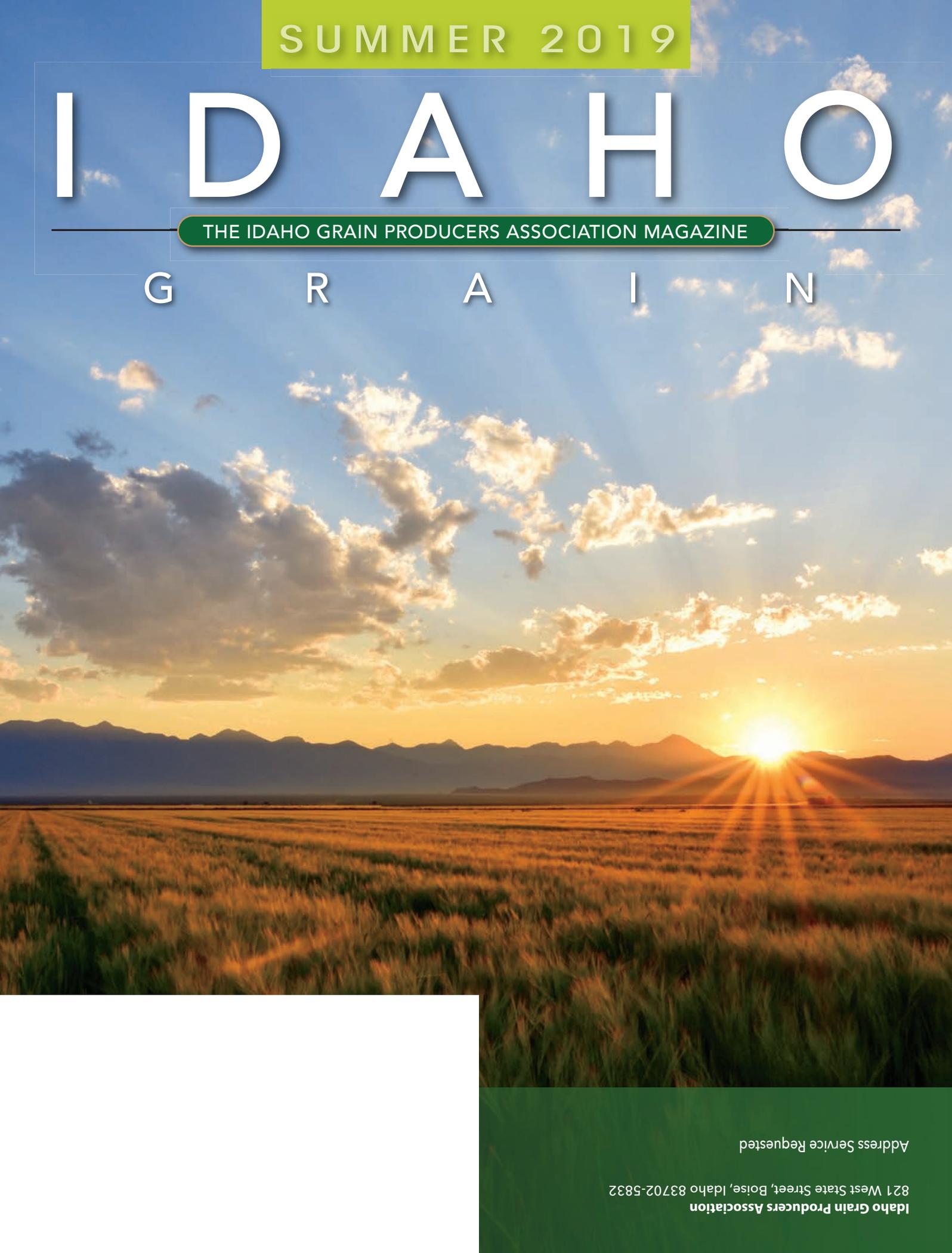


SUMMER 2019

IDAHO

THE IDAHO GRAIN PRODUCERS ASSOCIATION MAGAZINE

GRAIN



Address Service Requested

Idaho Grain Producers Association
821 West State Street, Boise, Idaho 83702-5832



VIEWS



**BY MATT MOSMAN
PRESIDENT**

Well for me, and I'm sure most of you all, it's been a hell of a spring! We had a late start and I haven't been out of the airplane except to eat, sleep and dodge another rainstorm.

Finally, it seems Mother Nature is releasing her grip and the weather is warming up.

An issue I know has been on everyone's minds of late is the dam issue (pun intended.) With all the water we saw this spring, those dams played a vital role and prevented a lot of flooding that could have happened downstream. And to growers, particularly in North Idaho, those dams are our livelihood.

The Columbia Snake River System is a critical part of Idaho's grain industry. The river system is the nation's single largest wheat export gateway, transporting about half of Idaho's wheat crop, and over 50 percent of all U.S. wheat to overseas markets. The Snake River alone moves nearly 10 percent of our nation's wheat exports in most years.

For Idaho's wheat industry, it is critical that we keep our river transportation system in place. Having the ability to import and export commodities via the river system is vital. In fact, as environmental issues become increasingly more critical, the river transportation system will play a more important role in reducing the country's carbon footprint.

Barging is one of the most efficient, most environmentally friendly modes of transportation available. In 2017, more than 3.5 million tons of cargo were barged on the Snake River – nearly all this cargo was U.S. products for export. It would take over 35,140 rail cars to carry this cargo, or over 135,000 semi-trucks. In comparison, just 244 four-barge tows were needed to move this cargo.

This dam issue affects ALL Idaho wheat farmers, not just those in my neck of the woods. In Eastern and Southern Idaho, the price of wheat is based on Portland prices – and more importantly, the wheat in North Idaho needs to be barged to Portland so it doesn't displace the wheat grown in Southern and Eastern Idaho used by domestic customers. Changes to the river system would negatively impact farming communities throughout the state.

We applaud the commitment from elected officials that changes to the river system would occur only if affected parties are made whole and nobody gets left behind. Since the Columbia Snake River System is a major driver of the entire PNW economy, this standard must not get lost as the discussion moves forward. We look forward to working with our elected officials on this critical issue. ■

CONTENTS

Views: Matt Mosman, IGPA President	2
Editor's Note: Stacey Satterlee	3
Legislative Update.	4
Grower Profile: Jonathan Rosenau	8
How Vital is Agriculture to Idaho?.....	9
Kids on the Farm.....	11
Legislator Profile: Senator Jim Woodward	12
State Program Partners with Growers to Burn Crop Residue, Protect Air Quality	14
Proposal would amend Idaho's Seed Indemnity Fund statute.....	16
Glyphosate in the environment and our food: What does it mean?.....	18
What if ... dams on the Snake River were removed.....	20
Idaho Wheat Commission Celebrates 60 Years.....	22
Beerccation Anyone? Beer Tourism is a Big Deal and Growing	26
Idaho Nutrition and Foodservice Professionals learn about the Health Benefits of Barley at April Meetings in Boise.....	29
Bonnors Ferry Barley Grower and former Idaho Barley Commissioner Tim Dillin Presented 2019 Idaho Governor's Award for Marketing Innovation at February 2019 Idaho Ag Summit in Boise.....	30



*Cover Photo By:
Candace Cope, Monteview, ID*

Published quarterly by
Idaho Grain Producers Association
821 W. State St. • Boise, Idaho 83702-5832
(208) 345-0706

Stacey Katseanes Satterlee Editor-in-Chief
Kellie Kluksdal Assistant Editor

Every effort is made to assure accuracy in articles published in Idaho Grain. However, the publishers assume no responsibility for losses sustained, allegedly resulting from following recommendations in this magazine. Send inquiries about articles or editorial content to the Idaho Grain Producers Association. The publisher will attempt to handle unsolicited articles with care, but the magazine assumes no responsibility for them. Materials will be returned only if accompanied by a self-addressed envelope with return postage.

Address inquiries regarding editorial policy and writer guidelines to the editor.

For subscription corrections, please call Idaho Grain Producers Association at (208) 345-0706

To subscribe or unsubscribe to Idaho Grain magazine at any time, visit the IGPA website at www.idahograin.org/idaho-grain-magazine, click on the appropriate button, and fill out the required information.

Printing Production Coordinated by
Northern Directory Publishing
25 Division Road, Great Falls, Mt. 59404

**For Advertising information call:
Leah Anderson Advertising Sales
Representative • Phone: (406) 475-1856**

Printed in the USA



IDAHO GRAIN PRODUCERS ASSOCIATION

821 West State Street
Boise, Idaho 83702-5832
(208) 345-0706

e-mail: ssatterlee@idahograin.org
e-mail: cprescott@idahograin.org
<http://www.idahograin.org>

President

Matt Mosman • Nezperce

Vice President

Jamie Kress • Rockland

Secretary/Treasurer

Lucas Spratling • Declo

Executive Member

Ty Iverson • Bonners Ferry

Past President

Dwight Little • Newdale

Executive Director

Stacey Katseanes Satterlee

Association Manager

Christie Prescott

Communications Manager

Kellie Klukdsal

Government Affairs Director

Rich Garber

IDAHO WHEAT COMMISSION

821 West State Street
Boise, Idaho 83702-5832
(208) 334-2353

Chairman

Clark Hamilton • Ririe

Vice Chairman

Bill Flory • Winchester

Commissioner

Joe Anderson • Genesee

Commissioner

Jerry Brown • Soda Springs

Commissioner

Ned Moon • Heyburn

Executive Director

Blaine Jacobson

Director of Research

Collaboration

Cathy M. Wilson, PhD

Director of Education

and Communications

Britany Hurst

IDAHO BARLEY COMMISSION

821 West State Street
Boise, Idaho 83702-5832
(208) 334-2090

Chairman

Scott Brown • Soda Springs

Vice Chairman

Mike Wilkins • Rupert

District I Commissioner

Wes Hubbard • Bonners Ferry

Industry Representative

Tim Pella • Idaho Falls

Administrator

Laura Wilder • Boise

Administrative Assistant

Wren Hernandez • Boise

EDITOR'S NOTE



BY STACEY KATSEANES SATTERLEE
EXECUTIVE DIRECTOR

We are lucky to have so many great leaders in the grain industry in Idaho. In particular, the industry is served by five wheat commissioners and three barley commissioners who give a lot of their time promoting Idaho's wheat and barley. Wheat commissioners serve five-year terms and barley commissioners serve three-year terms and both groups traditionally allow commissioners to serve two terms. Commissioners have a big job – they decide how wheat and barley assessment dollars should be spent in research, marketing, promotion, and education projects. They also represent the state by hosting trade teams here at home and traveling abroad to represent Idaho grain around the world.

The process of getting a Commissioner appointed takes months and starts with IGPA. We publicize the commission openings in all our communication pieces. Generally, there is over a month-long period during which IGPA collects names of interested individuals. IGPA then submits those names – at least three – to the Governor, who then screens the nominees, performs background checks, and appoints one of them to serve on the Commission.

This year, there is a seat coming open on the Wheat Commission in District 5 which represents Power, Bannock, Oneida, Franklin, Bear Lake, and Caribou Counties. Jerry Brown from Soda Springs has served as the District 5 Commissioner for the past 10 years and has been a tremendous asset to Idaho's wheat industry. We are sad to see him go, but so grateful for all the time and expertise he has given as a Commissioner.

On the Barley Commission, the seat in District 1 is open. Wes Hubbard, who has served as commissioner for the past three years, will submit his name for consideration for a second term. Wes currently represents the commission as the IBC delegate to the U.S. Grains Council and has represented the commission in hosting trade teams and on food barley marketing initiatives, along with other commission business. For the barley commission, District 1 includes the following counties: Boundary, Bonner, Kootenai, Benewah, Shoshone, Clearwater, New Perce, Lewis, Idaho Adams, Valley and Washington.

