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Prospering in Rural America

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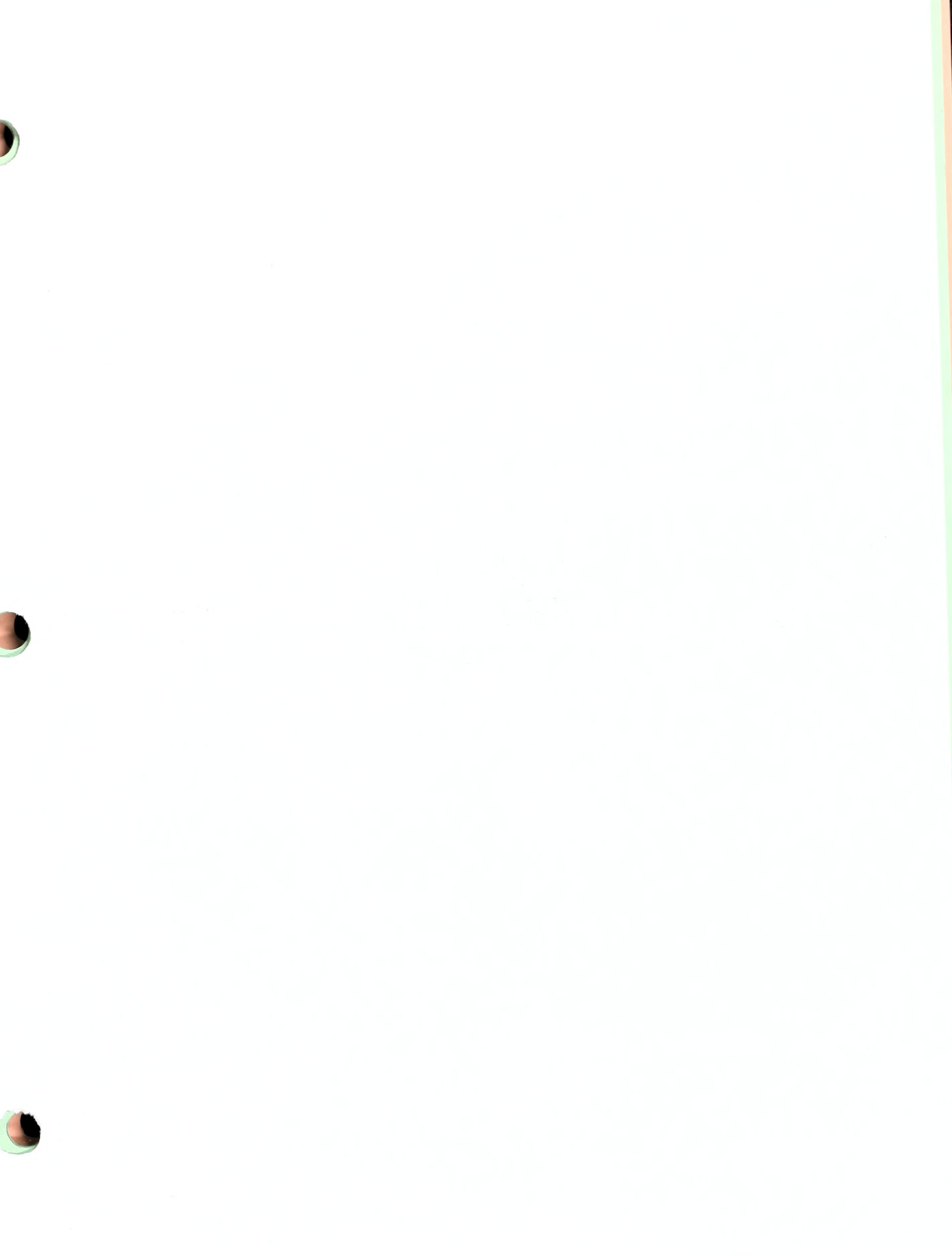
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Prospering in Rural America

Speaker's Handbook

February 16, 2006



Speeches and PowerPoints are being posted on USDA's Forum Web site.

www.usda.gov/oce/forum/

Thursday, February 16, 2006
8:30 a.m.

PLENARY SPEAKERS

OUTLOOK FORUM WELCOME

Charles F. Conner
Deputy Secretary of Agriculture
USDA

Charles F. Conner was sworn in as Deputy Secretary of Agriculture on May 2, 2005, by Agriculture Secretary Mike Johanns.

Prior to his tenure at the U.S. Department of Agriculture, Mr. Conner served on the National Economic Council beginning in November 2001 as a Special Assistant to the President for Agricultural Trade and Food Assistance, focusing primarily on Farm Bill issues.

From 1997 to 2001, Mr. Conner was President of the Corn Refiners Association, Inc., a national trade association representing the corn refining industry. Prior to his tenure with the Corn Refiners Association, Conner held several staff positions with the Senate Committee on Agriculture, Nutrition, and Forestry.

Mr. Conner served as both the Majority Staff Director (1995-1997) and the Minority Staff Director (1987-1995), of the Senate Agriculture, Nutrition, and Forestry Committee. He also worked as a Professional Staff Member for the Committee from 1985 to 1987. Prior to joining the Senate Committee in Agriculture, Nutrition, and Forestry, Conner worked as an Agricultural Legislative Assistant to Senator Richard G. Lugar.

Mr. Conner grew up on a family farm in Benton County, Indiana, which remains in the family and is operated by his older brother, Mike.

Mr. Conner received a Bachelor of Science degree in Agricultural Economics from Purdue University in 1980. He is married and has four children.

**The plenary sessions will be Webcast at 3:30 p.m. on February 16 at:
www.usda.gov/oce/forum**

2006 AGRICULTURAL ECONOMIC OUTLOOK

Keith J. Collins
Chief Economist
USDA

Dr. Keith Collins, Chief Economist of the U.S. Department of Agriculture, is responsible for the Department's agricultural forecasts and projections and for advising the Secretary of Agriculture on economic implications of alternative programs, regulations, and legislative proposals. During 1993 and 1994, Dr. Collins served as Acting Assistant Secretary of Agriculture for Economics. Prior to that, he served as Director of the Economic Analysis Staff in the Office of the Secretary.

Dr. Collins is currently the Chairman of the Board of Directors of the Federal Crop Insurance Corporation that sells 1.3 million policies annually. He also chairs the Corporation's Governance Committee and serves as Vice Chairman of the General Administrative Board of the USDA Graduate School and as chair for the School's Finance and Personnel Committee. He chaired the Commission on the Application of Payment Limitations for Agriculture, which was created by the 2002 Farm Bill. Dr. Collins received the Presidential Rank Award for Meritorious Executive in 1990 and 1996 and for Distinguished Executive in 1992 and 2002, the highest award a Federal executive can receive.

U.S. TRADE AND AGRICULTURAL POLICY

J.B. Penn

**Under Secretary for Farm and Foreign Agricultural Services
USDA**

Dr. J.B. Penn was sworn in as Under Secretary for farm and foreign agricultural services by Agriculture Secretary Ann M. Veneman. Before his appointment to USDA, Penn had an extensive career in the private sector. Most recently, he was senior vice president and manager of Sparks Companies, Inc.'s Washington office for over a dozen years. Prior to joining Sparks, he was president of Economic Perspectives, Inc. from 1981 to 1988.

Penn has extensive international experience, having served on many foreign missions and task forces as well as conducting projects in numerous countries.

Penn's government experience includes service as deputy administrator for economics of the USDA's then Economics and Statistics Service and as senior staff economist for the President's Council of Economic Advisers.

Penn received a B.S. in agriculture from Arkansas State University in 1965. He earned a M.S. in agricultural economics from Louisiana State University in 1967 and a Ph.D. in agricultural economics from Purdue University in 1973.

Penn is a member of several professional organizations including the American Agricultural Economics Association; Bennett Agricultural Roundtable; Council on Food, Agriculture, and Resource Economics; and the Farm Foundation. In 1988 he was a founding member of the Foundation for the Development of Polish Agriculture.

Penn has authored or co-authored numerous journal articles, technical reports, research monographs, book chapters and popular reports. He co-authored Agricultural and Food Policy (fourth edition), which is widely used in U.S. universities. He has been a frequent speaker before industry groups and associations. He also has received numerous awards, the most recent being Distinguished Alumnus from Arkansas State University and also from the College of Agriculture at Purdue University.

KEYNOTE ADDRESS

Mike Johanns
Secretary of Agriculture
USDA

Secretary Mike Johanns was sworn in as the 28th Secretary of the U.S. Department of Agriculture (USDA) on January 21, 2005. As the son of a dairy farmer, he developed a deep respect for the land and till describes himself as "a farmer's son with an intense passion for agriculture." During his six years in tenure as Nebraska's 38th governor, Johanns was a strong advocate for rural communities and farmers and ranchers. He enacted a Value-Added Agriculture Initiative, signed into law the "Agricultural Opportunities and Value-Added Partnership Act," supported the development of a hydroponic produce facility, and signed legislation that focused financial resources on providing transferable, non-refundable gas tax credits for the production of ethanol. He also led eight delegations of Nebraska government, business, and agriculture leaders on trade missions to foreign countries including Japan, Taiwan, China, Hong Kong, Australia, Korea, Singapore, Malaysia, Brazil and Chile.

Johanns served as chairman of the Governors' Biotechnology Partnership and as the state government representative on the advisory committee to the Export-Import Bank of the United States. As a member of both the National Governors' Association and the Western Governors' Association, Johanns concentrated on issues important to agriculture, including drought relief, ethanol, and the 2002 Farm Bill.

Secretary Johanns is a graduate of St. Mary's University of Minnesota in Winona. He earned a law degree from Creighton University in Omaha and practiced law in O'Neill and Lincoln, Nebraska. Johanns served on the Lancaster County Board from 1983-1987, and on the Lincoln City Council 1989-1991. He was elected mayor of Lincoln in 1991. He was reelected in 1995, and successfully ran for governor three years later.

BUILDING ON THE HONG KONG MINISTERIAL: A CRUCIAL YEAR FOR THE DOHA DEVELOPMENT ROUND

**Distinguished Guest Speaker
Ambassador Robert Portman
U.S. Trade Representative**

Ambassador Rob Portman was appointed United States Trade Representative by President George W. Bush on April 29, 2005 and was sworn into office on May 17, 2005, by Andrew H. Card, Jr, Chief of Staff to President Bush. Previously he served as a Representative of the Second District of Ohio in the United States Congress.

During his time in Congress, Ambassador Portman served as the Chairman of the House Republican Leadership and was the liaison between the House Leadership and the White House. He was also a prolific legislator known for reaching across the aisle to achieve results. As a Member of the House Ways and Means Committee, and its Subcommittee on Trade, he has been involved with trade issues and legislation for years. He also served as Vice Chairman of the House Budget Committee. Among other international meetings and conferences, he attended the Seattle WTO Ministerial in 1999.

Ambassador Portman's specific legislative successes include authoring the law to curtail unfunded federal mandates; the first comprehensive reform of the Internal Revenue Service (IRS) in 50 years (adding over 50 new taxpayer rights); four laws to reduce substance abuse and its consequences through prevention and education; and three laws to encourage people to save more for retirement.

Prior to his serving in Congress, Ambassador Portman was an associate in the Washington law firm of Patton Boggs from 1984-1986, where he specialized in international trade law. He worked as an associate and then a partner at the law firm of Graydon, Head and Ritchey from 1986-1989 and 1991-1993 in Cincinnati. He served in the first Bush White House from 1989-1991 as Associate Counsel to the President and later as Director of the White House Office of Legislative Affairs.

PLENARY PANEL: RURAL AMERICA'S NEW ECONOMIC FRONTIER – ENTREPRENEURSHIP, INNOVATION, AND COLLABORATION IN RURAL AMERICA

Moderator: Orion Samuelson, WGN Radio, Radio Hall of Fame

Orion Samuelson is heard 6 days a week on *WGN Radio in Chicago*, where he has served as Agribusiness Director since 1960. Orion and his associate, Max Armstrong, present 16 agricultural reports daily on the station. Orion is also heard daily on 260 radio stations with his syndicated *National Farm Report* and on 110 stations with his syndicated *Samuelson Sez*. Orion and Max are seen weekly on *RFD-TV* as co-hosts of *This Week in Agri-Business*.

Orion's life long commitment to agriculture has been recognized by organizations in all segments of agri-business. In 1998, the American Farm Bureau Federation honored Orion and Senator Bob Dole with the AFBF Distinguished Service Award. In 1997, Illinois Governor Jim Edgar renamed the State Fair Junior Livestock Building the Orion Samuelson Junior Livestock Building as a tribute to Orion's four decades of service to the agricultural youth of Illinois. In 2001 the University of Illinois conferred Orion with the Honorary Degree of Doctor of Letters; and in 2003, Orion received the highest award in the radio industry when he became the first Agribusiness Broadcaster to be inducted into the National Radio Broadcasters Hall of Fame. Hall of Fame Paul Harvey presented the award to Orion on the national radio broadcast hosted by Larry King.

Orion is also in the Illinois 4-H Hall of Fame, the National 4-H Hall of Fame, the Illinois Broadcasters Hall of Fame, the Scandinavian-American Hall of Fame and the National Association of Farm Broadcasters Hall of Fame.

Orion has traveled with his television crew to 43 countries to cover agriculture; four of his trips were official agricultural trade missions with the Secretary of Agriculture. During his 1989 trip to Taiwan, Orion was presented the International Communicator of the Year Award by the President of the Republic of China.

Orion is active outside broadcasting. He is Vice Chairman of the Illinois Agricultural Leadership Foundation, a member of the Farm Foundation Bennett Round Table, a member of the Board of the Agriculture Future of America, a member of the Board of Farm Safety 4 Just Kids, a member of the Board of Directors of the Foods Resource Bank, a Trustee of the Cornerstone Foundation of Lutheran Social Services in Illinois and a newly-named member of the Board of Trustees of the National 4-H Council.

TAKING OWNERSHIP OF GRAIN BELT AGRICULTURE AND RURAL ECONOMIC DEVELOPMENT

**Gerald Tumbleson
President
National Corn Growers Association**

Gerald Tumbleson serves as President of the National Corn Growers Association (NCGA), a producer-directed trade association headquartered in St. Louis, Missouri, with a second office in Washington, DC. Its mission is to create and increase opportunities for corn growers.

Gerald farms in Martin County, raising corn and soybeans, and feeding hogs. Gerald and his wife Joanne live on the same farm where Gerald was born and raised. He has served on several local co-op boards, has been a volunteer county ditch viewer, served on the Harvest States Resolutions Committee, and was a member of the local Jaycees, serving as the chapter's president. Gerald is a graduate of the University of Minnesota, and has a degree in Soil Science and Animal Husbandry. He is involved as a lay speaker in his church, where he has served as chair of the church board. As a member of the NCGA Corn Board, Gerald has served as liaison to the Production and Stewardship Action Team, representative to the U.S. Grains Council, and was appointed to serve as NCGA representative to the National Coalition for Food and Agricultural Research.

Gerald and Joanne have three married sons, Trace, Thad and Trent. Thad is a school teacher in Mahtomedi, MN, and Trace and Trent farm with their parents.

PROVIDING LEADERSHIP FOR RURAL AMERICA

Robert W. Lane
Chairman and Chief Executive Officer
Deere & Company

Robert W. Lane has served as chairman and chief executive officer of Deere & Company since August 2000. Lane, following an early career in global banking, joined John Deere in 1982, initially managing various operations within the Worldwide Construction Equipment Division and later serving as president and chief operating officer of Deere Credit, Inc. In 1992, he joined the Worldwide Agricultural Equipment Division where, as senior vice president, he directed equipment operations in Latin America, Australia and East Asia.

Elected chief financial officer in 1996, Lane subsequently moved to Germany where, as managing director, he led Deere's agricultural equipment operations in Europe, Africa, the Middle East, India and the nations of the former Soviet Union. He returned to the United States as president of the Worldwide Agricultural Equipment Division and thereafter was elected president and chief operating officer of Deere & Company.

BUILDING ON RURAL AMERICA'S COMPETITIVENESS IN A GLOBAL MARKETPLACE

**Tom Dorr
Under Secretary for Rural Development
USDA**

Thomas C. Dorr was appointed by President George W. Bush to be the Under Secretary for Rural Development and was sworn into office by Agriculture Secretary Mike Johanns on July 27, 2005. As Under Secretary, Mr. Dorr oversees USDA Rural Development policies and programs. Rural Development consists of three program areas -- business, utilities and housing -- that provide \$14 billion annual funding authority for loans, grants, and technical assistance to rural residents, communities, and businesses and an \$87 billion portfolio of existing business, housing, and infrastructure loans to rural America. Rural Development has over 7,000 employees located across the United States and in Puerto Rico, the Virgin Islands, and the Western Pacific Trust territories.

Mr. Dorr previously served as Under Secretary for Rural Development under a recess appointment from August 2002 to December 2003. After his recess appointment ended, he was named Senior Advisor to the Secretary for Rural Development Issues. In this position, Mr. Dorr coordinated several major initiatives on behalf of the Secretary. He played critical roles in USDA disaster relief efforts in response to the hurricanes in Florida; he worked closely with the Assistant Secretary for Civil Rights to reach out to minority farmers; and he provided key leadership on various activities to improve program management and business practices throughout the USDA.

Mr. Dorr has broad agricultural, financial and business experience. He has served as a member of the Board of Directors of the 7th District Federal Reserve Bank of Chicago, the Iowa Board of Regents from 1991-1997, and as a member and officer of the Iowa and National Corn Growers Associations. Prior to his current service at the Department of Agriculture, Mr. Dorr was the President of a family agribusiness company consisting of a corn and soybean farm, a state licensed commercial grain elevator and warehouse, and two limited liability companies.

Mr. Dorr, from Marcus, Iowa, graduated from Morningside College with a B.S. degree in business administration. He is married to Ann Dorr and has two children.

February 16, 2006
Post Plenary
Brief Session: 1:15 p.m.-1:45 p.m.

1:15 p.m. 2006 Retail Food Price Outlook: *Grand Ballroom, Salon A*

SUMMARY OF 2006 RETAIL FOOD PRICE OUTLOOK

Ephraim Leibtag, Economist
Economic Research Service
USDA

BIO: Ephraim Leibtag is an economist with USDA's Economic Research Service, researches retail food prices and the dynamics of retail food markets. His research interests include forecasting and analyzing trends in retail food markets and his work is used in presentations to government officials, policy analysts, the research community, and other public audiences. He has conducted radio, newspaper, and magazine interviews on retail food price trends.

SPEECH: This presentation will focus on recent trends in retail food markets and their impact on food prices. The increase in nontraditional retailers, global trade, and improved production technology have been the major factors keeping food price inflation relatively stable over the past 15 years. In 2005, food prices increased 2.4 percent as higher energy prices caused production costs to increase across the food supply system. Without any major increases in food sub-categories (as opposed to 2004), 2005 food price inflation was mostly mild. The largest increase for a food sub-category was in the sugar and sweets category as recent increases in sugar prices caused the index to rise 3.5 percent in 2005. Egg prices experienced the largest decrease in prices in 2005, falling 13.7 percent. This decrease was not too surprising, though, given the large increases in 2003 and 2004 egg prices.

Look ahead to 2006, food prices are again expected to increase 2 to 3 percent. As energy prices have stabilized over the last few months of 2005, food prices have returned to standard inflation rates. Unexpected changes in trade, weather, or retail market conditions could increase food price inflation in 2006, but none of these are expected to have major effects at this time.

1:45 p.m. – 3:30 p.m.

Concurrent Sessions

RURAL AMERICA: BIO-FUEL PRODUCTION AND NEW ENERGY FORMS IN RURAL AREAS

Moderator: Sara Wyant, Agri-Pulse Communications

Presented: Thursday, February 16, 2006

TRENDS ON LOCALLY OWNED AND FINANCED BIODIESEL PLANTS

Warren L. Bush

Member of The Biodiesel Group, LLC

Wall Lake, Iowa

BIO: Based in Wall Lake, Iowa, Warren Bush has engaged in a general law practice since 1970 with an emphasis on ag related issues. He has served as a Sac County Judicial Magistrate for the past 18 years. In 2004 he became involved as one of the 12 board members of Western Iowa Energy, LLC, which was formed to develop a 30 million gallons per year continuous flow biodiesel plant in Wall Lake. After experiencing the difficulties faced by the Board in putting together that project, Bush and four other WIE board members formed The Biodiesel Group, LLC to assist other local boards in developing biodiesel projects. They are currently developing projects in Newton, Washington and Farley, Iowa and in Freeport, Illinois. Other members of his group include Tom Schroeder, the Wall Lake city manager, Bill Horan, Denny Mauser and Mark Muench, all of whom are Iowa farmers. The Biodiesel Group assists with site selection, obtaining an option to the site, entity formation, formation of and service on the board of directors, arranging for completion of a feasibility study, business plan and a lender negotiator for the project. They have associated with Renewable Energy Group and West Central Cooperative in the development, construction, and management of the biodiesel plants. They have developed expertise in assisting with raising both the necessary seed capital as well as the equity and capital and lender financing necessary to finance the projects.

SPEECH: Based on its experience with the WIE project in Wall Lake The Biodiesel Group has developed a model which it uses in developing additional projects. I will outline that model and relate our experience in raising seed capital to finance early stages of development and equity and borrowed capital to finance the project. I will relate how these projects have attracted both producer and non-producer equity capital as well as how lender financing has been attracted to these projects.

Presented: Thursday, February 16, 2006

THE FUTURE OF WIND ENERGY DEVELOPMENT

Mark Willers
CEO, MinWind Energy, LLC
Luverne, Minnesota

BIO: Mark Willers is the CEO of MinWind Energy, LLC and president of MinWind I, a farmer-owned commercial size wind farm. He served on the Rock County USDA Committee on farm programs from 1985 to 2002. From 1994 to 2000 he served as chairman of the University of Minnesota Southwest Research Farm, and as a soil consultant from 1985 until 1987. He was Chairman of the Kellogg Foundation with NDSU, SDSU, and the University of Minnesota on Rural Development for six years. He also served as Chairman of the Southwest Minnesota University Extension Service. He has farmed for the past 26 years.

SPEECH: Understanding energy policies and prices, along with the changing economics of wind both in production and as an environmentally clean asset, agriculture must realize the value of this natural resource. Agriculture has always been the core of harvesting asset dollars from land and now has the chance to produce as much revenue per acre as is economically feasible in the form of wind energy. Agriculture needs to adapt to equity management concepts and techniques that assist in the governance and ownership of these equity dollars. The key issues involved are: SEC requirements, management concepts, corporate governance, Power Purchase Contracts, transmission costs, and the costs of both ownership and operation associated with commercial wind farms. Agriculture must become part of this \$247 billion industry.

**A MODEL FOR TRANSFORMING SUCCESSFUL ANAEROBIC DIGESTION
TO
ELECTRIC POWER DEVELOPMENT**

John M. McWilliams, MBA, PE
Resource Planner, Dairyland Power Cooperative
LaCrosse, Wisconsin

BIO: John McWilliams is Dairyland Power Cooperative's Resource Planner. John oversees Dairyland's energy forecasts and resource planning. A major focus of his work is renewable energy generation planning. He joined Dairyland Power Cooperative in July 1999 after previously working for Westinghouse Electric as a field service engineer on construction projects in Iowa, Saudi Arabia and Texas and working for AVO International as a Regional Technical Sales Manager in Texas, Malaysia and England. He has a bachelors degree in electrical engineering from Iowa State University and a masters degree in business administration from the University of Wisconsin – La Crosse. He is a registered professional engineer in Wisconsin and a member of the Institute of Electrical and Electronic Engineers.

SPEECH: The name "Dairyland Power Cooperative" clearly states the fundamental reason why Dairyland Power Cooperative is interested in developing anaerobic digestion technology within its service territory. The number of dairy cows within the service territory is almost equal to the number of people and the number of hogs is almost four times the number of people. Including the large numbers of chickens and turkeys within the service territory causes waste management issues to be of critical concern to Dairyland Power Cooperative's agricultural-based membership. Using these waste streams to produce electricity allows Dairyland Power Cooperative to meet state mandated renewable energy requirements, assists with keeping the agricultural base more stable, and improves the environment for all members.

Dairyland Power Cooperative initiated its anaerobic digester program in 2003 with the signing of a non-exclusive agreement with Microgy Cogeneration Systems to develop above ground, thermophyllic digestion projects. The basis of the agreement is that the farmer owns the anaerobic digestion part of the project and Dairyland Power Cooperative owns the generation part of the project. This division of ownership allows both parties to have control over the part that is most important to them. The farmer receives the waste management benefits and Dairyland Power Cooperative receives the renewable energy. Dairyland Power Cooperative pays the farmer through a gas purchase agreement.

The first two projects started producing power in mid-2005 with three additional projects scheduled for 2006. The goal is to eventually reach 25 to 30 anaerobic digestion projects.

BIO-BASED PRODUCTS: AN EXAMPLE OF US AIR FORCE INTEGRATION

Brian W. Joyner, P.E.

**Environmental Engineer, Seymour Johnson AFB, North Carolina
U.S. Department of the Air Force**

BIO: Brian Joyner is an Environmental Engineer with the Department of the Air Force at Seymour Johnson Air Force Base, where he is Chief of the Pollution Prevention Element. His engineering efforts at Seymour Johnson include the areas of solid waste management, hazardous waste reduction, hazardous material management, Emergency Planning & Community Right-To-Know Act implementation and Affirmative Procurement. Brian is also program manager for the base's ISO 14001 based Environmental Management System. Prior to joining Seymour Johnson, Brian was a regulator for the State of North Carolina, Division of Air Quality. Before graduating cum laude from North Carolina State University with a degree in Biological and Agricultural Engineering, Brian grew up on a family farm near Goldsboro, NC, where he resides today. He is also a licensed Professional Engineer in North Carolina.

SPEECH: In accordance with Executive Order 13101 – “Greening the Government through Waste Prevention, Recycling, and Federal Acquisition,” Seymour Johnson AFB established an Affirmative Procurement Program, requiring the promotion of environmentally friendly products. Seymour Johnson subsequently established an Environmentally Preferable Product Purchasing Policy which required all personnel to give considerations to the environmental impacts associated with all purchases. These considerations were not just for the products themselves, but environmental impacts associated with the manufacture, transportation, and disposal of said products. These actions set the stage for Seymour Johnson to respond to the preference provisions within the 2002 Farm Bill. One small part of the Farm Bill required federal agencies to give preference to bio-based products in their acquisition procedures. The first effort by Seymour Johnson to buy bio-based in the name of the 2002 Farm Bill was introducing a new floor scrubber detergent. The base has about 35 floor scrubbers operating in hangers and maintenance facilities. Waste water from these scrubbers are dumped to sanitary sewer which is managed off-site by the City of Goldsboro. Goldsboro discharges into the Neuse River, which has been defined as a nutrient sensitive waterway by the State of North Carolina. Therefore, in association with a local detergent manufacturer / distributor, Seymour Johnson introduced a low phosphate, neutral pH, soybean based floor detergent as a pilot project. The vendor was able to provide competitive pricing and delivery for the detergent. After additional training from the scrubber manufacturer, to ensure proper operation, the pilot project was viewed as a success. The success of the detergent and the required preference for bio-based products was then advertised base-wide. The speech is intended to demonstrate trends within the Department of the Air Force toward the use and promotion of bio-derived products as well as the pros and cons associated with their use in the environmentally regulated world.

Presented: Thursday, February 16, 2006

**UPDATE ON ETHANOL PRODUCTION AND ITS IMPACT ON RURAL
ECONOMIC DEVELOPMENT**

**Bob Dinneen
President and CEO
Renewable Fuels Association**

BIO: Bob Dinneen is the President and CEO of the Renewable Fuels Association (RFA), the national trade association for the U.S. ethanol industry. As such, he is the ethanol industry's lead lobbyist before the Congress and Administration.

Mr. Dinneen joined the RFA in 1988 as Legislative Director, and became President in July of 2001. In this capacity he has the association's effort to build coalitions with the industry's petroleum customers as well as transportation and environmental group in order to provide for marketplace growth for the industry. These coalitions have resulted in an historic Renewable Fuels Standard (RFS) fuels agreement and passage of the Volumetric Ethanol Excise Tax Credit (VEETC).

Mr. Dinneen has presented testimony before the Congress and Federal agencies on numerous occasions, and represented the ethanol industry's interests at state, national, and international forums.

Prior to joining the RFA, Mr. Dineen worked on Capitol Hill for various Members of Congress and Congressional committees.

Mr. Dinneen graduated from the Catholic University of America with a Bachelor's Degree in Political Science.

SPEECH: Bob Dinneen will be discussing the current and future state of the ethanol industry in the United States and world wide and its impact on energy independence, rural revitalization, and environmental stewardship.

1:45 p.m. – 3:30 p.m.
Concurrent Sessions

GLOBALIZATION: WORLD TRADE ORGANIZATION – U.S. AGRICULTURAL TRADE AGENDA

Arlington Ballroom, Salon V

Moderator: *Ken Roberts, Associate Administrator, Foreign Agricultural Service, USDA*

Presented: Thursday, February 16, 2006

IMPLICATIONS OF THE DOHA ROUND FOR THE U.S. FARM BILL AND VICE VERSA

**Jeffrey J. Schott, Senior Fellow
Institute for International Economics
Washington, DC**

BIO: Jeffrey J. Schott joined the Institute for International Economics in 1983 and is a senior fellow working on international trade policy and economic sanctions. During his tenure at the Institute, Schott was also a visiting lecturer at Princeton University (1994) and an adjunct professor at Georgetown University (1986)88). He was a senior associate at the Carnegie Endowment for International Peace (1982)83) and an official of the US Treasury Department (1974)82) in international trade and energy policy. During the Tokyo Round of multilateral trade negotiations, he was a member of the US delegation that negotiated the GATT Subsidies Code. Since January 2003, he has been a member of the Trade and Environment Policy Advisory Committee of the US government.

