Gainesville, Fla., \$250,000
Kansas State University, Manhattan, Kan., \$300,000
Kansas State University, Manhattan, Kan., \$300,000
University of Nebraska, Lincoln, Neb., \$300,000
South Dakota State University, Brookings, S.D., \$300,000

Project details can be found on the NIFA website.

Among the projects announced today, scientists from Kansas State University will use the advancing technology of unmanned aerial vehicles (UAV) outfitted with cuttingedge imaging tools to rapidly assess field trials in wheat breeding programs and use aerial images to gather precise measurements of plant traits relating to yield and health. A consortium of 19 institutions led by the University of California, Davis will train a new generation of 15 plant breeders as well as identify, characterize and deploy wheat genes to increase grain yield. This project builds on prior international, multi-institutional NIFA investments that have had direct positive impacts on wheat breeding.

This is the second year of investments in IWYP to enhance agricultural research that supports the G20 Nations' Wheat Initiative, benefiting U.S. farmers and consumers as well as the global community. This international partnership includes USDA's NIFA and the Agricultural Research Service; The U.S. Agency for International Development; Biotechnology and Biological Sciences Research Council of the United Kingdom; Grains Research and Development Corporation of Australia; Department of Biotechnology of India; Mexico's International Maize and Wheat Improvement Center and the Secretariat of Agriculture, Livestock, Rural Development, Fisheries and Food; Agriculture and Agri-Food Canada; France' Institut National de la Recherche Agronomique; and Switzerland's Syngenta Foundation for Sustainable Agriculture.

Authorized by the 2014 Farm Bill, AFRI is the nation's premier peer-reviewed competitive grants program for fundamental and applied agricultural sciences. The

Initiative helps build a foundation of knowledge in fundamental and applied food and agricultural sciences critical for solving current and future societal challenges. AFRI's six priority areas include plant health, production, and plant products; animal health and production, and animal products; food safety, nutrition and health; renewable energy, natural resources and environment; agriculture systems and technology; and agriculture economics and rural communities.

Since 2009, USDA has invested \$19 billion in research both intramural and extramural. During that time, research conducted by USDA scientists has resulted in 883 patent applications filed, 405 patents issued and 1,151 new inventions disclosures covering a wide range of topics and discoveries. To learn more about how USDA supports cutting edge science and innovation, visit the USDA Medium chapter Food and Ag Science Will Shape Our Future.

NIFA invests in and advances innovative and transformative research, education and extension to solve societal challenges and ensure the long-term viability of agriculture. NIFA support for the best and brightest scientists and extension personnel have resulted in user-inspired, groundbreaking discoveries that are combating childhood obesity, improving and sustaining rural economic growth, addressing water availability issues, increasing food production, finding new sources of energy, mitigating climate variability and ensuring food safety.

To learn more about NIFA's impact on agricultural science, visit www.nifa.usda.gov/impacts, sign up for email updates or follow us on Twitter @usda_NIFA, #NIFAimpacts.

USDA is an equal opportunity provider, employer and lender.

NIFA invests in and advances agricultural research, education, and extension, and seeks to make transformative discoveries that solve societal challenges



Premiums Rise as Supplies of High Protein Wheat Fall By Stephanie Bryant-Erdmann, USW Market Analyst

As the <u>Dec. 9 World Agricultural Supply and Demand Estimate (WASDE)</u> confirms, global wheat supplies are at a record high this year. USDA increased its estimate for 2016/17 global wheat production to 751 million metric tons (MMT), up 2 percent from 2015/16 and 6 percent above the 5-year average. USDA now forecasts Australian wheat production to reach a record 33.0 million metric tons (MMT), up 35 percent year over year, if realized.

Higher yields tend to be associated with lower protein. As discussed in the Nov. 3 Wheat Letter, quality test results from Stratégie Grains, UkrAgroConsult, Canadian Grain Commission and other international agricultural groups show lower-than-average protein in the supplies from wheat-exporting countries.

Lower average protein content is problematic for many end-users. According to work done by Shawn Campbell, USW Deputy Director, West Coast Office, nearly all of the world's high protein wheat exports (13 percent protein on a 12 percent moisture basis or higher) originate from just six countries: Australia; Canada; Kazakhstan; Russia; Ukraine; and the United States. High protein wheat production in these countries accounts for an average one-fifth of their total production in a normal year.