We need good leaders in Idaho's grain industry – one of the ways we identify and develop leaders is by sponsoring growers to participate in Leadership Idaho Agriculture. You can learn more about the program at www.leadershipidahoag.org – the application to participate in Class 40 is August 1, 2019. Another opportunity is IGPA's mentorship program, where we take growers to meetings with our national affiliates in Washington, DC or to Commodity Classic. If you're interested in either of these programs, let me know – we'd love to have you step out as a leader among Idaho's grain growers. ■



BY RICH GARBER

**DIRECTOR OF GOVERNMENT AFFAIRS,
IDAHO GRAIN PRODUCERS ASSOCIATION**

A “mixed bag” would probably best describe the third longest session in Idaho’s legislative history. After 95 days of intense committee work, dominated by hours and hours of public testimony and many lengthy and passionate floor debates, the gavels finally dropped on the 2019 session. As is always the case, there were both positive and negative outcomes, often determined by one’s political viewpoint. However, this session seemed more contentious, frustrating and in many cases disappointing than most. It was also one of IGPA’s busiest sessions in the last several years.

Before we reflect on some of the specific issues and votes from the session, it is always interesting to compare session histories. The longest session in Idaho history was in 2003 and lasted 118 days. Second longest was in 2009 and lasted 117 days. This year’s 95 days matched the 1983 session for the 3rd longest. The shortest session in history was in 2002 and lasted 68 days. The last ten-year average is 85 days.

522 bills were introduced this session and after 2 vetoes, first-term Governor Brad Little has signed 320 of them into law. The ten-year average for bills signed is 351. In addition, there were 67 combined Concurrent Resolutions, Joint Memorials, and Joint Resolutions passed.

There were several “big ticket” items up for consideration this session but what kept legislators in town so long were a couple of very complicated and controversial bills, Medicaid expansion sideboards and changes to the requirements for voter initiatives. Interestingly, hemp legalization also ended up being one of the more contentious issues still at play on the last day of the session.

Medicaid Expansion: Last November, by a 60.6 percent margin, Idaho voters enacted Medicaid expansion via a ballot initiative known as Proposition 2. The initiative merely required the Legislature to appropriate the necessary funds to implement it. In his budget and state of the state address, the governor outlined what he considered a painless way to do it. The Senate overwhelmingly passed the Governor’s funding

recommendation, but when it reached the House many members battled heatedly for sideboards to be attached. Sideboards included work requirements, expiration dates, a family planning clause and more. After many, many hours of public testimony, almost all in opposition to the proposed sideboards, the Medicaid expansion bill was agreed on by both bodies and, after expressing strong reservations about the work and training reporting requirements, Governor Little signed the bill. In his transmittal letter he urged lawmakers to make changes next year. IGPA took no position on Medicaid expansion.

Initiatives: While the Medicaid expansion debate was intense it was nothing compared to the battle over a proposal, SB 1159, to make it much harder to qualify initiatives or referendums for the Idaho ballot in the future. The bill would have made Idaho’s process the strictest among the 26 states that allow initiatives. Idaho has had only 15 initiatives and 4 referendums pass since 1912 when the right to voter initiatives and referendums was placed in the Idaho Constitution.

Senator C. Scott Grow’s bill, SB 1159, proposed upping the requirements from 6% of registered voters to 10% and from 18 of Idaho’s 35 legislative districts to 32 of 35 districts. It would also cut the time allowed to gather signatures by two-thirds.

After hours of public testimony and overwhelming public outcry, lawmakers introduced a new follow-up bill, HB 296, to soften the restrictions, setting the bar at 24 legislative districts and cutting the time in half rather than by two-thirds. None of this was enough to convince the Governor and he vetoed both bills.

In a last ditch bid to keep the initiative issue in play for the session, the House broke SB 1159 into four separate bills but none of them made it to a hearing.

Hemp: After getting an early and seemingly favorable start in the House Agricultural Affairs committee and a near unanimous vote on the House floor, HB 122, the Hemp Research and Development Act, appeared to finally have some momentum that would bring Idaho in



line with our neighbors and in line with the legalization of hemp in the 2018 Farm Bill. Unfortunately, the Senate had other ideas. The Senate referred the bill to the State Affairs Committee rather than the Agricultural Affairs Committee. In an effort to address law enforcement concerns the State Affairs Committee sent the bill to the amending order where it was rewritten and became HB 122a. The Senate passed the bill, but the amendments seemed to take all the steam out of the House and it eventually died due to a lack of action.

In an effort to keep the issue alive and on target for a 2020 planting date the House introduced HB 300. HB 300 primarily addressed the issue of interstate commerce and the transportation of hemp through the state. It passed the House but again the Senate chose to amend the bill. After passing the Senate with amendments it was sent back to the House for possible concurrence. The House shelved that bill also.

So, hemp still remains illegal to grow, possess or transport if the product contains any amount of THC. Supporters still seem determined that they will have the necessary laws in place so that a 2020 spring planting in Idaho will be possible. IGPA supported H122a.

Surplus Eliminator: Disappointing to IGPA was the failure of the legislature to do much of significance for our roads and bridges and our basic transportation infrastructure. Early in the session there were discussions about continuing the Surplus Eliminator, which has been a significant source of funds directed toward state and local highway districts. SB 1053 would have simply extended the surplus eliminator for another 5 years and a second bill, SB 1126 would have extended the surplus eliminator for another five years but with a \$100 million cap on the distribution. SB 1126 passed the Senate 35-0 and sent it to the House.

The House then proceeded to amend the bill to create a new Economic Reserve and Investment Fund (ERIF). The ERIF would have been funded from the remaining money in the economic recovery and reserve fund, money from the budget stabilization fund and general fund excess dollars.

A primary purpose of ERIF was to provide funding for the Idaho Transportation Department’s Strategic Initiatives Program. The Strategic Initiatives Program funds transportation projects that are proposed by the department’s six districts and local units of government. Under the bill, distributions from the fund would be similar to the 60/40 split already in place – 60% to the state and 40% to local units of government.

We supported the amended bill and felt funding the new ERIF was probably a better long-term strategy for funding critical infrastructure programs. We were disappointed when at the end of the session, due to shortfalls in revenues, the bill was sent back to committee.

Following is a summary of other bills IGPA either lobbied on or tracked during the session.

SB 1125 – Electronic Warehouse Filing: Signed into law this bill provides the option for warehouses to file their receipts electronically rather than on an ISDA required form. We helped draft and supported this bill at the request of a couple of warehouses.

HB 164 – Tax Commission Written Notice: This new law requires the State Tax Commission provide written notice to county assessors and commissioners by April 1 of each year if it has reason to believe a county has improperly assessed a category. IGPA supported.

HB 202a – Administrative Procedures Act: This IGPA supported bill that would have required certain actions of the State Tax Commission and the State board of Equalization may be governed by the Administrative Procedures Act. It was amended and then died in the Revenue and Taxation Committee.

HB 80 – Depredation Payments: IGPA supported this law that will expand the opportunity to file a depredation claim on damaged irrigation equipment and prepared seed beds.

SB 1151 – Depredation Payment Cap: Signed by the Governor this law puts a per-claim cap of 10% of the big game depredation fund appropriation for the fiscal year. With some reluctance IGPA supported this bill knowing that there will be legitimate claims that will exceed the cap. However, maintaining the integrity of the depredation account seemed a greater concern.

SB 1201 – Highway Patrol Funds: While overall, we were disappointed in the lack of any significant progress on infrastructure funding, SB 1201, signed into law, phases out the distribution of funds from the Highway Distribution Account to the Law Enforcement Account, and reallocates those funds to local units of government and the State Highway Account for Transportation. Since we were assured that this reallocation of funds from the Idaho State Police will be replaced from other sources IGPA supported SB 1201.

HB 87 – Equipment Exemption: Signed into law and retroactive to January 2019, HB 87 clarifies that

Continued on next page



LEGISLATIVE UPDATE

Continued from previous page

all agricultural operations be assessed similarly for farm equipment and machinery. It further clarifies the definition of harvest to include all activities necessary for a raw agricultural commodity to be put into the most basic saleable form. IGPA supported the two-year process to get this legislation passed.

HB 25 – Farmland Annexation: This IGPA supported law requires that a city must have written landowner permission before they can annex any private property greater than five acres into the city.

SB 1224 – Field Burning: For several years IGPA has been actively engaged in negotiations pertaining to both law and rules regarding field burning in Idaho. Now law, SB 1224 changes the timing of when burning fees are paid to an annual invoice format for actual acres burned rather than a fee due when estimated acres are registered.

SB 1145 – Research and Extension Appropriation: Idaho’s grain industry is heavily dependent on our land grant university, University of Idaho, for a wide array of research that keeps our growers productive and competitive in today’s global markets. Each year IGPA actively supports the Agricultural Research and Extension appropriation request. Governor Little has signed SB 1145 into law.

SB 1045 – Inmate Labor: After two years of discussion and negotiations this effort to create an opportunity for Agriculture In-Job Training for inmates once again failed. Following a “do pass” recommendation to the Senate floor and a unanimous vote on the floor it was sent to the House and referred to the House Judiciary, Rules and Administration committee. For reasons not completely understood, committee Chairman Dayley never scheduled a hearing on the bill. IGPA supported S1045.

HB 121 – Processed Potato Negotiations: While IGPA did not take an official position on HB 121, both staff and several of our members carefully followed this controversial bill. After what many growers considered unfair negotiating tactics by a processor, HB 121 was drafted to force “good faith” negotiations in the future. The bill created a timeline during which a potato processor and a potato cooperative must negotiate contracts for the purchase and sale of potatoes for processing.

After a lengthy and tense hearing in the House Agricultural Affairs Committee it was sent to the House floor with a do pass recommendation. It remained on the House reading calendar for several days before it was sent back to the committee. Fortunately, negotiations between the growers and the processor were successful and a satisfactory

resolution of the issues was accomplished without the legislature taking a position on the bill.

HB 61 – Shortline Railroads: For two sessions now IGPA has actively supported this effort to provide a \$3.1 million tax credit for improvements to our shortline rail tracks. Idaho grain producers utilize all forms of transportation, including trucks, trains and barges to keep our products moving. We felt this credit was a modest way to provide some incentive to improve an aging and deteriorating track system. After passing out of the House Revenue and Taxation Committee it failed on a 28-42 vote on the floor.

HB 168 – Transportation Processes and Fees: Signed into law by Governor Little, this bill establishes new processes and fees for local authorities defined as counties, highway districts or municipal and other local boards or body having authority over highways and streets and the Idaho Transportation Department to designate route and issue permits allowing vehicles with gross weights between 105,501 GVW and 129,000 GVW to access highways and street under their jurisdiction. IGPA supported HB 168.

SB 1209 – Truck Registration Fees: Early in the session we had reported on two bills, SB 1066 and SB 1076, introduced by Transportation Chairman Brackett. These bills proposed creating a new annual registration fee for all farm and commercial vehicles. In addition, it proposed creating a new mileage use fee on all vehicles over 60,000 pounds. For a variety of reasons, including a lack of consensus by any of the impacted parties, the bills never received a hearing.

All during the session we heard rumblings of another fee bill was in the works. SB 1209 was introduced late in the session and with the understanding that it would not be heard this year but that it would be up early in the 2020 session. SB 1209 replaces the current five-tier system of registering all commercial and farm vehicles having a maximum gross weight of 60,000 pounds. The legislation establishes an annual base fee or plate fee of \$280.00. In addition to the registration fee, there will be a mileage fee based on the maximum gross weight of a vehicle and the total number of miles driven. The millage use fee will be determined by multiplying a cost-per-mile charge by the total miles driven in Idaho.

We were also informed by the Chairman that, in an effort to get everybody on board, he will also be proposing a new bill with a very soft approach to regulating dyed fuel.