Schott is the author, coauthor, or editor of several books on trade, including *NAFTA Revisited: Achievements and Challenges* (2005), *Free Trade Agreements: US Strategies and Priorities* (2004), *Prospects for Free Trade in the Americas* (2001), *Free Trade between Korea and the United States?* (2001), *NAFTA and the Environment: Seven Years Later* (2000), *The WTO After Seattle* (2000), *Restarting Fast Track* (1998), *The World Trading System: Challenges Ahead* (December 1996), *The Uruguay Round: An Assessment* (1994), *Western Hemisphere Economic Integration* (1994), *NAFTA: An Assessment* (1993), *North American Free Trade: Issues and Recommendations* (1992), *Economic Sanctions Reconsidered: History and Current Policy* (second edition, 1990), *Completing the Uruguay Round* (1990), *Free Trade Areas and U.S. Trade Policy* (1989), and *The Canada-United States Free Trade Agreement: The Global Impact* (1988), as well as numerous articles on US trade policy and the GATT. Schott holds a BA degree magna cum laude from Washington University, St. Louis (1971), and an MA degree with distinction in international relations from the School of Advanced International Studies of Johns Hopkins University (1973).

SPEECH: Dr. Schott will discuss what the Doha Round can achieve and what that means for U.S. farm policy.

Presented: Thursday, February 16, 2006

**BIG PICTURE POLICY VIEWPOINT
WTO'S DOHA ROUND & THE U.S. AGRICULTURE AGENDA: A BIG
PICTURE POLICY VIEWPOINT**

**Andrew L. Stoler
Executive Director
Institute for International Business, Economics & Law
The University of Adelaide, Australia**

BIO: Andrew Stoler has headed the Institute for International Business, Economics and Law since retiring from the World Trade Organization in 2002. At the WTO, he served as Deputy Director-General from 1999 to 2002 where his specific responsibilities included legal affairs and dispute settlement, market access and international trade in services. Before taking up his position with the WTO, Mr. Stoler served for ten years as the Deputy Permanent Representative of the United States to the GATT and later the WTO. Earlier, he held a variety of senior positions in the Office of the U.S. Trade Representative in both Washington and Geneva. He has an MBA in International Business from George Washington University and a BS in International Economic Affairs from Georgetown University's School of Foreign Service.

SPEECH: The WTO Doha Round of multilateral trade negotiations holds a promise of huge potential benefits for the world economy; however, observers are increasingly questioning whether it will be possible to successfully conclude this Round. Now running more than three years behind schedule, the negotiations are limping forward in the aftermath of the under-achieving Hong Kong Ministerial Conference. Research shows that few experts expect to see negotiating targets met in April and July and only a small minority believe that the Doha Round can be finished in 2006. Most believe that American negotiating authority will expire as scheduled in mid-2007, so we need to ask where this leaves the Round. The speech looks at the state of play in the Round, the possible impact – both positive and negative – of increasing levels of activity around the world on Free Trade Agreement negotiations and at the prospects for the WTO negotiations.

MEDIA VIEWPOINT: WHY TRADE POLICY WILL CHANGE U.S. FARM POLICY

Elizabeth Becker, Journalist
Former New York Times' International Trade Correspondent
Washington, DC

BIO: Elizabeth Becker is a journalist and author who specializes in trade, globalization, development, agriculture and Asian affairs. She was the New York Times' International Trade correspondent as well as its international development correspondent. Over her ten years at the Times she also covered agriculture, homeland security, international development and the Pentagon focusing on international security issues. Previously she was the Times' Assistant Washington Editor for foreign and financial news. Before joining the Times, Ms. Becker was the Senior Foreign Editor at National Public Radio, where she received two DuPont-Columbia Awards as executive producer for coverage of the South African elections and the Rwandan massacres. She began her career in Asia, as a war correspondent for the Washington Post in Cambodia and has continued covering that country over the past 30 years. She is the author of *WHEN THE WAR WAS OVER, A History of Modern Cambodia and The Khmer Rouge*, which won a Robert F. Kennedy Book Award. It was recently published in the Khmer language to coincide with the Khmer Rouge tribunals. She is also the author of *America's Vietnam War*, a narrative history for young adults. Her articles have appeared in numerous Asian, European and American magazines and journals. She has received awards from the Overseas Press Club and the North American Agricultural Journalists. She holds a degree in South Asian studies from the University of Washington and studied at the Kendriya Hindi Sansthaan in Agra. She is a member of the Council on Foreign Relations and the board of the Arthur Burns Foundation.

SPEECH: During the last few years it seems that the more the United States government and American farmers profess their belief that trade is the answer for its agriculture sector, the more they shy away from tying their farm policy to the new realities of global trade. While some policy makers proclaim proudly that one out of three acres in the U.S. are now planted for export, another set warns that only Congress will determine farm policy - not trade negotiators and certainly not the W.T.O. Does it have to be such an either/or proposition? A review of the last few years of trade negotiations and trade disputes raises some serious questions about how long this attitude can work for American farmers. Farm policy is no longer hidden in the shadows or restricted to the corridors of Congress. It is at the center of domestic and international debate. It's not just poor countries who want the U.S. to reduce agricultural subsidies. Health officials are pointing to them as a cause of obesity. Development experts, global health experts and energy officials are all calling for a re-examination of how the government supports American farmers. If the farm bill of 2007 bears a close resemblance to the one it replaces, the U.S. could find itself in a difficult position in the world of trade without a lot of allies.

1:45 p.m. – 3:30 p.m.
Concurrent Sessions

**CONSERVATION: PUTTING CONSERVATION ON THE GROUND
– USING INCENTIVES TO INCREASE CONSERVATION
ACTIVITIES**

Arlington Ballroom, Salon VI

Moderator: *Merlin Carlson, Deputy Under Secretary for Natural Resources and the Environment, USDA*

Presented: Thursday, February 16, 2006

**PARTICIPANT VIEWS OF THE CONSERVATION SECURITY PROGRAM:
A FARMER'S PERSPECTIVE OF THE 2005 CSP EXPERIENCE IN IOWA**

James O. Andrew
President, Andrew Farms, Inc.
Jefferson, Iowa

BIO: James O. Andrew is a fifth generation Iowa farmer who manages Andrew Farms, Inc., a 1,275 acre corn and soybean operation in central Iowa. A graduate of the University of Iowa in 1971, Andrew served three years active duty as an infantry and quartermaster officer before returning home to farm in 1974. In addition to his extensive conservation efforts, Andrew has 33 years of leadership service in director and officer positions with the Iowa and National Corn Growers Associations, Iowa Corn Promotion Board, U.S. Grains Council, and Iowa Soybean Association. Andrew Farms was selected by Farm Futures magazine as one of the Top 100 Best Managed Farms in 1998.

SPEECH: From passage of the Conservation Security Program as a vital part of the 2002 Farm Bill, I had a strong feeling that Andrew Farms was positioned after 31 years of conservation efforts to rank in Tier 3 of the new program. Upon selection of the Raccoon River watershed for CSP in 2005, I aggressively pursued making the first appointment for application with my county NRCS office.

As the first applicant, I felt a sincere desire to set the example for those who followed and became a “guinea pig” for the local and augmented TDY staff to hone their interview skills and develop uniform questions and techniques. Instead of a one-on-one interview, I experienced 5-6 NRCS personnel sitting in and asking questions during my interview. This experience with county NRCS staff was totally professional and proved extremely helpful in fine tuning the farm’s operation to qualify for maximum results. This speech and comments surround this very positive experience working with local NRCS personnel over the years culminating in Andrew Farms being awarded Tier 3 status. This was of further significance in July 2005 when a National CSP Signing ceremony was held at one of the Andrew Farms ponds with NRCS Chief Bruce Knight representing the U.S. government.

**IMPLEMENTING THE CONSERVATION SECURITY PROGRAM – THE
CHALLENGE OF CAPPED ENTITLEMENT PROGRAM WITH A
BUDGET CAP**

Craig R. Derickson
Conservation Security Program Manager
Natural Resources Conservation Service, USDA

BIO: Craig Derickson is currently the Branch Chief of Stewardship Programs – namely the Conservation Security Program, in the Financial Assistance Programs Division of the Natural Resources Conservation Service (NRCS) in Washington D.C. He holds Bachelors Degree in Agriculture from the University of Nebraska and a Master Degree in Administration from Doane College. He has an extensive background in natural resources conservation and has experience in agricultural research, soil science, and most recently in policy development and rulemaking with CSP in Washington DC.

SPEECH: As originally enacted, the Conservation Security Program (CSP) was an entitlement program where many producers would have received payments if they were eligible. The statute opens CSP to nearly 850 million acres of working land and prohibits the ranking of applications. However, there are not sufficient funds to allow everyone to participate. The greatest challenge for NRCS was to design a new conservation entitlement program with a cap on its total expenditures over multiple years. The statute did not provide direction as to how the Secretary should implement a broad entitlement program with the statutory fiscal constraints. Since the Farm Bill was signed in May 2002, the Omnibus Bill of 2003, 2004, the Disaster Bill and the Military Appropriation Act of 2004 have all amended CSP and changed CSP's total expenditures to a current total of \$6.01 billion over eleven years (Fiscal Year 2004 through Fiscal Year 2014). When developing the regulations to implement CSP, USDA confronted several challenges in addition to the shifting legislative landscape. Furthermore, NRCS expects that a large number of producers will seek participation in CSP and ask for assistance to determine their potential eligibility for the program. Thus the statutory cap on technical assistance of 15% becomes another limiting factor for implementing CSP.

15% Technical Assistance Cap: By law, NRCS cannot incur technical assistance costs for NRCS employees or approved technical assistance providers in excess of 15 percent of the available funds. To address this problem, NRCS developed the Self Assessment Tool – available to the public in hardcopy, on CD-ROM and as interactive tool on the Internet.

Self Assessment Tool: The CSP self-assessment workbook is a useful tool for potential CSP participants. By going through the workbook, producers will get a good idea about whether they are eligible for CSP at this time. Producers who may not be eligible can find out about programs that can help them achieve a higher level of conservation so that they may apply for CSP in the future.

CSP SUCCESS IN OREGON

David R. Brewer
Owner/Operator, Emerson Dell Farm, The Dalles, Oregon

BIO: Along with his wife Margaret and two children, David manages a fifth generation family farm near The Dalles in north-central Oregon. In 1997 the Brewers adopted direct seeding technology where seed and fertilizer are placed with a single pass into the undisturbed residue of the previous crop. Today Emerson Dell Farm direct seeds wheat, barley, mustard and forage crops in a 12" annual rainfall zone. When moisture allows, crops are raised annually rather than with a fallow year as is traditional in the area. Since assuming management responsibilities in 1994, David has tested over 20 different alternative crops for use in intensifying and diversifying the crop rotation. These management changes have resulted in soil organic matter improvements after 125 years of declines due to tillage. Soil erosion, always a family concern due to the steep slopes farmed, has been greatly reduced with the direct seed farming system. Cattle and grasslands are managed in a rotational grazing system. The Brewers direct market all beef produced as natural beef. Emerson Dell Farm has received Food Alliance certification in recognition of our careful management of the land, livestock and people that make up the business. David received a MS in Applied Economics from the University of Minnesota in 1990. He graduated from Oregon State University in 1988 with a BS in Agricultural and Resource Economics, a BA in Spanish and a minor in Latin American Affairs.

SPEECH: Oregon generally and our local Mid Columbia Hood Watershed specifically did very well in the 2005 CSP sign up. Oregon growers received 867 contracts with 2005 payments totaling approximately \$19 million, which is the highest total for any state. Oregon also has the highest percentage of Tier III contracts in the nation. The watershed had 258 applications and 254 contracts of which about 96 percent are Tier III Category A. Those contracts resulted in 2005 payments to growers of a little over \$5.25 million. By both measures Oregon has done well relative to other states in the first two sign ups.

Dry land wheat growers in Wasco and Sherman Counties on average received larger contracts with 2005 payments averaging around \$36,000 per contract. Twenty years ago the vast majority of the wheat growers in Wasco County were still burning stubble and bottom plowing their fields to raise winter wheat in a two year rotation with fallow. The 1985 Farm Bill forced these growers to adopt mulch tillage. In 1997 the first modern direct seed drill was introduced to the county and annual spring cropping was employed as a control technique for winter annual grassy weeds. The combination was effective at controlling weeds while also being good for the soil. Local NRCS and Conservation District staff have been very proactive in finding and using incentives to aid growers in the adoption of direct seed systems.

The speech will further explore some of the incentive programs used locally that helped position growers well for the CSP sign up.

1:45 p.m. – 3:30 p.m.
Concurrent Sessions

Presented: Thursday, February 16, 2006

**SCIENCE: CRITICAL RESEARCH NEEDS IN VETERINARY
MEDICINE AND COORDINATED GLOBAL EFFORTS TO
COMBAT AN AVIAN INFLUENZA PANDEMIC**

Arlington Ballroom, Salon III

Moderator: *Ron DeHaven, Administrator, Animal and Plant Health Inspection Service, USDA*

Presented: Thursday, February 16, 2006

WORLDWIDE RESPONSE AND COORDINATION EFFORTS

**Juan Lubroth, Senior Officer, Head of the Emergency Prevention System at the
Food and Agriculture Organization of the United Nations
Rome, Italy**

BIO: Dr. Lubroth obtained his veterinary degree from University of Georgia, where he also received one of his master's degrees (Medical Microbiology). His second Master's and Ph.D. are from Yale University, Department of Epidemiology and Public Health, where he focused his interests in infectious diseases, and arboviruses in particular, although his thesis was on foot-and-mouth disease.

Under his responsibility at the FAO is the United Nations' response to epidemic diseases of livestock such as foot-and-mouth disease, African and classical swine fevers, Rift Valley fever, rinderpest and peste des petits ruminants, highly pathogenic avian influenza, among others, by strengthening veterinary services, improving surveillance, contingency planning, good farming practices, with the overall mission of poverty reduction and improved food security. Prior to his appointment with FAO, Dr Lubroth was head of the Reagents and Vaccine Section and Diagnostic Services Section at the Plum Island Animal Disease Center (United States Department of Agriculture). He has lived and worked in Brazil as an epidemiologist with the Pan American Health Organization, in Mexico with the Mexico-US Commission for the Prevention of Foot-and-Mouth Disease and Other Exotic Animal Diseases, and spent time on extended missions in the Caribbean and North Africa. He currently serves on several committees of the World Organization for Animal Health (OIE) and the World Health Organization (WHO), and is a FAO observer at the Biological Weapons Convention.

Presented: Thursday, February 16, 2006

**ANIMAL HEALTH AT THE CROSSROADS. FINDINGS FROM A NAS STUDY
SUGGEST A NEW FRAMEWORK**

Dr. Sharon Hietala
Professor of Clinical Diagnostic Immunology
California Animal Health and Food Safety Laboratory System
School of Veterinary Medicine
University of California
Davis, California

BIO: Sharon Hietala served on the National Academy of Sciences Committee “Assessing the Nation's Framework for Addressing Animal Diseases.” The committee’s report “Animal Health at the Crossroads: Preventing, Detecting, and Diagnosing Animal Diseases” was published in late 2005.

Sharon Hietala is a professor of clinical diagnostic immunology with the California Animal Health and Food Safety Laboratory System, and has a joint appointment in the School of Veterinary Medicine, Department of Medicine and Epidemiology at the University of California, Davis. Her bachelor's degree (Bacteriology, 1976) and Ph.D. (Comparative Pathology, 1987) were both earned at UC Davis.

Sharon joined the California Animal Health and Food Safety Laboratory in 1989, where she is responsible for the immunology and biotechnology services in the five-laboratory system.

Her professional interests include serology, molecular diagnostics, and diagnostic epidemiology. She served on the USDA Safeguarding Review Panel, and is currently a member of the USDA National Surveillance System Steering Committee. She is active in the American Association of Veterinary Laboratory Diagnosticians, the US Animal Health Association, and a variety of food animal and poultry industry issue and interest groups.

SPEECH: The committee’s report “Animal Health at the Crossroads: Preventing, Detecting, and Diagnosing Animal Diseases,” which was published in late 2005 is the topic of her presentation.

UNDERSTANDING EVOLUTION AND PATHOGENESIS OF HPAI

David L. Suarez D.V.M., Ph.D.
Southeast Poultry Research Laboratory
Agricultural Research Service
USDA

BIO: Dr. Suarez received his Doctorate of Veterinary Medicine from Auburn University in 1988 and his Ph.D. in Veterinary Microbiology from Iowa State University in 1995. After graduation from veterinary school he practiced in a small animal veterinary clinic in Anniston, AL for three years before returning to graduate school. After his Ph.D. he had a short postdoctoral stay at the Plum Island Foreign Animal Disease Laboratory before taking a permanent position at the USDA/ARS Southeast Poultry Research Laboratory in Athens, GA in 1995 to study avian influenza virus. Dr. Suarez became the Research Leader of the Exotic and Emerging Avian Viral Diseases Research Unit at Southeast Poultry Research Laboratory in 2005. His main research is with avian influenza virus, but he also has worked with Newcastle disease virus and SARS. Dr. Suarez is board certified in Veterinary Microbiology in the areas of both virology and immunology. Dr. Suarez also serves as an adjunct professor at the University of Georgia and serves on the editorial board for Avian Diseases.

SPEECH: Avian influenza virus has been a serious threat to the poultry industry for many years, but the ongoing outbreak of H5N1 in Asia and Europe has been the most widespread and damaging to the poultry industry in modern times. To better understand avian influenza and the threat of the current outbreak, it is important to understand more about avian influenza in general and also about the unique features of the current H5N1 virus in Asia and Europe. Low pathogenic avian influenza virus is naturally and commonly found in wild birds, particularly in ducks and shorebirds, where the virus typically causes no disease. However, on rare occasions these wild bird viruses may jump species and infect our domestic poultry species, including ducks, chickens and turkeys. Initially all these viruses are low pathogenic, although some may cause respiratory disease. However, some forms of the virus, the H5 and H7 subtypes, are of special concern because these viruses can mutate to the highly pathogenic form of the virus. Highly pathogenic avian influenza (HPAI) causes severe disease and death for most chickens and turkeys that it infects making it one of the worst poultry diseases known, but it normally does not cause serious disease in ducks.

Avian influenza has shown its ability to change rapidly and the current H5N1 is much different from the virus first identified in China in 1996. The virus has spread to at least 14 different countries, appears to be spread both by movement in poultry and in wild birds, and it also can infect and cause disease in a wide range of species. Efforts to control and eradicate this virus are ongoing and will require broad international support to be successful.

Presented: Thursday, February 16, 2006

**ACTIVITIES AND COORDINATION TO ADDRESS
HIGHEST PRIORITY GAPS**

**Daniel Perez
Program Director
Prevention and Control of Avian Influenza in the United States
University of Maryland, Assistant Professor
Department of Veterinary Medicine
College Park, Maryland**

BIO: Dr. Daniel R. Perez's expertise is in molecular virology of influenza viruses. In March 2000, he joined the laboratory of Dr. Robert Webster at St. Jude's Children's Research Hospital. Under Dr. Webster's supervision, Dr. Perez became involved in all aspects related to the epidemiology of influenza in birds and other animals and the factors that contribute to the interspecies transmission of these viruses. His contribution on the role of quail as a potential intermediary host in which influenza viruses may emerge with an increased host range was one of the scientific arguments that were used to ban live quail in Hong Kong poultry markets in February 2002. While at St. Jude, Dr. Perez was an active member in the team that led to the first H5N1 vaccine developed by reverse genetics with potential application in humans.

In April 2003, Dr. Perez joined the Department of Veterinary Medicine, University of Maryland where he has continued studying the role of quail in the ecology of influenza, a project funded by NIAID-NIH. Since February 2005, Dr. Perez is Program Director of the project entitled "Prevention and Control of Avian Influenza in the US", a coordinated agricultural program funded by the USDA. This is an ambitious multi-institutional project with a comprehensive research structure including basic aspects of influenza virus transmission and pathogenesis, surveillance in wild-birds of the four major flyways in the US, surveillance of domestic birds in live bird markets and backyard flocks, education and training of commercial and game bird producers, and development of alternative influenza diagnostic and vaccine tools for poultry.

1:45 p.m. – 3:30 p.m.
Concurrent Sessions

MARKETS: LIVESTOCK MARKETS AND MANDATORY PRICE REPORTING: WHAT DO THE REPORTS TELL US? WHAT ELSE WOULD WE LIKE TO KNOW?

Grand Ballroom, Salon A

Moderator: *Warren Preston, Agricultural Marketing Service, USDA*

Presented: Thursday, February 16, 2006

WHAT DOES MPR DO FOR CATTLE FEEDERS?

Jim Gill
Market Director
Texas Cattle Feeders Association
Amarillo, Texas

BIO: Based in Amarillo Texas, Jim Gill has been Market Director for the Texas Cattle Feeders Association for the past 25 years. Prior to assuming the duties of Market Director Mr. Gill worked as a Market Analysts and Membership Director for the association. The Texas Cattle Feeders Association serves the three state areas of Texas, New Mexico and Oklahoma. Their membership includes about 200 feed yards in the three state area that in a typically year will feed approximately 25% to 30% of the fed cattle in the U.S. The Market department's main responsible is to keep feed-yard managers informed on an up-to-the minute basis on what is happening in the fed cattle market. Mr. Gill graduated from Texas Tech University with an Agricultural Economics degree and for the first five years after graduation, work for the Statistical Reporting Service (now NASS) in the USDA.

SPEECH: Many producers were excited when Mandatory Price Reporting (MPR) was first envisioned. They thought MPR would make the market completely transparent and they would know all the details about every cattle bid and trade. It did not happen and, in my estimation, was never intended to expose private business's actions. And even if it could expose every thing, the timing would still be to slow. Due to the tremendous amount of data that the USDA has to collect and compile, it is a physical impossibility to turn this data around in a summary report and disperse it back to producers in a completely timely fashion. Feed yards used to trade cattle four or five days per week. Now, the whole week's trade can transpire in as little as two hours or less. When the markets and prices are moving that fast, reports generated from data that packers are required to report three times per day are not timely enough to keep producers completely informed. That is why the USDA reinstated the voluntary market reporting program, in an effort to help keep producers informed in a timelier manner. It has worked well and the USDA should be commended for the effort.

Do these perceived *flaws* in MPR mean that the effort should be abandoned? Certainly not. There is a virtual gold mine of data that is highly useful for analytical purposes. For instance, one report I have personally been paying close attention to lately is LM_CT153. This report lists the Forward Contracted Cattle Purchased Weekly by the packers as well as a cumulative total for 12 months out. At the end of December the forward contracted number was near 980,000 head. It will be interesting to see how this number grows between now and April which is usually the highest month for forward contracted cattle and try to estimate what impact this will have on the cash market.

Often someone will say I wish I had data on x or y. And quite often the data is already being collected and published by the USDA. What we in the industry need to do is educate ourselves to what is available and use the data to the best of our abilities.

Presented: Thursday, February 16, 2006

**DOES MANDATORY REPORTING PROVIDE IMPROVED INFORMATION IN
CATTLE MARKETS?**

Jim Mintert
Professor and Livestock Extension Specialist
Kansas State University
Manhattan, Kansas

BIO: Dr. James Mintert is a Professor and Extension State Leader, in the Department of Agricultural Economics at Kansas State University. Mintert holds B.S. and M.S. degrees in agricultural economics from Purdue University and a Ph.D. from the University of Missouri-Columbia. Since joining the KSU faculty in 1986, Dr. Mintert has received numerous awards including *Outstanding Extension Program Awards* from both the *American Agricultural Economics Association* and the *Western Agricultural Economics Association*, and the *American Agricultural Economics Association's Premier Forecaster Award* for his livestock production and price forecasts. Dr. Mintert is also the author of over 100 publications focusing on the economics of the livestock industry. Recently, Professor Mintert has focused on his attention on developing and maintaining the livestock and meat marketing component of K-State's new *AgManager.info* Web site(www.agmanager.info/livestock/marketing), one of the nation's premier internet sites for livestock outlook and price analysis information.

Presented: Thursday, February 16, 2006

WHAT MARKET INFORMATION IS NEEDED IN HOG MARKETING?

Ron Plain
Professor and Extension Economist
University of Missouri
Columbia, Missouri

BIO: Ron Plain has BS and M.Ed. degrees from the University of Missouri and a PhD from Oklahoma State University. He is a Professor in the Department of Agricultural Economics at the University of Missouri. He is a past President of the Extension Section of the American Agricultural Economics Association and a member of USDA's Advisory Committee on Agricultural Statistics.

He's received the following awards: Missouri Agricultural Leader of the Year (1999); Governor's Award for Quality and Productivity (1997); Distinguished Service Award, National Association of County Agricultural Agents (1997); Outstanding State Specialist, Epsilon Sigma Phi (1992); Service in Education Award and Missouri Pork Producer's Association Award (1988).

Presented: Thursday, February 16, 2006

HOW PRIVATE MARKET ANALYSTS USE MARKET NEWS IN LIVESTOCK AND MEAT REPORTS

Dr. Rob Murphy
Vice President
Informa Economics, Inc.
Memphis, Tennessee

BIO: Rob Murphy's duties include livestock and red meat research, price analyses, and the design and implementation of margin risk management systems. Much of his work focuses on methods of measuring and mitigating price risk exposures across a variety of commodities. Prior to joining Informa, he was an economist in the Research Department at the Chicago Mercantile Exchange where he was responsible for maintenance of the CME's Live Cattle futures contract. He received his bachelor's degree in animal science and his master's degree in agricultural economics, both from Louisiana State University, and his doctorate in agricultural and applied economics from Virginia Tech, Blacksburg, Virginia.

SPEECH: Informa Economics is a private consulting firm that specializes in assisting agribusinesses with decisions that improve and maintain profitability. For clients that operate in the livestock and/or meat markets, price data from USDA's Market News reports are an essential ingredient in that process. A large proportion of the beef and pork sold in the U.S. is transacted at values derived in some way from the prices that appear in Market News reports. As a result, companies place a high value on forecasts of the prices contained in these reports and Informa dedicates considerable resources to this activity. In the beef sector, mandatory price reporting has resulted in additional information that has enhanced this forecasting process. The mandatory requirement has removed much of the uncertainty that previously accompanied prices reported under the voluntary reporting system. We can speak with better confidence and make better decisions with this improved data. Information on volumes transacted provided by mandatory beef price reports has facilitated a new type of analysis that allows monitoring of packer inventory levels by specific meat cuts. Knowledge of these inventories improves the accuracy of short-term price forecasts. This volume information also makes it possible to calculate objective measures of demand for individual meat cuts, a considerable improvement in a process that had been largely subjective prior to mandatory price reporting. Market News price data are also used in real-time systems to facilitate cross-hedging of beef and pork items in live cattle and lean hog futures markets. These decision-making tools would not be possible without the reliable stream of cash market prices provided by AMS Market News Service. At Informa, the Market News livestock and meat reports are vital to our ongoing efforts to help make U.S. agribusinesses more successful.

3:45 p.m. – 5:30 p.m.
Concurrent Sessions

RURAL AMERICA: REGIONAL INNOVATION IN RURAL ECONOMIC DEVELOPMENT

Arlington Ballroom, Salon IV

Moderator: *Allan Johnson, Deputy Under Secretary, Rural Development, USDA*

Presented: Thursday, February 16, 2006

RURAL INNOVATION BEYOND THE ACADEMY

Karl Stauber
President & CEO
Northwest Area Foundation
St. Paul, Minnesota

BIO: Karl Stauber is President and CEO of the Northwest Area Foundation, which helps communities reduce poverty. Based in St. Paul, Minnesota, the Northwest Area Foundation focuses all its resources on strengthening each community's ability to fight poverty. Stauber is responsible for all aspects of the Foundation, including implementing its mission and objectives, developing long-range plans, managing the administration, and working with communities locally and regionally. The Foundation serves communities in Iowa, Minnesota, North Dakota, South Dakota, Montana, Idaho, Washington, and Oregon.

Prior to becoming the Foundation's president in 1996, Stauber served as a senior appointee in the Clinton Administration at the United States Department of Agriculture (USDA) in Washington, D.C. Stauber's work focused on rural development policy, education efforts, and implementing the community development portion of the President's Northwest Timber Initiative. As the first Senate-confirmed Under Secretary for Research, Education, and Economics, he oversaw the consolidation and integration of USDA's "knowledge producing agencies." Before being nominated for the Under Secretary position, Stauber served as the Deputy Under Secretary for Rural Development at USDA.

From 1986 to 1993, Stauber was vice president of programs for the Northwest Area Foundation. In this role, he was responsible for developing new approaches to economic development, focusing on rural and other low-income communities. Under his direction, the Foundation helped low-income communities gain access to capital to create businesses.

Prior to joining the Foundation in 1986, Stauber managed an alternative venture capital firm in Colorado. He also served as executive director of the Needmor Fund, based in Toledo, Ohio, and as assistant director of the Babcock Foundation in Winston-Salem, North Carolina.

Stauber holds a Ph.D. in public policy from the Union Institute in Cincinnati, Ohio, a certificate from the Program for Management Development at the Harvard Business School, and a B.A. in American Studies from the University of North Carolina–Chapel Hill. He has written and spoken widely on rural development and public policy issues.

As a volunteer, Stauber is a member of the Board of Directors of the Minnesota Council on Foundations, Forum of Regional Association of Grant-makers, and National Council on Foundations. Previously, Stauber was a member of the Presidential Advisory Board on Tribal Colleges and Universities, the vice-chair of the USDA Task Force on Federally-funded Agricultural and Forestry Research Facilities, and on the boards of many non-profits.

SPEECH: Economic development in rural areas is different than in urban settings. In depressed urban areas the challenge is to **connect** declining communities and their residents to the surrounding opportunities. In most rural areas, we must **create** the opportunities and then connect. Unfortunately, most federal and state practices focus on economic sectors where economic opportunity is in decline—food and fiber commodity production and low-skill manufacturing. If rural communities are to prosper, they must create new economic opportunities, cohesive community visions, overcome resistance to change, and build affordable infrastructures (government and non-profit) to sustain on-going efforts.

Drawing on the extensive experience of the Northwest Area Foundation and its 10 year, \$200 million poverty reduction efforts, Stauber will identify several examples of successful rural communities and draw lessons from them.

Presented: Thursday, February 16, 2006

**NEW TOOLS FOR THE ENGAGED 21ST CENTURY LAND
GRANT UNIVERSITY**

**Victor L. Lechtenberg
Vice Provost for Engagement Purdue University
West Lafayette, Indiana**

BIO: Victor L. Lechtenberg became Purdue's Vice Provost for Engagement in 2004 after serving 10 years as Dean of Agriculture. As dean, Lechtenberg was responsible for Purdue's teaching, research, and extension programs for food, agriculture and natural resources. As Vice Provost, Lechtenberg works to align the university's intellectual and other resources to assist economic growth and address the challenges facing Indiana.