High protein wheat supply and demand factors are driving the growing premium between the Minneapolis Grain Exchange (MGEX), which trades hard red spring (HRS), and the Chicago Board of Trade (CBOT) and Kansas City Board of Trade (KCBT), which trade soft red winter (SRW) and hard red winter (HRW), respectively. Last December the intermarket spread between MGEX and KCBT averaged 36 cents. Fast forward to this December, and the MGEX to KCBT spread averages \$1.47.

If the same high-yield, lower-than-average protein correlation also plays out in Australia, there will be little help from that corner for buyers searching for high protein wheat, further supporting the MGEX to KCBT and MGEX to CBOT spreads.

The demand for higher protein wheat also supports HRW protein spreads, which have widened significantly this year at both Gulf and Pacific Northwest (PNW) ports. Over the past 15 years, the average premium for 12 percent protein (12 percent moisture) at the Gulf has been 12 cents per bushel. This year that premium is 46 cents per bushel. The 15-year average premium for 12 percent protein HRW at the PNW is \$1.05 per bushel. Since the beginning of the 2016/17 marketing year on June 1, that average premium is \$1.64 per bushel.

Despite the increasing premiums for higher protein HRW and HRS, U.S. HRW exports are 25 percent ahead of the 5-year average and U.S. HRS exports are 29 percent ahead of the 5-year average. While the average protein content of HRW exports this year is down from last year due to increased demand for all HRW, 12 percent protein shipments account for 31 percent of all HRW shipments to date, up from 27 percent last year. The brisk pace of HRW and HRS exports and anecdotal reports from traders indicate buyers are breaking from the hand-to-mouth buying pattern that has been prevalent this past year to secure supplies of higher protein wheat. Forward contracting for high protein needs now makes sense.

When evaluating competing prices of high protein wheat, buyers should be sure to convert protein values quoted to a common moisture basis. Because water can be readily removed (by drying) or added (by tempering), exporters quote protein using a fixed moisture basis, but they do not all use the same basis. The United States specifies protein on a 12 percent moisture basis. The European Union and the Black Sea region typically use a dry-matter (0 percent) moisture basis. Australia uses an 11 percent moisture basis and Canada uses a 13.5 percent moisture basis. Below is an example of how moisture basis impacts actual protein received, and the conversion equation.

Please call your local USW representative if you have any questions about the

U.S. wheat marketing system, U.S. wheat supply or moisture basis calculations.

Country	Moisture basis used	Example: 13% Protein	Protein Converted to Dry-Matter Basis
Australia	11.0	13.0	14.6
Black Sea	0.0	13.0	13.0
Canada	13.5	13.0	15.0
European Union	0.0	13.0	13.0
United States	12.0	13.0	14.8

Equation to calculate protein content based on different moisture basis: Example: You have a sample of wheat with 10 percent protein on a 13 percent moisture basis (mb) and want to convert to 12 percent mb.

Equation: Protein1/(100-mb1) = Protein2/(100-mb2) 10/(100-13) = Protein2/(100-12) 10/87=Protein2/88

Protein2= (88*10)/87 = 10.1%

Wheat Grower Organizations Welcome New Trade Enforcement Actions Challenging China Policies

USW and the National Association of Wheat Growers (NAWG) welcome two trade dispute actions by the U.S. Trade Representative (USTR) challenging Chinese government policies that distort the wheat market and harm wheat growers throughout the rest of the world. USW and NAWG are encouraged to see the U.S. government take such a strong position on trade enforcement, which is crucial for building confidence in existing and new trade agreements.

The USTR filed a request on Dec. 15, 2016, for consultations with the World Trade Organization (WTO), alleging that China is not fairly administering its annual tariff rate quotas (TRQ) for corn, rice and 9.64 MMT of imported wheat. This request states that China's TRQ administration unfairly impedes wheat export opportunities. The USTR announced the TRQ action simultaneously with a request that the WTO form a dispute panel in the case it filed in September against China's excessive market price support for domestic wheat, corn and rice production.

"As with its price support case, the USTR is shining a light on other policies that preempt market driven wheat trade, stifle our export opportunities and force private sector buyers and Chinese consumers to pay far more for milling wheat and wheat-based foods," said USW President Alan Tracy.