Which means we are barely done with this session and yet already preparing for 2020. Just like farming! ■



We love wheat. It's what we do all day, every day.

Overall Winner, National Wheat Yield Contest 2018 & 2017
Quality Check Variety, Wheat Quality Council 2019

SUPERIOR GENETICS. PREMIUM VARIETIES. PROVEN RESULTS.

BRED FOR THE PACIFIC NW

UI Magic CL+ | best-selling CL+ in the PNW
LCS Jet | National Wheat Yield Contest winner
LCS Hulk | incredible yields and test weight
More | LimagrainsCerealSeeds.com/pnw



Maximize your wheat acres

📍 LimagrainsCerealSeeds.com/find-a-dealer
📞 Frank Curtis | 970.214.6612



Jonathan GROWER PROFILE: Rosenau

БОЙГЕ: ROSENAU
СКОМЕК

Tell us about your farm. 2100 Acres. We grow wheat, bluegrass, barley, canola, chickpeas, lentils and hay.

How and when did you get into farming? I started farming in 2011 after I rented my own new ground to add to the farm.

When was the operation established? I am the fourth generation farmer on a farm that was established in 1937. We have been farming in Idaho since 1908, around the Genesee area, and moved down to our current farm in 1937.

Tell us about your family; who is on the farm? I am the main farm manager and operator. My wife Christy keep records and takes care of financial book keeping and my father Bill still helps me out a lot. Christy and I have two young kids, Caleb (5) and Lillian (2).

I grew up on the farm homestead around Winona, Idaho, which is 15 miles south of Nezperce. I am the eldest of 3 boys. My brother Nathan is an area manager and grain merchant for Columbia Grain out of Pullman and my brother Ryan works at a children's home in Lewiston.

How did you and Christy meet? It's a funny story, which actually involves IGPA. I knew Christy in high school as she was from a neighboring town and we had many of the same friends. She and I were never really were close friends or even dated. My father had been part of the Grain Producers for as long as I can remember, and I started going with him to meetings and conventions when I was in junior high. I then started filling in for him during my time as a student at the University of Idaho. Christy's father, Tom Zenner, was also very much involved with IGPA and was president on the executive-board two years prior. I attended the Boise spring meeting that year and was chatting with Tom as we were in the hospitality room together and I asked him how Christy was doing. Christy was

attending Boise State at the time and he said, "She's upstairs in our room studying; you should go see what's up." That was 2006 and the rest is history.

How do you market your grain? My brother Nathan is a grain merchant and I lean on him for advice. He advises me, trades and helps me make educated market decisions. We home store some, but at this point don't have enough storage for most of my production, so we haul most to Columbia Grain or CHS.

Is there anything unique about your operation? Maybe not the operation but my farm. In 1937 when my great-grandfather looked at the farm, it was condemned due to a weed called White Top (or Hoary Cress). He saw the potential and bought anyways.

What conservation practices do you employ? I use bluegrass a lot for erosion purposes. In the last 10 years we have moved from a conventional style farm to a minimum-till type farm. We haven't plowed on our farm for over 10 years.

What are the biggest challenges your operation faces? Market prices!

What are the guiding principles of your operation? Honesty, conservation for now and future generations, and thankfulness for what we have.

Why do you farm? There's nothing like the smell of a fresh sown field, or the first hay cutting, or the smell of wheat harvest. I think for most of us that question is hard to explain because it's almost an unexplainable part of you.

What brings you satisfaction? Watching and teaching the same principles to my two young kids Caleb and Lillian and the value and importance of farming. Also, being a part of associations like IGPA as I feel that we are making a difference.



What do you do for fun? We love camping, fishing, SXS riding in the woods, mushroom and huckleberry picking, and farming. We like to travel when possible.

What challenges face the U.S grain industry and the grain industry in Idaho? Right now trade is huge, I mean HUGE (in my best President Trump voice). With the loss of the Trans-Pacific Partnership deal we need to get the ball moving quickly for the big four (wheat, corn, soybean and barley). Genetics for barley and wheat would be something we need to try to keep pushing more money, time and manpower into. Grain quality testing accuracy as well; if falling numbers are going to be the standard, the test needs to be much more accurate and duplicatable.

How do you see the future of the U.S. grain industry and the grain industry in Idaho? For my area the grain industry relies on trade and the river system and barging

in a huge way. Almost every kernel I raise leaves my farm on a semi to Lewiston and gets on a boat and heads to Portland. With the already low commodity prices, shipping would kill us without the barging systems. Protecting the river system and continuing to increase trade as well as trying to get better prices for the PNW are critical for our future.

What did you learn from your experience in the IGPA mentorship program? I think the biggest thing I learned was how things work at the national level. Visiting Washington D.C. and learning how NAWG and NBGA work was very impressive. The program is a must as we need new members and what better way than to take a new young farmer and show them the ropes and what we do. It's getting harder and harder to get membership and participation, but if you can get some young guys excited about what IGPA is trying to do, they can go back and have positive influence in their communities. ■

How Vital is Agriculture to Idaho?

BY SEAN ELLIS, IDAHO FARM BUREAU FEDERATION

REPRINTED WITH PERMISSION

Agriculture is critically important to Idaho's economy, according to a recent University of Idaho Extension report.

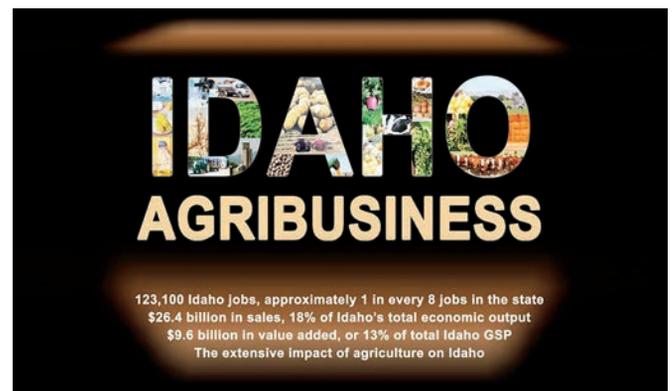
It is based on 2017 data and updates a previous report based on 2014 data.

According to the report, "Economic Contribution of Idaho Agribusiness," agriculture was directly and indirectly responsible for 123,100 jobs in 2017, or one in every eight jobs in the state.

Agribusiness, which includes crop and livestock production and the processing of agricultural products, also generated 13 percent of Idaho's total gross state product in 2017.

"We're talking 13 percent of the state's economy. That's a significant sector of Idaho's economy," said the report's author, Philip Watson, an associate professor in U of I's College of Agricultural and Life Sciences.

The report, which was published in January and is based on several sources, including data from USDA and the U.S. Bureau of Economic Analysis, found agriculture was also responsible for \$26.4 billion in



sales or 18 percent of Idaho's total economic output.

"By that measure, it makes agriculture the largest sector in the state of Idaho," said U of I Agricultural Economist Garth Taylor. "That is an astounding number."

One in every \$9 in wages paid in the state of Idaho can be attributed to agriculture, according to the report.

Agriculture's impact on Idaho's economy in 2017 actually decreased slightly from the previous report

Continued on next page



Continued from previous page

that was based on 2014 numbers. But Watson pointed out that 2014 was a record year for Idaho agriculture in terms of total farm cash receipts and it was anticipated that agriculture's impact, on a percentage basis, would be down a little.

Idaho farmers and ranchers brought in a record \$8.8 billion in farm cash receipts in 2014 but that number dropped to \$7.2 billion in 2017. Total net farm income in Idaho was \$2 billion in 2014 but \$1.23 billion in 2014.

"The impact is down slightly from that high in 2014 but agriculture is still a very big player in Idaho's economy, that's for sure," Watson said.

In calculating how important different sectors are to the state's economy, Watson attributed every dollar generated in state GSP to a specific sector, so there was no double counting.

For comparison's sake, technology manufacturing, which includes computers, electronic equipment and other electronics, accounted for 7 percent of Idaho's total GSP.

Agriculture's total impact on the state's economy includes its indirect impacts on other sectors. For example, it would include the sale of a tire tractor to a wheat producer.

"There are lots of segments of Idaho's economy that we wouldn't have if we didn't have agriculture," Watson said.

Taylor said that every industry sector has indirect "multiplier" effects on the economy but the indirect impacts from agriculture are bigger because almost all the food produced in Idaho is exported to other states or nations.

According to the Idaho State Department of Agriculture, if Idahoans had to consume all the farm products produced within the state, they would have to eat, every day, 43 potatoes, 2 pounds of cheese, 180 slices of bread, two onions, 2 pounds of beef and three cups of beans.

"It is the exports that create new wealth in an economy," Taylor said. "Agribusiness is creating a lot more exports and has a bigger multiplier than other industries. Obviously, we cannot consume the milk, potatoes and other products we produce. It's almost all exported out of the state."

Watson said one thing that jumps out of the data that was used to create the report is that the percent of Idaho's GSP that comes from farm production is higher than the percent of state GSP that comes from food processing.

That, he said, is not the case for most big farming states.

"That's a very unusual phenomenon," he said. "It is ma and pa farmer doing the lion's share of the work."

A separate report by Taylor found that total Idaho GSP from production agriculture grew twice as fast as the state's overall GSP from 1997-2017, while the food processing sector's percentage of total state GSP increased slightly during that time.

As he told lawmakers in January, Idaho agriculture's GSP growth is being driven largely "by grandma and grandpa on a tractor."

Watson's report shows that agriculture's importance to Idaho's economy is much greater than it is in surrounding states and the U.S. as a whole.

It found that agriculture's importance to Idaho's economy is 12.4 times greater than it is in Nevada, 4 times greater than in Utah, 3.9 times greater than in Montana, 3.4 times greater than in Washington, 2.7 times greater than in Oregon and 3.3 times greater than in the U.S. overall.

A report prepared last year by U of I Agricultural Economist Ben Eborn showed that when it comes to farm cash receipts on a per capita basis, Idaho is an unchallenged No. 1 among the 11 Western states.

That report, which was based on USDA Economic Research Service data, found that in 2017, Idaho agriculture generated \$4,287 in farm cash receipts per person in the state, far more than California (\$1,266), which leads the nation in total farm receipts. No other state was even close to Idaho in that category.

According to Watson's report, Idaho ranked in the top five among the states in the production of 16 farm commodities, based on National Agricultural Statistics Data from 2017.

That included No. 1 in four commodities, (potatoes, barley, trout and Austrian winter peas), No. 2 in five commodities (sugar beets, hops, alfalfa, peppermint oil and wrinkled seed peas), No. 3 in cheese, No. 4 in five categories (milk, onions, lentils, spearmint oil and number of milk cows) and No. 5 in dry beans. ■



Kids on the Farm



Submitted by Stacey Satterlee



LEFT, ABOVE LEFT and ABOVE submitted by Alex Meisner



Submitted by Sam Marshall



LEFT and ABOVE submitted by Amber Tingey



LEFT and ABOVE submitted by Christie Prescott

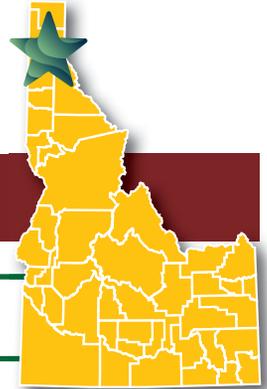


Submitted by Jonathan Rosenau



SENATOR
Jim Woodward

SAGLE, ID • DISTRICT 1



How long have you lived in Sagle? Brenda and I moved back to Idaho in 2000 when I came off active Navy duty, and landed in Sagle, just south of Sandpoint.

Where did you grow up? We both grew up just north of Sandpoint in Boundary County.