Lechtenberg has been an advocate for research and technology policy to increase competitiveness in the food, agriculture, and natural resource sectors. He chaired USDA's National Agricultural Research, Extension, Education, and Economics Advisory Board from 1996-2002. He is past-president of the Crop Science Society of America and Council for Agricultural Science and Technology (CAST). He is a Fellow of the American Society of Agronomy and Crop Science Society of America. Lechtenberg received his B.S. degree from the University of Nebraska and his Ph.D. from Purdue University.

SPEECH: Land grant universities evolved during the 20th century to provide high quality education for working class Americans and became premier research institutions. The tripartite mission of teaching, research, and extension was broadly embraced by agricultural colleges and by colleges of human and family sciences, but much less so in other disciplines. Education, research, and extension programs have spurred huge productivity gains in the food and agriculture system and have provided thousands of middle-class youth exciting and productive career opportunities, often beyond their imaginations.

Land Grant Universities must develop new tools to address evolving 21st century missions. Purdue University's tool-kit creates exciting learning environments across the entire university, and for youth from all social and economic sectors. Service learning, international study, internships, and interdisciplinary teamwork help equip graduates to be industry and society leaders. Discovery and application of new knowledge is enhanced by a complement of 12 interdisciplinary centers, dedicated to state-of-the-art fundamental research targeting today's grand societal challenges. New technology emanating from university research is commercialized via licenses, agreements, technical assistance and targeted educational programs. Purdue is partnering with private business and industry, with governmental agencies, with schools, with numerous associations and non-governmental organizations, and with local communities to strategically advance economic growth and quality of life in Indiana. Learning, Discovery, and Engagement are the cornerstones of Purdue's strategic plans.

Presented: Thursday, February 16, 2006

STRATEGIES FOR ENGAGING RURAL ECONOMIC DEVELOPMENT: THE ALCORN STATE UNIVERSITY COMMUNIVERSITY MODEL

Clinton Bristow, President, Alcorn State University

BIO: Dr. Clinton Bristow, Jr. was named president of Alcorn State University on August 24, 1995. He is committed to (1) increasing the percentage of minority students attending graduate and professional school; and, (2) increasing the public's awareness and appreciation of the value and contributions to society by land-grant universities through their research, extension programs and overall excellence. Since becoming President of Alcorn, he has doubled the percentage of students attending graduate/professional school, improved retention and established a faculty research incentive program to enhance research in the life sciences, where Alcorn is a national leader in the production of African-American baccalaureate graduates in the life and agricultural sciences.

Dr. Bristow is active in many organizations. He is a member of the Board of Directors of National Association of State Universities and Land-Grant Colleges (NASULGC), Commission on Colleges - Southern Association of Colleges and Schools (SACS), Southern Education Foundation, Inc., National Collegiate Athletic Association, The College Board - New York, National Association for Equal Opportunity in Higher Education (NAFEO), and numerous others.

SPEECH: During the past ten years, Alcorn State University has been transforming itself into what is conceptually referred to as a "communiversity." A communiversity is defined as an institution that is academically strong and community-oriented. During this time, the institution has engaged with numerous outreach projects, including a Saturday Science Academy for middle school students, "Building a Bridge to Sustainable Community and Economic Development of Mound Bayou Through Collaboration and Partnering," "The Alcorn Writing Project for Public School Teachers," and America Reads Mississippi--a school-based tutoring program for K-3rd grade students, just to name a few of the ongoing communiversity projects. During 2004-2005, the institution embarked on a new project to assist in the revitalization of small towns in Mississippi with the view that a successful model or models can be implemented in other small towns across the United States of America. This presentation on "Strategies for Engaging Rural Citizens in Rural Economic Development: The Alcorn State University Communiversity Model" shares ideas on how the communiversity model may be applied in engaging rural citizens in rural economic development in rural America.

The literature, as well as the print and broadcast media, are replete with research findings and observations attesting to the myriads challenges confronting America's rural communities and citizens. The presentation will explore the following basic tenets or premises and provide examples of how the communiversity model has addressed them in efforts to increase rural citizens engagement in rural economic development.

Presented: Thursday, February 16, 2006

CREATING JOBS AND ECONOMIC DEVELOPMENT IN RURAL AMERICA

Bruce Peterson
Senior Vice President
Wal-Mart

BIO: Bruce is the Senior Vice President, General Merchandise Manager of Perishables for Wal-Mart Stores Inc., based in Bentonville, Arkansas. He is responsible for the merchandising and procurement of meat, produce, dairy, frozen food, floral, bakery and commercial bread for domestic Supercenters, Wal-Mart Stores, and the new Neighborhood Markets. Bruce began his career in the grocery industry more than 30 years ago in his hometown of Detroit, Michigan, as a part time clerk in a local supermarket chain. Before coming to Wal-Mart Stores in 1991, he once owned and operated his own produce business and worked for other major food retailers in several regions of the country. Bruce's recruitment included an interview with the late Sam Walton, and he was first hired as the Produce Director of the new Supercenter Division of Wal-Mart Stores. In 1994, he was named as Vice President of Produce Merchandising working his way up to his current position of Senior Vice President and G.M.M. of Perishables.

Bruce has served on numerous boards and task forces within the produce industry, and was honored as the 1997 Marketer of the Year at an annual produce trade association convention. His areas of expertise include category management, computer-based training, electronic data interchange applications, and organizational structure. Bruce is frequently quoted in industry publications and has spoken to groups both internationally and domestically on produce issues and supercenter food strategies.

Bruce was named Perishable Executive of the Year by "Grocery Business" Magazine in 2001, and he served as Chairman of the Produce Marketing Association in 2003. He was also appointed by the Secretary of Agriculture to serve on the USDA Produce Advisory Council. Bruce and his wife, Maggie, reside in Bentonville, Arkansas and have one grown son.

SPEECH: Beginning as a family-owned business in rural Arkansas in 1962, Wal-Mart Stores, Inc. has grown to become the largest retailer and the largest private employer in the nation. More than 1.3 million Americans work at over 3,800 facilities around the country. Wal-Mart Stores offers competitive paying jobs and full benefits, including medical and dental to all associates, many of whom live in underserved rural areas. In 1988, Wal-Mart Stores introduced its first Supercenter, a general merchandise store with a full grocery component, and since then, the company has grown to become the largest grocer in the U.S. Wal-Mart spent more than \$150 billion with nearly 61,000 suppliers in all 50 states in the last year. Further, more than 138 million Americans shop at Wal-Mart every week, and a recent independent study by Global Insights, Inc. determined Wal-Mart saves families more than \$2,300 annually.

3:45 p.m. – 5:30 p.m.
Concurrent Sessions

**GLOBALIZATION: SHIFTING TRADE PATTERNS FOR THE U.S.
AND WORLD: ANTICIPATING AND MANAGING CHANGE**

Arlington Ballroom, Salon V

Moderator: *Walter Armbruster, President, Farm Foundation*

Presented: Thursday, February 16, 2006

**GLOBALIZATION: SHIFTING TRADE PATTERNS FOR THE
U.S. AND WORLD: ANTICIPATING AND MANAGING CHANGE**

Mark Gehlhar
Economist, Economic Research Service
USDA

BIO: Mark Gehlhar is senior economist in the Market and Trade Economics Division of USDA's Economic Research Service. He has been with the Economic Research Service since 1995. In 1999 he served on a team at the U.S. International Trade Commission conducting a study of the economic impacts of China's accession to the WTO. While at ERS he has conducted analysis for both bilateral and regional trade agreements and factors shifting global trade patterns. Mark received his Ph.D. from Purdue University in 1994 and Bachelors of Science from the University of Wisconsin in 1985. Before returning to graduate school Gehlhar worked for the private sector in Wisconsin and California in the dairy manufacturing industry.

SPEECH: The U.S. agricultural trade surplus dropped from \$12.3 billion in 2002 to \$4.7 in 2005 and is expected to fall further in the foreseeable future. In 1996, USDA's projected agricultural trade surplus for 2005 was \$40 billion. Today the economic health of the U.S. farm economy is no longer dependent on an agricultural trade surplus. As the surplus declined in the 3-year period 2003-2005 the U.S. farm sector saw its highest income level on record. Even as demand for U.S. farm products grew, imports of processed food and beverages grew at an unprecedented rate in recent years. The direction and composition of farm and food trade has changed in unanticipated ways.

The presentation provides a global perspective of how trade patterns for the United States and the world have shifted and why certain changes were not anticipated from a decade ago. The speech examines the dual role of emerging markets becoming both competitors and growth markets for the United States and the implications of growing or declining population in mature high-income markets. Further, the speech describes the role of foreign direct investment and the location of processing activity in the world and why certain products are growing faster in world trade. The presentation raises some new issues facing future trade for the U.S. farm and food sectors.

Presented: Thursday, February 16, 2006

**RAPID DEVELOPMENT OF BRAZIL'S PROCESSING AND SUPPLY
CHAIN SYSTEM: IMPLICATIONS FOR BRAZILIAN PROCESSED FOOD
TRADE**

**Mauro de Rezende Lopes
Research Project Manager
Center for Agricultural Economics Studies
The Brazilian Institute of Economics
The Getulio Vargas Foundation
Rio de Janeiro, Brazil**

BIO: Based in Rio de Janeiro, Brazil, Mauro de Rezende Lopes was a former Director of the Brazilian Commodity Credit Corporation. Now he is in charge of supervising research and teaching in the Vargas Foundation. Prior to that position he served as a member of the Brazilian Delegation to the Uruguay Round Negotiations, in Geneva. He was a finalist of the World Bank's Development Marketplace contest, with the project of Consortium and Condominium of Landless Workers to Rent Land. He has been consultant to the World Bank, the Interamerican Development Bank and several farm organizations. He has a PhD degree in Agricultural Economic from Purdue University.

SPEECH: Brazil became an important player in world trade of agricultural commodities, agro-processed products and industrialized food. The country now ranks as first and second in production and exports of the major agricultural commodities and meats. With abundant natural resources the country decided to take advantage of the opportunities in world trade. Reforms were also implemented to further improve the competitiveness of the country in world markets: the country liberalized trade, reduced government intervention in agricultural markets and compensated the sector with heavy investments in research. These reforms although had a high cost, they have proved to be very effective in further enhancing the competitive position of the country. With the occupation of the so-called "new frontier" production and exports of commodities boomed. However, new challenges are threatening Brazil's position of one of the key exporters of agro-processed products, such as the structure of taxation to the farm sector, the high cost of money, the overvaluation of exchange rates, the severe limitations on infrastructure, etc. There is a "new generation" of "agricultural industries" mainly devoted to quasi-commodities, such as poultry, hogs and beef. Brazil became a competent competitor in world markets. But still the growing domestic market of almost 180 million inhabitants needs to be fed with reasonable prices for the future. The structure of demand for food in Brazil is changing rapidly. And new challenges are just ahead: how to be efficient in producing processed food to feed domestic consumers and, at the same time, to keep its competitive position in world markets. This paper also addresses the question of the competitiveness of the Brazilian food industry in the years ahead, from both perspectives: the public and the private sectors.

STRATEGIC THINKING FOR GLOBAL OPERATIONS: THE CASE OF BLUE DIAMOND GROWERS

**Dale Darling, Export Industrial and Retail Sales
Blue Diamond Growers
Sacramento, California**

BIO: Dale Darling has served Blue Diamond Growers for six years directing the exports for industrial and retail almonds into Europe, Africa, South America, and parts of the Middle East. Bulk and industrial sales account for the vast majority of overseas business. Almonds are used in the confectionery, cereal, bakery, snacks, and grocery trade. Before joining Blue Diamond Growers, Mr. Darling exported dairy and beef genetics for eleven years for World Wide Sires. He received his M.S. in Agricultural Economics in 1989 and B.S. in 1987 from Michigan State University. He is originally from Michigan where his family continues their cash crop farming operation. He presently resides in Orangevale, California.

SPEECH: Blue Diamond Growers is an agricultural cooperative with over 3,400 member almond growers located in California. For 96 years Blue Diamond Growers has led the industry increasing almond consumption globally. Approximately 80% of the world's almonds are produced in California thus exports are a primary focus. Approximately 70% of all California almonds are exported abroad to over 90 countries. Over 50% of all exports are to Europe where historical and cultural traditions utilize almonds. Primary usage has been in the Marzipan, confectionery, baking, chocolates, and growing snack food sectors. Almond consumption and demand is growing in Eastern Europe, India, and China with increased consumer income levels. Current California almond production has risen to 900 million pounds per year, and it is expected to grow to over 1.5 billion pounds by 2010. With new plantings of almonds producing in the coming years, more effort to expand current and new markets will be of utmost importance. Consumer education on the nutrition and health benefits of almonds is key to expanding both traditional and newer developing markets. Another essential aspect to our strategy is the preservation of close working relationships with partners.

The major growth area for almonds is in the snack nut and energy bar categories. Consumers view almonds as a healthy snack food, and the industry invests resources to educate consumers about health benefits. In most markets, we work directly with industrial partners, retailers, and snack food producers. This strategy helps minimize additional marketing costs, and promotes a closer understanding and relationship to our clients. Country and client importing requirements are expanding each year which makes close working relationships more important. Our annual marketing strategy is based on the crop production of the given season. There are over 120 companies producing and marketing California almonds. Our marketing and sales strategies are of paramount importance in providing competitive and favorable returns to our almond grower members.

Presented: Thursday, February 16, 2006

**TARGETING OPPORTUNITIES AND MANAGING CHANGE: A
PERSPECTIVE FROM GENERAL MILLS**

**Shay Wyley, Director, Strategic Initiatives
International Division, General Mills
Plymouth, Minnesota**

BIO: Shay Wyley is a sixteen year veteran of General Mills and is currently the Director of Strategic Initiatives for General Mills' International Supply Chain, based in Minneapolis. He holds a Bachelor of Mechanical Engineering degree from University College Dublin, in his native Ireland. Throughout his 22-year career, Shay has held Engineering, Supply Chain and General Management positions in the United States, Mexico, Europe, Africa and Asia.

In his current role at General Mills, Shay works across regions and functions to define Supply Chain strategies that will support the future needs of General Mill's fast growing International business. Previously Shay has held several General Management positions, most recently as Regional Director for General Mills' Southeast Asia business. He has also held Managing Director positions in South Africa and the Philippines and has been responsible for the start-up and turnaround of various businesses relying on the development of local managerial talent in each case.

No stranger to different cultures, Shay and his family emigrated to the United States from Ireland in 1988 and, since then, has taken multi-year assignments to South Africa and, most recently, the Philippines. Shay, his wife and four children now live in Plymouth, Minnesota.

SPEECH: Managing in the International business world means dealing with constant change. Some changes are foreseeable, and can be planned for, some need to be planned for as a business grows. However, many changes in International business are unforeseen and immediate requiring great agility from a solid foundation of talent and business. In our flattened world, the pace at which we need to deal with change is ever increasing requiring a balanced approach to targeting the great opportunities that the ever-changing International environment presents. Success in such a dynamic environment requires well thought out strategies considering varied factors such as structure in an entrepreneurial environment, understanding local cultures and needs while keeping a global perspective and maintaining balance in market approach

3:45 p.m. – 5:30 p.m.
Concurrent Sessions

Presented: Thursday, February 16, 2006

CONSERVATION: USDA'S CONSERVATION ROLE IN BIO-FUEL PRODUCTION

Arlington Ballroom, Salon VI

Moderator: *Bryce Stokes, Forest Service Research and Development, Vegetation Management and Protection Research, USDA*

Presented Thursday, February 16, 2006

CROP RESIDUE AS A BIO-ENERGY FEEDSTOCK: EFFECTS ON SOILS

Susan S. Andrews

**Leader, Soil Quality National Technology Development Team
Natural Resources Conservation Service
USDA**

BIO: Susan Andrews has led the USDA-NRCS National Technology Development Team for Soil Quality in Greensboro, NC, since March, 2005. Susan's duties include leading her agency's acquisition, development and transfer efforts in soil quality technology. Additionally, she serves as a consulting member of the NRCS ad hoc bioenergy team. She joined the NRCS in 2002 as a member of the Soil Quality Institute in Ames, IA. While there, she served as the Institute liaison to DOE and ARS for bioenergy from crop residue feedstocks, participated in DOE's Biomass Roadmap focus groups and listening sessions, wrote a white paper on the topic, and developed the prototype for an energy calculator for cropping systems. Susan's postdoctoral work with the Agricultural Research Service was on the development of soil quality assessment tools. She graduated from the University of Georgia with a Ph.D. in Ecology in 1998.

SPEECH: In light of the renewed interest in domestic production of biofuels and other biomass energy, can the more than 500 million tons of crop residue produced each year be used to meet some of our energy needs? The answer is not straightforward because residues perform many positive functions for agricultural soils. Studies since the early 1970s predict that residue removal as an inexpensive feedstock is likely to have unintended environmental costs. Several recent studies and reviews re-examined this issue and reported many similar concerns. If this alternative feedstock is to be used, specific guidelines for residue harvest should be developed, recommending acceptable removal rates with respect to soil type, climate, yield and management. Despite some shortcomings, existing research and models can be used to guide practices, especially for corn stover harvest in the Corn Belt, which has been studied most extensively. Additional conservation practices, such as no-till, cover cropping, and crop rotations, are necessary to mitigate potential increases in erosion, losses of organic matter and nutrients, and decreases in crop yield.

Presented Thursday, February 16, 2006

IMPACTS OF BIO-FUELS EXPANSION ON LAND USE AND CONSERVATION

**Josh Roe, Research Associate, Department of Agricultural Economics
Kansas State University
Manhattan, Kansas**

BIO: Josh Roe is a native of North-Central Kansas, where he grew up on a diversified crop and cattle farm. He earned his BS in Agricultural Economics with minors in Finance and Statistics at Kansas State University then completed his MS in Agricultural Economics at Iowa State University.

Josh's primary research platform at Iowa State involved evaluating farmer investment in the stock market and/or value-added agricultural businesses as alternatives to farm expansion. In addition to his extensive inquiry, Josh served on the faculty of Iowa's Ag Credit School for rural lenders and provided consultation for the Iowa Soybean Board.

Currently an Economics PhD candidate, Josh was most recently appointed as the USDA Needs Fellow for the Kansas State University Agricultural Economics Department.

SPEECH: Josh Roe emphasizes both the macro and farm-level ramifications of increasing ethanol production in the U.S. as he continues his consultative work with individual Midwest ethanol plants.

Presented Thursday, February 16, 2006

ANEROBIC DIGESTERS — ANOTHER SOURCE OF RENEWABLE ENERGY

**Dennis Haubenschild
Haubenschild Farms
Princeton, Minnesota**

BIO: Dennis Haubenschild owns and operates the 1,000-cow Haubenschild Dairy with his wife Marsha and sons Tom and Bryan and their families near Princeton, Minnesota. Dennis grew up on this farm, which he started with his parents in 1952. Dennis has been active in the Minnesota dairy industry for many years. Dennis has been interested and done research on anaerobic digestion since the early 70's.

SPEECH: Dennis will describe how he began operating a plug flow methane digester system in September 1999. Since then, the system has logged in excess of 54,000 hours. The goals have been to show sustainable and environmentally sound methods for not only the dairy industry but other industries and government agencies alike. He will share his experiences about installing and operating a methane digestion with Forum attendees, as he has done with numerous groups from across the country and hosts hundreds of visitors at the farm each year seeking to learn about their operation.

Presented Thursday, February 16, 2006

PERENNIAL CROPS FOR BIO-FUELS AND CONSERVATION

**Gregory Ruark, Director of the USDA National Agroforestry Center,
USDA Forest Service, Normal, Alabama**

BIO: The speaker, Dr. Greg Ruark, received a B.S. in forestry (1979) and an M.S. in forest soils (1982) from the University of Massachusetts. In 1985, he completed a Ph.D. with a double major in soil science and forestry from the University of Wisconsin. He began his research career with the U.S. Forest Service in North Carolina, where he conducted studies on the productivity of forest soils. In 1992, he moved to Forest Service headquarters in Washington, D.C. to become the national program coordinator for tropical forestry and biological diversity research. While in Washington D.C. he spent 1.5 years on detail to the White House Office of Science and Technology Policy. Following that assignment he served as the Science Policy Analyst for Forest Service Research and worked closely with the President's Council on Sustainable Development. In 1998, he assumed his current position as Director of the USDA National Agroforestry Center.

SPEECH: Perennial crops have the potential to contribute significantly to the production of bio-fuels while simultaneously helping to provide a wide range of conservation benefits. Among these benefits are increased biological diversity in the landscape, conservation of soil and water resources, maintenance of forest ecosystem productivity and health, contribution to the global carbon cycle, and provision of socioeconomic benefits.

Perennial grasses, such as switchgrass, can be grown across a wide range of site conditions. These native grasses help protect soil from erosion and provide habitat for nesting birds and other wildlife, while yielding high levels of biomass. Short rotation woody crops, like hybrid poplar and willow, grow rapidly and can reach 5-8 meters in height after only three years. Production systems that sustainably grow and harvest these and other tree species are being developed and refined. When a mixture of different short rotation tree species is planted across formerly agricultural fields in various spatial arrangements and age blocks, landscape diversity can be enhanced. There also exists a large opportunity for the traditional forestry sector through bio-refinery processes to contribute significantly to the bio-fuel arena. In particular, the initial thinning of pine and other forest plantations rely on the existence of markets that can accept small diameter stems. In recent years and in many locations the traditional pulpwood markets have been declining as aging pulp mills have been closed and new ones are being built offshore. Redirecting this wood fiber into bio-fuels would benefit both the energy sector and forest landowners, while providing an array of conservation benefits that ensue from managed forests.

The amount of bio-fuel that can be sustainably produced each year from perennial crops is potentially very large. The next Farm Bill affords an opportunity to insure that this potential can be more fully realized.

3:45 p.m. – 5:30 p.m.

Concurrent Sessions

SCIENCE: NEW, EMERGING PRODUCTS

Grand Ballroom, Salons J, K

Moderator: *Carmela A. Bailey, National Program Leader, Agricultural Materials, Cooperative State Research, Education and Extension Service, USDA*

Presented Thursday, February 16, 2006

GUAYULE LATEX PRODUCTION

Katrina Cornish, Ph.D., FAAAS

Senior Vice-President, Research and Development, Yulex Corporation

BIO: Dr. Katrina Cornish is the leading U.S. scientific expert on domestic latex production from guayule. As Senior Vice President, Research & Development at Yulex, Dr. Cornish oversees the company's ongoing research, development, and validation programs for the commercialization of guayule latex for hypoallergenic medical devices and specialty consumer products. Prior to joining Yulex in 2004, Dr. Cornish was the USDA-ARS, Western Regional Research Center's only GS-15 female scientist and had led the agency's development of domestic natural rubber crops for 15 years. Dr. Cornish is the sole inventor of process and product patents to produce hypoallergenic natural rubber latex and products from guayule. She has over 100 publications and patents (not including abstracts), in several scientific fields, of which over 80 are related to rubber biosynthesis and production. In 2004, Cornish received the Good Housekeeping Award for Women in Government in recognition of her inspired leadership proving that good government can change our lives. In 2002, she was elected a Fellow of the American Association for the Advancement of Science and won a presidential award from the American Chemical Society. In 1998, she was honored with the USDA's Scientist of the Year Award for Outstanding Senior Research Scientist. In 1997, she was recognized by the Agricultural University of Antonio Narro, Mexico for guayule research. She serves on the editorial boards of *Phytochemistry*, *Industrial Crops and Products*, and *Industrial Biotechnology*. Dr. Cornish received a first class honours degree in Biological Sciences in 1978, and a Ph.D in plant Biology in 1982 both from the University of Birmingham, England.

SPEECH: Natural rubber is a strategic raw material used in enormous quantities, for commerce, medicine, transportation and defense, but until recently the United States has been completely dependent upon imports, largely from south-east Asia. Natural rubber latex from the native industrial crop, guayule, is now being commercially produced by Yulex Corporation, the exclusive licensee of technology developed and patented by USDA-ARS. Although this development was spearheaded and coordinated at the Western Regional Research Center it provides an exemplary picture of how cooperation throughout the agency, and with academia, can lead to technology transfer and commercial success. The new, commercially-viable, opportunity for domestic rubber production from guayule arose in 1991 when the Food and Drug Administration issued a

medical alert warning of life-threatening Type I latex allergies to proteins in natural rubber products. Guayule had not been investigated as a commercial source of latex for medical product manufacture because it does not make its rubber in the form of a tapable latex. However, on a microscopic level, guayule, like latex-producing species, makes its rubber in small rubber particles in the aqueous cytosol. Extracting the guayule rubber particles, while maintaining them in aqueous suspension, generates an artificially-produced natural rubber latex suitable for the manufacture of latex products – now produced under the material name of “yulex®”. The automated Yulex semi-works plant is in 24-h operation, and extracts and purifies latex from guayule shrub without detectable losses, and the first commercial plant is due on-line in Spring 2006. Because the latex contains very little protein, none of the proteins cross-react with Type I latex allergy, and because the products outperform synthetic alternatives, its use is initially aimed towards the high-value medical products marketplace, allowing a significant premium to be charged. Clinical and performance trials continue to ensure that guayule processing provides a safe, high performance, natural rubber latex that is safe for human use. Also, in June, 2005, Yulex entered into a \$150 million five-year distribution agreement with Centrotech USA and Centrotech Deutschland GmbH., and has begun latex shipments and commercial sales. The value of the latex in high-end medical uses, such as catheters, surgical tubing, condoms and surgical gloves, is sufficient that guayule production can be supported by the latex stream alone. As markets are developed for guayule resin coproducts and bagasse byproducts as acreage expands across the southwestern United States, enhancing rural development, guayule is poised to meet the serious market shortfalls now predicted by the International Rubber Study Group which forecasts that increasing global demand will lead to significant shortfalls by 2010, and a three million tonne per year natural rubber deficit by 2020.

Presented: Thursday, February 16, 2006

IMPROVING BIODEGRADABLE CAFETERIA WARE

John B. Nevling

Vice President

Product and Management and Environmental Affairs

EarthShell Corporation

Lutherville, Maryland

BIO: John Nevling joined EarthShell in 1998 and serves as Vice President for Product Management and Environmental Affairs. He is responsible for ensuring the products performed to the standards of the industry and that the environmental profile is thoroughly tested and confirmed by independent third-part research.

Prior to coming to EarthShell he held various positions at the National Starch and Chemical Company where he managed the Biodegradable Products business.

Mr. Nevling has a BS in chemistry for the University of Illinois, and an MBA in Marketing from Fairleigh Dickinson University.

SPEECH: EarthShell Corporation is engaged in the licensing and commercialization of proprietary composite material technology for the manufacture of foodservice disposable packaging, including cups, plates, bowls, hinged-lid containers, and sandwich wraps. In addition to certain environmental characteristics, EarthShell Packaging is designed to be cost and performance competitive compared to other foodservice packaging materials. Mr. Nevling will discuss the results his company has had in providing products made from potatoes, wheat and corn. He'll also discuss current trends in the marketplace.

Presented: Thursday, February 16, 2006

THINKING BIORENEWABLES? THINK CORN!

**Corn and Soybean Producer
Member Iowa Corn Promotion Board
Randolph, Iowa**

SPEECH: Talking Points.

1. Corn can replace petroleum in wide range of products.
2. Ethanol (corn is the most abundant source of fermentable sugars in the world).
3. Plastics and fiber for clothing and carpet.
4. Base Industrial chemicals (isosorbide).
5. Fiber Utilization (polyols).
6. Hemicellulose.
7. No shortage of corn--hopefully a shortage of cheap corn someday.
8. Fund corn-genome research including functionality. Expanded uses through and bioengineering (pharmaceuticals).
9. Looking at an endless stream of new uses.

Presented Thursday, February 16, 2006

NEW USES FOR ANIMAL BY-PRODUCTS

Justin Barone

**Research Chemist, Agricultural Research Service
USDA**

BIO: Based at USDA's Beltsville Area Research Center, Justin Barone has served as a Research Chemist since 2002 with research focusing on biobased technologies from agricultural waste products. Justin served two stints in industry prior to joining the USDA, one from 2000-2002 at the PolyOne Corporation and one from 1994-1996 at UDC, a small start-up chemical company. Justin was raised in New Jersey and graduated with a B.S. in Materials Science and Engineering from Lehigh University in 1994. In 2000, he received a PhD degree in Macromolecular Science from Case Western Reserve University. He has received recognition for his work on making value added products from animal by-products including making plastic materials from waste poultry feathers.

SPEECH: It is well known that proteins are abundant in food and are vital to nutrition and biochemical function. What is not very well known is that proteins derived from agricultural sources are used in everyday products such as glue and textiles. Research continues to find new uses for proteins in a wide variety of applications, most of which would be replacements for petroleum-derived materials. While there are many current and future non-food uses for proteins, it is the intent of this presentation to concentrate on recent advances focusing on uses as polymers, which have enormous commercial potential.

There are over 5 billion pounds of wet poultry feathers available annually. Domestically, these poultry feathers usually find their way into animal feed known as "feather meal" that has a small or non-existent profit margin. Feathers are composed of the structural protein keratin, which is a high performance polymer or plastic. Research at USDA's Beltsville Agricultural Research Center has shown that poultry feathers can be converted to a polymer with properties similar to currently available commodity plastics such as polyethylene and polypropylene by controlling the *nanostructure* of the keratin.

Non-biodegradable petroleum-based polymers account for about 11% of the 229 million tons of municipal solid waste generated in the U.S. each year, most of which is packaging. With petroleum prices and land-filling fees rising, packaging that is biobased and biodegradable has a distinct advantage. This presentation shows the potential of this poultry feather-based polymer and the results of current pilot scale trials in anticipation of creating a commercial product for the agricultural industry such as mulching film and nursery containers.

3:45 p.m. – 5:30 p.m.
Concurrent Sessions

**MARKETS: AFRICAN GROWTH & OPPORTUNITY ACT AND
AGRICULTURE: TRADE WORKS**

Grand Ballroom, Salon A

Moderator: *Mike Williams, Senior Associate, Carmen Group*

Presented Thursday, February 16, 2006

IMPACT OF AGOA ON U.S. – AGRICULTURAL TRADE

Ambassador Karan Bhatia
Deputy U.S. Trade Representative
Washington, D.C.