"The facts in these two cases go hand-in-hand, demonstrating how Chinese government policies create an unfair advantage for domestic wheat production," said Gordon Stoner, president of NAWG and a wheat farmer from Outlook, Montana. "Both actions call attention to the fact that when all countries follow the rules, a pro-trade agenda and trade agreements work for U.S. wheat farmers and their customers."

China's wheat TRQ was established in its WTO membership agreement in 2001. Under that agreement, China is allowed to initially allocate 90 percent of the TRQ to be imported through government buyers, or state trading enterprises (STEs), with only 10 percent reserved for private sector importers. The private sector portion of the TRQ is functioning well enough to be filled in recent years, in part because Chinese millers are trying to meet growing demand for products that require flour from different wheat classes with better milling and baking characteristics than domestically produced wheat provides. However, China's notifications to the WTO on TRQ usage show an average fill rate of only 23 percent.

The WTO does not require that TRQs fill every year, but it has established rules regarding transparency and administration that are intended to facilitate the use of TRQs.

"When you consider that China's domestic wheat prices are more than 40 percent higher than the landed cost of U.S. wheat imported from the Pacific Northwest, it would be logical to assume the TRQ would be fully used if the system were operating fairly, transparently and predictably as the rules intend. It is clearly not operating that way," said Tracy. "This troublesome administration of China's wheat TRQ is restraining export opportunities for U.S. wheat farmers and farmers from Canada, Australia and other wheat exporting countries to the detriment of Chinese consumers."

The facts also argue against potential claims that enforcing the TRQ agreement would threaten China's food security. China produces more wheat each year than any other single country and currently holds an estimated 45 percent of the world's abundant wheat supplies. If China met its 9.64 MMT wheat TRQ, it would move up from number 14 to number 2 on the list of the world's largest wheat importers, and its farmers would still produce 90 percent of domestically consumed wheat. Opening the wheat TRQ would also allow private sector millers and food producers to import the types of wheat they say they need, but cannot now obtain, and the benefits would be passed on to China's consumers.

USW and NAWG also applaud the USTR's request for a dispute panel in its WTO challenge to China's trade-distorting market price support programs for wheat, corn and rice. It is a crucial step toward reining in a policy that costs U.S. wheat farmers between \$650 and \$700 million annually in lost income by pre-empting export opportunities and suppressing global prices, according to a 2016 Iowa State University study sponsored by USW.



Field to Market Releases Third Edition of National Indicators Report; Indicators for Wheat Positive

Earlier this month, Field to Market: The Alliance for Sustainable Agriculture released the report "Environmental and Socioeconomic Indicators for Measuring Outcomes of On-Farm Agricultural Production in the United States", commonly referred

to as the National Indicators Report. This report analyses national sustainability trends over time for ten commodities, including wheat. The commodity specific environmental indicators include land use, soil conservation, irrigation water use, energy use, and greenhouse gas emissions. Wheat production in the study period of 1980-2015 improved in land use (acres per bushel), soil conservation, irrigation water use efficiency and energy use per bushel. Greenhouse gas emissions remained consistent over the study period. These results reflect improvements in crop yield and adoption of conservation practices. The report also includes national level trends in biodiversity, soil carbon and water quality. Socioecononmic indicators of farm financial health, farm profitability, worker safety, labor productivity and the generation of economic value are also assessed in the report. Read more...

Federal Policy Update



Ag Secretary Nominee Unknown; Idaho's Otter Joins List, Heitkamp still a Contender

The list of candidates to be President-elect Donald Trump's nominee for secretary of agriculture keeps growing, with congressional politics playing an increasing role unrelated to policy or programs. Insiders still contend a name will be released soon, and possibly

as early as this weekend.

The newest name to be vetted is Idaho Gov. Butch Otter, according to Otter's people talking to the media. The 74-year-old politico mirrors several other nominations put forward by Trump, i.e., male, older, wealthy and business oriented. His experience as a western state governor and six years in the House strengthen his resume. Otter backed Ohio Gov. John Kasich during the primaries, and prior to his political career, he worked his way up to president of Simplot International, the potato/dairy giant, founded by Otter's former father-in-law.