Tell us about your family. Although we knew each other, my wife and I were not high school sweethearts. In fact, we were typically competitors and she normally won. Brenda and I both went to the University of Idaho. She earned a degree in chemistry and I got a mechanical engineering degree. Our last year in Moscow, I realized teamwork was better than having a competitor. We started dating and married about two years later. Brenda and I have two children, a 20-year-old son and a 13 year-old-daughter.

What is your occupation? I own a small, heavy construction company. We install underground utilities, move dirt, construct some steel structures, drive piling, and perform natural resource restoration work. Just like any small business owner, I have more work to do than time in the day. Luckily, I have a great group of employees who did a great job with the company this year while I was living in Boise for the legislative session.

Early years of your career? Before working in the construction industry, I served as a Navy submarine officer. My active duty service included one tour of duty on a nuclear-powered submarine and another tour of duty at a land-based Navy prototype reactor plant. Early in my Navy career, I spent six months living in Idaho Falls and working at the Idaho National Laboratory as a student. After seven years of active Navy service, I shifted to the reserve component. In total, I completed 21 years of military service.

Why did you decide to run for office? I decided to run for office a few years after finishing military service.



Senate freshman class of the 65th Idaho Legislature.

Pictured L-R: Sen. Van Burtenshaw, Sen. C. Scott Grow, Sen. Dave Nelson, Sen. Jim Woodward, Sen. Dave Lent, Sen. Don Cheatham.

I felt I should find a way to continue to contribute to society. Initially, I joined our local electric cooperative board. From there, through the statewide consumer-owned utilities organization, I came to know a handful of legislators and better understand our state government processes. My motivation for public service stems from my childhood years. Growing up in a small Idaho town, I remember the people serving on city council and in the legislature were veterans and small-business owners. In my early forties, I realized I met those criteria, I have a deep appreciation for our state, and I'd like to see our way of life continue.

Why did you want to serve on the Education and Finance Committees? Were they your first choices?

The Finance and Education committees were my first choices. I knew that in the Finance committee, I would gain a better picture of our entire state government operation. That has certainly been the



case. Education is key to our success individually, as a state, and as a nation. Education is also an ever-changing subject. We have to place an emphasis on our educational system and never stop striving to improve.

What challenges do you think the state faces in 2019 and beyond? The largest challenge Idaho faces is growth. Growth is a logistical challenge to keep infrastructure on pace with the population, but that is most likely the easier part of the problem. The other challenges with growth are the increasing rural – urban divide and the ideological divides. Idaho is changing.

Other things you do in your community? Besides serving on the electric cooperative board, I also serve as a fire district commissioner. With my construction company, we typically take on one or two volunteer community projects per year.

What do you do in your free time? In my free time, I enjoy everything outdoors. Being outside and moving

is part of the reason I work construction. When I’m not working for someone else, I enjoy working on our property, motorcycle riding, flying, and spending some time on Lake Pend O’reille.

What do you love most about Idaho? My great-grandfather came to Elk River, Idaho around 1908 to help build the mill. Idaho is in my blood. The more I participate at a state level, see more of the state, and get to know more Idahoans, the more I love the place I call home. We are a successful state and should be proud of our accomplishments.

What are you most passionate about and/or hope to accomplish during your time in the legislature? I would like to move us away from the ever-recurring supplemental school levy cycle, although I haven’t come up with a solution yet. Almost ninety percent of our school districts statewide are running supplemental levies. The levy elections are a significant bi-annual distraction from the primary mission of our districts, which is educating the next generation for our future success. ■



State Program Partners with Growers to Burn Crop Residue, Protect Air Quality

BY SARA CASSINELLI, COMMUNICATION AND OUTREACH SPECIALIST

Crop residue burning has had its fair share of controversy in Idaho, but over the past 10 years, common ground between farmers who need to burn their fields and those seeking to protect public health from smoke impacts have helped to develop an effective smoke management program.

In 2008, the Idaho Department of Environmental Quality (DEQ) was assigned by the Idaho Legislature to oversee Idaho’s Crop Residue Burning Program. The program is designed to work with the agricultural community to allow burning and ensure smoke does not adversely impact the public with special emphasis placed on those locations with sensitive populations such as schools; hospitals; and health care facilities for children, the elderly, or infirm.

Crop residue burning is used for the disposal of vegetative material remaining in the field after harvest or produced on Conservation Reserve Program lands. It includes entire fields, spots within a crop for weed control, broken bales on the field where they were generated during harvest, pastures, food plots, and lands that are conservation reserve and habitat improvement programs.

“We work with growers through all steps of the program, starting with the registration process, to filling out post burn reports.” says Tami Aslett, DEQ’s smoke management analyst.

Every spring and fall, growers register online or in person with DEQ for a Permit-by-Rule. Burn days are



limited to weekdays during daylight hours, with no burning on weekends and state and federal holidays. Growers must also complete training once every five years to review permitting processes, responsibilities, and compliance techniques.

Before DEQ makes a burn decision, the agency evaluates daily air quality and weather conditions to determine if pollutant levels are within an acceptable range and smoke is expected to disperse with minimal impact to public health and safety. If conditions are favorable, DEQ contacts approved growers before 11 a.m. with approval to burn and permit requirements.

Idaho Falls barley grower, Shawn Seedall, has participated in the Idaho crop residue program since 2008 for his small family farm.

“Every September, we burn 100 to 300 acres depending on the crop rotation.” Seedall said. “And



because we live in a populated area and near a school, we need to work with DEQ.”

DEQ has six regional offices located in Boise, Coeur d’Alene, Idaho Falls, Lewiston, Pocatello, and Twin Falls. Regional staff work closely with growers to assist with registration, monitor smoke dispersion and weather parameters, and help with post burn reporting.

“The crop residue burning registration process is pretty simple.” Seedall says. “You can go online and fill out the necessary paperwork, and the sooner you register, the sooner you can get on the list to burn.”

In February 2019, DEQ, in cooperation with the Crop Residue Burning Advisory Committee, introduced a new payment schedule. Before this recent rule change, growers paid a \$2 per acre fee seven days before their burn date, now, growers will receive an invoice the first week of the following year for acres burned.

“We continually look for ways to improve the program.” DEQ’s Aslett says. “We work with our Crop Residue Burning Advisory Committee to review each burn season, program accomplishments, and recommended program improvements.”

Idaho growers interested in learning more about the crop residue burning program, can visit DEQ’s website at www.deq.idaho.gov/crop-residue-burning, or contact a DEQ regional office. The program does not cover lands on all Idaho Indian Reservations, except for burning on Kootenai Tribal Lands. For information on field burning within reservation boundaries, contact the individual tribes.

“We value the relationships we have built with the growers around the state,” Aslett says. ■



Ag is constantly evolving. So are we.

The businesses we finance – in farming, ranching, forestry and fishing – are ever changing. We embrace agriculture’s dynamic nature and operate on the leading edge, interpreting trends, pitfalls and opportunities. When it comes to managing change, we’re right there with you.

800.743.2125 | northwestfcs.com

 Equal Housing Lender
This institution is an equal opportunity provider and employer.

Here to Help You Grow®



Proposal would amend Idaho's Seed Indemnity Fund statute

BY SEAN ELLIS, IDAHO FARM BUREAU FEDERATION

POCATELLO – A “discussion starter” bill that was introduced late in the 2019 Idaho legislative session was designed to provide seed producers further protection from a possible warehouse failure.

House Bill 188 would have amended the state’s Seed Indemnity Fund law to require licensed seed warehouses to submit an annual financial statement and provide proof of a minimum net worth.

The bill wasn’t intended to pass this year – it was printed in late February and sent to the House Ways and Means Committee but never received a public hearing – but was submitted as a basic “discussion starter” for supporters and opponents of the proposal.

Seed warehouses in Idaho currently have to provide an audited financial statement only during their initial license application.

The Seed Indemnity Fund, which has a current balance of \$8 million, was established in 2002 following some high-profile financial failures by warehouses in Idaho.

Seed producers who deliver seed to a licensed warehouse pay a small assessment to help finance the fund, which would cover 90 percent of a grower’s loss in the event of a warehouse failure.

The Idaho State Department of Agriculture administers the fund and the proposed change was recommended by an ISDA industry advisory committee.

Advisory committee chairman Richard Durrant said he was surprised to learn that ISDA “didn’t have the ability to check the financials of a warehouse after they were initially licensed. They don’t even get to look at a line of credit or review any of their financial information.”

Durrant, who farms 1,500 acres and also owns a seed warehouse, said the proposal to require seed warehouses to submit annual financial information is all about protecting producers by trying to prevent a warehouse failure in the first place.

“It’s all about farmers getting paid when it’s all said and done,” he said. “Prevention is much easier, usually, than a catastrophic cure.”

Durrant said an audited financial statement costs



between \$2,000 and \$5,000 and requiring warehouses to present one annually is not too much to ask to ensure the state’s seed producers are protected.

Because he owns a seed warehouse, he would also be required to submit a financial statement annually.

“I’m not asking anybody else to do what I’m not willing to do,” Durrant said. “We need to have some more financial accountability for these warehouses so that we protect the producers and the \$8 million we have invested in the fund right now.”

Supporters of the change to the Seed Indemnity Fund introduced a similar bill in 2018 but that bill was revised to drop the proposal to require warehouses to submit annual financial statements.

Durrant said supporters and opponents of the bill plan to discuss the issue in-depth this year and he hopes to propose legislation during the 2020 Idaho Legislature that would be acceptable to both parties.

The proposal is opposed by the Idaho-Eastern Oregon Seed Association.

IEOSA Executive Director Roger Batt said the issue dates back to 2001 and 2002 when seed producers and seed companies were negotiating the language of the Seed Indemnity Fund statute.

“At that time, and still today, the seed companies were not comfortable releasing their financial information to any government entity,” he said. “They are afraid that

financial information could get hacked into and people could see some information that the seed companies don't want to share with folks.”

Batt said publicly trade seed companies don't have an issue with the proposal because they are already required to release financial information annually.

“But there are small companies that would have to pay tens of thousands of dollars in some cases to have an audit done or several thousand dollars to have a financial review done annually and that would be a big cost to those small seed companies,” he said.

“Plus,” he added, “they don't want their financials to get leaked out somehow. With the hacking going on

in today's society and people being able to hack into government systems, they are really concerned about that potential.”

Doug Jones, the former House Agricultural Affairs Committee chairman who helped author the Seed Indemnity Fund statute, said it might be a good idea for the parties to take a good look at the entire statute while they're discussing the annual financial disclosure proposal.