BIO: Ambassador Karan K. Bhatia serves as Deputy U.S. Trade Representative, having been nominated for this position by President George W. Bush and confirmed by the Senate in November 2005. As Deputy USTR, Ambassador Bhatia is a key member of U.S. Trade Representative Portman's senior management team. His portfolio includes overseeing U.S. trade relations with East Asia (including China and Japan), South Asia (including India), Southeast Asia, and Africa. His responsibilities also include supervising USTR's functional offices handling trade capacity building, environmental, labor, and pharmaceutical issues, and serving as USTR's designee on the boards of Ex-Im Bank and the Millennium Challenge Corporation.

Prior to joining USTR, Ambassador Bhatia held the position of Assistant Secretary for Aviation and International Affairs at the U.S. Department of Transportation from 2003-2005. In this role, he crafted U.S. international and domestic aviation policy, and supervised the negotiation of international air services agreements with more than 20 countries, including landmark market liberalizing agreements with China and India.

Earlier in President Bush's administration, Ambassador Bhatia served in the Department of Commerce, where he held the positions of Deputy Under Secretary and Chief Counsel for the Bureau of Industry and Security, the U.S. Government agency that administers U.S. export controls. Prior to joining the Bush Administration in 2001, he was an equity partner at the law firm of Wilmer, Cutler & Pickering, where he was a member of the firm's international and corporate groups.

Ambassador Bhatia holds a bachelor's degree from Princeton University, a master's from the London School of Economics, and a law degree from Columbia University. He has written and spoken widely on issues of international trade and transportation. From 1999-2003, he served as an adjunct professor at Georgetown University Law Center, and is a term member of the Council on Foreign Relations. He is married to Sara Levine Bhatia and has two children.

Presented Thursday, February 16, 2006

TRADE ENHANCING GOALS FOR REDUCING SANITARY AND PHYTOSANITARY BARRIERS

**Dr. Dan Sheesley, Deputy Administrator
International Services, APHIS, USDA**

BIO: Dr. Dan Sheesley was appointed Deputy Administrator for APHIS' International Services (IS) program in January 2005. Dr. Sheesley's responsibilities including internationally-based plant and animal health expertise, enhancing APHIS' ability to safeguard U.S. agricultural and natural resources. He is also responsible for Management of technical SPS, Issues and delivery of specific disease and pest eradication and control programs. Prior to his appointment, he served in various leadership positions overseas and in headquarters. Dr. Sheesley graduated with a degree in veterinary medicine from Colorado State University. He and his wife of 38 years are both natives of Colorado.

SPEECH: Dr. Sheesley will discuss the efforts that USDA, and APHIS in particular, are undertaking in order to increase cooperation with our counterparts in Africa. Thirteen percent of the world's population live in Africa, but the region generates just 2 percent of world economic output. In fact, Africa's share of total world merchandise trade has fallen from 7.3 percent in 1949 to just 2.6 percent in 2004. Sub-Saharan African countries account for less than 2 percent of the total value of world trade in goods and services. Only 3 Sub-Saharan – South Africa, Nigeria, and Angola countries are included among the top 50 exporters of merchandise goods, and petroleum products are an important component of these exports for Nigeria and Angola.

Sanitary and phytosanitary requirements are vital to protecting consumers and to preserving agricultural and natural resources. Developed countries like the United States have invested in building food safety and agricultural health systems at home, and have put in place the necessary import requirements to ensure that we can provide the level of protection we feel is appropriate. While we have an internationally protected right to do this under the WTO and other international agreements, our measures can make it harder for some countries to export food and agricultural products to the United States. In some cases, it may not be possible to export certain products at all. The African Growth and Opportunity Act, originally enacted in 2000 and extended until 2015 in 2004, provides extensive non-reciprocal preferential tariff treatment for African countries that meet specified criteria. Currently 37 countries are "AGOA-eligible". Virtually all agricultural products are included in this preferential tariff treatment. Despite these benefits, the United States accounted for a very small share of African agricultural exports in 2004, less than 5 percent. That percentage did not increase from 2000 (although the value of exports did in absolute terms). Non-tariff barriers, including SPS requirements, may well explain part of the limited ability of African agricultural exports to exploit the elimination of tariffs. Certainly, it is a common perception in many African countries that SPS measures in developed countries are used to exclude products from developing countries.

CHALLENGES TO U.S. – AFRICA TRADE

Richard Olson
President, GANTEC, Inc.
Midland, Michigan

BIO: Richard A. Olson is the President and co-founder of GANTEC Inc. located in Midland, MI. Ric is also the owner and Chief Steward of Environmental Partnerships, LLC which provides strategic regulatory advice to major corporations, as well as support to US government and non profit organizations. Ric and other international business owners started International Business Investing and Consulting Company (IBICC). One of the goals of this company is to bring economic and environmental development to underdeveloped nations. IBICC has evaluated and made some investment in projects in Mauritania, Tonga, Fiji, Indonesia and Nepal. Mr. Olson worked for 24 years with Dow Chemical Company in the environmental health and safety area. Ric was a Dow representative on President Clinton's Council on Sustainable Development, and the World Business Council on Sustainable Development. He is a graduate of Augustana College with a B.A. in Chemistry. He received his M.S. in Environmental Health from the University of Minnesota.

SPEECH: GANTEC's experience with AGOA. GANTEC is a natural products technology company headquartered in Midland, Michigan. GANTEC develops new, large volume supplies of agriculturally-important natural products, and work with end-users and development partners to create sustainable, state-of-the-art products through high-quality supply and process development, formulation and testing. We use cutting-edge technology, global resource networks, and high standards of community development to achieve sustainability and high-impact in both supply-side and end-use markets.

1. AGOA has provided good networking opportunities through the AGOA conferences and website. As a speaker at the 4th AGOA conference in Dakar in July of 2005, I had the opportunity to identify other countries that have interest in our business as well as other business which have interest and experience in what we are doing. This is very helpful.
2. AGOA has helped focus attention on Africa and the potential opportunities. We are hopeful that this will create greater ease in obtaining financing for our start up business. However, the business must be viable and have a good business plan. In principle this should lower some of the investment barriers.
3. AGOA has helped reduce barriers for trade from Africa to the US.
4. The trade hub in Dakar should help facilitate West Africa exports to the US.

Presented Thursday, February 16, 2006

CHALLENGES TO U.S. – AFRICA TRADE
Kasasira Mwine, President & Founder
Commerce Africa
Silver Spring, Maryland

BIO: Kasasira (Sas) Mwine, Esq, founded Commerce Africa, LLC in 2003 and serves as the company's President. Commerce Africa, LLC was established to operate as a full service marketing company to import key commodities from Africa for distribution to wholesale as well as retail networks in the United States and Canada. The vision for Commerce Africa was based on the idea that Africa is host to a wealth of exportable products and related business opportunities yet critical barriers limit the capacity for trade. One of those challenges believed to be a principal barrier is the lack of marketing agents that understand both the expectations of buyer networks in North America and the commodities in Africa with genuine potential for success. Commerce Africa identified seafood wholesalers and retailers in Atlanta, Boston, Baltimore and Montreal that were interested in seafood products from Africa. Mr. Mwine contacted fish processing plants in Uganda and through the assistance of the CCA SAIBL program, contacted fish processing plants in South Africa. He explained to those plants the packaging standards, quality standards and logistics required to solidify long-term sales programs with the select wholesalers. Commerce Africa developed a market strategy, which included preparing recipe cards, targeting customers through product tasting as well as demonstrations and negotiating long-term sales agreements.

Currently, Commerce Africa imports 2 tons per week of Lake Victoria Nile Perch from Uganda for distribution to a network of five wholesalers in the U.S. and Canada. In addition, during the applicable seasons Commerce Africa imports 1-2 tons of lobster per week from South Africa and 1-2 tons of yellow fin tuna. One of the key wholesalers is the top seafood distributor in the southern region of the U.S. and the fourth largest distributor nationwide. The retail buyers include Wholefoods/Freshfields and top seafood restaurants such as McCormick's & Schmick's. The networks established through importing seafood products have opened the door for the sale of organic vegetables and various other agricultural products. In 2005 Commerce Africa is making arrangements to import to the U.S. agricultural commodities such as dried fruits, chickpeas, sesame seeds, hibiscus products, Rooibos tea and Moringa powder. Furthermore through the support of the West Africa International Business Linkages Program (WAIBL) and the West Africa Trade Hub (WATH) and the IESC Africa Fast Track program, Commerce Africa has made arrangements to import 40 – 80 tons per month of frozen and smoked seafood products from West Africa to U.S. distributors and wholesalers.

Mr. Mwine worked as an attorney in Washington, DC, before serving with the Whitaker Group focusing on international corporate law and regulatory compliance matters. Mr. Mwine has a Juris Doctorate degree from George Washington University Law School and a Public Policy degree from the College of William and Mary.

6:30 p.m.

Forum Dinner

**BUILDING DOMESTIC AND FOREIGN MARKETS
FOR RURAL PROSPERITY**

Cal Dooley, President, CEO, Food Products Association

Cal Dooley is President and Chief Executive Officer of the Food Products Association (FPA), formerly the National Food Processors Association.

The Food Products Association is the largest trade association serving the food and beverage industry in the United States and worldwide. FPA's laboratory centers, scientists and professional staff provide technical and regulatory assistance to member companies and represent the food industry on scientific and public policy issues involving food safety, food security, nutrition, consumer affairs and international trade.

Prior to being named FPA's President and CEO, Dooley served as a Member of the U.S. House of Representatives from 1991 to 2004, representing the 20th District of California. He served on the House Agriculture Committee, as well as the House Resources Committee.

Dooley was a founder of the New Democrat Coalition, an organization of centrist, pro-growth Members of Congress dedicated to finding bipartisan solutions to our nation's problems. The Coalition has grown into the largest group of Members in the Democrat Caucus, and played a major role in building support for policies advancing trade, technology and education reform.

As a Member of Congress, Dooley was a leader in promoting a pro-trade agenda, and he was instrumental in securing passage of Trade Promotion Authority. He was honored by the Washington International Trade Foundation with its prestigious Distinguished Service Award, and was twice recognized by Consumers for Free Trade for his strong support for international trade.

Congressional Quarterly named Dooley one of the House's most influential "Power Players," in recognition of the breadth and effectiveness of his leadership in Congress.

Dooley is a fourth-generation farmer and partner in Dooley Farms, growing cotton, alfalfa and walnuts at his farm in California's San Joaquin Valley.

Dooley earned a Bachelor's degree in Agricultural Economics from the University of California, Davis and, as a Sloan Fellow, earned a Master's degree in Management from Stanford University. He and his wife, Linda, have two daughters, Brooke and Emily.

Notes:

The USDA Outlook Forum is organized by the Office of the Chief Economist and 13 USDA agencies, including:

Agricultural Marketing Service
Animal Plant Health and Inspection Service
Agricultural Research Service
Cooperative State Research, Education and Extension Service
Economic Research Service
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Grain Inspection, Packers and Stockyards Administration
National Agricultural Statistics Service
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Risk Management Agency
Rural Development

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March 1-2, 2007

2007 Agricultural Outlook Forum

**Crystal Gateway Marriott Hotel
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Prospering in Rural America

Speaker's Handbook

February 17, 2006



Speeches and PowerPoints are being posted on USDA's Forum Web site.

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February 17, 2006

8:15 a.m. - 9:45 a.m.
Concurrent Sessions

**RURAL AMERICA: STAKEHOLDER COLLABORATION IN
SUPPORT OF AGRICULTURE AND RURAL COMMUNITIES**

Grand Ballroom, Salons J, K

Moderator: *Chuck Fluharty, Rural Policy Research Institute, University of Missouri*

Presented: Friday, February 17, 2006

THE ROLE OF RURAL HEALTH SYSTEMS IN REGIONAL INNOVATION

Wayne W. Myers MD
National Rural Health Association
Waldoboro, Maine

BIO: Dr. Wayne Myers spent most of his career developing rural health professional education programs and strengthening rural health care organizations in rural Alaska, the Pacific Northwest and central Appalachia. He also managed a system of consultation and revitalization for rural hospitals and health care systems. He was a member of the original RUPRI Health Panel before becoming the Director of the Federal Office of Rural Health Policy in 1998. He is a past President of the National Rural Health Association. He and his wife now raise sheep, operate a "you-pick" berry, vegetable and flower operation, and are active in both the Maine Farm Bureau and the Maine Organic Farmers & Gardeners Association.

SPEECH: Health care is one of the most critical sectors in all rural economies. Wayne Myers, Past President of the National Rural Health Association and past Director of the Federal Office of Rural Health Policy, will address the emergent awareness within the rural health sector of its critical role assisting in these integrative cross-sector efforts, and will discuss the increased attention being paid by the National Rural Health Association to supporting these cross-sectoral efforts.

Presented: Friday, February 17, 2006

THE ROLE OF COUNTIES IN BUILDING A RURAL REGIONAL INNOVATION SYSTEM

**Colleen Landkamer, Commissioner
Blue Earth County, Minnesota
1st Vice President, National Association of Counties**

BIO: Colleen Landkamer, a 17-year county commissioner from Blue Earth County (Mankato), is the National Association of Counties (NACo) President - Elect. Landkamer has served on NACo's Board of Directors since 1996 and has served on more than a dozen NACo committees and task forces. She was instrumental in the formation of the Rural Action Caucus, a group of hundreds of county officials who lobby on rural issues before Congress and the Administration. Landkamer is a past president of the Association of Minnesota Counties (AMC), and currently chairs the Minnesota Counties Research Foundation. She also serves on the Minnesota Transportation Alliance Board, Rural Policy Center Board and the Greater Minnesota Housing Fund. Landkamer has been a Humphrey Institute Policy Fellow, a Rural Policy Research Institute/ Missouri European Union Policy Fellow, and completed the Senior Executive Program in State and Local Government at Harvard University. In 2000, American City and County Magazine named Landkamer, "County Leader of the Year."

SPEECH: The National Association of Counties has had a significant rural policy focus over the last decade. Colleen Landkamer, original Chair of the NACo Rural Action Caucus, and currently First Vice President, will discuss the critical role which counties play in regional innovation, and the critical role a "renaissanced" rural county leadership will play in these dynamics.

Presented: Friday, February 17, 2006

WHY CITIES CARE ABOUT THE FUTURE OF RURAL GOVERNANCE

**James C. Hunt, President
National League of Cities
Clarksburg, West Virginia**

BIO: Jim Hunt, a councilmember from Clarksburg, West Virginia has been elected to serve as President of the National League of Cities for 2006. Councilman Hunt is a six term councilman and former Mayor of Clarksburg, and served as president of the West Virginia Municipal League in 1996. Active for over 20 years with the National League of Cities, Jim has served as Vice-Chairman and Chairman of both the Leadership Training Council and the Advisory Council and served on the Board of Directors from 1993-95.

Councilman Hunt serves as manager of the Clarksburg Field Office of the West Virginia Housing Development Fund and has been involved in many of the major economic development projects in Northern West Virginia. In addition, Hunt heads the West Virginia Housing Development Fund's Statewide Demolition Program which is responsible for removing vacant and dilapidated houses throughout West Virginia. Jim also works with the local Habitat for Humanity in Harrison County.

SPEECH: While cities are not often viewed as critical to the future of rural areas, new rural innovation will demand a much closer working relationship between all jurisdictions, and particular attention to the role which small and medium sized cities will play in regional innovation systems. Jim Hunt, President of the National League of Cities, and a longtime rural advocate within that organization, will address the importance of cities in rural futures.

RURAL INNOVATION THROUGH REGIONAL APPROACHES

Matthew Chase, Executive Director
National Association of Development Organizations
Washington, DC

BIO: Matthew Chase has served as the Executive Director of the National Association of Development Organizations (NADO) and the NADO Research Foundation since October 2003. From March 1997 to August 2000, he served as the association's Director of Legislative Affairs until he was promoted to Deputy Executive Director. Prior to joining NADO, he was the Chief Operating Officer and Membership Services Director of the Professional Managers Association in Washington, DC.

Chase has extensive advocacy experience with federal community, economic and rural development programs, including successful campaigns to reauthorize the Economic Development Administration (EDA) in 1998 and 2004, establish the Delta Regional Authority in the early 2000s and preserve annual funding for core rural development programs under USDA. He remains at the forefront in advancing federal policies to enhance rural transportation planning and services. He is a regular presenter on the impact of federal budget and appropriations trends on small metropolitan and rural America. He is a founding member of the National Rural Network, a coalition of more than 50 national associations interested in rural policy, and serves as NADO's liaison to the Congressional Rural Caucus.

As the chief administrative officer of the NADO Research Foundation, he oversees a diverse set of projects and programs. These programs include the Economic Development Finance Service (EDFS), a subscription-based service providing information, training and networking opportunities for small business development finance professionals; the Rural Brownfields Awareness Project (EPA funded); the Rural Transportation Capacity Building Project (FHWA funded); a new initiative with EPA to promote regional approaches to environmental stewardship and economic development; and a new national center for regional transportation and economic development.

He holds a bachelor's degree from Hartwick College in Upstate New York and a master's degree in political management from The George Washington University in Washington, DC. He has been a member of the American Society of Association Executives and the American League of Lobbyists and has also served on the Alumni Steering Committee for the Graduate School of Political Management.

SPEECH: Matt Chase, Executive Director of the National Association of Development Organizations, will address the essential role of regional intermediaries in providing the "strategic glue" which must be in place to build more integrative regional strategies, and will discuss the potential which exists in federal and state policy to advantage these organizations

8:15 a.m. - 9:45 a.m.
Concurrent Sessions

Presented: Friday, February 17, 2006

GLOBALIZATION: CHINESE AGRICULTURE: IMPEDIMENTS TO GROWTH

Arlington Ballroom, Salon IV

Moderator: *Francis Tuan, Economist, Economic Research Service, USDA*

NATURAL RESOURCE ISSUES IN CHINA: WIND AND WATER EROSION

Mark Majerus
Manager/Botanist
Bridger Plant Materials Center
Natural Resources Conservation Service
USDA

BIO: Since 1975, Mark Majerus has been stationed at the USDA-NRCS Plant Materials Center near Bridger, Montana, serving as Manager since 1998. The Plant Materials Center works to develop native plants to solve conservation problems in Montana and Wyoming, helping to make seed and plants commercially available for soil stabilization, wildlife habitat, livestock grazing, wind break/shelterbelts, etc. Since 1993, Majerus has traveled to China six times and Outer Mongolia four times to consult on seed collection, plant evaluation, and seed production. Prior to his current position he was a Research Associate with the Reclamation Research Unit of Montana State University-Bozeman conducting reclamation research on coal strip mines of southeastern Montana. Majerus was raised on a farm/ranch in central Montana and attended the University of Montana-Missoula receiving a Bachelors degree (1970) and a Masters degree (1972) in Forestry/Range Ecology.

SPEECH: The major dust storms of 2000, and again in 2001, raised the awareness of the Chinese Central Government to the ever increasing soil erosion problem in northern China. Increased livestock numbers, along with year-round grazing and an extended drought has increased desertification of thousands of hectares of grasslands of the desert and temperate steppe regions of northern China. Surface water erosion on deteriorated grasslands and grasslands converted to cropland has also created heavy silt loads in all the major waterways. In an attempt to reverse this downward trend, the Chinese government has taken drastic measures in the northern provinces of Xinjiang, Ningxia, Gansu, Qinghai and the autonomous region of Inner Mongolia. Measures taken include the complete removal of all grazing livestock from critically impacted areas for at least five years, development of fenced grazing paddocks with no grazing allowed during April through June, and the relocation of herders to communal dairies, providing housing,

dairy animals, milking barns, and grazing land. In north-eastern Inner Mongolia, alone, animal numbers have been reduced from 2,000,000 to 1,000,000 in the last three years.

In 1989 the USDA-NRCS Plant Materials Center, Bridger, MT initiated a cooperative exchange with the Grassland Research Institute (GRI)-Chinese Academy of Agricultural Sciences, in Huhehot, Inner Mongolia and more recently with the China Agricultural University-Beijing to assist with the development of plant materials for restoration of deteriorated grassland. A scientist from GRI spent one year (1989-90) at the Bridger Plant Materials Center learning the procedure for collecting, evaluating, and releasing native plants, making seed/plants available to the public through the commercial seed and nursery industry. In 2004 another Chinese scientist spent six months at the Bridger PMC learning about the U.S. seed industry and seed production technology. A series of seed production lectures were given at two universities and a government farm in China in the fall of 2004. This scientific exchange has resulted in the purchase of U.S. farming and seeding equipment and seed of U.S. and Canadian forage grass and legume cultivars by China. The Chinese government is investing heavily in an attempt to recover the productivity of the northern grassland steppes.

Presented: Friday, February 17, 2006

**CHINA'S AGRICULTURE AND BIOTECHNOLOGY: ACHIEVEMENTS,
PROMISES, AND BARRIERS**

Scott Rozelle
Professor of Agriculture and Resource Economics
University of California, Davis

BIO: Scott Rozelle is recognized internationally as an expert on Chinese agriculture and rural development. He is fluent in Chinese and has close working ties with Chinese researchers and policymakers, and his articles have been published in *Science*, *Nature*, the *American Economic Review*, and other leading journals. Dr. Rozelle is currently a professor of Agricultural and Resource Economics at the University of California, Davis, and will be joining the faculty of Stanford University as the Helen's Farnsworth Professor in the Institute of International Studies in July 2006. Dr. Rozelle received his B.Sc. from University of California, Berkeley, and he received M.Sc. and Ph.D. degrees from Cornell University.

SPEECH: China has made a substantial commitment to building one of the world's largest plant biotechnology programs. Professor Rozelle will review the research of his collaborative team on the record of China's investment and achievements in plant biotechnology. The presentation will first trace the recent trends in investment and build up of human capital in the area of biotechnology research inside China. China's public spending in this area far dominates the rest of the developing world and by some measures rivals the efforts of the United States. The presentation will also examine the record of scientists and seed companies — both foreign and domestic — in commercializing and extending new technologies. Particular attention will be given to the impact of Bt cotton on farmer income and health. Recent work published in *Science* examines the effect of new varieties of genetically modified rice on the production, income and health of farmers. Finally, Dr. Rozelle will raise issues about the emergence of China's biosafety management program and its ability to manage GM crops in a sustainable and safe way.

CHINA'S LIVESTOCK INDUSTRY DEVELOPMENTS

Frank Fuller
Center for Agricultural and Rural Development
Iowa State University
Ames, Iowa

BIO: Since 2003, Frank Fuller has served as a senior international market analyst in the Center for Agricultural and Rural Development at Iowa State University researching issues related to trade in agricultural products and trade policy, with an emphasis on China. From 2001 to 2003, Frank was a faculty member at the University of Arkansas, and prior to that he was an international dairy market analyst with the Food and Agricultural Policy Research Institute (FAPRI) at Iowa State University. Over the last decade, Frank has been an investigator on two National Research Initiative (NRI) grants for research related to China's livestock and dairy-sectors. Frank graduated with a B.A. in Economics from the University of Wisconsin—Eau Claire in 1990, and received a Ph.D. in Economics from Iowa State University in 1996. He has received recognition for his policy analysis and modeling work with the FAPRI group.

SPEECH: Rapid income growth and rising urbanization have prompted a shift in the diets of many households in China toward increased consumption of livestock products over the last two decades. Domestic production of all livestock products has risen dramatically in China in response to market liberalization and growing consumer demands. While household-based backyard producers were the first to respond to the growing demand, households specialized in livestock production and commercial operations quickly emerged and began capturing an increasing share of the market. Growing investments by multinational companies in the agro-food industries and the privatization of state-owned food processing enterprises is rapidly transformed the processing, distribution, and retail delivery of livestock products, particularly in urban areas. With China's entry into the WTO, tariffs on livestock products have fallen, and regulations governing foreign direct investment are being relaxed. China's role in international livestock markets in the medium to long term continues to be hotly debated.

This presentation briefly summarizes major trends and pressing issues for China's livestock sector in this decade: including trends in productivity growth, phytosanitary issues, and investment by multinationals. The implications of these developments for feed use and trade in livestock products is addressed, and key uncertainties regarding the future development of China's livestock sector are identified.

Presented: Friday, February 17, 2006

TRENDS IN CHINESE FOOD DEMAND AND TRADE PATTERNS
Fred Gale, Senior Economist, Economic Research Service
USDA

BIO: Fred Gale is a senior economist in the Market and Trade Economics Division of the Economic Research Service. His work focuses on China's international trade, agricultural policy, and new developments in China's food sector. Recent reports have covered China's farm policy, corn markets, changing food consumption patterns, and macroeconomic developments. Dr. Gale has been at ERS since 1988. He was a visiting economics lecturer at Shandong University in China (1990-91) and has a PhD in economics, North Carolina State University, and a BS in economics from Virginia Tech.

SPEECH: All eyes are on the China market. China is home to one fifth of the world's consumers and its GDP has more than doubled over the past decade. Food is the largest item in household budgets in China and diets are changing as incomes rise. China's agricultural imports have surged since 2003 in order to feed the country's growing appetite for commodities. The value of China's ag imports during 2004 and 2005 were more than double their value in 2002. China is one of the top agricultural importing countries in the world, and the fourth-largest market for U.S. agricultural imports after Canada, Mexico, and Japan, taking \$5.5 billion in U.S. products during 2004.

However, a closer look at China's agricultural import statistics reveals that China is still surprisingly self-sufficient in most food items despite the growth and change in consumption patterns. More than half of its ag imports fall in two broad categories: (1) raw materials used in industrial production (for final goods that are re-exported) or (2) oilseeds and their products (the one major sector where China relies on imports). China's growth in food consumption is faster than in most developed countries, but growth is slower than the eye-popping rates in many other sectors of China's economy. Chinese consumers have many other spending priorities and income growth has been concentrated in the upper echelon of the income distribution. Chinese consumers have been spending a large portion of their extra food dollars on higher quality or more convenient food, not just bigger quantities. Furthermore, the demand for imported food is constrained by the low prices of domestic foods.

Will China have an even bigger role in agricultural trade in coming years? The emerging demand for safe food will challenge China's ability to sacrifice quality and safety to produce the quantity of food demanded by its population. China also faces a challenge in spreading its wealth to the vast rural population, the segment that tends to spend larger shares of income on food. China has already cut agricultural tariffs to a relatively low level, and further liberalization of regulations and foreign investment will encourage imports. The value of its currency is another uncertainty. An appreciation of the Chinese yuan would make imported food cheaper in comparison with low domestic food prices. While there are many uncertainties, feeding the Chinese dragon will become a more important factor in world agricultural trade during the 21st century.

8:15 a.m. - 9:45 a.m.
Concurrent Sessions

Presented: Friday, February 17, 2006

CONSERVATION: FUTURE OF CONSERVATION MARKETS

Arlington Ballroom, Salon V

Moderator: *Mark Rey, Under Secretary for Natural Resources and the Environment, USDA*

WATER QUALITY TRADING AND OTHER ECONOMIC OPPORTUNITIES FOR AGRICULTURAL PRODUCERS

G. Tracy Mehan, III
Principal
The Cadmus Group, Inc.,
formerly
Assistant Administrator for Water
U.S. Environmental Protection Agency
Arlington, Virginia

BIO: G. Tracy Mehan, III (gmehan@cadmusgroup.com), currently a Principal with The Cadmus Group, Inc., an environmental consulting firm in Arlington, VA, was nominated by President Bush and confirmed by the U. S. Senate as Assistant Administrator for Water at the U.S. Environmental Protection Agency (EPA), 2001-2003, where he was responsible for the development of a new Water Quality Trading Policy as well as the promotion of watershed-based permitting and expanded ambient water quality monitoring. Mehan also served as Environmental Stewardship Counselor to the 2004 G-8 Summit Planning Organization. He has served in cabinet-level positions in both Missouri and Michigan. He was Director of the Missouri Department of Natural Resources, 1989-1992, and the Michigan Office of the Great Lakes, 1993-2001. An attorney, he is a graduate of Saint Louis University and its law school. He is a member of the Missouri Bar Association, the Environmental Law Institute, and the Water Environment Federation. Mehan is the recipient of the 2004 Environment Award from the Association of Metropolitan Sewerage Agencies and the 2003 Elizabeth Jester Fellows Environmental Partnership Award from the Association of State and Interstate Water Pollution Control Administrators.

SPEECH: 33 years after passage of the Clean Water Act, progress on water quality has come largely from the regulation of large dischargers, the so-called point sources. However, diffuse runoff from nonpoint sources, be it row crop agriculture or municipal stormwater are proving to be difficult to address. Many of these latter sources are unregulated and are likely to remain so. The time has come to develop market-based policies and programs which create incentives for good stewardship and the implementation of Best Management Practices (BMPs) across the landscape. Water quality trading is a cost-effective means of compliance for point sources, but offers economic opportunity for agricultural producers which may extend beyond those for

cleaning up the Nation's waters only. By allowing one source to meet its regulatory obligations by using pollutant reductions created by another source that has lower pollution control costs, regulated or not, it creates economic incentives to improve water quality. Yet, there are multiple environmental benefits—habitat, Greenhouse Gas (GHG) reduction, wetlands restoration—all of which can yield economic benefit for producers. New mediating institutions, along with standards and monitoring, need to be developed to let these markets flourish.

ACCOUNTING SYSTEMS FOR ENVIRONMENTAL MARKETS

William Hohenstein
Director, Global Change Program Office
USDA

BIO: William Hohenstein is the Director of USDA's Global Change Program Office, within the Office of the Chief Economist. The Global Change Program Office serves as the focal point for all support to the Secretary of Agriculture on the causes and consequences of global change, as well as strategies for addressing them. The Office ensures that USDA is a source of objective, analytical assessments of the effects of climate change and proposed mitigation strategies, and has a coordinated research program to address the multidisciplinary dimensions of climate change.

Before becoming the Director of USDA's Global Change Program Office, Mr. Hohenstein served as a Division Director in EPA's National Center for Environmental Economics. Mr. Hohenstein was responsible for evaluating the environmental impacts of international trade agreements. He also assessed the environmental benefits of biomass energy and biobased products. He also served for six years as a team leader and senior analyst in the Climate Policies and Programs Division of EPA's Office of Policy. Mr. Hohenstein represents the United States at international negotiations on climate change. He has also frequently serves as a United States representative to the Intergovernmental Panel on Climate Change.

SPEECH: Mr. Hohenstein will discuss systems for defining quantities of environmental goods and services from agricultural and forestry activities. These measures and metrics form the basis of emerging environmental markets and trading systems. Mr. Hohenstein will compare mechanisms for quantifying benefits for various environmental goods and services, including approaches for ensuring that benefits remain over time, validation and verification systems, constraints and limitations on transfers, and the status of development and implementation.