The likelihood Sen. Heidi Heitkamp (D, ND) could be named secretary also continues to bubble within the Trump transition team despite heavy GOP opposition. Known to have been in New York to interview with Trump, a Heitkamp nomination would demonstrate bipartisanship, given the North Dakota Democrat has often voted with the Senate GOP on agriculture issues, and it would let Trump nominate another woman to a cabinet slot. Her nomination, however, wouldn't sit well with some of the major crop

and animal producer groups, many of which landed hard on Trump's agriculture advisory committee when her name first surfaced as a possible candidate.

Heitkamp joining the new administration could also provide Senate Majority Leader Mitch McConnell (R, KY) wider majority control in the Senate - and increase the odds of higher GOP committee seats - as her seat would likely go to a Republican, most insiders contending at-large Rep. Kevin Cramer (R, ND) the most likely successor. Currently, in the wake of Republican John Kennedy's victory in the Louisiana Senate run-off earlier this month, Republicans enjoy a 52-48 majority.

Perry Gets Energy Nod, Zinke Named to Head Interior

Former Texas Gov. Rick Perry, who unsuccessfully campaigned for the GOP presidential nomination in part by pledging to shut down the Department of Energy (DOE), is President-elect Donald Trump's nominee to head that department, while relative unknown House freshman Rep. Ryan Zinke (R, MT), a significant public lands protector, is Trump's pick to head the Interior Department.

Perry, Texas' longest serving governor, got the nod on DOE because of management experience and his willingness to curb the activities of the federal department that not only oversees several critical components of President Obama's climate agenda, but also works on nuclear weapon security. Perry is also a climate change skeptic, and is seen in accord with conservative pushes to curtail or shutdown major programs within DOE. He also unsuccessfully sought a waiver from Texas from the Renewable Fuel Standard (RFS), but has since made statements offering limited support to the program.

Zinke, a former Navy Seal commander and member of the House Natural Resources Committee, was an early Trump supporter and his wife is a member of Trump's transition team on veterans' issues. Zinke's name was a surprise as media reports had all but confirmed Rep. Cathy McMorris Rodgers (R, WA) was Trump's pick for Interior. Also in the mix for the job was Rep. Raul Labrador (R, ID).

Said House Speaker Paul Ryan (R, WI) of the Zinke nomination, "Ryan is a nononsense leader who has spent his entire life serving this country. As a member of the Natural Resources Committee, he has been an ardent supporter of all-of-the-above energy policies and responsible land management. And as a westerner with close to one third of his state owned by the federal government, he is intimately familiar with how Washington's decisions affect people's lives."

Just as a Sen. Heidi Heitkamp (D, ND) nomination could net Senate Republicans their 53rd GOP Senator, Zinke is often talked about and has confirmed he's thinking about running against Sen. Jon Tester (D, MT), seen as a vulnerable incumbent in 2018.

Names Surface on Possible FDA Commissioner Nominees

Save for once retreating from a primary statement about killing off the "FDA food police," President-elect Donald Trump has said almost nothing publicly about FDA, food policy and who should head that agency. Rep. Tim Price (R, GA), a member of the House Budget and Ways & Means Committees, will be nominated to head the Department of Health & Human Services (DHS), which oversees FDA, the animal food industry's chief regulator.

This week, however, two names surfaced as contenders for the top food and drug regulator spot. The leading candidate is Dr. Scott Gottlieb, a physician, former FDA deputy commissioner under President George. W. Bush, and a cancer survivor. Liked and well respected by regulated industry, Gottlieb is a partner at New Enterprise Associates, a venture capital firm, and a resident fellow at the American Enterprise Institute (AEI), a conservative Washington, DC, think tank.

Also talked about because his name is being pushed by his business colleague Peter Thiel, co-founder of Mithril Capital Management, an early Trump supporter and advisor to the transition team, is venture capitalist Jim O'Neill. O'Neill calls himself a libertarian and worked in the office of the deputy secretary at the Department of Health & Human Services (DHS) during the Bush Administration.

Water Resources Development Act/Water Infrastructure Improvement for the Nation Act Approved by Senate in Last Minutes of 114th Congress

The long-awaited Water Resources Development Act (WRDA) - converted ultimately to the Water Infrastructure Improvement for the Nation Act (WIIN) - overcame a handful of political barriers and was approved by the full Senate in the early hours of December 17, finalizing legislation on a 78-21 vote, and providing funding for 30 federal government construction/maintenance projects as part of the inland waterways system, including the lock-and-dam system critical to grain shippers. The House approved the bill last week.