“A lot has changed in the industry over the past two decades,” he said. “We need to sit down and review the whole statute. If there is anything else that needs to be fixed, we should take care of it at the same time.” ■

2019 FIELD DAY SCHEDULE					
	LOCATION	ADDRESS	TIME	CONTACT	NOTES
June 7 th	Parma Cereals Field day	29603 U of I Lane Parma	8:00 AM	Olga Walsh: owalsh@uidaho.edu	lunch
June 18 th	UI Snake River Pest Management Research Tour	1693 S. 2700 W. Aberdeen		Pamela Hutchinson: phutch@uidaho.edu	
June 19 th	Weed Science Field Tour	RJ Cook Agronomy Farm Whelan Road, Pullman	1:00 PM	Drew Lyon: drew.lyon@wsu.edu	
June 20 th	UI Weed Science Field Tour	Parker Farm, 1025 Plant Science Road, Moscow	7:45 AM	Doug Finkelburg: dougf@uidaho.edu	
June 25 th	Prairie Area Crop & Conservation Tour	Craigmont Community Hall 109 E. Main Street, Craigmont	7:00 AM	Doug Finkelburg: dougf@uidaho.edu	breakfast
June 27 th	UI/LCS/CHS-Primeland Collaborative Field Day	Nez Perce County Fairgrounds 1229 Burrell Ave., Lewiston	8:00 AM	Doug Finkelburg: dougf@uidaho.edu	lunch
June 27 th	Rockland/Arbon Field Day	Rockland: West of Rock Creek Road on Deeg Road Arbon: Mink Creek Road	9:30 AM 2:00 PM	Jianli Chen: jchen@uidaho.edu	
June 28 th	Boundary County Crop Tour	Dillin Farm 5285 Farm to Market Road Bonners Ferry	10:00 AM	Kate Painter: kpainter@uidaho.edu	lunch
July 9 th - July 11 th	Thresher Grower Events	American Falls, Blackfoot, Idaho Falls, Newdale	8:30 AM	208-785-4460	
July 16 th	Rupert/Minidoka Field Day	Winter Trials: 900 N. 300 W. (starting at winter trials) Spring Trials: 700 N. 500 E.	10:00 AM	Jason Thomas: jasont@uidaho.edu	lunch
July 17 th	Aberdeen/LCS Field Day	1693 S. 2700 W. Aberdeen	8:30 AM	Jianli Chen: jchen@uidaho.edu	
July 18 th	Ashton Field Day	3850 E. 1350 N. Ashton	10:00 AM	Jon Hogge: jhogge@uidaho.edu	lunch
July 18 th	Idaho Falls Field Day	Marc Thiel's 2400 S. 45th W., Idaho Falls	4:00 PM	Derek Reed: derekreed33@gmail.com	Grain Growers dinner at Sealander Park
July 23 rd	Soda Springs Field Day	1 mile west of Government Dam Road on Ten Mile Pass	3:00 PM	Justin Hatch: jhatch@uidaho.edu	dinner



What if ... dams on the Snake River were removed?

At a conference in Boise on April 23rd at the Andrus Center for Public Policy, Representative Mike Simpson announced he has been studying ways to increase fish counts in the Snake River, largely through the possibility of dam removal. As far as we know, this is the first time a member of Congress from any PNW state has taken this position. He said he has been asking “What if...” types of questions.

A glimpse at Idaho’s past before the Columbia Snake River System was engineered to make the “desert blossom like a rose” helps answer Simpson’s “what if” question. The productive Snake River Valley was not always as desirable as it is today.

When western explorer Captain Benjamin Bonneville passed through Idaho in 1833 he described it as “A land where no man can live. It will remain uninhabited.” Captain Bonneville today would be astonished at the abundance of high-quality wheat grown in the county named after him. In 1839 Captain Price Hunt reported that not a single acre west or north of Fort Hall was suitable for raising grain or vegetables.⁽¹⁾

The great explorer, John Fremont, who also gave his name to one of Idaho’s wheat-growing counties, passed through Idaho in 1843. He reported there was nothing but sagebrush and the group survived only by catching a few fish from the Snake River. Their horses went without feed until they had passed through the area.⁽²⁾

Father DeSmet called it “the most barren of all mountain deserts.” Washington Irving said, “It is a land where no man permanently resides – a vast uninhabited solitude . . . desert tracts that must ever defy cultivation.” In Brigham Young’s time, Idaho was referred to as “not yet the place.”⁽³⁾

Today, however, traveling through the verdant fields of Idaho, gazing at trees, gardens, flowers, and crops as far as the eye can see, it is difficult to imagine this was the same place the early explorers described. The transformation of this barren country began with the first shovels of dirt that diverted water near Lapwai, or water from the Snake River onto Poole Island near Rigby to fashion a more livable environment. More than 70 cash crops are now grown in Idaho. Idaho’s bountiful harvest is due to a well-developed irrigation infrastructure using waters from the Snake River to

WHAT IS THE VALUE OF THE RIVER SYSTEM?

The Columbia Snake River System is the nation's single largest wheat export gateway, transporting 53% of all U.S. wheat to overseas markets. Eleven states export through the Columbia Snake River System.

THE SNAKE RIVER DAMS ALONE ACCOUNTED FOR 10% OF ALL U.S. WHEAT EXPORTS.

THERE ARE 17 HYDROELECTRIC PLANTS ON THE SNAKE RIVER AND ITS TRIBUTARIES.

46.4% OF IDAHO'S POWER COMES FROM THE CLEAN ELECTRICITY OF HYDROPOWER MADE POSSIBLE BY DAMS.

1.77 BILLION KILOWATT HOURS OF ELECTRICITY WERE USED FOR IRRIGATION IN 2017.

40,000 LOCAL JOBS

IDAHO GROWERS PRODUCE 100 MILLION BUSHELS OF WHEAT ANNUALLY. HALF OF THAT CROP IS BARGED DOWN THE RIVER AND EXPORTED.

EFFICIENCY & EMISSIONS: MILES PER GALLON PER ONE TON OF CARGO

Road	~100	ONE 4 BARGE TOW MOVES AS MUCH AS:
Rail	~200	140 RAIL CARS MOVES AS MUCH AS:
River	~600	538 SEMI TRUCKS.

The river system keeps Idaho wheat prices and supply competitive across Idaho and around the world.

IDAHO WHEAT
QUALITY WHEAT SINCE 1800

reach rich soils, along with water-based transportation. Water diverted onto the arid desert south of the Snake River caused farms in Twin Falls, Burley and other parts of southcentral Idaho to sprout out of nothing as if “by magic.” As a result, this part of Idaho is known as the Magic Valley.

Today, The Columbia Snake River System, including 14 dams on the Columbia and 15 on the Snake, is a



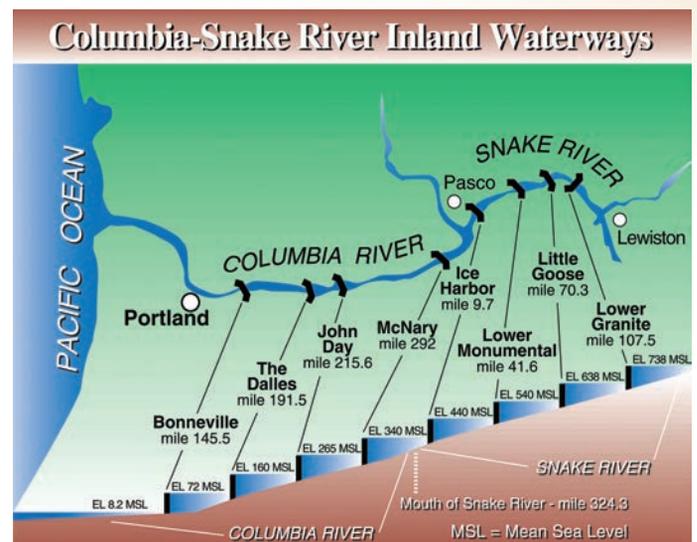
primary pillar of the economy of the Pacific Northwest. The river system provides irrigation for crops, clean power generation, navigation, water storage and flood control. Agriculture is Idaho's largest base industry and is export driven. Agricultural export dollars ripple throughout Idaho's economy, creating \$27 billion in sales (21% of total economic output), more than 126,000 Idaho jobs (14% of state employment), and more than \$10 billion of state GDP (16% of GDP).⁽⁴⁾ The Snake River is our economic engine and "500-mile smile". More than 80% of Idaho's population live and work within 30 miles of the Snake River.⁽⁵⁾

Wheat is grown in 42 of Idaho's 44 counties and about half of our annual harvest is exported. Wheat was Idaho's original export agricultural commodity, blazing a path for many other commodities to follow. Wheat from Idaho was first shipped to Japan more than 60 years ago. Wheat remains Idaho's second most prominent crop, and Idaho is a primary supplier of soft white wheat to Japan, Taiwan, Korea, and other Asian countries.

Barging wheat from Lewiston is one of the most efficient and environmentally-friendly modes of transportation available. The four dams on the lower Snake River, which have become the most immediate target for removal by activists, move nearly 10% of the nation's wheat exports each year. In 2017, more than 3.5 million tons of cargo were barged on the Snake River and nearly all was for export. U.S. agricultural exports is one of the leading ways that our balance of trade has improved.

"Without an economical way to move wheat to export channels, export bushels would instead glut the domestic market driving down prices," said Clark Hamilton, Ririe wheat grower and Idaho wheat industry leader. "The result would be financial distress on 4,500 Idaho farm families and hollowing out of farming communities throughout the entire state. Without river barges, farm incomes will drop, and transportation costs will go up as growers become captive to railroads. Barges keep a cap on railroad costs."

Rail has been suggested as a replacement for the wheat barges on the river. It would have taken more than 35,140 rail cars or 135,000 semi-trucks to carry this cargo in 2017. In comparison, just 244 four-barge tows moved the same amount of wheat.⁽⁶⁾ It would take a truly impressive number of trains and trackage rights to move more than 35,140 rail cars out of the Palouse region. It is difficult to imagine the costs involved in such a system, not to mention additional



pollutants going into the scenic, sensitive airshed of the Columbia Gorge.

"The focus by fish passage advocates on the lower Snake River dams is disingenuous," said Blaine Jacobson, Executive Director of the Idaho Wheat Commission. "Those dams have a 95% fish survival rate. This is their opening wedge which they hope to replicate up and down the river until the entire river system is open. They have selected four dams where they think resistance is less organized."

What if dams on the Snake River were removed? Look no further than the comments on the arid and desolate view of Idaho made by explorers before the dams were built. Then compare it to the flowers, trees, orchards, crops, homes and schools that dot our desert landscape and the livelihood we have today. Without dams on the Snake River, Idaho's miracle in the desert would disappear. ■

Notes:

1. Beal, *A History of Southeastern Idaho*, Caxton Printers, 1942
2. Groberg, *The Idaho Falls Temple*, Publishers Press, 1985
3. Groberg, *The Idaho Falls Temple*, Publishers Press, 1985
4. Eborn and Taylor, *The Financial Condition of Idaho Agriculture: 2018*
5. <http://worldpopulationreview.com/states/idaho>
6. Pacific Northwest Waterways Association, www.pnwa.net



IDAHO WHEAT

WHAT MAKES IDAHO WHEAT SO AW



THE CUSTOMERS:

- Asian Soft White Markets
- Grain Craft
- Ardent Mills
- Ogden
- California
- Wheaties and Wheat Chex
- Goldfish Snack Crackers



THE INNOVATORS:

- Thresher Artisan Wheat Conditioning
- Moscow and Aberdeen wheat breeding stations
- Joint Breeding Operation with Limagrain
- Bayer Wheat Technology Center
- Wheat Quality Lab in Aberdeen
- National Small Grains Collection in Aberdeen
- Research Partnership with University of Idaho



THE IDAHO WHEAT GROWER:

- Family Farmers
- Industry Leaders
- On-Farm Storage



PILLARS OF THE INDUSTRY CELEBRATING 60 YEARS OF PROMOTING IDAHO WHEAT

ESOME?

THE LAND & THE WHEAT:



- White Wheats
- Deserts Environment and Volcanic Soils
- Irrigation
- Ideal Rainfall Patterns
- Multiple Classes of Wheat

THE GRAIN HANDLERS & MARKETERS:

- Columbia Snake River System
- Idaho's 15 largest Grain Handlers
- Union Pacific and Short Lines
- Portland Export Terminals
- Port of Lewiston and Lewis Clark Terminal
- U.S. Wheat Associates
- Wheat Marketing Center

Soft white wheat is ideal for Idaho's soils and climate and is preferred by domestic and export customers for its' soft bite. Hard white wheat is ideal for Idaho's desert environment and is the preferred source for domestic customers. Soft and hard white wheats offer higher extraction for millers than red wheats.

Our dry environment reduces disease and pest problems and enables grower to more carefully control his production. Loose, rich volcanic soils are ideal for high quality wheat. Nearly two-thirds of Idaho's wheat harvest is grown under irrigation, allowing us to manage to customer specifications. Idaho wheat yields are among highest in nation.