Mr. Hohenstein will also focus on USDA's development of new accounting rules and guidelines for reporting greenhouse gas emissions reductions and carbon sequestration achieved by agriculture and forestry entities. The new system is being developed for use in the Department of Energy's Revised 1605b Voluntary Greenhouse Gas (GHG) Reporting Program. The revised guidelines provide a consistent set of methods for estimating levels of emissions and sequestration, and for computing reductions. The estimation methods for specific sources/sinks are ranked according to relative accuracy. Companies and individuals that use more accurate estimation methods can be awarded "registered reductions".

BUILDING COALITIONS TO DEVELOP MARKETS

Carolyn Brickey

Executive Director, Protected Harvest

Tucson, Arizona

BIO: Ms. Brickey is Executive Director of the Protected Harvest, a non-profit organization that independently certifies farmers' use of environmental growing practices. Protected Harvest promotes the development and use of eco-labeling for more sustainably grown food. In another effort, she is working with Arizona's Special Master for Water as Project Administrator of "Dividing the Waters: A Dialog for Judges and Masters", a Hewlett Foundation project designed to further the resolution of general stream adjudications in the western United States.

For seven years Ms. Brickey directed The National Campaign for Pesticide Policy Reform which helped to spearhead the enactment of the "Food Quality Protection Act of 1996", a new law designed to protect children from exposure to harmful pesticides. Of special expertise and experience are governmental policy-making in water, environmental toxins, food safety, drug law, and the regulatory process. Ms. Brickey is currently serving on the EPA Pesticide Policy Dialogue Committee, the EPA Committee to Advise on Risk Assessment and Transition, and, until recently, the USDA Advisory Committee on Agricultural Biotechnology. She serves on the Dow Agro-Sciences Global Stewardship Council.

Previously, Ms. Brickey chaired the National Organic Standards Board, an advisory board that assists the Secretary of Agriculture in the implementation of the national organic program. Clients have included the World Wildlife Fund, the Arizona-Sonora Desert Museum, the Centers for Disease Control and Prevention, the Natural Resources Defense Council, Environmental Defense, and the Gerber Food Company, the California Winegrape Growers, and the American Phytopathological Society. Ms. Brickey served as Senior Counsel to the Chairman of the U.S. Senate Agriculture, Nutrition, and Forestry Committee until May, 1992. In that capacity she specialized in environmental issues and managed legal and policy strategy for Chairman Patrick Leahy. She helped draft the 1990 Farm Bill, and was the lead drafter of pesticide reform legislation in 1988. She obtained her law degree from Georgetown University Law Center in 1979.

SPEECH: Protected Harvest is a non-profit organization that focuses on the development and utilization of more sustainable growing and processing standards in agricultural production. We provide third-party certification and an eco-label to those who meet our board-approved standards. We offer the opportunity for conventional growers who want to "green" their farms to distinguish their products and earn a Protected Harvest seal. We also work with food companies and hope to extend this relationship to supermarkets in the coming years. Third party certification ensures accountability for environmental practices. Self-certification does not provide that credibility. Consumers are interested in this approach if they are offered a simple choice.

8:15 a.m. - 9:45 a.m.
Concurrent Sessions

***SCIENCE: COTTON & FIBERS OUTLOOK**

Grand Ballroom, Salon VI

Moderator: *Jim Martin, Director of Risk Management, Parkdale Mills*

Presented: Friday, February 17, 2006

THE USDA COTTON OUTLOOK

**Carol Skelly
Fibers Analyst
World Board
USDA**

BIO: Carol Skelly is the Fibers Analyst for United States Department of Agriculture's (USDA's) World Agricultural Outlook Board. She is the chairperson of USDA's Interagency Cotton Estimates Committee, which makes the official U.S. government estimates of cotton supply and demand for the United States and world. She also serves as an economic resource on cotton for the Secretary of Agriculture and the Department's Chief Economist. Prior to coming to the World Board in 1997, she was an agricultural economist in the Farm Services Agency, where she provided economic and budget analysis of policy issues related to the cotton domestic farm program, including estimates for a variety of supply management, price support, and competitiveness provisions.

SPEECH: This presentation provides supply and demand projections for the world, the United States, and the major foreign cotton producers and consumers for 2006/07. The first official USDA supply and demand projections for 2006/07 will be published in the *World Agricultural Supply and Demand Estimates* on May 12. This presentation and the accompanying paper include preliminary forecasts and analyses by members of USDA's Interagency Cotton Estimates Committee.

THE WTO NEGOTIATIONS: POTENTIAL IMPLICATIONS FOR COTTON

Carol Goodloe
Senior Economist
Office of the Chief Economist
USDA

BIO: Carol Goodloe currently serves as a senior economist in the Office of the Chief Economist, where she is responsible for analysis on issues related to agricultural trade, trade policy, and domestic farm programs. Between 1992 and 1998, Ms. Goodloe worked in the Foreign Agricultural Service, where she participated in the negotiation and implementation of the NAFTA. She worked at the Economic Research Service, USDA between 1978-1992, where she participated in the negotiation and implementation of the U.S.-Canada Free Trade Agreement, and also worked extensively on Canadian agricultural issues in the Uruguay Round. She also had a short assignment at the Food and Agriculture Organization in Rome in 1982-83. Ms. Goodloe was graduated in 1975 from Wesleyan College in Georgia with a B.A. in history and German. She received an M.A. in international commerce from the University of Kentucky in 1977.

SPEECH: U.S. farm programs for cotton have become front and center in the World Trade Organization (WTO) agricultural negotiations, caught in the crosshairs of dispute settlement and negotiation. The seminal event leading to the current focus on U.S. cotton programs in the WTO negotiations was Brazil's successful challenge to many of those programs through the WTO dispute settlement process. Recent Administration actions on export credit programs and legislation to eliminate Step 2 are aimed at addressing the WTO panel findings on prohibited subsidies and on serious prejudice. But there are still many steps in the process before there is a final resolution, likely including both compliance panels and arbitration.

The Doha Development Agenda has been underway since November 2001. Leading up to the WTO Ministerial in December, 2005 in Hong Kong, on October 10 the U.S. unveiled a bold new proposal on agriculture, calling for substantial cuts in trade-distorting subsidies. The U.S. WTO proposal has implications for current U.S. farm programs, including cotton. Recent analysis suggests U.S. farm programs for cotton would have to be changed to accommodate the U.S. proposal.

Cotton has also been singled out in the WTO negotiations as a result of the formation of the Cotton Sub-Committee. Cotton issues remained front and center at the Hong Kong Ministerial. The final Declaration called for developed countries to eliminate all forms of export subsidies for cotton in 2006, and to provide duty-free, quota-free access for cotton exports from least developed countries from the commencement of the implementation period. Although there are too many unknowns to be definitive, the combination of the WTO panel findings and proposals to reduce domestic subsidies in the WTO negotiations suggest changes in U.S. cotton programs are inevitable.

Presented: Friday, February 17, 2006

CAUSE AND EFFECT IN THE GROWTH OF U.S. COTTON YIELDS

Seth D. Meyer
Cotton Analyst
Food and Agriculture Policy Research Institute
University of Missouri
Columbia, Missouri

BIO: Seth Meyer is the cotton analyst for the Food and Agricultural Policy Research Institute (FAPRI) and a research assistant professor in the Department of Agricultural Economics at the University of Missouri-Columbia. He is a native of Eastern Iowa and obtained a B.S. in Community and Regional planning and a M.S. in Agricultural Economics at Iowa State University and a Ph.D. in Agricultural Economics from the University of Missouri.

Seth's current responsibilities include: conducting policy analysis for domestic and international cotton markets, maintaining an econometric model of international cotton and textile sectors, analysis of lock and dam upgrades on the Mississippi river for agricultural commodity transportation, FAPRI baseline analysis, and teaching classes. In addition to his work with domestic and international cotton policy researchers, he has had several visiting research assignments cooperating with researchers at the Japan International Research Center for Agricultural Sciences (JIRCAS) on rice markets in South-East Asia.

SPEECH: The 2004/05 cotton crop was a record breaker by all accounts. Weather conditions appeared ideal through harvest and phenomenal yields were achieved. The USDA continued to raise estimates for the crop which appeared in excellent condition the entire season. Crop conditions in 2005/06 were less promising, however the crop picked better than it looked and again the USDA continued to raise estimates in what turned out to be the second biggest crop on record.

Using a model which predicts yields through subjective crop conditions, it appears that the last two years' crop yields are not fully explained by weather. When seeking the cause for the apparent step-up in yields we need to look at variety changes, management practices, and eradication programs. Whatever the cause, a baseline projection with higher yields has implications for cotton acreage, prices, returns and government costs. My presentation at the Agricultural Outlook Forum looks at the possible cause and effect of a new cotton yield plateau.

NEW DEVELOPMENTS IN COTTON TRADE WITH CHINA

Dale L. Cougot
Paul Reinhart, Inc.
Dallas, Texas

BIO: Dale Cougot is an Assistant Vice President of Paul Reinhart, Inc., a member of the worldwide Paul Reinhart Group, headquartered in Winterthur, Switzerland. Paul Reinhart, founded in 1788, is today one of the leading cotton merchants in the world with their own offices, representatives and agents in all major cotton producing and consuming countries. From their Texas office, Paul Reinhart, Inc. handles over one million bales of cotton each year, mainly U.S., selling to the U.S. domestic industry as well as to export markets.

Since joining the company in 2000, Mr. Cougot has assumed responsibility for the review of international market conditions, including supply/demand, price trends and forecasts, which he provides for both Paul Reinhart, Inc. and Paul Reinhart AG in Switzerland. He is also responsible for Washington relations and for tracking policy and farm program developments.

Prior to coming to Paul Reinhart, he served as a Marketing Team Leader in USDA's Foreign Agricultural Service and was USDA's liaison with Cotton Council International, the Cotton Board, and Cotton Incorporated, including oversight of their international programs. Early in his career, he served as a member of the Secretary's Long-Term Agricultural Trade Strategy team where he designed and implemented procedures for a competitive process for multiple international programs across all commodities. He also served on the Vice President's Inter-Departmental Trade Promotion task force.

Mr. Cougot holds a B.S. degree in Agricultural Business and an M.A. in International Trade and Development from Texas A&M. He attended the American Cotton Shippers Association 2001 International Cotton Institute in Memphis, Tennessee and was a graduate of the National Cotton Council's 2004/05 Cotton Leadership Program.

SPEECH: Rapid growth in China's textile industry and growing demand for cotton imports has resulted in innovative trading arrangements affecting the timing of sales, financing, quality standards, storage and delivery. The paper will address the changing needs of China's textile mills, the development of new marketing strategies, the advancement of stronger relationships through tighter contracts, and the effects of the new strategies on international merchants as it relates to the exports of U.S. cotton.

10:15 a.m.- 11:30

Presented: Friday, February 17, 2006

***Special Technical Session**
THE CHALLENGES OF ESTIMATING CHINA'S COTTON CONSUMPTION

Ms. Ying Yuan, Assistant Manager
China Textile Information Center
Beijing, China

BIO: Ying Yuan is the assistant director of the China Textile Information Center and the information department manager for the China Textile Company, Ltd. After completing university studies in trade and economics, she joined the China Textile Information Center in 2001. She is responsible for the collection and release of cotton and cotton textile information. She has also written many articles on the cotton textile market and industry analysis for the agency Web site (www.ctei.gov.cn), general media, and textile and apparel journals.

SPEECH: Accurate estimation of China's cotton consumption is very difficult due to the large number of textile plants, the recent rapid growth of the spinning industry, and problems in collecting and analyzing the data. Ms. Yuan's presentation will focus on the technical aspects of estimating China's cotton consumption, including the National Bureau of Statistic's recent data revisions for the Economic Census.

8:15 a.m. - 9:45 a.m.

Concurrent Sessions

MARKETS: GRAINS & OILSEEDS OUTLOOK

Grand Ballroom, Salon III

Moderator: *Bob Riemenschneider, Director, Grain and Feed Division, Foreign Agricultural Service, USDA*

Presented: Friday, February 17, 2006

GRAINS & OILSEEDS OUTLOOK

**Ed Allen, International Grains Analyst
Economic Research Service, USDA**

BIO: Edward Allen has worked for ERS for the last 25 years. For the last 9 years, he has been a senior economist forecasting wheat and feedgrains trade and foreign countries' supply and demand for those crops. For the previous 10 years he was ERS's lead domestic wheat analyst, doing much of the Department's analysis and forecasting of U.S. wheat by class, and Head of the Food Grains Section. Before that he was the Brazil Country Analyst, an international cotton market analyst, an international oilseeds markets analyst, and worked on a global agricultural commodity model. Prior to joining USDA, Ed was in the Peace Corps in Colombia. His graduate degree is in Economics from the State University of New York at Stony Brook.

SPEECH: This speech provides supply, use, and price projections for 2006/07 for wheat, corn, and soybeans and products. The first official USDA supply and use projections will be published May 12, which will include the first forecast of winter wheat production published by the National Agricultural Statistics Service (NASS). Projections presented are based on the Winter Wheat Seeding report and analyses by members of the Interagency Commodity Estimates Committees for Wheat, Feed Grains, and Oilseeds.

Presented: Friday, February 17, 2006

THE OUTLOOK AND IMPACT OF BIODIESEL ON THE OILSEEDS SECTOR

John C. Baize
President, John C. Baize and Associates
Falls Church, Virginia

BIO: John C. Baize is President of John C. Baize and Associates, an international agricultural trade and policy consulting firm specializing in the oilseeds sector. His clients include international agribusiness firms, agricultural trade associations, and investment firms. Prior to establishing his own firm in 1989, Baize served for over 10 years as a Staff Vice President in the American Soybean Association's Washington. Prior to joining the American Soybean Association, Baize served as a member of the staff of the Office of the U.S. Trade Representative (USTR) and for 4 years on the staff of the U.S. House of Representatives Committee on Agriculture.

Raised on a Texas grain and livestock farm, Baize earned a Bachelor of Science degree in agriculture from Texas Tech University and a Master of Science degree in agriculture from Colorado State University. Baize and his wife Joan reside in Falls Church, Virginia

SPEECH: A combination of high global petroleum prices, a desire by countries for greater energy self-sufficiency, and farmers' intent to create greater demand for oilseeds and vegetable oils has resulted in growing public and private support for biodiesel production from vegetable oils. The European Union (EU) has been the leader in creating and supporting a biodiesel sector. The EU's goal is to replace 5.75% of EU diesel consumption with biodiesel by 2010. It is expected the EU will produce 4 mmt of biodiesel annually within the next 3 years. Rapeseed oil is the major feedstock, but the use of soybean oil and palm oil is increasing.

The United States also has embarked on creating a taxpayer-supported biodiesel sector. The Energy Policy Act of 2005 includes a \$1.00 per gallon tax credit for biodiesel made from virgin vegetable oils and a 50¢ per gallon tax incentive for biodiesel made from used oils and animal fats. Existing and announced biodiesel production capacity in the United States now exceeds 900 million gallons. Soybean oil is expected to be the most important feedstock.

Biodiesel industries also are being established with government support in Brazil, Philippines, Malaysia, and other countries. The expansion of a global biodiesel industry promises to have a substantial impact on the global oilseeds industry as well as the animal feeds sector. As more vegetable oils and animal fats go into biodiesel production the result is likely to be higher vegetable oil prices, lower protein meal prices, and greater incentives to produce oilseeds with a high oil content. Poor people around the world and vegetable oil deficit countries like China and India may be negatively impacted by the biodiesel industry.

THE OUTLOOK FOR ASIAN FEED DEMAND
The Impact of Avian Flu

Dr. Paul Aho
Poultry Perspective
Storrs, Connecticut

BIO: Dr. Paul Aho is an International Agribusiness Economist specializing in projects related to the poultry industry. He has a BS in Agricultural Economics at Cornell University, an MS in International Agribusiness at Arizona State University and a Ph.D. in Poultry Economics at Michigan State University. He has held academic positions in Poultry Departments at Cornell University and the University of Georgia, as well as agribusiness experience at two of the largest poultry breeding companies. Dr. Aho has been a prolific writer and speaker in both the United States and in Latin America, writing hundreds of articles in poultry trade journals and speaking at numerous poultry and agribusiness meetings, shows, and conventions. Dr. Aho operates his own consulting company called “Poultry Perspective”. In that role he has worked around the world with poultry companies government policy makers and international non-governmental organizations.

SPEECH: Asian feed demand has a history of rapid growth driven by the rise in per capita income which leads to increased consumption of animal protein. Recently feed demand for poultry has been affected by outbreak of avian flu. The production, consumption and trade of chicken meat have all been disrupted by the disease. In particular there has been a surprising slowdown in chicken production in China after years of rapid growth. Another notable effect has been the sudden drop in exports of chicken meat from Thailand, a country that was formally a notable chicken exporter. Although chicken production is down, other meat production is up across Asia. As a result, the effect of avian flu on feed demand is somewhat mitigated. A rebound in poultry production in the next year or two will lead to increased feed demand and accelerating feedstuff exports to Asia unless there is a worldwide recession.

10:15 a.m. - 11:45 a.m.
Concurrent Sessions

RURAL AMERICA: CAN RURAL AMERICA MEET THE DEMAND FOR SKILLED WORKERS?

Arlington Ballroom, Salon IV

Moderator: *Carol Whiteside, President, Great Valley Center*

Presented: Friday, February 17, 2006

GROWING A RURAL ECONOMY WITH AN ENTREPRENEURIAL COMMUNITY COLLEGE

Berkley Carlyle Ramsey
President, Danville Community College
Danville, Virginia

BIO: Dr. Carlyle Ramsey was born in South Boston, Virginia, and attended public schools in both Virginia and Florida. He received his B.A. degree in History from the University of Florida, and an M.S. and Ph.D. in History from Florida State University.

Dr. Ramsey was appointed President of Danville Community College (DCC) March 1, 1992. From December 1988 to February 1992, he served as Assistant Vice Chancellor for Instructional Programs and Student Services, Virginia Community College System in Richmond; from 1987 until December 1988, Dr. Ramsey was Dean of Instruction and Student Development at DCC. Prior to his arrival in Danville, Dr. Ramsey had served as Vice President of Academic Affairs at Union College in Barbourville, Kentucky, and Assistant Academic Dean and division chair at South Georgia College in Douglas, Georgia.

Dr. Ramsey serves on a number of local, regional and national boards such as: the Danville Development Council (chair), the Industrial Development Authority of Halifax County (chair), the Danville Area and Halifax County Chambers (chair), and the Rural Community College Alliance (chair). In addition, Dr. Ramsey served as President of the Association of Virginia Colleges and Universities. He was selected to participate in the Virginia Executive Institute and the Harvard Institute for Educational Management. Ramsey has published scholarly articles in a number of professional and trade journals. One of his areas of interest is workforce development.

He and his wife, Rosemary, have two children, Stephanie and David.

TALENT DEVELOPMENT LEADING TO ECONOMIC GROWTH IN RURAL COMMUNITIES

**Joe Sertich, President
Rural Community College Alliance
Chisholm, Minnesota**

BIO: Joe Sertich was appointed President of the Northeast Minnesota Higher Education District in November 1999. The district consists of five comprehensive rural community colleges in six towns across northeast Minnesota. This position reports to the Minnesota State Colleges & Universities Chancellor and Board of Trustees.

Dr. Sertich has been committed to economic growth through community development across the region. He has received the David A. Martin Entrepreneurial Leadership Labo Award which recognizes an individual who has a history of leadership in the economic development network of northeast Minnesota.

Currently Dr. Sertich is the chair of the Rural Community College Alliance and sits on the governing board for the National Institute for Rural Community colleges which was launched in September 2005.

Dr. Sertich has a BS in Education, a Masters in Educational Administration and his Ed.D degree is from the Leadership Academy of the University of Minnesota in Educational Policy and Administration.

SPEECH: The key to building a sustainable regional rural economy is dramatically influenced by the capacity of a rural region to develop a talented workforce. Parts of rural America are prospering and growing, but far too many regions, communities, families and children are struggling. Too much of rural America remains in decline with people, jobs and hope leaving. America's rural-serving community colleges can serve as catalysts for change when appropriate talent is continuously developed in conjunction with business expansion and creation.

Rural America is a great place to live. With high-speed access to the Internet and modern transportation, most business can be conducted from almost anywhere. Employers will consistently list a lack of talented workers as their first hurdle to jump when expanding their business to a rural community. Community colleges, when partnered with private industry and government, can create a new regional governance structure poised to promote talent development leading to economic growth in rural communities. Talent development is the process of identifying specific skills and matching them to learner/workers so they can add value to the wealth creation formula. This stands in stark contrast to identifying an available workforce with variable and often times inappropriate skills. This speech provides an understanding of how talent must be developed through partnership utilizing the 957 rural campuses across this country.

Presented: Friday, February 17, 2006

A STATEWIDE APPROACH TO DEVELOPING A SKILLED WORKFORCE

Douglas Ridge
Director of Employer Initiatives
Texas Workforce Commission

BIO: Doug Ridge is the director of the Office of Employer Initiatives for the Texas Workforce Commission (TWC) and manages the Texas Industry Cluster Initiative. His extensive private sector experience complements his role in leading initiatives that continue to establish strong ties with employers and ensure strong business involvement in the activities of TWC. Doug brings to the position over 25 years of energy-related experience. Most recently he held the position of regional principal for the Americas in the management consulting arm of IBM, where he led engagements in business strategy, organizational development, and process with client companies from Alberta to Argentina.

Doug has a B.A. in Political Science and History from Texas A&M University, a B.A. in Finance from Texas Lutheran College, and an MBA from Southern Methodist University. He has lectured on business strategy and organizational development at the graduate programs at the University of Texas – Austin and Southern Methodist University. Doug has published articles on emerging organizational structures in energy companies and strategy development in emerging technology clusters. Doug is married to his high school sweetheart, and they share three wonderful children.

10:15 a.m. - 11:45 a.m.
Concurrent Sessions

GLOBALIZATION: THE IMPLICATIONS OF GLOBAL MACROECONOMIC SHOCKS ON U.S. AGRICULTURE

Grand Ballroom, Salon VI

Moderator: *David Stallings, Senior Analyst, Office of Chief Economist, World Board,
USDA*

Presented: Friday, February 17, 2006

THE MACROECONOMIC LINKAGES OF US AGRICULTURE

Professor G. Edward Schuh
Regents Professor and Director,
Orville and Jane Freeman Center for International Economic Policy
The Humphrey Institute of Public Affairs
University of Minnesota
Minneapolis, Minnesota

BIO: Has served as Senior Staff Economist, President's Council of Economic Advisers; Deputy Under- Secretary of Agriculture for Domestic Programs and International Affairs; and Director, Department of Agriculture in the World Bank. He has joint academic appointments in the Humphrey Institute, in the Department of Economics, and in the Department of Applied Economics at the University of Minnesota, and served as Dean of the Humphrey Institution for ten years. His extensive international experience has taken him to Latin America, Sub Saharan Africa, India, and the Middle East. His research interests include economic development, international trade and exchange rate policy, and agricultural policy. He is the author or co-author of six books, has edited another six books, and has over 150 scientific and technical papers to his credit. He is a Fellow of the American Agricultural Economics Association, of the American Association for the Advancement of Science, and of the American Academy of arts and Sciences. Just this past year the Brazilian government recognized him with the equivalent of the U.S. President's Medal of Freedom – the highest award the Brazilian government gives – for his lifetime contributions to Brazil's agricultural institutions.

SPEECH: Much good comes from the increased economic integration of the international economy as consumers and firms in the private sector are able to purchase goods and services at lower prices. However, increased integration can also be a problem for some sectors of the economy. That is the case with U.S. agriculture, a sector dependent on exports to absorb part of its output, but also a sector that competes with imports from many countries. As a sector that is well integrated into the international economy, U.S. agriculture suffers from the fact that the U.S. dollar has become the preferred medium of exchange for the international economy, and from the fact that the United States is an attractive place for other countries to invest their money.

U.S. agriculture also suffers when other countries pursue discriminatory policies designed to benefit their own export sectors. Brazil and Argentina are two countries that have intervened to make their currencies worth less than they would otherwise be, thus increasing their international competitiveness. China and Japan have for some years kept the value of their currency similarly undervalued, thus giving them protectionist policies to help keep out exports.

EXCHANGE RATES, FOREIGN INCOME, AND U.S. AGRICULTURE

Terry Roe
Professor of Applied Economics
Director of the Center for Political Economy
University of Minnesota
St. Paul, Minnesota

BIO: Terry Roe is a Professor of Applied Economics, University of Minnesota and Director of the Center for Political Economy, and Co-director of the Economic Development Center. He teaches at the graduate level in the areas of economic growth, trade and development. He was Major Professor to over 45 recipients of a Ph.D. in Applied Economics, and has directed projects in over 20 countries. He has served as a consultant for the World Bank on the macroeconomics of water policy in Morocco, Mexico, Turkey and South Africa, and worked with the International Food Policy Research Institute on numerous projects. He has published over 100 journal articles and several books, the most recent of which is (2004) *Pricing Irrigation Water: Principles and Cases from Developing Countries*, RFF Press.

SPEECH: This presentation focuses on the effects of trade partner income and real trade-weighted exchange rates on US agricultural exports. For the period 1972-2003, a one percent annual increase in trade partners' income is shown to increase total agricultural exports by about 1.6 percent while a one percent appreciation of trade partners' real trade-weighted exchange rate decreases total agricultural exports by about 0.8 percent. These effects are found to carry over to 12 agricultural commodity subcategories, although the effects are conditioned by differences between bulk and high value commodities. These commodity differences, in turn, are associated with export demand from high compared to low income countries. Surprisingly, the negative effect of exchange rate appreciation on exports are found to often dominate the positive effect from income growth, particularly during the 1990s.

THE OIL SHOCK OF 2005 – WHAT IT MEANS FOR U.S. AGRICULTURE

Mathew Shane
Senior Economist for Macroeconomics
Economic Research Service
USDA

BIO: Dr. Mathew Shane is a Senior Macro Economist with the Economic Research Service of the Department of Agriculture. His responsibilities include analyzing major macroeconomic shocks to the international economy and providing implications of those shocks for U.S. agriculture. Before focusing on international macroeconomics, Shane was the Senior Economist for International Trade Issues. As such he was the leader of a taskforce to analyze the economic implications of the NAFTA and the GATT. Shane has also served as the Branch Chief of the Markets and Competition Branch, and as a Deputy Director. Shane has substantial international consulting experience, having spent six years in Southeast Asia advising Malaysia and other Southeast Asian governments on agricultural and forestry development. Shane was an Associate Professor of Applied Economics at the University of Minnesota between 1969 and 1979 and has written extensively on the links between international macroeconomics and U.S. agriculture.

SPEECH: This presentation focuses on the effects of high energy prices on U.S. agriculture. Beginning with the oil projections in the current USDA Baseline, the implications of the high energy prices are explored. Two of the major inputs into agriculture are energy intensive: diesel fuel and fertilizer. Thus the impact of high energy prices on agriculture will be far more substantial than for the rest of the economy. Our current projections assume that increasing energy prices are largely a demand rather than supply phenomena. With energy costs such a large percent of agricultural costs, the persistence of high energy prices will have a substantial impact on agricultural income. This is particularly true for agricultural crops which are highly dependent of energy inputs. The longer term impacts are likely to encourage more rapid growth in the less energy intensive areas of agriculture, which include soybean production as well as production of meats and dairy.

THE REVALUED RENMINBI

Owen Humpage
Research Department
Federal Reserve Bank of Cleveland
Cleveland, Ohio

BIO: Owen Humpage is an economic advisor in the Research Department of the Federal Reserve Bank of Cleveland. His area of specialization is international economics. Dr. Humpage joined the Bank as an economic analyst in 1973 and was promoted to economist in 1978. He assumed his present position in 1987.

A native Clevelander, Dr. Humpage received a bachelor's degree in economics from the University of Dayton, a master's degree in economics from Miami University, and a doctorate in economics from Case Western Reserve University. His dissertation investigated the effectiveness of Federal Reserve intervention in foreign-exchange markets. Dr. Humpage has authored and coauthored numerous research articles published by the Federal Reserve Bank of Cleveland and in professional journals.

SPEECH: Many claim that China scores an unfair trade advantage against the United States because it keeps the renminbi at an artificially attractive rate relative to the dollar. Complaints that its exchange-rate policies give China a trade advantage are overstated; the type of exchange-rate system that a country adopts matters little for its long-term international competitiveness. What does matter is China's real exchange rate, which the country cannot control.

Besides missing the key distinction between nominal and real exchange rates, the recent focus on China's exchange-rate policies diverts attention from the real problem: China maintains a command economy that substantially restrains private financial outflows, encourages exports, and discourages imports. As these restraints continue to weaken and trade continues to grow, China will find it increasingly difficult to maintain its current exchange-rate policies. The process is already underway.

10:15 a.m. - 11:45 a.m.
Concurrent Sessions

**CONSERVATION: CONSERVATION TITLE OF 2007 FARM BILL
– POSSIBILITIES & PROBABILITIES**

Arlington Ballroom, Salon V

Moderator: *Bruce I. Knight, Administrator, Natural Resources Conservation Service, USDA*

Presented: Friday, February 17, 2006

**RATIONALIZING OUR CONSERVATION INVESTMENT
AND CHARTING A WAY FORWARD ON GREEN PAYMENTS**

Ferd Hoefner
Sustainable Agriculture Coalition
Washington, DC

BIO: Ferd Hoefner serves as Policy Director for the Sustainable Agriculture Coalition (SAC), working for the group since its inception in 1988. The Coalition is an alliance of national, regional and local grassroots farm, rural, and conservation organizations that together advocate for public policies supporting the long-term economic, social and environmental sustainability of agriculture, natural resources and rural communities. Hoefner has nearly 30 years experience in federal food, development, agricultural and environmental policy work. Prior to his work with SAC, he consulted on federal policy reform campaigns for national and state farm, public interest, and faith-based groups and also worked for nine years as an agriculture and development advocate for the Interreligious Taskforce on U.S. Food Policy and its successor organization, Interfaith Action for Economic Justice. Hoefner served on the USDA Advisory Committee on Beginning Farmers and Ranchers for the past six years and has been a long-time contributor to the Conservation Coalition, National Campaign for Sustainable Agriculture, and many other policy coalitions. Hoefner currently is a member of the coordinating team for the newly formed Farm and Food Policy Project (FFPP), a collaborative of diverse organizations united by the common vision of a more sustainable food and agricultural system. Starting with the 2007 Farm Bill, the FFPP will work to increase farming opportunities, reward environmental stewardship, promote new markets and rural entrepreneurship, and increase access to healthy food.