A "buy America" provision in the bill, which applies to steel and iron used in waterway and drinking water projects, was accepted as a temporary requirement, even though Senate Democrats wanted it made permanent. The bill also carries major watershed "restoration" language important to environmentalists.

The Army Corps of Engineers projects specifically identified in the bill are based upon the completion of major final reports on the Calacsieu Lock in Louisiana, the Upper Ohio Navigation System and deepening of Brazos Island Harbor in Texas, along with port projects in Georgia and Florida. The bill also carries funding for several flood prevention and ecosystem restoration projects.

Dumped from the Senate bill was language - the Public-Private Partnership (P3) program - authorizing private lock and dam operators to charge private tolls or lockage fees on the Illinois River and other parts of the inland waterway system.

The Senate also rejected a move by Sen. Barbara Boxer (D, CA), who's retiring from Congress, to strip language from the bill she said "attacks head-on" the Endangered Species Act (ESA), by allowing authorities to move water away from salmon fisheries to irrigation projects. The 11th-hour drought language Boxer opposed was negotiated between House Majority Leader Kevin McCarthy (R, CA) and Sen. Dianne Feinstein (D, CA).

The drought language expands the current water transfer period from July-September to April-November to ensure farmers have enough water for spring plantings. Agencies would have to explain why they might pump water at levels lower than what is allowed by biological criteria to protect fish habitats.

Dairy Tells Trump Importance of Trade

The importance of international markets to the U.S. dairy industry was laid out in detail last week in a letter sent to President-elect Donald Trump by the National Milk Producers Federation (NMPF) and the U.S. Dairy Export Council (USDEC).

Implicit in the letter is growing concern among many in agriculture that Trump does not truly understand the importance of trade to growing domestic production and supporting farm income. The two organizations said "expanded agriculture trade has created thousands of jobs and billions of dollars in economic activity in rural America."

"It is important to preserve current overseas dairy sales while seeking to achieve new gains by removing foreign barriers that hold back additional exports," NMPF President Jim Mulhern said. In 20 years, dairy exports have grown from less than \$1 billion a year to over \$5 billion last year, creating 120,000 jobs in dairy farming, manufacturing and related sectors, said USDEC President Tom Suber.

Both organizations urged Trump to begin a "ramp up in trade enforcement," saying that even with formal treaties "rampant foreign nontariff barriers" arise to block U.S. sales. The groups said it's particularly important to closely monitor other nations' compliance with existing market access concessions.

EPA Wraps Up Two-Day Science Panel Meeting on Glyphosate

A two-day Science Advisory Panel (SAP) meeting held by EPA this week laid out the agency's case for why it has determined glyphosate is not a carcinogen in humans, and after eight hours of public comments on Tuesday, the review process appears to be coming to end so the agency can "put this chemical to bed so we can move on."

Glyphosate, arguably the world's most widely use broad-spectrum systemic herbicide, is the foundation chemical in Monsanto's Roundup products, and was deemed a "probable carcinogen" by the International Agency for Research on Cancer (IARC).

However, EPA, like its counterpart in Europe and several other nations, says a broader library of evidence proves the chemical is not cancer-causing. The agency said the IARC conclusion results from a reliance on only publicly published literature, whereas EPA has "quite a bit of access" to unpublished studies from pesticide companies developed during product invention and registration. EPA said it used only peer-reviewed studies and noted the funding source when using industry data.

EPA Finalizes Review of Pesticide Applicator Certification

EPA announced it has finalized its review of the agency's new standards for certifying workers who apply pesticides. The final rule is expected to be published in the *Federal Register* within the week.

The new standards track the agency's August, 2015, proposal, requiring applicators who work with pesticides to update their registrations and certification every three years. For the first time, EPA is setting a minimum age for applicators at 18 years old.

The rule is said to cost the states and applicators \$47.2 million, a cost the agency says is offset by an \$80.5 million increase in health and other benefits. The full review and the new certification standards can be found at: https://www.epa.gov/pesticide-worker-safety/revised-certification-standards-pesticide-applicators.

Quick Links...

California Wheat Commission

National Association of Wheat Growers

California Weekly Grain and Feed Report: USDA-AMS

CARB Diesel Fuel Ave Rack Prices

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