The portion of Idaho's crop not grown under irrigation benefits greatly from ideal rainfall patterns, usually an early rain at time of seeding and a later rain when wheat kernels are being filled. (North Idaho is like the Land of Promise described in Joel 2:23). Idaho is one of the few places in the world where up to five classes of quality wheat can be grown side-by-side.

Idaho has approximately 4,500 wheat growers and 97% of our harvest comes from family farms. Most growers are skilled in growing multiple crops and many have traveled and lived overseas giving them a world view of the industry.

In recent years, Idaho growers have served as chairman of U.S. Wheat Associates, president of National Association of Wheat Growers, chairman of National Wheat Foundation, chairman of Wheat Marketing Center, and president of Wheat Foods Council. This service gains them nuggets of value they bring back to Idaho growers and to their own operation. Idaho growers can store most of their crop in farm storage to better match it up to market need.

Soft white wheat from Idaho and its PNW neighbors is the world's premier soft wheat and is preferred for fine bakery delicacies in eastern Asian markets. Asian noodles, sponge cakes, steam breads, and flat breads get their start in Idaho.

Approximately 12% of Idaho's harvest remains in-state and is milled in Blackfoot for western U.S. customers. Grain Craft also ships Idaho wheat to four other western U.S. mills and buys nearly 20% of Idaho's annual harvest. Nearly 20% of Idaho's harvest also goes to Ardent Mills, the largest milling company in the U.S. Their Wheat Select and UltraGrain brands use Idaho wheat.

Once called "Minneapolis of the West", Ogden has six wheat mills including a presence by both Ardent Mills and Grain Craft. California is the largest wheat milling state in the U.S. and is wheat-deficit. As their agricultural land shrinks or moves to higher-value crops, Idaho becomes California's closest and best source of high-quality wheat.

America's favorite wheat cereals come to Idaho for their soft white wheat and take more than 5% of the state's harvest. Wheaties and Wheat Chex from Big G, along with Post, Malt-O-Meal, and Kashi come to Idaho for wheat for breakfast cereals. Nineteen states west of the Mississippi are supplied by Goldfish snack crackers using soft white wheat from Idaho and taking more than 5% of the state's harvest.

Researchers in Moscow and Aberdeen develop cultivars adapted to Idaho's climate and environment. Innovative partnership with LimaGrain Cereal Seeds, one of world's largest seed companies, brings germplasm from around the world to Idaho growers. Bayer Crop Science has one of its Wheat Technology Centers in Filer, Idaho.

The Wheat Quality Lab in Aberdeen screens samples for milling yields, protein levels, and dough-mixing and baking qualities to help Idaho growers stay competitive. The National Small Grains Collection in Aberdeen collects agriculturally important varieties of wheat from around the world and safeguards the genetic diversity for future research.

Nearly half of Idaho grower check-off dollars are spent each year with Idaho's Land Grant University. University of Idaho programs include variety development, pest and disease management, and production practices. In the last ten years, Idaho wheat growers have provided \$3 million for capital items at the University. In the last 25 years Idaho wheat growers have purchased ten combines, tractors, trucks, or drills for wheat research programs at the University.

The 360 miles of inland navigation on the Columbia Snake River System gives Idaho growers the right economics to sell their wheat into the world market. Tidewater and Shaver Transportation provide invaluable industry leadership and the tugs that move barges of wheat.

Most of the wheat used in breakfast cereals in the U.S. is sourced to Thresher Artisan Wheat in Blackfoot from their conditioning plant which seeks to be 100% defect free. Their technical innovation earned Rudy deWitt, V.P. of Idaho Operations, and his team a Governor's Award for Excellence in 2018.

Idaho's 15 largest elevators buy and ship more than 90% of Idaho's annual wheat harvest. They find new customers, assist growers in all facets of their crop, and provide storage when needed. The UP Railroad ships Idaho wheat to customers in approximately 26 states in an average year. Short lines aggregate wheat for delivery to UP hubs.

Seven export terminals at the mouth of the Columbia export Idaho wheat and half of the U.S. annual wheat exports, more than all other wheat export locations combined. Known as Idaho's seaport, the Port of Lewiston and the lower Snake River dams handle 10% of all U.S. wheat exported. The Lewis Clark Terminal is a cooperative effort among the largest grain handlers in north Idaho.

Leveraging grower dollars to obtain matching funds from USDA, U.S. Wheat Associates maintains overseas offices and promotes Idaho wheat to wheat buyers, millers, bakers, food processors and government officials around the world. Last year, soft white wheat from Idaho was shipped to 17 countries. The Wheat Marketing Center in Portland helps promote Idaho wheat by demonstrating its quality and functionality in Asian noodles, tortillas, crackers and biscuits, flatbread and other products.

Idaho Wheat Commission Celebrates 60 Years

BY SEAN ELLIS, IDAHO FARM BUREAU FEDERATION

POCATELLO – Idaho’s first known wheat crop was planted in 1838 near Lapwai by Presbyterian missionary Henry Spaulding. Since then, wheat grew to become one of the pillars of Idaho agriculture and the grain is now grown in 42 of Idaho’s 44 counties and is the state’s second biggest crop, behind potatoes, in terms of farm cash receipts. The state’s wheat growers voted to form the Idaho Wheat Commission in 1959 as a way to pool their money and resources and propel the industry forward.

Idaho typically ranks among the top six or seven states in total wheat production each year and leads the nation in yields per acre. The state’s wheat farmers say much of the success that Idaho farmers have had in growing wheat can be linked to the tens of millions of dollars spent by the wheat commission over the decades on research and market development. Over the past 12 years alone, the commission, which is funded by grower money, has spent \$13 million on research with the University of Idaho.

The IWC is celebrating its 60th anniversary this year and wheat farmers spoken to for this story said it’s important to remember that a lot of the increase in yields and advancements in agronomic practices are a direct result of the millions of dollars spent by the commission since 1959. The commission’s annual budget of \$3 million is funded by a grower assessment of 3.5 cents for every bushel of wheat sold in the state. The IWC’s five commissioners, who are growers themselves, vote to spend that money on a variety of programs and projects, including research to develop new wheat varieties or improve growing practices. The money is also spent to develop new markets as well as inform and educate growers. A little more than half of the commission’s annual budget is spent on research.

“Research is critical to our industry and the commission funds a lot of it,” said current IWC Commissioner Clark Hamilton, an East Idaho farmer. “I think the checkoff dollars farmers are paying to the commission are a good investment. It’s money well spent and the return on investment is very good.”

“When you look back at the changes we’ve had as far as new varieties and types of fertility, those are some of the products of the commission’s research efforts,” said “Genesee Joe” Anderson, an IWC commissioner and North Idaho grower.

Research has always been the major focus of the commission, said former IWC Commissioner Boyd Schweider, who served on the commission from 1995-2005 and farms in the Ammon area. “One of the major things that the commission funds is research; it always

has been,” said Schweider. “A lot of the yield increases that we have seen over the decades are due to the research that the commission has funded.”

Blaine Jacobson, who has served as executive director of the IWC since 2002, said the benefit of the commission is that “Idaho wheat growers can advance their industry faster as they pool their money to research new varieties, develop export markets and fight off regulatory pressures and environmental activists.”

In 1959, when the commission was formed, the average wheat yield in Idaho was about 35 bushels per acre. In 2018, wheat yields in Idaho averaged 91.9 bushels per acre, which led the nation among states that produced at least 10 million bushels of wheat. Idaho’s 4,500 wheat growers collectively produced 104 million bushels of wheat last year, which ranked Idaho No. 5 in the United States. That 104 million bushel total was also 160 percent more than the 40 million bushels the state’s wheat farmers produced in 1959.

Idaho growers plant an average of 1.2 million acres of wheat each year. Roughly 60 percent of that wheat is soft white wheat, which is preferred by domestic and export customers for its soft bite, and Idaho is one of the premier regions for growing soft white wheat in the world. Idaho has also gained a global reputation for producing a high-quality, consistent wheat crop annually. According to IWC officials and wheat growers, the reason Idaho farmers can accomplish that is because nearly two-thirds of the state’s wheat crop is grown under irrigation, which allows farmers to manage their crop to the customer’s specifications. The portion of Idaho’s wheat crop that is not grown under irrigation, mostly in North Idaho, benefits from ideal rainfall patterns. “One of the big advantages we have is irrigation in the southern part of the state and really favorable rainfall and soil conditions up in the northern part,” said Anderson.

Southern Idaho’s dry, hot conditions means Idaho wheat growers don’t deal with a lot of disease issues that other regions face, Hamilton said. “The drier climate makes for good, consistent harvests,” he said.

Those dry, low-humidity conditions “are really good conditions for harvesting and storing crops,” Anderson said. As a result of these ideal growing conditions, Idaho is one of the very few regions in the world that produces five of the six classes of wheat.

Also, as a result of those conditions, Idaho also leads the nation in wheat yield per acre. While that is something to be proud of, it’s more important to be famous for producing a high-quality crop every year, said Flory.

<p>1803 The United States buys the Louisiana Territory which extends the nation's boundaries from the Mississippi to the eastern edge of what would become Idaho.</p> <p>1838 Presbyterian missionary Henry Spaulding plants the first known wheat crop in Idaho near Lapwai.</p> <p>1860 First farming community in Idaho, Franklin, was established and crops grown included wheat.</p> <p>1894 The Carey Act allowed private companies to build irrigation systems in the arid western states and profit from the sale of water. Approximately 60% of all Carey Act projects are in Idaho.</p>	<p>1915 Arrowrock Dam, highest dam in the world at the time, is completed opening the Boise Valley for widespread agriculture.</p> <p>1956 Idaho wheat is export to Japan.</p> <p>1959 Western Wheat Associates, with Idaho grower Chuck Gabby as president, is formed for the purpose of promoting sales of Idaho and PNW wheat overseas.</p> <p>1967 Idaho is a founding member of Taiwan Baking School, which helps develop wheat-based food for the Taiwan market. By presenting wheat-based foods to the Taiwanese people, wheat surpasses rice by 2016 in market share.</p>	<p>1992 Idaho's wheat harvest exceeds 100 million bushels for the first time.</p> <p>2003 Idaho growers purchase a building adjacent to the state capitol in Boise for offices for the Idaho Wheat Commission and other agricultural groups.</p> <p>2004 More Idaho wheat is sold to domestic customers than is exported to overseas customers for the first time.</p> <p>2018 Idaho Wheat Commission invests grower funds in Endowed Chair for Risk Management in the Colleges of Business and the College of Agriculture and Life Sciences at the University of Idaho.</p>
<p>1800 1905 First dam in Idaho, Milner Dam, a Carey Act project on the Snake River, opens southcentral Idaho to irrigated farming.</p> <p>1863 Wheat is planted alongside the Boise River to help feed workers at nearby gold and silver mines.</p> <p>1855 Fort Lemhi is established by missionaries from the Church of Jesus Christ of Latter-Day Saints and are the first to reclaim Idaho land with irrigation for wheat.</p> <p>1805 Captains Meriwether Lewis and William Clark are the first known men of European descent to enter Idaho.</p>	<p>1966 Taiwan becomes a customer of Idaho wheat.</p> <p>1962 Wheat Quality Lab in Aberdeen opens, with grower checkoff dollars through the Wheat Commission, to better match crop quality to customer needs</p> <p>1959 Idaho wheat growers form the Idaho Wheat Commission for the purpose of developing markets and researching production of wheat.</p> <p>1927 The largest reservoir on the Snake River is created with the construction of the first American Falls Dam.</p>	<p>2000 2019 All-time record Idaho wheat yield of 91.9 bushels per acre, due to advances in varieties, irrigation, and crop management.</p> <p>2012 Idaho Wheat Commission invests grower funds in two endowed chairs at the Aberdeen Research and Extension Center: Cereal Agronomy and Wheat Breeding.</p> <p>2008 Master Research Agreement is signed with the University of Idaho.</p> <p>1999 Idaho wheat growers contribute \$1.7 million toward new biotech building at University of Idaho.</p>

“Quantity is one thing,” he said. “Maintaining the quality while being successful on the quantity side is a really impressive feat on the part of our growers.”