SPEECH: The 2002 Farm Bill made significant strides for farmland stewardship by increasing the funding level of conservation programs overall, moving toward greater balance between land retirement and land stewardship funding, and creating a new approach to comprehensive stewardship incentives for working lands in the form of the Conservation Security Program (CSP). The 2007 Farm Bill should continue to promote and reward stewardship of the land by placing a high priority on working lands and fostering a new generation of conservation-minded farmers and ranchers.

Attention often focuses heavily on specific programs, constituencies, and specific resource concerns without sufficient attention to the overall architecture of the conservation effort. The next farm bill provides an opportunity to establish national natural resource and environmental objectives and anticipated outcomes for conservation programs, create authority and funding for ongoing monitoring and evaluation of the outcomes of the conservation investment, reinstitute educational assistance, set whole farm conservation planning at the heart and gateway to all financial assistance programs, and promote cooperative conservation partnership-based projects, among others. The next bill also provides an opportunity to create greater balance between compliance, retirement, and stewardship incentives, to make clearer choices in establishing comprehensive base conservation programs and programs focused on specific places or resource problems, and to produce greater equity among the full range of resource and environmental concerns. In light of continuing serious agro-environmental challenges, tight budgets, and evolving trade rules, consolidating and strengthening the CSP and integrating it more closely with farm programs will be perhaps the most important challenge. This speech will provide a context for reforming the conservation title as a whole and advancing the prospects for a comprehensive, robust green payments program to reward and motivate exceptional stewardship efforts.

EXTERNAL FORCES AFFECTING CONSERVATION CHALLENGES FACING AGRICULTURE AND CONSERVATION

**Don R. Parrish, Senior Director, Regulatory Relations
American Farm Bureau Federation, Washington, DC**

BIO: Don Parrish is a Senior Director, Regulatory Relations, for the American Farm Bureau Federation's Public Policy team in Washington, D.C. Don's area of expertise at the American Farm Bureau is Environmental and Conservation Policy. Don's work focuses on the Clean Water Act, Wetlands, Water Quality, and Conservation policy. Don provides ongoing support for state Farm Bureaus, while also serving as a liaison to numerous commodity organizations, industry and trade associations and government agencies. Don has served on the Environmental Protection Agency's (EPA) Phase II Stormwater Federal Advisory Committee, Animal Agriculture Water Quality Customer Advisory Team, American Society for Testing and Materials (ASTM) Environmental Committee, and the Small Business Administration's (SBA) Small Business Regulatory Enforcement Fairness Act (SBREFA) Committee on Animal Feeding Operations/Concentrated Animal Feeding Operations and Effluent Guidelines.

Don joined the AFBF staff in July of 1988 as the Director of Cotton, Rice and Sugar Departments. Before joining the AFBF staff, Don was an economist at Auburn University. Prior to his working at Auburn, he was employed by the Farm Credit System as a Research Analyst. Don received a Bachelor of Science Degree in Agronomy from Auburn University and a Master of Science Degree in Agricultural Economics from Auburn University. Originally from a farm in Alabama, Don now resides in the Washington, D.C. area with his wife, Dee Dee, daughter, Leslie Anne, and son, Austin.

SPEECH: Agriculture faces ever-widening challenges as it reacts to market trends, new technologies and growing regulatory pressures. But while dynamic market forces and new technologies offer the potential for new markets and more efficient processes, regulatory pressures are creating equal and opposite forces that constrain and increase costs. The overwhelming number of proposed regulations on the nation's food system is unprecedented and promises profound effects on both the structure and competitiveness of the entire industry. Powerful dynamics are changing the character of business relationships throughout the food industry. Pressures to increase efficiency, respond to rapidly changing markets and contain costs have always existed, but the pace of technological advancement has amplified these forces, magnified their effect. Often regulations can impose costs that far exceed the benefits to society. Agriculture must respond to the regulatory pressures by finding ways to reduce costs, maintain its competitiveness and increase its level of output. This can be especially challenging given the wide variation in the characteristics of farms today. There is little doubt that agricultural production is much more specialized. New and existing regulations can have varying effects on different types of producers, in turn having their own effect on the size, structure and competitiveness of the agriculture sector.

BALANCING FARM BILL TITLES

Anne Simmons
House Agriculture Committee
U.S. House of Representatives
Washington, DC

BIO: Anne Simmons is a Professional Staff member on the House Agriculture Committee's Democratic staff. She is responsible for issues related to wheat, feed grain, and oilseed crops as well as conservation and energy issues for the Ranking Democrat on the House Agriculture Committee, Congressman Collin Peterson of Minnesota's 7th District. From 1997 to 2004, she was responsible for the same issues for the former Ranking Democrat on the Committee, Charlie Stenholm of Texas.

From 1995 to 1996, she was the Minority Consultant for the Resource Conservation, Research and Forestry Subcommittee, of which then-Representative, now Senator Tim Johnson of South Dakota, was the ranking Democrat. She was also responsible for several issues for the former Chairman and Ranking Democratic Member, E (Kika) de la Garza of Texas.

She served in 1994 as Staff Director of the Subcommittee on Environment, Credit and Rural Development and the General Farm Commodities Subcommittee in 1993, while Johnson was the chairman of each subcommittee. Prior to joining the Agriculture Committee staff, she was a member of Johnson's congressional office, having joined him in 1988 as a legislative assistant.

She has received the National Wheat Growers Association "Friend of Wheat" Award in 2002 and 2004 as well as Pheasants Forever's "Conservation Service Award" in 2002. Anne was raised on a corn, soybean, and livestock farm near Spencer, Iowa. She graduated from Cornell College in Mt. Vernon, Iowa, with a Bachelor of Special Studies Degree in Politics.

10:15 a.m. - 11:45 a.m.
Concurrent Sessions

SCIENCE: POULTRY & LIVESTOCK OUTLOOK

Arlington Ballroom, Salon III

Moderator: *Chuck Lambert, Deputy Under Secretary for Marketing and Regulatory Programs, USDA*

Presented: Friday, February 17, 2006

OUTLOOK FOR U.S. LIVESTOCK AND POULTRY

Joel Greene
Livestock, Poultry & Dairy Analyst
World Board
USDA

BIO: Joel Greene has been a livestock analyst at USDA's World Agricultural Outlook Board working on the department's livestock, poultry, and dairy forecasts since 1999. Prior to joining the Board, he was the senior beef analyst in the Dairy, Livestock, and Poultry Division of the Foreign Agricultural Service, and an agricultural trade analyst in the Trade Analysis Branch at the Economic Research Service. He holds a BA degree in Asian studies from the University of North Carolina, and an MA degree in international affairs and economics from George Washington University.

SPEECH: This speech provides the 2006 outlook for the livestock and poultry sectors. The outlook includes supply, use, and price forecasts for cattle and beef, hogs and pork, sheep and lamb, and broilers, turkeys, and eggs. The forecasts presented here are based on the analyses of the Livestock and the Poultry Interagency Commodity Estimates Committees whose members are comprised from the World Agricultural Outlook Board, Economic Research Service, Foreign Agricultural Service, Farm Service Agency, and Agricultural Marketing Service.

U. S. BROILER INDUSTRY AND THE AVIAN INFLUENZA CHALLENGE

John A. Smith DVM, MS, MAM

**Director of Health and Hatchery Services, Fieldale Farms Corporation
Baldwin, Georgia**

BIO: John A. Smith is a practicing poultry veterinarian, and has served as Director of Health and Hatchery Services for Fieldale Farms Corporation since 1991. Fieldale Farms is the twelfth largest broiler producer in the United States, producing approximately 3.1 million broilers per week. John is active in a number of national poultry industry associations, including the National Chicken Council, the U. S. Poultry and Egg Association, the American Association of Avian Pathologists, and the United States Animal Health Association, where he has served the Committee on Transmissible Diseases of Poultry and Other Avian Species as Vice Chairman from 1999-2003, and as Chairman from 2004-present. Prior to entering the poultry industry, John taught ruminant medicine and surgery as an Assistant and Associate Professor at Colorado State University and Auburn University. John is a native of Georgia, and received the DVM in 1975, an MS in Medical Microbiology in 1983, and the Master of Avian Medicine in 1991, all from the University of Georgia. He is a Diplomate of the American College of Veterinary Internal Medicine and the American College of Poultry Veterinarians.

SPEECH: The primary challenge that Avian Influenza (AI) presents to the U. S. broiler industry is the public perception of the danger of a human disease, as opposed to the actual threat of a devastating outbreak of an avian disease in our domestic flocks. Frankly, we are more afraid of an unjustified consumer flight from chicken than we are of getting the disease in our flocks. There are a number of reasons for this conclusion, on a number of levels, from our assessment of the current lack of public understanding of the situation to the reasons for our confidence in our security from the avian disease.

A distinction should be made between the human disease and the avian disease, a distinction that does not always come through clearly in media reports. Currently, the Asian highly pathogenic H5N1 subtype of Avian Influenza (AI) is strictly an avian disease with only sporadic human infections. While the possibility of adaptation of this virus for efficient human transmission is a grave concern, and while public health agencies need to be preparing for a possible human pandemic (whether with Asian bird flu or some other subtype), many in the industry feel that certain experts and officials have overstated the current domestic threat. Science-based reporting in the proper context is sorely needed. More resources should be devoted to attempts to control the problem at the source, in the Asian poultry population. Such efforts represent a more judicious application of resources compared to waiting for a human-adapted virus to emerge and then mounting a massive human pandemic response.

A NEW LOOK FOR THE CANADIAN PORK AND BEEF SECTORS

Kevin Grier
Senior Market Analyst
George Morris Centre
Ontario, Canada

BIO: Kevin Grier is a well-respected market analyst and editor. Reports authored by Kevin Grier are depended upon and used by livestock farming operations as well as companies across the Canadian grocery products and meat industry. His publications include:

- *Grocery Trade Review, Canadian Cattle Buyer, Canadian Pork Market Review and Canadian Chicken Market Review.*
- He has conducted market research and analysis for decision makers across the Canadian livestock and meat sector.
- He has developed the trust of one of the widest networks of senior level contacts throughout the Canadian food and meat industries.
- He has proven analytical ability and a deep understanding of industry issues and trends from farm to retail.

10:15 a.m. - 11:45 a.m.
Concurrent Sessions

MARKETS: HORTICULTURE – THE GROWING IMPORTANCE OF CHINA

Grand Ballroom, Salons J, K

Moderator: *Linda Calvin, Senior Agricultural Economist, Specialty Crops Branch, Economic Research Service, USDA*

Presented: Friday, February 17, 2006

HORTICULTURE IN CHINA: THE BIG PICTURE

Maurice House
Minister Counselor for Agricultural Affairs, China
Foreign Agricultural Service
USDA

BIO: Maurice House has served as the Minister Counselor for Agricultural Affairs in the U.S. Embassy in Beijing, China, since 2003. Earlier in his Foreign Agriculture Service career he served in various positions in Washington, DC; Thailand; Pakistan; Nigeria; and Algeria. Maurice graduated from the University of Illinois with an MS degree in Agricultural Economics.

SPEECH: As Chinese produce production and exports have increased over the last several years, generalized fear of the awakening of China as an economic giant has spread to the fruit and vegetable industry. At first glance, China's dominance in the world apple and garlic markets seems a premonition. In fact, systemic constraints limit sustainable growth. Physical constraints, including small farm size, limited arable land, and water supply problems, are compounded by basic infrastructure problems, including poor pesticide regulation, inefficient transportation, lack of cold chain delivery systems, and the need for the Chinese government to take a staged approach to agrarian reform. Consistent with current successes, future growth of Chinese exports will be limited to specific commodities where Chinese farmers have particular expertise and accessible markets. United States export opportunities in the Chinese market will continue in niche areas including the restaurant sector, specialty food stores, and large supermarkets and hypermarkets. The interest of the expanding middle and upper income urban consumers in quality and safety will provide opportunities for produce companies, premised on market research and investment in the market.

Presented: Friday, February 17, 2006

HORTICULTURE IN CHINA: THE FARM-LEVEL PICTURE

John Chapple
Sino Analytica
Qingdao, China

BIO: John Chapple is Director and General Manager of Sino Analytica, a private firm providing internationally accredited laboratory analysis for food products, based in Qingdao, China. Previously he was involved in growing vegetables in China for the export market. John worked for CWS Agriculture, the United Kingdom's largest farming business, where as well as farming for 19 years, he was in charge of commercial policy for vegetable production and was involved in food safety issues. He was born in England and received a BSc (honors) degree in Agriculture from Newcastle University.

SPEECH: China's horticulture is under tremendous pressure just to feed its own populous nation with safe and plentiful food. This speech will examine the pressures and challenges facing the horticultural industry in China, with specific focus on the field-level conditions and problems, the structure of the rural market, and the challenges to the development of a cohesive traceable food chain.

Presented: Friday, February 17, 2006

U.S. EXPORTS TO CHINA—CITRUS

Mike Wootton
Vice President of Corporate Relations
Sunkist Growers
Los Angeles, California

BIO: Mike Wootton is the Vice President of Corporate Relations for Sunkist Growers, a 112 year-old citrus marketing cooperative, headquartered in Sherman Oaks, California. He oversees public communications, relationships with state and federal governments, and relations with Sunkist's 6,000 growers and 47 affiliated packinghouses. Mike also serves on multiple boards of organizations representing the U.S. horticultural industry. Prior to his work for Sunkist, Mike served for 24 years on House and Senate staffs of several Members of Congress from California. He is a graduate of the University of San Francisco and lives in Los Angeles.

Presented: Friday, February 17, 2006

**COMPETITION FROM CHINA IN U.S. EXPORT MARKETS AND THE
U.S. MARKET—FROZEN STRAWBERRIES**

**Dave Yvanovich,
Vice President and General Manager
Frozsun Foods
San Jose, California**

BIO: Dave Yvanovich is the vice president and general manager of Frozsun Foods, the largest U.S. producer of frozen strawberries. He has held this position since 1996. He is also the Chairman of the Processed Strawberry Advisory Board. Previously he worked in a variety of food industries, including Ghirardelli Chocolate. Dave was born and raised in California and has a BS degree in mechanical engineering from San Diego State University.

12:15 - 1:30 Luncheon

GRAINS AND OILSEEDS LUNCHEON

Arlington Ballroom, Salon III

Moderator: *Bill Tierney, Grains Analyst, World Board, USDA*

Presented: Friday, February 17, 2006

WHERE WILL THE NEW ETHANOL PLANTS BE?

Bill Holbrook
Holbrook Consulting Services, LLC
Kearney, Missouri

BIO: Bill Holbrook is owner of Holbrook Consulting Services and an affiliate of the ProExporter Network. Bill was raised on a diversified crop and livestock farm in north central Kansas. He received a Bachelor of Science degree in Agricultural Economics and a MBA in Finance from Kansas State University. While in college Bill worked for the Cooperative Extension Service conducting research on cooperative equity management and long term strategic financial planning. Bill began his career with Farmland Industries in 1990 where he held various positions including Regional Marketing Manager, Region Grain Manager, and Director of Professional Business Services. For the past 2 1/2 years Bill has been conducting feasibility studies for ethanol start-up ventures as well as assisting agricultural cooperatives with strategic planning. Bill, his wife and four children reside in Kearney, MO, northeast of Kansas City.

SPEECH: Historically ethanol plant development has been a story of fits and starts. However over the last 3-4 years, plant development has progressed at a more even pace with many new plants coming online. With a combination of factors, such as, high energy prices, low corn prices, and legislative mandates, coming to bear on the market over the past 9 months, plant development has increased at a feverish pace. Several key factors drive plant development and location. Among these are feedstock availability, transportation and logistics and market access. This speech will review the importance of these items and take a look toward the future as to where new ethanol development will take

12:15 - 1:30 Luncheon

HORTICULTURE LUNCHEON

Grand Ballroom, Salons B,C (Note: This location is changed from program!)

Moderator: *Lloyd C. Day, Administrator, Agricultural Marketing Service, USDA*

Presented: Friday, February 17, 2006

NEW DIETARY GUIDELINES: IMPLICATIONS FOR FRUIT & VEGETABLE MARKETING

Elizabeth Pivonka, Ph.D., R.D.
President & CEO
Produce for Better Health Foundation
Wilmington, Delaware

BIO: Elizabeth Pivonka is President of the Produce for Better Health Foundation, a not for profit foundation devoted to increasing consumption of fruits and vegetables.

A passionate advocate of the health-promoting benefits of fruits and vegetables for America's better health, Dr. Pivonka has been integrally involved with the Foundation's efforts since it was incorporated in 1991 as a founding partner of the National 5 A Day for Better Health Program. She served as Director of Nutrition and Science and then as Deputy Executive Director before she was selected as President in 1997.

A nationally-recognized expert on nutrition and the role fruits and vegetables can play to promote better health, Dr. Pivonka regularly interfaces with policy makers, regulators, academia and industry on nutrition policy and programs, and is widely quoted in consumer media. Her work has been published in leading professional nutrition science journals, and she co-authored *5 A Day: The Better Health Cookbook*, published in 2001 by *Prevention* magazine publisher Rodale Press.

Dr. Pivonka has been recognized as the 2001 Marketer of the Year by the produce industry's leading publication, Vance Publishing's *The Packer*. Kansas State University selected her as their 2005 Alumni Fellow for the College of Human Ecology. Under Pivonka's leadership, the Foundation has also received one of Secretary Tommy Thompson's Health & Human Services 2004 Innovation in Prevention Awards and the 2003 Produce Industry Advocate of the Year Award from the United Fresh Fruit & Vegetable Association.

Dr. Pivonka is a Registered Dietitian, and holds a doctorate in food and nutrition science from Kansas State University. She is married and has two children.

SPEECH: Since the 5 A Day Program's inception in 1988, ongoing science behind the benefits of fruits and vegetables has expanded beyond cancer to include obesity, heart disease, diabetes, stroke and many other chronic illnesses. In fact, in early 2003, NCI changed the 5 A Day logo from 5 A Day to "5 to 9 A Day" to better reflect the then

current federal dietary recommendation of daily fruit and vegetable consumption. Then, in 2005, USDA and the Department of Health & Human Services (HHS) released new dietary guidelines that changed the recommendation of 5 to 9 servings of fruits and vegetables to four to 13 servings, depending on age and gender. Also recommended is the use of cups as the primary metric as opposed to servings.

To be consistent with federal nutrition policy, and yet not have to introduce a new brand if the science changes in the future, the National 5 A Day Partnership agreed that it is time to revisit the 5 A Day brand. This session will share consumer insight behind the development of a new consumer brand for marketing fruits and vegetables.

12:15 - 1:30 Luncheon

SUGAR AND SWEETENERS LUNCHEON

Arlington Ballroom, Salon V

Moderator: *Jennifer Ehn, Special Assistant to the Under Secretary for Farm and Foreign Agricultural Services, USDA*

Presented: Friday, February 17, 2006

THE FUTURE OF CORN SWEETENERS IN INTERNATIONAL TRADE AND MEXICO

Audrae Erickson

President of the Corn Refiners Association

BIO: Audrae Erickson is the President of the Corn Refiners Association based in Washington, D.C. CRA is the national trade association representing members of the U.S. corn refining industry who produce sweeteners, starches, ethanol, bioproducts and feed ingredients.

Since joining the CRA, Erickson has undertaken the challenge of resolving the Mexican sweetener dispute, addressing continued access for bio-engineered products in Europe including corn gluten feed, and providing science-based information on processed corn products in the context of the national obesity debate. She represents the CRA interests as a cleared advisor on the Agricultural Policy Advisory Committee that advises USDA and USTR on trade issues affecting the food and agricultural sector.

Before joining CRA, Erickson served as Senior Director of Congressional Relations for the American Farm Bureau Federation (AFBF), where she specialized in agricultural trade issues including trade policy, negotiations, dispute settlement, Trade Promotion Authority and matters involving the World Trade Organization (WTO) and the Free Trade Area of the Americas (FTAA).

In 1999, Erickson founded the Ag Trade Coalition to promote U.S. agricultural interests on WTO negotiating objectives. The coalition consists of more than 100 organizations representing producers, processors and agribusiness. Erickson continues to Co-Chair the coalition.

Prior to her 4-year tenure at AFBF, Erickson served as Director of Agricultural Affairs at the United States Trade Representative's (USTR) Office. Erickson was responsible for oversight of all trade issues pertaining to sweeteners, horticultural crops, biotechnology and sanitary and phytosanitary barriers to trade. She also oversaw agriculture policy matters related to the FTAA and the North American Free Trade Agreement and represented USTR at WTO Committee on Agriculture meetings.

Before taking the position at USTR, Erickson served as an economist at the U.S. Department of Agriculture's Economic Research Service where she specialized in trade and environment issues.

Erickson earned a Master of Arts degree in economics as a Rotary scholar from McGill University in Montreal, Quebec, Canada. She graduated Magna Cum Laude with Bachelor of Arts degrees in economics/business and French at Linfield College in McMinnville, Oregon. Erickson resides in Maryland with her husband and two sons.

SPEECH: The Future of Corn Sweeteners in International Trade and Mexico

- * General Overview of Corn Sweeteners and their prominence in the U.S. and international marketplace
- * U.S. Corn Wet Milling Industry's Strong Support of International Trade
- * Recap of the Mexico HFCS Dispute and Prospects for a Solution
- * Looking to the Future - A Promising Horizon

12:15 - 1:30 Luncheon

COTTON AND FIBERS LUNCHEON

Arlington Ballroom, Salon VI

Moderator: *Stephen MacDonald, Senior Economist, Economic Research Service, USDA*

Presented: Friday, February 17, 2006

**PERVERSE EFFECTS AND UNINTENDED CONSEQUENCES OF U.S.
TEXTILE TRADE POLICY – THE WTO, CAFTA, AND CHINESE SOCKS**

Pietra Rivoli

Associate Professor McDonough School of Business, Georgetown University

Author: *The Travels of a T-Shirt in the Global Economy*

Washington, DC

BIO: Pietra Rivoli serves on the faculty of the McDonough School of Business at Georgetown University, where she teaches in the undergraduate, graduate, and executive programs. Professor Rivoli has special interests in social issues in international business and in China. She received her Phd in Finance and International Economics from the University of Florida. Her 2005 book, *The Travels of a T-Shirt in the Global Economy*, has been widely acclaimed as a pathbreaking study of globalization and was recently named as a Finalist for the inaugural *Financial Times* –Goldman Sachs Business Book of the Year Award.

SPEECH: US trade policies governing cotton, textiles, and apparel comprise a complex set of constantly evolving policies. However, the effects of these policies are sometimes perverse, often handicapping those they are designed to help. There are also a wide range of unintended consequences from trade policy developments. While producers across the industry complex often “speak with one voice” to maintain political influence, diverse priorities within the complex cause can cause political agendas to reflect poorly the interests of individual firms and industries. A historical perspective on this tension is useful and illuminating.

12:15 - 1:30 Luncheon

POULTRY & LIVESTOCK LUNCHEON

Arlington Ballroom, Salons I, II

Moderator: *Howard Wetzel, Director, Dairy Livestock and Poultry Division, Foreign Agricultural Service, USDA*

Presented: Friday, February 17, 2006

WHAT WILL WE DO TO GET THE BEEF MARKET BACK?

**Phillp M. Seng
President & CEO
U.S. Meat Export Federation
Denver, Colorado**

BIO: Philip M. Seng is the President and Chief Executive Officer of the U.S. Meat Export Federation, which is headquartered in Denver, Colorado.

Raised on an Iowa farm, Mr. Seng has a bachelor's degree in political science and a master's degree in East Asian studies. He speaks fluent Japanese and worked as a journalist in Tokyo in the late 1970s. He also taught in a leading Japanese university and at the Japanese Ministry of Foreign Affairs. He then worked for a leading Japanese firm with extensive international operations and experience in the Japanese market and business community, before joining the USMEF staff in the Tokyo office in 1982. He lived in Japan for more than 10 years.

As USMEF's Asian director for six years, Mr. Seng played a central role in opening the Japanese beef market through his involvement in the U.S./Japanese beef negotiations, which culminated in the historic beef liberalization agreement in 1988. As an authority on Japan's complex distribution system, he has worked closely with both industry and government officials in Japan. His marketing strategies and approach to the Japanese market have received critical acclaim in the international business community and served as a case study in the Harvard University Business School, where he has been a guest lecturer on several occasions.

In January 1990, Mr. Seng was named President and CEO. In this position, he oversees USMEF operations worldwide, providing direction for USMEF strategies and priorities in international programs, research, technical services, industry relations and global communications. He also serves as the primary spokesman for USMEF and other exporting interests to government and private entities regarding international trade policy and foreign market development issues related to U.S. red meat products.

Mr. Seng is credited for developing USMEF's first marketing campaign in Asia under USDA's Targeted Export Assistance Program, which later became the Market Assistance Program, or MAP. This approach now means that virtually every checkoff dollar invested

in international market development is leveraged with USDA and membership dollars to deliver two dollars worth of program. Under his leadership, USMEF programs today are recognized in more than 80 countries and are directed from 13 international offices. USMEF is the largest USDA cooperator – evidence of the fact that it is considered to be among the most successful in USDA’s Foreign Market Development Program. During Mr. Seng’s tenure as president and CEO, U.S. meat exports have more than doubled ... topping \$5 Billion last year.

Mr. Seng has also been active in a number of other organizations. As the only American ever to serve as president of the International Meat Secretariat – where meat experts from more than 40 nations regularly meet to discuss and resolve issues – Mr. Seng was recently reelected to serve a fourth term. He also is president of the Japan-American Society In Colorado, and has served since 1993 on the President’s Agricultural Policy Advisory Council in Washington.

“Putting U.S. Meat On The World’s Table” is USMEF’s mission – but it also is Mr. Seng’s passion. Here’s a recent example: When the Japanese market was rocked in 2001 and 2002 by the discovery of BSE (bovine spongiform encephalopathy) in the domestic herd, Mr. Seng was in Tokyo in just a few days ... and spent more than 60 days in that market over the next five months to make sure Japanese consumers would know our beef was safe. In addition, he spearheaded a successful effort to raise more than \$8.4 million for special promotions. Consumption now appears to be coming back due in no small part to the programs Mr. Seng helped put in place.

1:30 p.m. - 3:00 p.m.
Concurrent Sessions

RURAL AMERICA: E-COMMERCE & E-RURAL ECONOMIC DEVELOPMENT

Arlington Ballroom, Salon V

Moderator: *Kip Pendleton, President, AgriStar Global Networks*

Presented: Friday, February 17, 2006

BROADBAND USE BY RURAL SMALL BUSINESSES

Stephen B. Pociask
TeleNomic Research
Oak Hill, Virginia

BIO: With over twenty-five years experience, Steve Pociask is president of TeleNomic Research, an economic consulting firm specializing in public policy analysis. He has spoken on various telecommunications topics before the FCC, as well as federal, state and local legislators, and he testified before state regulatory commissions and Congress. Steve has written about deregulation, industry cost and price structure, broadband competition, and mergers. He has written several books and has appeared numerous times in TV, radio and print media. He is an affiliated scholar and expert for the American Consumer Institute, the New Millennium Research Council, the Competitive Enterprise Institute and the Center for the New West. Steve has completed his Ph.D. coursework in economics and has an M.A. in economics from George Mason University. He can be reached at (703) 471-3954 or Steve@TeleNomic.Com.

SPEECH: One popular belief is that information technology (IT) investments can be an important aspect of growth and economic development. Based on a study conducted for the Small Business Administration, evidence will be presented showing that broadband investment (and more generally IT investment) appears to provide substantial benefits to both consumers and the overall economy. Evidence will show that broadband investment and services appears to stimulate economic productivity and output, as well as create jobs. This speech will cite numerous ways in which broadband services can be used to improve consumers' lives, particularly in rural areas.

Another common belief is that rural broadband deployment and use lags urban broadband deployment and use. This speech will provide evidence that rural small businesses do not subscribe to broadband services as frequently as urban small businesses do, and discuss the difference in broadband use between rural and urban areas to be statistically significant.

In summary, both of these common beliefs appear to be true – namely, that investments in broadband are a key economic driver for communities and that rural communities are lagging in broadband investment. Therefore, it follows that the benefits of broadband

services are failing to reach rural communities as timely as they are in urban areas. What causes the rural digital divide? This speech investigates supply and demand factors that contribute to the shortfall in rural broadband use by small businesses, including firm size, high-costs, price elasticity and demographic factors.

**COMPETING GLOBALLY FROM KANSAS: A RURAL AMERICA
MANUFACTURER REACHES THE GLOBAL MARKET**

**Stan Thibault
President
Osborne Industries, Inc.
Osborne, Kansas**

BIO: Stan Thibault was raised on a family farm and attended public school in Osborne, Kansas. He attended Benedictine College in Atchison, Kansas, graduating with a Bachelor of Science degree in Business Administration and Economics in 1967. After graduating from college, he was employed by a major oil company and did marketing work in the Denver and Kansas City metro areas. That employment was interrupted by four years of service with the U.S. Navy including two overseas deployments. Given the opportunity to move back to his hometown, in 1973 Stan was one of the founders of Osborne Industries and has served as the Company's President and General Manager since that time. He has served on the Board of Directors of NIST/Mid-America Manufacturing Technology Center, Kansas City and was Chairman in 1993. He also served on the State Advisory Council for the Kansas Small Business Development Centers during the mid-1980s. He currently serves on the Supervisory Board for the City of Osborne Department of Economic Development.

SPEECH: Osborne is a community of about 1,900 people located on the high plains of north central Kansas. Like most small towns in this part of the state, the early development of the community was based almost entirely around production agriculture, namely raising wheat and livestock. Since the town was founded in 1871 until the mid-twentieth century, that base of commerce was sufficient to adequately support a variety of community businesses and other assets such as churches, schools, and health care providers, etc. Together, these all combined to produce an acceptable standard of living and the quality of life provided by a friendly small town.

Much to their credit, thirty-five years ago, several merchants of the community recognized that production agriculture was the only primary industry in the area and the dynamics of that industry was changing. Farms were consolidating and they were consolidating at an increasing pace. They understood that fewer and fewer farm operations would require less and less businesses and people to support the operators that remained. They understood that this combined loss of farms and commerce would seriously threaten the viability of all those things that make a small community a desirable place to live. These merchants organized an economic development effort that eventually resulted in "home grown" primary businesses to replace the loss of agricultural commerce. Osborne Industries, Inc. was one of those businesses. Currently the Company employs about 120 people developing and manufacturing livestock management equipment based on RFID technology and contract molds plastic parts for other manufacturers. The Company markets internationally from its rural location.

CREATING E-BASED JOBS IN RURAL NORTH DAKOTA

Jim Belquist
Executive Director-Rural Economic Area Partnership
Maddock, North Dakota

BIO: Based in Maddock, North Dakota, Jim Belquist has served as Executive Director of the Rural Economic Area Partnership (REAP) Investment Board since June 2004. The REAP Investment Board is a volunteer committee which manages the REAP Fund, Inc., a non-profit IRS 501 (c) 3 corporation. The primary goal of the Fund is to partner with others to improve the economic environment of communities located in fourteen counties and portions of three Native American Reservations within two Federal Designated Zones.

Prior to his current position, he worked for U S WEST, Inc., a telecommunications “Baby Bell” in Denver, where he analyzed, implemented and monitored investment programs for the \$13 billion pension fund. After retiring as Vice President in 1999, Jim and his wife traveled and participated in volunteer work before returning to their home state in 2004. Jim graduated from Valley City State University and he has taken additional financial courses from Drake University, Des Moines, IA.; Wharton University, Philadelphia, PA.; and Berkeley University, Berkeley. CA.

SPEECH: North Dakota is well-positioned to create E-Based businesses in its rural areas. Significant investments have been made in North Dakota rural communities for technological training and infrastructure. As more requirements are placed on businesses for data security, North Dakota, with its sparse population, is a logical solution for data solutions, including data verification, data correction, storage and encryption. North Dakota’s relatively remote location provides a natural barrier for “terrorism-sensitive” data. North Dakota’s rural communities possess an ability to make and implement decisions quickly, a characteristic desired by most E-based businesses. Most importantly, costs for operating E-based businesses are usually less in rural communities.

**CONNECTING THE ENTIRE COMMUNITY
REINVENTING RURAL COMMUNITIES WITH BROADBAND**

**Jesse M. DeWare IV
Jeffersonian Institute
Jefferson, Texas**

BIO: Jesse (Duke) M. DeWare IV is a resident of Jefferson, Texas. He is a lawyer and his wife is a real estate agent. Duke graduated from high school in Jefferson, Texas, received a BA degree in political science from The Citadel and a JD degree from SMU School of Law. He worked in the Justice Department as an intern and studied abroad while in law school.

He returned to Jefferson and became active in historic preservation, environmental conservation, economic development and in innovative educational projects. He is President of the Jeffersonian Institute, Inc., a nonprofit organization which addresses rural economic development through education, technology and leadership development.

SPEECH: Rural communities are facing a crisis in loss of jobs, loss of leadership and a loss of residents. Until the advent of broadband availability in rural communities there has been little hope to reverse this alarming trend.

Broadband allows neighboring communities to become teammates not competitors. It allows residents of urban areas to achieve a better quality of life in a rural community. It empowers the leaders of rural communities with the tools to compete for jobs, services and new residents.

The implementation of broadband services requires communities to embrace change and to consider how their community is a vital part of the global marketplace. It requires leaders who have courage, can think outside of the box and create partnerships which share resources.

DeWare will present concepts, methods for change and his community's experience in embracing its reinvention with broadband.

1:30 p.m. - 3:00 p.m.
Concurrent Sessions

Presented: Friday, February 17, 2006

**GLOBALIZATION: SUGAR – WHAT DOES THE FUTURE
MARKET FOR SUGAR LOOK LIKE?**

Grand Ballroom, Salons D, E

Moderator: *Ron Lord, Deputy Director, Import Policies and Program Division, Foreign
Agricultural Service, USDA*

**EU SUGAR POLICY REFORM
IMPACT OF THE EUROPEAN SUGAR REFORM
ON THE INTERNATIONAL TRADE**

JEAN-LOUIS BARJOL
Director General
European Federation of Sugar Manufacturers
Brussels, Belgium

BIO: Based in Brussels, Europe, at the European Federation of Sugar Manufacturers, has served as Director general since July 2000. Prior to the current post, he served as Agronomist Attaché in the French Embassy of Spain. Before moving to Spain in 1995 worked in the French Ministry of Agriculture in Paris in charge of the definition of various industrial policies (starch, oil, flour, sugar, hops, ...). Barjol was an agronomist graduate of the Institut National Agronomique in Paris with specialization in economics in 1982.

SPEECH: Having been a net sugar exporter for decades the European Union will become from 1st July 2006 a net importer. A massive restructuring program will finance the closure of at least 4 factories among 10 over a period of 3 to 4 campaigns and in 2009/2010 the Least Developed Countries will receive a free tariff quota free access to the European market. Over the same period of time the European institutional sugar price will be reduced by 36%.

The speech will examine the reasons of such a revolution and the consequences for the world market balance. It will end in a comparison of European and US situation in the context of the WTO Doha Round.

**WHAT DO CHANGES ON THE TRADE POLICY HORIZON MEAN FOR THE
U.S. SUGAR INDUSTRY?**

**Margaret Blamberg
Executive Director
American Cane Sugar Refiners' Association
Brooklyn, New York**

BIO: Margaret Blamberg has worked in the sugar industry for almost thirty years. She holds a Ph.D. in Economic History from Indiana University. Margaret began as a futures trader. For most of her career, she worked at Domino Sugar Corporation as Vice President for Economics and Government Relations. Presently she is Executive Director of the American Cane Sugar Refiners' Association. She resides in Brooklyn, New York, with her husband.

SPEECH: The US sugar industry is well poised to meet tomorrow's challenges. Steps have been taken to make the industry, both beet and cane, competitive with the most efficient of the world's sugar producers under the scenario of truly free trade. The US sugar industry is not subsidized, unlike much of world trade in which exporters benefit from direct and hidden subsidies. Free trade through the World Trade Organization must be truly free. In addition, it is essential that trade liberalization be accomplished globally through the WTO rather than through a variety of regional and bilateral FTAs, which are even at best a patchwork of conflicting and ill-advised measures. Besides WTO negotiations, a new Farm Bill is on the horizon. When reviewing the US sugar program, Congress needs to keep in mind that the sugar program is designed to operate at no cost to the government and does not involve either subsidies or payments, each an aspect of WTO reform. In addition, the program has demonstrated its flexibility by allowing the USDA to respond to supply management issues arising from the three hurricanes of late summer. The US sugar program allows the domestic industry to continue to supply the American consumer with a high quality product in a timely manner under a wide variety of circumstances.

Presented: Friday, February 17, 2006

THE BRAZIL PERSPECTIVE

Eduardo Pereira de Carvalho
President, Sao Paulo Sugarcane Agroindustry Union
Sao Paulo, Brazil

BIO: Eduardo P. de Carvalho, economist by the University of São Paulo in 1962, was an Economics professor at that University up to 1982. He also served at the Finance Ministry of Brazil, as the Chief of Economic Advisory Department, from 1967 to 1974. He was the Chief Planning Officer, in charge of implementation of all projects related to iron ore mining and transportation, phosphate and bauxite mining, pulp plant and aluminum smelter at Cia. Vale do Rio Doce - CVRD, the world's largest iron ore mining company, from 1975 to 1979, where he served also as Vice-President.

Between 1979 and 1982 he held several public service positions, as Secretary of Agriculture in the State of São Paulo; Deputy Finance Minister of Brazil; Chairman and CEO of the São Paulo State Bank. In the last 20 years, he held several major positions in private owned banking (both commercial and investment banks) and industry (a hybrid corn seed company; an engineering project consulting group; a large agriculture cooperative in São Paulo; a private pension fund company)

He has held the positions of Chairman and CEO of UNICA since August 2000. UNICA is the trade association of the sugar and ethanol producers of the state of São Paulo, representing around 65% of all Brazilian Producers, with over 90 associates, that accounted for more than 178 million ton of sugar cane crushing in the last crop season, out of which 13,1 million ton of sugar (9,8 million ton to exports) and 7 billion liters of ethanol were produced, not to mention the increasing participation of electric power co-generation for the public grid.

SPEECH: Cane sugar prices have been moving up since early 2005. There are specific reasons for this upward trend. But it's more and more evident that there is also a neat link between sugar prices and energy costs. Brazilian producers are investing heavily in productivity and are committed to add fresh capacity to theirs mills. Most plants are capable of swinging part of output between sugar and ethanol. But it's clear that local demand for ethanol is stronger than ever and producers will deliver the necessary amount of biofuel to serve the growing fleet of hybrid cars. Cane sugar is not and never will be considered a byproduct to an industry that's alert to internationalization of both sugar and ethanol markets. But production system in this case will charge it's price. Brazil knows that renewable energy sources create a huge opportunity for emerging economies. But the main concern to producers is to improve theirs company's market value: that means a strong presence in the cane sugar market, as well as to optimize production methods in order to stay competitive in the fuel market. The bottom line is simple: the largest and lowest-cost producer of sugarcane ethanol in world can also be the lowest-cost cane sugar producer. This economic logic will benefit consumers throughout our planet.

POLICY PROSPECTS IN A TURBULENT MARKET

Robert Randall Green
President, Sweetener Users Association
Washington, DC

BIO: Randy Green is Senior Government Relations Representative at McLeod, Watkinson & Miller, where he assists several of the firm's clients in dealing with Congress and federal agencies. Before joining the firm in February 1999, Mr. Green had served almost 10 years on the staff of the Senate Committee on Agriculture, Nutrition, and Forestry, working for the Committee's chairman, Senator Richard G. Lugar of Indiana. In 1997, Mr. Green was named chief of staff for the Committee. Earlier, his duties for the Committee included commodity programs, futures and derivatives issues, trade policy and the federal budget.

In 1992, Mr. Green was named Deputy Under Secretary for International Affairs and Commodity Programs at the U.S. Department of Agriculture. He subsequently served as Acting Under Secretary. He has also worked for the American Soybean Association as its Manager of Government Relations and as Director of the Wheat Export Trade Education Committee. His career in Washington began in 1982 when he was hired by Congressman Charles W. Stenholm of Texas as a legislative assistant for agriculture.

Mr. Green is a graduate of Texas A&M University. He and his wife, Mary, live in Arlington, Virginia, and have five children.

SPEECH: Sugar policy debates are marked by a history of rancor and sharp disagreement, but all segments of the industry have much in common and depend on each other. Users need a stable, reliable, high-quality supply of sugar at competitive prices, while producers depend on users to transform their commodity into a product with value to the ultimate consumer.

Current sugar policy is unbalanced and does not take the needs of the entire industry into account. Today's sugar policy faces pressures for change because of the implementation of NAFTA; program-based incentives to increase sugar-containing product imports; forecasts of increasing taxpayer costs in the sugar program; and the fallout from the CAFTA debate. The peanut industry offers a successful example of producers and users working together to support change to a program that once operated much like the current sugar program. Users want to work with producers to develop a common approach to the next farm bill, and propose that the groups begin to discuss how they might work together.

1:30 p.m. - 3:00 p.m.
Concurrent Sessions

WEATHER: RISKS AND BENEFITS

Grand Ballroom, Salon A

Moderator: *Teresa C. Lasseter, Administrator, Farm Service Agency, USDA*

Presented: Friday, February 17, 2006

THE SCIENCE BEHIND ATLANTIC HURRICANES AND NOAA'S SEASONAL HURRICANE PREDICTIONS

By Dr. Gerald Bell

**National Centers for Environmental Prediction, National Weather Service
Climate Prediction Center
Camp Springs, Maryland**

BIO: Dr. Gerry Bell is a research meteorologist and seasonal hurricane specialist at NOAA's Climate Prediction Center in Camp Springs, MD. Gerry has been the lead scientist for NOAA's seasonal Atlantic hurricane outlooks since their inception in 1998. He has since has published numerous scientific papers and given many lectures on Atlantic hurricane variability and on the climate factors controlling hurricane activity. In addition, Gerry also specializes in monitoring global climate variability, especially that related to the El Niño and to other large-scale atmospheric processes. Gerry is co-author of the monthly *Climate Diagnostics Bulletin*, which provides the latest El Niño analysis and diagnosis, along with a description and analysis of global weather and climate conditions. He is also an author/ editor of Special Climate Summaries and Annual Climate Assessments that provide a timely analysis of major global climate variations. He has received numerous NOAA-wide awards for his work in helping to understand global climate variability. He also received the prestigious Isaac M. Cline award for developing and leading the NOAA team in making continuously successful seasonal Atlantic hurricane predictions. Gerry received his B.S. degrees in both meteorology and mathematics at the University of Illinois. He received M.S. and Ph. D. Degrees in atmospheric sciences at the State University of New York at Albany in 1990.

SPEECH: Atlantic hurricane activity exhibits alternating 20-40 year periods of above-normal and below-normal activity. We are 11 years into an active hurricane era that began in 1995. Therefore, it is reasonable to expect continued high levels of hurricanes and landfalling hurricanes for many years to come (10 to 20+ years). NOAA scientists have done extensive research into the climate factors controlling this activity, and now understand, monitor, and predict these factors in a way not possible as little as 8 years ago. NOAA research shows that the recent increase in activity is caused by natural climate variability related to multi-decadal fluctuations in tropical monsoon rainfall and Atlantic Ocean temperatures. The tropical climate patterns controlling this increased activity are similar to active hurricane era of the 1950s-1960s. They differ significantly

from the inactive 1970-1994 period, when only 3 in 25 seasons were above normal and far fewer hurricanes struck U.S.

Because of these long-term cycles in hurricane activity, preparedness must be for an active hurricane era and not just a single season. Meaningful and well thought out preparations must occur at the individual level, and at all levels of government. This includes being prepared for multiple U.S. hurricane landfalls in a season, multiple landfalls in a given region in a single season, landfalls in areas not recovered from previous season, and inland flooding.

Presented: Friday, February 17, 2006

WIND AND ITS POTENTIAL FOR ENERGY

David Emory Stooksbury
Assistant Professor, Biological Agricultural Engineering
University of Georgia
Athens, Georgia

BIO: David Emory Stooksbury is the state climatologist of Georgia and is a member of The University of Georgia's Faculties of Engineering and Atmospheric Sciences. He has been the state climatologist since 1999. He is a former member of the American Wind Energy Association's Meteorological Standards Committee. While in Nebraska, he served with the Nebraska Wind Energy Task Force which coordinated a multi-year study of wind energy resources in Nebraska. His current research projects include investigating the potential of wind energy along the Southeast US coast. He also teaches courses in atmospheric thermodynamics, atmospheric radiation, boundary layer meteorology, and coastal meteorology and is the graduate coordinator for atmospheric sciences. He is graduate of The University of Georgia with undergraduate majors in physics-astronomy and plant genetics and a masters degree with a major in agronomy. His Ph.D. was awarded by the University of Virginia with a major in environmental sciences specializing in atmospheric sciences.

SPEECH: This speech will focus on the wind energy potential for rural America. The talk will include an overview of the economic and physical reasons for a complete wind energy resource assessment before a new wind energy project is built. The basic parameters needed for a complete wind energy assessment and how they relate to the physics of wind energy production. The talk will also include the most likely regions for major wind energy development and a look at potential areas that in the past have been ignored.

1:30 p.m. - 3:00 p.m.
Concurrent Sessions

**SCIENCE: BIO-TECH DEVELOPMENT & DROUGHT
TOLERANCE/ SUPERIOR CORN & SOYBEAN VARIETIES FOR
INDUSTRIAL PRODUCTION**

Arlington Ballroom, Salon VI

Moderator: *Kay Walker Simmons, National Program Leader, Grain Crops, Agricultural Research Service, USDA*

Presented: Friday, February 17, 2006

USDA DROUGHT TOLERANCE RESEARCH OVERVIEW

Melvin J. Oliver
Research Leader; Plant Genetics Research Unit
Agricultural Research Service, MWA
USDA

BIO: Based in Columbia, Missouri, Melvin Oliver has recently joined the Plant Genetics Research Group with responsibility of overseeing the research of a group of nine exceptional plant scientists whose main interests are centered on the genetic improvement of soybeans, maize and wheat. Mel Oliver's own research program centers on the molecular mechanisms for dehydration tolerance in plants, in particular extreme dehydration or desiccation. Prior to his current position, Mel was a Research Plant Physiologist at the Plant Stress Laboratory in Lubbock Texas. Mel was born and raised in the U.K. and received a Bachelor of Science degree from North East London Polytechnic. Mel obtained a Masters in Biochemical Genetics and a PhD in Plant Biochemistry from the University of Calgary, Canada. In 1983, Mel moved to the U.S and in 1985 became an Assistant Professor at New Mexico State University. In 1990, after becoming a U.S. citizen, Mel joined ARS and has been with the agency for the last 16 years. Mel received the Southern Plains Early Career Scientist of the Year award in 1992 and in 1999 received the Senior Scientist equivalent for his contributions to the understanding of stress tolerance mechanisms in plants.

SPEECH: Drought is the leading cause of agricultural productivity losses. Drought occurs somewhere in agricultural production area for both maize and soybean every year and unless these crops are irrigated losses occur. In some years these losses can be substantial. In 1983 almost 50% of the national soybean acreage was severely damaged by drought and just this last growing season almost 50% of the maize crop in the Midwest was lost to a severe drought that hit Middle America. It is facts like these that have made drought tolerance a priority area for agricultural research agencies, and ARS is no exception.

Ultimately the goal of all drought tolerance research in ARS is to impact drought tolerance in an economic field situation: to identify and use genes and genotypes that impart a yield advantage in the field under drought. The complexity of this trait and its associated agronomic factors make any one single approach not only difficult and risky but also inefficient. Within ARS we are attempting to generate a more comprehensive approach that includes modern molecular and genomic tools, molecular genetic strategies, and conventional breeding to make headway in this important endeavor. Great

headway is being made in our understanding of the molecular mechanisms that underpin the ability of cells to tolerate dehydration. Such species as the grass *Sporobolus stapfianus* are instrumental in this approach and act as genetic reservoirs for genes and gene networks that directly impact dehydration tolerance. Gene discovery studies are opening up possibilities for new drought improvement strategies. Novel molecular genetic technologies, developed for maize in Columbia, allows us to look for polymorphisms in genes likely to impact drought tolerance and by association analysis identify loci that impact tolerance in a field situation for marker assisted breeding strategies.

Work in College Station utilizes drought tolerance QTL information for sorghum to identify syntenic regions in maize that may identify similar QTLs in this crop. The discovery of slow wilting genotypes in soybean by ARS scientists in North Carolina form the backbone of a strong conventional breeding program to develop drought tolerant soybeans for the U.S. Associated mapping efforts are underway to identify the loci and genes and involved in the trait. As these studies imply, an integrated program that goes from DNA to phenotype and from phenotype to DNA offers the best chance to reduce the impact of drought on the productivity of U.S. Agriculture.

BREEDING SUPERIOR DROUGHT TOLERANT CORN

Wenwei Xu
Professor of Corn Breeding & Genetics
Texas A&M University
Lubbock, Texas

BIO: Based at the Texas A&M Agricultural Research and Extension Center in Lubbock, Wenwei Xu is an associate professor and directs the corn breeding program that focuses on drought tolerance, heat tolerance, insect resistance and mycotoxin contamination. He also has a joint appointment with Texas Tech University where he teaches undergraduate and graduate courses and advises graduate students. He has published 21 referred papers, identified and developed drought tolerant corn germplasm, and released four inbred lines. He is the president of the Texas Chapter of American Society of Agronomy and a member of the Technical Steering Group of USDA Germplasm Enhancement of Maize (GEM) project. Prior to his current post, he was a post-doctoral fellow at Texas Tech University from 1993-1996 and worked for DeKalb Genetics Corporation from 1996 to 1998. His research experience includes genomic research and conventional breeding in corn, sorghum, and grasses. Xu was raised in a small town in northwestern China. He received his B.S. in agronomy from Gansu Agricultural University in 1982, M.S. degrees in plant breeding and genetics from the Chinese Academy of Agricultural Sciences in 1985, and Ph.D. degree in genetics from the University of Missouri-Columbia in 1992.

SPEECH: Drought is a major limiting factor for corn production. Superior hybrids with improved stress tolerance are a key to reduce drought's effect. Drought tolerance is a complex trait. Accurate screening for drought tolerance depends on the timing, intensity and duration of drought stress. A major effort of our breeding program at the Texas Agricultural Experiment Station in Lubbock is to develop multiple stress tolerant corn. With the low rainfall in West Texas and excellent subsurface drip irrigation systems, we have developed a field screening protocol to evaluate a large number of lines and hybrids for drought and heat tolerance. We introgress native stress tolerance genes from tropical and sub-tropical germplasm by crossing them with temperate adapted lines and making selections under controlled drought stress conditions. A useful source for stress tolerance is the germplasm from the USDA GEM project. Drought-tolerant hybrids have a stronger root system, higher hydraulic lift capacity, and recover better when drought stress is relieved. The new stress tolerant corn can save water, reduce yield loss and aflatoxin contamination.

Presented: Friday, February 17, 2006

STRATEGIES IN THE APPLICATION OF BIOTECH TO DROUGHT TOLERANCE

Marc Albertsen
Research Director
Pioneer Hi-Bred International Incorporated
Johnston, Iowa

BIO: Marc Albertsen has been employed by Pioneer Hi-Bred International, Inc. at Johnston, Iowa, since 1981. He is currently serving as Director, Agronomic Trait Lead Evaluation and Optimization.

Educational background: BS in Botany from Iowa State University
MS in Plant Breeding and Cytogenetics from Iowa State University
PhD in Plant Breeding and Genetics from The University of Minnesota
Post-doctoral Fellowship at Iowa State University
Professional history awards: Fellow: Iowa Academy of Science

SPEECH: The application of biotechnology to drought tolerance has been a topic for both the popular press and the scientific press the past several years. Although the message is often dismissed as hype, what can be overlooked is that real progress, measured by an ever-increasing level of hybrid maize performance in the presence of drought, has been made by non-biotech means over the past decade. Breeders have delivered many hybrids that today have a significantly improved capacity to deal with drought conditions and to yield a surprising degree of productivity that was not possible with hybrids of only ten years ago.

So why do the seemingly insignificant advances in biotech-based drought tolerance attract so much attention? One of the reasons is the potential for a broader improvement of drought tolerance via biotechnology, both in terms of germplasm and in terms of actual percentage of tolerance improvement. The technology exists today to make maize plants extremely tolerant to drought conditions. From an agricultural perspective, however, extreme tolerance means very little unless there is accompanying productivity. Turning maize plants into a form of cactus would not be well received! A second reason is that a biotech solution to drought tolerance may offer a compressed time period of crop improvement for farmers in the developing world.

In any application of new technologies to a long-standing problem, strategies in how to integrate the new technology can be as important as the technology itself in achieving a particular outcome. This presentation will consider how we might build upon what we already know about drought tolerance and how we might combine this knowledge with biotechnology techniques to enable us to meet the expectations and potential of applying biotechnology to drought tolerance.

MONSANTO'S R & D PROGRESS IN DEVELOPING BIOTECH CORN

**Michael Stephens Ph.D.
Corn Technology Team
Monsanto Company**

BIO: Michael Stephens has 17 years experience in corn biotech R&D + 5 years in industrial biotech R&D BS in Microbiology, University of London Ph.D. Plant Pathology, John Innes (pronounced inn ez) Institute, UK Post-Doctoral Fellow, Harvard University.

Previous to working for Monsanto, he was Director of Biotech Agronomic Traits: Developed DEKALB Genetics corn Bt trait. Since 1999 he has been the Corn Yield Development Lead, Corn Technology Crop Team - Monsanto.

SPEECH: Mr. Stephens will describe Monsanto's R&D work to develop biotech corn traits, which improves tolerance to low water stress (drought). The various potential segmentation of the drought trait market that may develop will be discussed together with the potential benefits provided by the traits. The progress of the R&D will be illustrated with data from multiple years of field testing.

1:30 p.m. - 3:00 p.m.
Concurrent Sessions

MARKETS: DAIRY OUTLOOK

Arlington Ballroom, Salon IV

Moderator: *John Mengel, Chief Economist, Dairy Programs, Agricultural Marketing Service, USDA*

Presented: Friday, February 17, 2006

OUTLOOK FOR THE U.S DAIRY SECTOR

Shayle D. Shagam
Livestock, Dairy, and Poultry Analyst
World Board
USDA

BIO: Shayle Shagam currently serves as a livestock analyst in the World Agricultural Outlook Board where he chairs the Interagency Commodity Estimates Committees (ICEC) for red meat, poultry and dairy. The ICECs bring together economic analysts from USDA agencies to generate the Department's monthly commodity forecasts. Between 1986 and 1998, Mr. Shagam worked for the Economic Research Service, USDA where he was responsible for developing forecasts of international red meat trade and commodity analysis support for the North American Free Trade Agreement and the WTO negotiations. Mr. Shagam graduated in 1980 from the University of Illinois with a B.S. in agricultural economics and received an M.S. in agricultural economics from Michigan State University in 1986.

SPEECH: This speech provides a brief summary of 2005 and the 2006 outlook for the dairy sector. The outlook includes supply, use, forecasts for milk and price forecasts for milk and Class II and Class IV products. The forecasts presented here are based on the analyses of the Dairy Interagency Commodity Estimates Committees whose members are comprised from the World Agricultural Outlook Board, Economic Research Service, Foreign Agricultural Service, Farm Service Agency, and Agricultural Marketing Service.

BEHIND THE TRENDS: LONG-RUN SHAPERS OF THE DAIRY INDUSTRY

James J. Miller
Dairy Analyst
Economic Research Service
USDA

BIO: Jim started dairy outlook work for USDA in 1974, trying to outguess dairy markets in 1974-79 and again since 1986. He was educated at the University of Illinois (B. S. 1970 and M. S. 1972) and Purdue University (Ph. D. 1982). Other work experiences include being an ERS researcher of dairy markets and policy (1979-86) and a county extension agent in northern Illinois (1972-74).

SPEECH: Many industry changes are too gradual to be important to short-term outlook very often. However, these subtle changes frequently prove to be key to the ultimate direction of the industry, dwarfing the effects of many of the factors important to the short-run outlook. Demand trends are critical to the size of the industry and the products produced. Similarly, industry structure and size also hinge on input prices, productivity, and technology on farms and in processing facilities. Lastly, changes in industry behavior and structure can have major impact on the way markets operate.

Presented: Friday, February 17, 2006

CHALLENGES FACING THE ORGANIC MILK INDUSTRY

Caragh McLaughlin
Senior Brand Manager, Horizon Organic
WhiteWave Foods Company
Broomfield, Colorado

BIO: Caragh McLaughlin has spent nearly 8 years in the consumer products industry in both the US and Europe. She has spent most of the past 3 years on the Horizon Organic brand, overseeing its growth in the Grocery, Mass and Club channels. During her tenure on the brand, the organic milk business has grown over 65%. Prior to joining Horizon Organic, she spent a year as the Brand Manager for diet Coke at the Coca-Cola Company. She began her career at Procter & Gamble working first in the Coffee category in the US, then in Pet Foods in Europe. Caragh holds an MBA from Cornell University and a Bachelor's degree in International Studies from Emory University.

SPEECH: The organic milk category has experienced incredible growth over the past decade, reaching roughly a half Billion dollars in retail sales in 2005. A Datamonitor study from December 2003 suggested that the Organic Dairy category would experience over 25% compound annual growth rates in the five years from 2002-2007. The past 2 years have seen higher growth rates than the previous 3 years, taking the industry somewhat by surprise. Exploding growth rates present a number of challenges to a relatively young industry. For example, how do you accurately forecast demand far enough out to ensure that you're growing supply fast enough to keep up? Is the regulatory environment able to handle the challenges inherent in a much larger and more competitive industry? In addition, with the growth of related industries such as Organic Beef and Poultry, there is currently not enough supply of organic feed available to support the growth across all the industries.

In 2005 alone, there were several key issues facing the industry: an industry-wide shortage of raw organic milk supply, challenges to the rules governed by the NOSB, an emerging debate over the reasons why consumers buy organic milk and dairy products, and a perception that larger companies entering the industry want to weaken the integrity of the organic label. This speech will address each of these challenges and provide perspective on where the industry is headed in the near term.

3:15 p.m. - 4:45 p.m.
Concurrent Sessions

RURAL AMERICA: NEXT GENERATION OF FARMERS

Arlington Ballroom, Salon IV

Moderator: *Marcia Taylor, Editor, Top Producer Magazine, Farm Journal Media*

Presented: Friday, February 17, 2006

BIO FARMING AND ITS IMPACT ON RURAL AMERICA IT'S NOT YOUR FATHER'S AGRICULTURE

William James Horan
Partner Horan Brothers Agriculture Enterprises
Rockwell City, Iowa

BIO: William and Joseph Horan; partners in Horan Brothers Ag Enterprises, a 4000 acre family farm operation based in Calhoun County, Iowa. Horan Brothers is a fourth generation farming operation which has been involved in specialty crop production and identity preservation for over 20 years. They have grown many high-value crops over the years, including waxy corn, tofu soybeans and Nutridense corn for juvenile poultry feed. Bill and Joe were members of an Iowa biotech trade industry mission, which included Governor Vilsack, to New Zealand in 2004.

William Horan, Rockwell City, Iowa, serves as COO of Horan BioProduction, LLC. He has been a full-time farm operator since 1973. He received a BS from South Dakota State University and attended the Harvard Business School – Agricultural Executive Education program. He is a director, of the Iowa State University Research Park; director, Truth About Trade and Technology; and steering committee member, Natural Resource Solutions, LLC, a non-partisan group dedicated to developing public policy with a goal of US energy use to be 25 percent biomass-based by 2025.

Bill's past positions include member, National Corn Growers Association Policy Team; director, National Corn Growers Association; director, US Grains Council; member, Governor of Iowa's Ag Value Growth Foundation; and member, Iowa State University Extension Council; member, DOE/USDA Biomass Technical Advisory Committee. He has served as President of the Calhoun County (Iowa) Farm Bureau, President of the Rockwell City School Board and President of the Iowa Corn Growers Association.

SPEECH: We all know the family farm is changing but why and how? The why and the how will be explored in this presentation. Examples will be given of how the future structure of agriculture will look.