Hamilton said that with increasing competition globally, quality and consistency are critical to the state’s wheat industry. “Our customers want consistent, quality wheat and I think that’s more important that it has ever been,” he said.

A lot has changed since the commission was formed in 1959. Back then, wheat sold for about \$1.50 a bushel and yields were a third of what they are today. But the biggest changes in the wheat industry over the past six decades have been the enormous improvements in agronomic practices and the way technology has changed farming, according to members of Idaho’s wheat industry. Anderson said the agronomic practices and systems of fertility wheat farmers are using now are light years ahead of where they were in 1959. “We’re using products and methods that weren’t even thought of back then,” he said. “We’re quite a ways ahead of where we were then.”

“Our production methods are much more refined and much more specific,” Flory said. “It’s really an exciting time in production agriculture.” The way technology has changed agriculture in the past several decades is almost mind-boggling, he added.

East Idaho farmer Gordon Gallup, who served on the commission from 2005-2015, said another big change is the close relationship that Idaho wheat farmers have with their foreign and domestic customers. “We’re better in touch with them than we have ever been,” he said.

Flory said that’s no accident and cultivating a close relationship with foreign as well as domestic customers has been a major focus of the state’s wheat industry, which typically hosts several foreign trade teams each year. “I think the emphasis on understanding our customers has elevated the past five years,” he said. “Part of the reason for this is the high level of competition we have internationally. Knowing and understanding our customers’ needs, both domestically and internationally, is a heightened level of importance in the industry. That has always been there but it’s certainly heightened in the past several years.”

One thing that hasn’t changed much is the family nature of farming in Idaho, Anderson said. According to the IWC, 97 percent of the state’s wheat harvest comes from family farms. “Agriculture has consolidated and there are some pretty large farms out there but for the most part, they’re still family run,” Anderson said.

Given how far agriculture has come in the past several decades, Idaho’s wheat farmers said they can only imagine what farming in the United States will look like in the future. ■



Glyphosate in the environment and our food: What does it mean?

BY DON W. MORISHITA, PH.D., PROFESSOR OF WEED SCIENCE AND EXTENSION SPECIALIST
UNIVERSITY OF IDAHO

Recently, two juries in California found Monsanto, now owned by Bayer Crop Science, guilty of not providing sufficient warning that led to the plaintiffs getting non-Hodgkin's lymphoma from using glyphosate. One of the plaintiffs was a California school district groundskeeper who used glyphosate regularly for about 2 years and the other was a landowner in California who used glyphosate to control weeds on his 56 acres of property from 1986 through 2012. Glyphosate herbicide was first registered for use in 1974 as Roundup. There are now more than 70 trade names for glyphosate including those used in the home and garden market. Since 1974, 18.9 billion pounds of glyphosate has been used worldwide and the most widely used herbicide in the world. In the US, more than 634 million pounds were used in 2016, with the majority applied on Roundup Ready crops. Glyphosate is registered for use in over 40 crops and sites, including preplant or pre-emergence applications in cereal grains and as a desiccant in several crops including wheat, barley and oats.

A 2016 survey found that 33% of wheat acres are sprayed with glyphosate, but it was not clear how much was applied as a desiccant or late-season weed control. In North Dakota, where glyphosate use in cereal crops has been documented, the most recent 2012 survey showed that 7.6% of wheat, <1% of barley and 2% of oats received a glyphosate application. The survey did not differentiate between how much was used as a desiccant and how much was used as a preplant or pre-emergence herbicide. In much less formal survey settings, cereal grain growers in southern Idaho were asked at the 2018 UI Cereal Schools how many used glyphosate as either a desiccant or for pre-harvest weed control in small grains. Only one or two people, representing 1 to 3% of the audience, at each of the five locations responded that they had used glyphosate for this purpose, but it was always as a spot application and was infrequently used.

Questions have been circulating about glyphosate and its use for weed control in crops grown in Idaho.



Responses to these questions are based on data published in scientific journals.

- 1) Does glyphosate persist in the environment? Glyphosate is not persistent in the environment. It's half-life ranges from 2 days to more than 7-months, with an average of 47 days depending to the soil type and environment. A half-life is defined as the amount of time required for one-half of the chemical to degrade. Even though, glyphosate may be in the soil for several months, it typically cannot be taken up by plants growing where glyphosate residue exists because it very tightly binds with cations, such as calcium, magnesium, iron, and potassium in the soil, as well as organic matter. The bonds it forms with the cations and organic matter prevents it from being taken up from the soil by plants. It also prevents glyphosate from leaching in the soil. However, this does not eliminate the potential of glyphosate moving into surface water attached to soil.
- 2) When glyphosate residue is tested for in the environment, is it commonly found? The extensive amount of glyphosate used today may be the biggest contributor to it being detected in the environment. It has been found not only in soil and sediment, but also surface water (streams, rivers, ditches, lakes, ponds, etc.) and even in precipitation. The detection of glyphosate



in so many sites contributes to the concern of glyphosate in the environment. In studies where glyphosate was found, the amount detected at all of the sites was very low. The highest glyphosate concentration detected in all of the sites was 476 ppb and that was in soil and sediment. In all of the water samples, the highest concentration was 427 ppb and the median concentration was 0.2 ppb.

- 3) Is glyphosate in the environment a toxicity risk to humans, animals, microbes? The acute toxicity of glyphosate to humans and animals is low, but the chronic toxicity has come into question recently in light of the cancer lawsuits. A large study called the Agricultural Health Study followed nearly 45,000 licensed pesticide applicators who had use glyphosate from 1993 to 2013 found no link between glyphosate and any cancers including non-Hodgkins lymphoma. No chronic health issues to animals have been reported. As far as toxicity to microorganisms, the primary way that glyphosate degrades in the environment is by microbial activity. In a study with dairy and beef cattle, glyphosate had no effect on the cattle or microbial populations in their digestive tracts.
- 4) How does the toxicity of glyphosate compare with other common chemical residues found in the environment? With the introduction of Roundup Ready crops including soybean, corn, cotton, alfalfa, and sugar beets starting in 1996 and the patent expiration in 2000, the use of glyphosate has increased dramatically because it is now so inexpensive yet still effective. In addition, growers continue shifting to no-till or direct-seeding practices and this utilizes glyphosate for weed control before or after the crop is planted. The extensive use means that glyphosate residue is found more often in the environment and in many food products.
- 5) How concerned should millers and consumers be about glyphosate in wheat? The US Food and Drug Administration (FDA) monitors all imported and domestic commodities for residues of over 700 different pesticides, including glyphosate. In FY 2016, the most recent reporting year, the FDA analyzed 7,413 samples in its pesticide monitoring program. Of these samples, over 99% of the domestic and 90% of imported human foods were compliant with federal pesticide residue standards. In the grains, 42% of the samples had no detectable pesticide residues,

57% of the samples had detectable residues that were below tolerance limits, and 0.1% had detectable residues above tolerance limits.

- 6) What are safe levels of residue if it is found? The EPA has an established tolerance levels for all pesticides, including herbicides, insecticides, fungicides, etc. The residue tolerance level is based on a number of criteria associated with the pesticide and how it is used. From that information, dietary risk assessments for babies, children and adults are determined. For glyphosate, the residue tolerance for wheat, barley and oats is 30 ppm. Studies have shown that if glyphosate was applied as a desiccant or for late-season weed control when grain moisture levels were <40%, the amount of glyphosate residue was <5 ppm, which is well below the allowable EPA limit. The allowable daily intake (ADI) of glyphosate is set at 1.75 ppm of bodyweight per day. At the maximum residue tolerance level of 30 ppm, a 45-pound child would have to eat 2.6 lb grain or more than 41 slices of bread per day to meet the ADI for glyphosate.

Recent news stories of studies showing the presence of glyphosate residues in cereals and beer have brought attention to consumers. In these studies, the amount of glyphosate residue detected in the cereals ranged from 10.6 to 3,000 times below the EPA residue limit. The amount of glyphosate residue detected in beer ranged from 5.7 to 49.7 ppb. In order for a 180-pound man to reach the ADI by drinking beer, he would need to consume 4.37 gallons or nearly 47 cans of beer in one day.

That fact that glyphosate residue levels have been detected in so many food products and elsewhere in the environment shows that its presence is widespread and this gives reason to consider how much is being used. However, the residue levels found in food products has been below the accepted EPA tolerance levels, which indicates that there are not dangerous levels of glyphosate residue in our food supply. From an agronomic standpoint, it is well known that the greater reliance on glyphosate for weed control, the greater the risk of selecting for more glyphosate resistant weeds. As with all pesticides, it is important to use them judiciously and safely.

For a list of references used in writing this article, please contact Don Morishita at don@uidaho.edu. ■



Beercation Anyone? Beer Tourism is a Big Deal and Growing

BY LAURA WILDER, ADMINISTRATOR, IDAHO BARLEY COMMISSION

More than 10 million people visit small and independent craft breweries every year, according to the Brewers Association, an organization representing more than 5,036 U.S. brewery members. That’s a lot of brewery tours and craft beer sales at the source! Beer tourism is no longer just a trendy hobby but a lifestyle choice more on par with the long-standing popularity of wine tourism. Just search “beercations” and you’ll get a plethora of results on where to tour craft breweries around the country, and the world.

While overall U.S. beer volume sales were down 1% in 2018, the Brewers Association said craft brewer sales continued to grow at a rate of 4% by volume, reaching 13.2% of the U.S. beer market by volume. Craft production grew the most for microbreweries. Retail dollar sales of craft increased 7%, up to \$27.6 billion, and now account for more than 24% of the \$114.2 billion U.S. beer market.



Beer Tasting at Barbarian Taproom in Boise during National Beer Marketing & Tourism Conference

industry stakeholder sponsors to help host the event attended by over 175 professionals involved in beer marketing and beer tourism from 25 states, five Canadian Provinces and Germany.

The BMTC was designed to provide hard information about the important and growing functions of beer marketing and beer tourism to help participants grow and improve their local offerings. Attendees included breweries, brewery guilds, destination management organizations, tour operators, bloggers, media and others. Networking was also an invaluable part of the conference



With the surge in beer tourism and steady growth of craft breweries, an annual National Beer Marketing and Tourism Conference (BMTC) was established in 2017. The 2019 event, planned by an advisory board of beer and tourism industry leaders, was held in Boise in March. The Idaho Barley Commission joined with the Idaho Hops Commission, the Idaho State Department of Agriculture, Idaho Tourism, Idaho Brewers United and about 30 other Idaho tourism related and craft beer

MARKET SHARE OF BREWERS 2018

The share of market for the top five brewers and importers has changed significantly over the past ten years. Since 2017, more than 9 percent of the market volume has shifted from large brewers and importers to smaller brewers and importers. The continued growth in small, upstart breweries makes the U.S. beer market a dynamic and competitive industry.

BREWER/IMPORTER	2008 SHARE	2018 SHARE
Anheuser-Busch Inbev	48.8%	40.8%
MillerCoors, LLC	29.4%	23.5%
Constellation	5.3%	9.9%
Heineken USA	4.2%	3.5%
Pabst Brewing	2.7%	2.1%
All Other Domestic and Imports	9.6%	20%

Source: Beer Marketer's Insights, 2019



National Beer Marketing & Tourism Conference in Boise

in an intimate forum for building relationships. Program topics covered included marketing, sales, driving consumers to your business or beer tourism offerings, tap room management, event planning, beer tour operation and much more.