Presented: Friday, February 17, 2006

BENEFITS OF ANIMAL AGRICULTURE TO RURAL AMERICA

Julie Maschhoff
Maschhoff's Pork Farm
Carlyle, Illinois

BIO: Julie Maschhoff is the director of public relations for The Maschhoffs, Inc. With headquarters near Carlyle, IL, The Maschhoffs, Inc. serves as a swine production management firm and networks with over 250 other family farms in the Midwest, and coordinates the production of more than 2 million pigs annually. Other family members involved in The Maschhoffs include her husband Ken Maschhoff, CEO, and Dave and Karen Maschhoff.

Julie grew up on a grain, hog, and dairy farm near Okawville, IL. She is a graduate of the University of Illinois, receiving her bachelor's degree in Agriculture Science. She is also a graduate of the Illinois Ag Leadership Program.

Julie and Ken have 4 children, ages 9 through 16, and are active in a variety of community and agricultural organizations.

SPEECH: The presentation will cover networking with over 250 other family farms in the Midwest.

Presented: Friday, February 17, 2006

BRINGING VENTURE CAPITAL TO RURAL SOUTH DAKOTA: THE JOYS AND PITFALLS OF PRODUCER PROJECTS AND LESSONS LEARNED

**Christine Hamilton
Managing Partner
Christiansen Land and Cattle, Ltd
Kimbal, South Dakota**

BIO: Christine Hamilton co-owns and manages a fourth-generation farming and ranching business in central South Dakota. It includes 30,000 acres of crop and range land, 1,000 cows and a feedlot. She also serves on a bank board, South Dakota's Game, Fish, and Parks Commission, and several civic boards, in addition to participating in a family foundation dedicated to promoting vitality in rural economies. As part of her interest in the agricultural industry and in new ventures, she has been involved in several start-up projects as an investor, board member, and part of the management team. She has a degree in philosophy from Smith College and an MBA in Entrepreneurship from the University of Arizona.

SPEECH: It seemed for awhile during the nineties that in order to become more profitable, producers simply needed to move up the supply chain, get into "value-added" ag projects. We seriously underestimated the difficulty and challenges we would meet, most centered around basic business principles and deep-rooted cultural issues at the core of rural life. Many times we don't know what we don't know and we don't acknowledge that "just showing up" may not be enough to ensure success—not all experience is transferable. Ownership structure counts, as does financing structure and rigorous due diligence. The competition is neither complacent nor inexperienced. We need to reward managerial expertise and become savvier in accounting and finance. These are several of the lessons learned the hard way in trying to diversify away from commodity production agriculture.

Presented: Friday, February 17, 2006

TAKING ADVANTAGE OF NICHE MARKETS IN ARKANSAS

**Harvey Williams
LLC Member
Williams Farms
Lexa, Arkansas**

BIO: Harvey Williams lives in rural eastern Arkansas, where he was born and reared on a farm. He is married and has four sons. He is a small limited-resource, second generation farmer. All of his farming activities are centered around growing produce after completely converting from traditional row crops several years ago. His markets are with area grocery stores, processors, and brokers.

SPEECH: Harvey Williams is a member of an LLC and has worked with co-ops for many years. He believes that with proper guidance and support niche markets for small limited- resource farmers can and will be beneficial for families and the communities they live in. He will discuss his experiences and perspectives on niche markets in Arkansas.

Presented: Friday, February 17, 2006

SUCCESSFUL JUMP START FOR BEGINNING MINORITY FARMERS

**Juan Marinez, Assistant to the Director
Michigan State University Extension
East Lansing, Michigan**

BIO: Juan Marinez is Assistant to the Director at Michigan State University Extension. He received a BA and an MS from Michigan State University.

In 2005 he received the Michigan Hispanic Educator Award. He has also received other awards including the Michigan State University Team Diversity Award, Center For Latino Farmers Award for leadership and support of Latino Farmers, a National USDA award for outstanding service to farm workers in response to National Disasters, and a USDA award for contribution to the Hispanic National Quick Facts on Hispanic Farmers and Ranchers.

SPEECH: Mr. Marinez will discuss the changing face of agriculture.

3:15 p.m. - 4:45 p.m.

Concurrent Sessions

Globalization: Overview of USDA Homeland Security Efforts – Current and Future Initiatives to Protect the Agriculture and Food Sectors

Arlington Ballroom, Salon VI

Moderator: *Sheryl Maddux, Acting Director, Homeland Security Office, USDA*

Presented: Friday, February 17, 2006

OVERVIEW OF USDA HOMELAND SECURITY EFFORTS – CURRENT AND FUTURE INITIATIVES TO PROTECT THE AGRICULTURE AND FOOD SECTORS

(USDA speakers will address single topic)

SPEECH: The Panel will provide an overview of USDA's Homeland Security efforts since 9/11. The overview will address the creation of the USDA Homeland Security Office, strategic planning, and current efforts in the areas of food defense, livestock and crop security, research and development, and training and outreach.

Larry Granger

**Associate Deputy Administrator for Emergency Management
Animal and Plant Health Inspection Service
USDA**

BIO: Dr. Larry M. Granger currently serves as the Associate Deputy Administrator for Emergency Management (EM) in Veterinary Services (VS) within the Animal and Plant Health Inspection Service (APHIS) of the United States Department of Agriculture (USDA).

His duties in EM include him serving as the National Incident Commander as well as Leader of The National Incident Coordination Group for VS emergencies. Dr. Granger has been in his current capacity with USDA since June of 2003. Before moving to his current position he served as the Tuberculosis Program Coordinator for the State of Michigan Department of Agriculture. Prior to 2000 he worked as a Veterinary Consultant for the MDA Office of Agriculture Development; in addition, he served from 1990 to 1996 as the Pseudorabies Control and Eradication Program Leader. He began his public service career in 1988 as a field Veterinary Medical Officer (VMO) in Southern Ohio with the USDA, APHIS, VS team. Dr. Granger also spent 9 years in large and small animal clinical practices after graduating from Michigan State University in 1979, with his Doctorate of Veterinary Medicine (D.V.M.).

Dr. Granger has five children and lives with his wife Jill and two youngest in Kensington, Maryland.

Osama El-Lissy
Director of Invasive Species and Pest Management
USDA

BIO: Osama El-Lissy is the Director of the Invasive Species and Pest Management Program at the Plant Protection and Quarantine Headquarters in Riverdale, Maryland.

Prior to his current position, Osama has served as the USDA-PPQ Operations Officer in Riverdale responsible for cotton pest programs since January 2000. In this role he has provided technical and operational guidance and coordination for national cotton pest programs in the United States.

His previous experience includes over seventeen years in management of regional and national large scale pest control and eradication programs in cotton and other field crops.

Osama received a Bachelor of Science in Entomology at Cairo University in Egypt and a Master of Public Administration from American University, Washington, DC.

**Ralph A. Otto, Ph.D., Deputy Administrator
Plant and Animal Sciences
Cooperative State Research, Education and Extension Service
USDA**

BIO: Dr. Ralph A. Otto serves as the Deputy Administrator for the Plant and Animal Systems (PAS) unit of the Cooperative State Research, Education, and Extension Service (CSREES). In this capacity, he is responsible for the management of substantial portions of Hatch research and Smith-Lever extension funds. The PAS unit has responsibility for a number of integrated, competitive programs, including food safety and the regional pest management centers. In addition, PAS has oversight responsibility for the Section 1433 Animal Health and Disease program of CSREES, and leads the CSREES effort in homeland security.

Otto has been with USDA since 1980. He served as the Assistant Deputy Administrator for Natural Resources and Rural Development with the Extension Service from 1990 until it became part of CSREES in 1994. In 1995, Otto became the Deputy Administrator of CSREES for Natural Resources and Environment, and remained there until March of 2002 when he moved to his current position.

From 1980 through 1989, Otto worked with USDA's Office of International Cooperation and Development, serving as Program Leader for Asia and the Middle East in the Technical Assistance Division, and then as the Director of the International Training Division. During this period, Otto traveled to more than a dozen countries on short-term assignments. His original interest in international development stems from working as a Peace Corps Volunteer in Malaysia in the early 1970s.

Otto is a native of New Jersey, and a current resident of northern Virginia. He is proud to have three degrees from land grant universities: a B.S. degree from Rutgers, an M.S. from Virginia Tech, and a Ph.D. from Rutgers University, the latter two degrees with emphasis on the quantitative aspects of wildlife biology.

**Carol Maczka, Assistant Administrator
Food Safety and Inspection Service,
Office of Food Defense and Emergency Preparedness
USDA**

BIO: Dr. Maczka is Assistant Administrator for the Office of Food Defense and Emergency Response. In this capacity she directs all efforts and initiatives and provides authoritative advice within the Agency relating to food security and emergency preparedness, especially from acts of bioterrorism and other forms of intentional contamination. She is the Agency's representative and spokesperson on homeland security issues and directs projects such as continuity of operations (COOP) plans. She promotes the establishment and improvement of scientifically sound measures for biosecurity and prevention of food emergencies, and works with USDA, other Federal agencies, foreign, State and local governments to develop and share food security strategies.

Prior to this, she was the Senior Advisor for Risk Assessment at the Food Safety Inspection Service where she provided scientific leadership, direction and guidance on the development, adaptation, and application of risk assessment to address the Agency's public health and food safety goals. Her previous positions at FSIS included Director of the Risk Assessment Division and the Executive Secretary of the National Advisory Committee for Microbiological Criteria in Foods. Prior to joining FSIS, Dr. Maczka served as the Director for the Toxicological and Risk Assessment Program for the National Academies of Science's Board on Environmental Studies and Toxicology. She has more than 20 years of experience in the field of risk assessment and has held positions in government and private industry. She has a Ph.D. in Pharmacology/Toxicology from George Washington University.

Joseph Spence
Deputy Administrator
National Program Staff, Nutrition
Food Safety and Quality, Agricultural Research Service
USDA

BIO: Joseph T. Spence, Ph.D., joined the Agricultural Research Service (ARS), USDA, in 1993 when he was appointed Director of the Beltsville Human Nutrition Research Center, Beltsville, Maryland. This is the oldest, and under his direction, has become the largest of the ARS-funded human nutrition research center. The center is actively conducting research on nutrition and immunology, phytonutrients, food composition, nutrition monitoring, and the role of individual nutrients in maintaining health. He received his doctoral degree in nutritional biochemistry from Cornell University in 1977 and was an NIH Postdoctoral Fellow at the McArdle Laboratory for Cancer Research of the University of Wisconsin, Madison. He was a Health Scientist Administrator at the National Heart Lung and Blood Institute of NIH. He was Professor of Biochemistry and Associate Dean for Research and Graduate Studies at the School of Medicine of the State University of New York at Buffalo prior to his arrival at Beltsville. His research interest is in the regulation of gene expression in liver in response to dietary and hormonal influences. In August, 2003, he was appointed Deputy Administrator for Nutrition, Food Safety and Quality where he oversees the ARS national programs related to food and nutrition as well as value added products and product quality.

3:15 p.m. - 4:45 p.m.
Concurrent Sessions

RISK: THE FIVE YEAR CHECK-UP – AN EVALUATION OF THE AGRICULTURAL RISK PROTECTION ACT

Arlington Ballroom, Salon V

Moderator: *Beverly Paul, American Soybean Association*

Presented: Friday, February 17, 2006

FIVE-YEAR REVIEW

Joe Glauber
Deputy Chief Economist
USDA

BIO: Joseph W. Glauber has served as Deputy Chief Economist at the U.S. Department of Agriculture since 1992. He served as economic adviser at the so-called Blair House agreements leading to the completion of the Uruguay Round negotiations. He is the author of numerous studies on crop insurance, disaster policy and U.S. farm policy. Prior to his current position, he was senior staff economist for agriculture, natural resources and trade at the President's Council of Economic Advisers from 1991 to 1992 and from 1984 to 1991, served as economist at the Economic Research Service, USDA. Glauber received his Ph.D. in agricultural economics from the University of Wisconsin in 1984 and holds an AB in anthropology from the University of Chicago.

SPEECH: The Agricultural Risk Protection Act of 2000 significantly increased the portion of crop insurance premiums paid by the federal government, particularly at higher coverage levels for crop yield and crop revenue policies. In addition, the Act included provisions that allowed an adjustment of producer's yields so that their insurance coverage would be less adversely affected in the event of multiple year losses. The Act also extended insurance coverage to livestock producers on a pilot basis and provided authority for private companies who developed new insurance products to be reimbursed for their research and development costs. These provisions were largely aimed at addressing a long standing goal of the program: to increase participation so as to obviate the need for ad hoc disaster assistance in the event of catastrophic crop and livestock losses.

This presentation examines the experience since passage of the Act and in particular, its effect on participation in the crop insurance program.

NEW HORIZONS FOR REVENUE INSURANCE

Russell Redding
Deputy Executive Secretary
Pennsylvania Department of Agriculture
Harrisburg, Pennsylvania

BIO: Russell Redding was appointed in April 2003 as Executive Deputy Secretary of the Pennsylvania Department of Agriculture by Governor Edward Rendell. He is responsible for oversight and the administrative operations within the Department.

Mr. Redding is a graduate of The Pennsylvania State University with a Bachelor and Masters Degree in Agriculture Education and the Agribusiness Executive Program.

Mr. Redding served as Deputy Secretary for Agriculture for the Ridge Administration from 1995-2003. In this position he was responsible for Marketing, Promotions, Farmland Preservation, Food Programs, Agricultural Statistics, and federal agricultural policy. He also served as the Agriculture Policy Advisor to a United States Senator from 1991-1994. Mr. Redding currently serves on the USDA Emerging Markets Advisory Committee.

He has served as Vice-Chairman of the Adams County Farmland Preservation Board, served on the Adams County Extension Board, the Pennsylvania Council of Cooperatives, the United Church Board for World Ministries, The Friends of the National Parks at Gettysburg, and the Trinity United Church of Christ Consistory.

Mr. Redding has worked extensively with the Pennsylvania farm and agribusiness community. His agriculture experience has been gained first-hand by operating a dairy farm with his wife, Nina. They have two sons, Garrison and Elliot, and reside in Adams County.

3:15 p.m. - 4:45 p.m.
Concurrent Sessions

SCIENCE: NOVEL APPLICATIONS OF AGRICULTURAL BIOTECHNOLOGY – STATE OF THE SCIENCE AND SOCIETAL ACCEPTANCE TO TRANSGENIC ANIMALS AND REGULATORY ISSUES

Grand Ballroom, Salon A

Moderator: *Steven Kappes, Deputy Administrator, Animal Production and Protection, USDA*

Presented: Friday, February 17, 2006

GENETIC ENGINEERING COMBATS MASTITIS

Robert J. Wall
Research Physiologist
Agricultural Research Service
USDA

BIO: Following a career as an electrical engineer, first working for Lockheed Missiles and Space Company and then for NASA as primary test conductor of the Altitude Simulation System for testing the Lunar Excursion Module (LEM) decent stage engine he received a Ph.D. in physiology from Cornell University and joined the United States Department of Agriculture's Agricultural Research Service in 1981. For the past 25 years Dr. Wall has focused his attention on developing methods for introducing new genes into animals as a tool for scientific discovery and as a means of improving livestock production efficiency and food quality and safety. Dr. Wall discovered a method to visualize pronuclei in living cattle or swine embryos. As a direct result of this discovery, the ARS-University of Penn. team was able to produce the first transgenic farm animals. Dr. Wall was the first to demonstrate the feasibility of producing pharmaceuticals in the milk of sows through genetic engineering; first to develop a means of detecting genes in embryos. The same basic approach is now being applied to human embryos to detect genetic diseases; first to demonstrate that including matrix attachment region (MARs) sequences in gene constructs effectively doubled the efficiency of producing functional transgenic animals; first to demonstrate the feasibility of using the urinary bladder as a bioreactor organ. Also, Dr. Wall, in collaboration with NIH colleagues, has demonstrated, for the first time, that a synthetic genetic switch can be used to turn off an oncogene, thus reversing the hyperplasia caused by a virally induced cancer. Most recently, Dr. Wall's lab produced the first genetically engineered cattle that are resistant to infection by *Staphylococcus aureus*, the most intractable cause of mastitis, a disease that exists on every dairy farm.

SPEECH: Mastitis is a disease of the mammary gland caused by both contagious and environmental pathogens that find their way onto every dairy farm in the country. These mammary gland infections cost the US dairy industry approximately \$2 billion dollars

annually and have a similar impact in Europe. In the absence of effective treatments or breeding strategies to enhance mastitis resistance, we have genetically engineered dairy cows to produce lysostaphin, a highly specific antimicrobial peptide, in their milk. *Staphylococcus aureus*, the most tenacious of the mastitis causing pathogens, is exquisitely sensitive to lysostaphin. The transgenic cattle resist *S. aureus* mammary gland infections, and their milk kills the bacteria, in a dose dependent manner. This first step in protecting cattle against mastitis will be followed by introduction of other genes to deal with potential resistance issues and other mastitis causing organisms. Care will be taken to avoid altering milk's nutritional and manufacturing properties. Multi-cistronic constructs may be required to achieve our goals as will other strategies possibly involving RNAi and gene targeting technology. This work demonstrates the possibility of using transgenic technology to address disease problems in agriculturally important species.

Presented: Friday, February 17, 2006

CURRENT APPROACH TO REGULATION OF ANIMAL BIOTECHNOLOGY PRODUCTS AT FDA

John C. Matheson III
Senior Regulatory Review Scientist, Center for Veterinary Medicine
U.S. Food and Drug Administration
Rockville, Maryland

BIO: John Matheson is a Senior Regulatory Review Scientist with specialization in toxicology and the environmental sciences. In the Center for Veterinary Medicine (CVM) Office of Surveillance and Compliance, he has focused on animal biotechnology products and aquaculture, but has also worked on teams developing regulations to prevent bovine spongiform encephalopathy (BSE) in the U.S., and detection and reduction of dioxin contamination of the feed and food supply. He was the FDA project officer for the recent National Academy of Science (NAS) contract on Animal Biotechnology: Science-Based Concerns. He is also the FDA project officer for a second animal biotechnology contract with NAS on risk assessment of transgenic fish. He is co-chair of an international task group under the Organization for Economic Community Development that is writing a consensus biology document on Atlantic salmon as a tool to aid countries in assessing the potential environmental impacts of the use of genetically engineered Atlantic salmon in aquaculture. He co-leads the Center effort to determine appropriate science-based regulation of animal clones and genetically engineered animals. In his 30+ year career at FDA, he has worked both on the environmental and public health aspects of pre-market review of animal health products and post-market surveillance and compliance issues with products for animal and animal-derived foods for humans. He holds a Master of Science Degree in Public Health and a Bachelor of Science Degree in Biology, both obtained from the University of North Carolina, Chapel Hill, where he studied in the Department of Environmental Sciences and Engineering, and the Department of Biology. Mr. Matheson was raised on a 4th generation family farm in rural North Carolina.

SPEECH: This talk will describe the various controls currently in place that apply to research with and product development with genetically engineered food-producing and companion animals. Even though the Federal government is still considering various alternative approaches to developing a coordinated framework for the regulation of genetically engineered animals, research and product development is still expected to go forward. FDA must make decisions on the regulated status of genetically engineered aquarium fish, genetically engineered companion animals, and investigations with genetically engineered animals intended to be used as food. The CVM's role begins when a project moves from basic research to product development. CVM works with producers of genetically engineered animals to ensure appropriate animal disposition and that producers efficiently develop data to support safety and effectiveness without being unduly burdensome.

ANIMAL BIOTECHNOLOGY: PUBLIC POLICY AND PUBLIC PERCEPTION

Michael Fernandez
Executive Director of the Pew Initiative on Food and Biotechnology
Washington, DC

BIO: Michael Fernandez, Ph.D. is the Executive Director of the Pew Initiative on Food and Biotechnology. Dr. Fernandez first joined the Initiative when it launched in early 2001, serving as the Initiative's Director of Science. In that role, he oversaw the Initiative's research into scientific questions generated by agricultural biotechnology, including the reports, workshops and conferences prepared by Initiative staff.

Previously, Dr. Fernandez served as the Associate Administrator for the Agricultural Marketing Service at the United States Department of Agriculture.

From 1995 to 1999, Dr. Fernandez served as the Special Assistant to the Assistant Administrator at EPA's Office of Prevention, Pesticides and Toxic Substances. In this capacity, he addressed biotechnology, pesticide and food safety issues. Before that, Dr. Fernandez served as agricultural science and technology advisor to the Senate Committee on Agriculture, Nutrition and Forestry.

Dr. Fernandez received a Ph.D. in Biochemistry and Molecular Biology from the University of Chicago, and received his undergraduate degree in biology from Princeton University.

3:15 p.m. - 4:45 p.m.
Concurrent Sessions

MARKETS: CONTRACT PROCUREMENT IN THE LIVESTOCK AND POULTRY INDUSTRIES

Grand Ballroom, Salons D, E

Moderator: *Amanda Taylor, Confidential Assistance to Grain Inspection, Packers and Stockyards Administration Administrator, USDA*

Presented: Friday, February 17, 2006

ALTERNATIVE MARKETING ARRANGEMENTS IN THE LIVESTOCK AND MEAT INDUSTRIES

Mary K. Muth

Program Director and Senior Research Economist

RTI International

Research Triangle Park, North Carolina

BIO: Mary K. Muth is Director of RTI International's Food and Agricultural Policy Research Program and manages projects to provide support for and analyze the economic impacts of policies and regulations affecting the food and agricultural industries. She specializes in applications of industrial organization, microeconomics, applied welfare analysis, and econometrics in evaluating policy and providing information for policy development. She is currently managing the Livestock and Meat Marketing Study for the Grain Inspection, Packers and Stockyards Administration; analyzing the factors affecting food safety performance in meat and poultry plants, and developing operational models for estimating the economic effects of regulations on poultry and pork plants. She also recently conducted an economic impact analysis of the BSE regulations on cattle slaughter and beef processing plants. Dr. Muth received a PhD in economics from North Carolina State University, an MS in agricultural economics from Cornell University, and a BS in agricultural and managerial economics from the University of California, Davis. Dr. Muth is also an adjunct assistant professor in the Department of Agricultural and Resource Economics at North Carolina State University. She has presented her research at the annual meetings of the Allied Social Science Associations, the American Agricultural Economics Association, and the Food Distribution Research Society. She has published papers in the *Journal of Law and Economics*, the *American Journal of Agricultural Economics*, the *Journal of Agricultural and Resource Economics*, the *Agricultural and Resource Economics Review*, the *Drug Information Journal*, the *Journal of Agricultural and Food Industrial Organization*, *AgBioForum*, and *Choices*.

SPEECH: In 2003, Congress allocated funds to conduct a broad study of the effects of alternative marketing arrangements in the livestock and meat industries (specifically, fed cattle and beef, hogs and pork, and lambs and lamb meat). Alternative marketing arrangements refer to methods, other than traditional cash or spot market transactions, by which livestock and meat are transferred through successive stages of production and

marketing. RTI International and teams of academic researchers are conducting the analyses for the study. The results of the study will be used by the Grain Inspection, Packers and Stockyards Administration (GIPSA) to determine what policy changes are needed to address concerns about the effects of changes in marketing practices in the livestock and meat industries. In the first stage of the study, the study teams developed an interim report, released in August 2005, that included profiles of the livestock and red meat industries, reviews of the literature on use of alternative marketing arrangements, and results of in-person and telephone interviews with industry participants from farm to retail regarding the reasons why they use different types of marketing arrangements. In the next stage of the study, RTI is administering surveys of livestock producers and feeders, meat packers, meat processors, and companies that buy meat (retailers, food service, exporters, and wholesalers). RTI is also collecting and analyzing livestock and meat purchase and sales data. These data will be used to analyze price differences associated with alternative marketing arrangements, measure and compare the costs and benefits of alternative marketing arrangements, and analyze the implications of alternative marketing arrangements throughout the livestock and meat marketing system. The analyses of the costs and benefits will focus on efficiencies, economies or diseconomies of scale, quality differences, and risk shifting associated with alternative marketing arrangements.

NEW DEVELOPMENTS IN CONTRACT RELATIONSHIPS IN THE SWINE INDUSTRY

Dennis DiPietre
Consultant for Swine Industry
Knowledge Venture, LLC
Columbia, Missouri

BIO: Dennis DiPietre received the BSA and MS degrees from the University of Arkansas and the Ph.D. with Research Excellence from Iowa State University in 1986 where he remained on the faculty through 1990. From 1991-1999 he was Associate Professor and Team Leader of the Commercial Agriculture Swine-Focus Team (a multi-disciplinary swine consultation group) at the University of Missouri-Columbia. In addition, he was a member of the Value-added Advisory Board for Agriculture and consulted extensively throughout the pork production and marketing chain.

Dr. DiPietre left the University of Missouri and serves in consultation relationships from time to time with major production, packing, genetics and pharmaceutical companies in the swine industry as well as National Pork Board and NPPC. Dr. DiPietre has consulted abroad in Eastern and Western Europe, Canada, and Mexico. He received the 1997 Missouri Governor's Award for Quality and Productivity for his contributions to a team effort related to price discovery for pork producers. Dr. DiPietre is a Lemman Fellow of the American Association of Swine Veterinarians (AASV) and serves on the Food Industry Advisory Board for Vance.

SPEECH: Contractual relationships among producers in the U.S. pork chain are changing as the industry continues to coordinate to deliver value. Dramatically rising and unstable costs, constant attack by professional environmentalists and activists, rising animal welfare concerns, homeland security and food safety issues, etc. are beginning to change the nature and substance of the traditional contractual relationships between producers and packers.

A LENDER'S PERSPECTIVE ON CONTRACT POULTRY PRODUCTION

Kenneth M. Bounds

**Vice President, Chief Development Officer, MidAtlantic Farm Credit, ACA
Denton, Maryland**

BIO: Mr. Bounds is a 1977 graduate of the University of Maryland, College Park with a degree in Agronomy-Soils. He has worked in the Farm Credit System for over 28 years and is currently Vice President/Government Affairs Officer for MidAtlantic Farm Credit, ACA. Kenny is Past President and current member of the Board of Directors of Delmarva Poultry Industry, Inc. (DPI). This trade group represents 4,000 members with an interest in the poultry industry. During Kenny's tenure as DPI President, Mike Wallace interviewed him on *60 Minutes* in a story entitled "*Big Chicken.*" In 2004, DPI awarded Kenny the J. Frank Gordy, Sr. *Delmarva Distinguished Citizen Award* for being a "forceful voice for Delmarva agriculture and an omnipresent agricultural ambassador."

MidAtlantic Farm Credit recognized Kenny's achievements by awarding him the 2002 President's Award and earlier the Distinguished Service Award. In January 2006, he received the Phelps- Martin award from the Farm Credit Council. This award is presented to an individual who exemplifies the community service ideals of Farm Credit and is chosen by application from the entire Farm Credit system of associations and banks across the country. Kenny is President of the LEAD Maryland Board of Directors. LEAD is a nonprofit organization dedicated to identifying and developing leadership for agricultural and rural communities. Kenny is involved in numerous other organizations and initiatives looking at agricultural issues and is active in developing new programs and legislation to keep agriculture viable.

SPEECH: Contract poultry production provides a platform from which the agricultural economy on the Delmarva Peninsula (eastern Maryland, Delaware, and eastern Virginia) thrives. Adding stability to cash flow and diversity of income to many farm operations, the vertically integrated and contract system of poultry production is integral to the strength and vitality of the economy of the region. Poultry loans are among the best performing loans in the portfolio of MidAtlantic Farm Credit and most agricultural lenders. Few commodities can be leveraged as highly as poultry and still provide a stable income source. Because of the surety of payment, lenders are willing to lend more against poultry assets, making more credit available to all producers and especially young and beginning farmers.

While not perfect, the contract system of poultry production has allowed the industry to expand and abate risk sufficiently for growers to continue to invest their capital in the new innovations and improvements necessary to remain competitive. Recent and significant increases in housing and equipments costs have tightened cash flow margins but the industry will find new ways for everyone to continue to benefit financially and keep the poultry industry viable.

WHY SO MANY CATTLE PRODUCERS ARE WILLING TO FORWARD CONTRACT

Jim Gill
Market Director
Texas Cattle Feeders Association
Amarillo, Texas

BIO: Based in Amarillo Texas, Jim Gill has been Market Director for the Texas Cattle Feeders Association for the past 25 years. Prior to assuming the duties of Market Director Mr. Gill worked as a Market Analysts and Membership Director for the association. The Texas Cattle Feeders Association serves the three state areas of Texas, New Mexico and Oklahoma. Their membership includes about 200 feedyards in the three state area that in a typically year will feed approximately 25% to 30% of the fed cattle in the U.S. The Market department's main responsible is to keep feedyard managers informed on a up-to-the minute basis on what is happening in the fed cattle market. Mr. Gill graduated from Texas Tech University with a Agricultural Economics degree and for the first five years after graduation, work for the Statistical Reporting Service (now NASS) in the USDA.

SPEECH: Often there seems to be a huge amount of distrust between cattle feeders who are willing to forward contract cattle to packers and those who will not use that method to merchandise their cattle. There seems to be this illusion that feeders who sell on a "hidden market", (forward contracted sales) are getting a much higher price that producers who are selling on a weekly cash market. But that doesn't make any sense. In the three state areas on Texas, Oklahoma and New Mexico, forward contracted sales account for about 45% of the sales each week. Would packers continue to pay dollars higher for 45% of his supplies on a weekly basis? It is very doubtful that packers would lower the price on the other 55% enough to pay a sharply higher premium for the 45% contracted cattle.

So, why forward contract cattle? There are benefits for both the packer and feeder. I think there are two main benefits for the packer. First, he insures a continuous and steady supply of cattle. This sharply increases the efficiencies of operating the huge plants they have today. The second benefit is that often the cattle are bought on a grid basis. With the packer's premium and discount on a grid sale a packer comes closer to paying the true value for the animal. Feedyards basically get the same benefits. There are more efficiency in operating their yard (up to 25%to 30% according to some reports). And a feedyard will get the true value of what he sales rather than selling on averages.

Notes:

The USDA Outlook Forum is organized by the Office of the Chief Economist and 13 USDA agencies, including:

Agricultural Marketing Service
Animal Plant Health and Inspection Service
Agricultural Research Service
Cooperative State Research, Education and Extension Service
Economic Research Service
Farm Service Agency
Foreign Agricultural Service
Food Safety and Inspection Service
Grain Inspection, Packers and Stockyards Administration
National Agricultural Statistics Service
Natural Resources Conservation Service
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