The Idaho Barley Commission (IBC) co-sponsored an Idaho lunch where Idaho foods, including barley were on the menu. IBC Administrator Laura Wilder spoke about Idaho barley and malt industries, highlighting Idaho’s place as the national leader in barley production, as well as discussing factors for the high quality and consistency of Idaho barley and malt.

U.S. Brewery Count	2014	2015	2016	2017	2018	'17 to '18 % Change
CRAFT	3,814	4,628	5,539	6,490	7,346	+ 13.2
Regional Craft Breweries	135	178	186	202	230	+ 13.9
Microbreweries	2,076	2,626	3,251	3,933	4,522	+ 15.0
Brewpubs	1,603	1,824	2,102	2,355	2,594	+ 10.1
LARGE/NON-CRAFT	46	44	67	106	104	
Total U.S. Breweries	3,860	4,672	5,606	6,596	7,450	+ 12.9

“It was a great opportunity to answer basic questions and clear up some misconceptions about barley production,” said Wilder. She also made the case for barley malt as the best package for brewing compared to other grains. “Barley malt offers the best combination of enzymes and starches for greater utilization and extract, as well as superior filtering for Wort clarification from barley husks, and has lower protein than other grains reducing beer cloudiness. In addition, beer color and a significant amount of beer flavor is derived from barley malt.”

Barbarian Brewing from Boise was one of the Idaho breweries participating in the BMTC. Barbarian Manager Bre Hovley said, “Although the beer industry nationwide has hit a slight decline, the trends are still positive for small brewery growth. There will be a huge focus on local breweries and taprooms, especially with a focus on local, creative ingredients and innovative, high quality beers.” She added that, “beer tourists want to feel like locals when they travel to new beer destinations, so

BEER IS THE PREFERRED BEVERAGE OF CHOICE

According to the Gallup Poll, 36 percent of people do not consume alcohol. Although there have been articles about widespread shifts of legal drinkers from beer to spirits or wine, the annual 2018 Gallup survey has shown remarkable stability in consumer preferences over the past decade.

Consumer Preferences in Beer, Wine and Spirits:

YEAR	BEER	WINE	SPIRITS
2001	46%	31%	18%
2002	44%	30%	22%
2003	42%	33%	22%
2004	39%	33%	24%
2005	39%	36%	21%
2006	41%	33%	23%
2007	40%	34%	22%
2008	42%	31%	23%
2009	40%	34%	21%
2010	41%	32%	21%
2011	36%	35%	23%
2012	39%	35%	22%
2013	36%	35%	23%
2014	41%	31%	23%
2015	42%	34%	21%
2016	43%	32%	20%
2017	40%	30%	26%
2018	42%	34%	28%

Source: Gallup Poll, 2018

having information readily available for tourists to be able to hang out like locals will help Boise greatly. For example, when we get beer tourists in at our taprooms we often find ourselves gushing to people about where they have to go next, whether it’s one of our favorite bars, wineries, breweries or restaurants.”

Beer tourism has become so popular that Travelocity has recently come out with its first Travelocity Beer Tourism Index - a list of America’s Best Beer Destinations by large metro areas and small metro areas. Although Boise has over 25 breweries in the close vicinity, it did not make the list of small metro areas this time but is definitely seen as an up and coming destination for beer tourism, along with all of Idaho. The top six small metro areas named were: Bend, OR; Boulder, CO; Fort Collins-Loveland, CO; Corvallis, OR; Missoula, MT and Burlington-South Burlington, VT.

Hovley said, “I’m not surprised that Boise didn’t make the list yet for small metro areas, as we’re a fairly young beer market compared to the top six that were chosen. But, there is definitely potential for us to make the list in the future! There is a huge culinary/beer/wine tourism push in Boise at the moment and many different businesses are starting to work together to push our city as a destination from the Downtown Boise Association,

Continued on next page



Brewery Tour at Payette Brewing in Boise during National Beer Marketing & Tourism Conference

Continued from previous page

hotels, Idaho Tourism and a new Garden City Tourism division that will focus solely on the hotels, breweries, wineries, ciders and art galleries in Garden City.”

The relatively steady overall picture of U.S. beer production and consumption, along with the rising interest in beer tourism bodes well for the U.S. beer industry and Idaho barley growers.

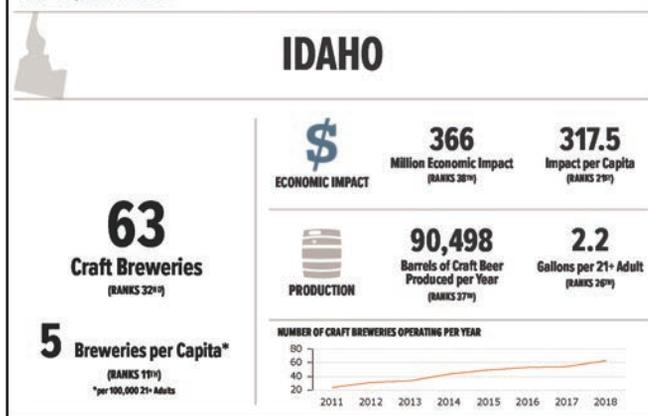
The U.S. Beer Industry by the Numbers

- In 2018, the U.S. beer industry shipped (sold) 202.2 million barrels of beer – equivalent to more than 2.8 billion cases of 24-12 ounce servings.
- In addition, the industry shipped approximately 2.3 million barrels of cider, equivalent to more than 32.2 million cases. *Source: U.S. Alcohol and Tobacco Tax and Trade Bureau (TTB) and U.S. Commerce Department, 2019.*
- In 2018, 82 percent of all beer was domestically produced, and 18 percent was imported from more than 100 different countries around the world. *Source: TTB and U.S. Commerce, 2019*
- Based on beer shipment data and U.S. Census population statistics, U.S. consumers 21 years and older consumed 26.5 gallons of beer and cider per person during 2018. *Source: NBWA Industry Affairs, 2019*
- About 241.4 million people, 73.8 percent of the population, are over the age of 21 and considered legal drinking age. The share of the U.S. population

IDAHO CRAFT BEER SALES STATISTICS, 2018

Craft beer sales and production by state, breweries per capita, economic impact* of craft breweries and other statistics as gathered and maintained by the Brewers Association.

*Economic impact data is from 2017



over 21 has increased steadily over the past 10 years. In 2006, the share was 71 percent. *Source: U.S. Census and NBWA Industry Affairs, 2019*

- The U.S. beer industry sells more than \$119.3 billion in beer and malt-based beverages to U.S. consumers each year. *Source: Beer Institute Annual Report, 2018* ■

CRAFT BEER INDUSTRY MARKET SEGMENTS

There are four distinct craft beer industry market segments: brewpubs, microbreweries, regional craft breweries and contract brewing companies.

Microbrewery

A brewery that produces less than 15,000 barrels of beer per year with 75 percent or more of its beer sold off-site.

Brewpub

A restaurant-brewery that sells 25 percent or more of its beer on site. The beer is brewed primarily for sale in the restaurant and bar.

Contract Brewing Company

A business that hires another brewery to produce its beer. It can also be a brewery that hires another brewery to produce additional beer.

Regional Craft Brewery

An independent regional brewery with a majority of volume in “traditional” or “innovative” beer(s).

Regional Brewery

A brewery with an annual beer production of between 15,000 and 6,000,000 barrels.

Large Brewery

A brewery with an annual beer production over 6,000,000 barrels.

Source: Brewers Association



Idaho Academy of Nutrition and Dietetics Speaker on Cardioprotective Patterns and Dietary Solutions sponsored by Idaho Barley Commission

Idaho Nutrition and Foodservice Professionals learn about the Health Benefits of Barley at April Meetings in Boise

Nearly 200 members of the Idaho Academy of Nutrition and Dietetics heard a presentation during their annual meeting in Boise during April on “Cardioprotective Dietary Patterns – Review of the Current Scientific Evidence and Tips for Practical Application”. The presentation was by Carol Kirkpatrick, PhD, MPH, RDN, CLS, FNLA, Wellness Center Director/Clinical Associate Professor, Kasiska Division of Health Sciences, Idaho State University. She discussed cardiovascular disease (CVD) risk factors and evidence-based dietary guidelines for CVD prevention, including the value of barley related to using barley as part of a dietary pattern for increased soluble fiber consumption to lower LDL-C.

The Idaho Barley Commission (IBC) sponsored Dr. Kirkpatrick’s talk, as well as exhibited at the trade show distributing samples of wholegrain hullless barley and wholegrain barley flakes, along with barley recipes and information on the types of barley and how to use them, and information on barley health benefits.

IBC also exhibited at the Idaho Preferred Farm to Chef Collaborative in April for outreach with about 50 Boise area chefs, restaurants and school foodservice directors about incorporating more barley into their menus. Samples of Barley Granola were served at both events.

The Food and Drug Administration (FDA) approved a heart health claim in May 2006 to include barley in the recognized relationship between beta-glucan soluble fiber (as found in oats) and reduced risk of coronary heart disease. To qualify for this health claim, a food made from eligible barley sources must contain at least 0.75 grams of beta-glucan soluble fiber per serving. This heart health claim is based on eating a total of 3 grams of beta-glucan soluble fiber daily. Eligible products include whole grain barley, bran, flakes, flour, grits, meal, sieved barley meal and pearl barley.

In addition, the 2015 Dietary Guidelines for Americans recommends that all Americans make half or more of their grains whole grains. For everyone age 9 and up,

Continued on next page

Continued from previous page

this means eating 3 to 5 servings or more of whole grains every day. Whole hullless barley, barley flakes, barley flour and barley grits are excellent menu items for including whole grains.

To learn more about the health benefits of barley, or find barley recipes, go to: eatbarley.com. IBC thanks PNW Food Barley Marketing Collaborative partners McKay Seed Company, Scoular Grain and Highland Milling for providing the barley product samples for these meetings. ■



Idaho Nutrition and Dietetics Professionals Learn About the Health Benefits of Barley



Idaho Barley Commission Staff Hands Out Wholegrain Barley Samples and Barley Information to Nutrition Professionals

Bonnors Ferry Barley Grower and former Idaho Barley Commissioner Tim Dillin Presented 2019 Idaho Governor's Award for Marketing Innovation at February 2019 Idaho Ag Summit in Boise

Tim Dillin farms 1,500 acres in partnership with his father and wife, Julie, producing barley, wheat, canola, alfalfa, and garbanzo beans in Boundary County. Dillin's family has been farming the Kootenai Valley for over 90 years and is noted for their progressive farming practices, including direct seeding. Tim has collaborated with the University of Idaho for the past 10 years on variety trail research for spring and winter wheat, spring and winter barley, and canola and mustard crops. He provides the land and manages the crops for UI Extension during the season, providing weed and pest control. The research results from these replicated plot trials for dozens of potential new varieties of each crop allow breeders to target their efforts to crop varieties that address our current challenges such as rust resistance and drought tolerance. During his time as an Idaho Barley Commissioner, Tim served on four national barley boards – the National Barley Growers Association, the National Barley Foods Council, the National Barley Improvement Committee, and was a delegate to the US Grains Council. Tim and his



wife Julie invested in an on-farm artisan flour mill called Farm to Market Grains and are producing and selling numerous wheat and barley flour products at farmers markets throughout northern Idaho and artisan bakers in the Treasure Valley. Congratulations Tim on receiving the 2019 Idaho Governor's Award in Agriculture for Marketing Innovation! ■

**THIS IS
YOUR
GRAIN.**



**THIS IS
YOUR
GRAIN
ON BUGS.**

*Protected with Diacon®-D IGR Unprotected wheat after 150 days of insect infestation**

Keep Wheat and Barley Neat with Diacon®-D IGR

Is there anyone out there who still isn't clear about what insects do to your grains? From causing discount penalties to rendering grains altogether inedible, infestations make a verifiable economic impact. Diacon®-D IGR is a ready-to-use solution for protecting wheat, barley and other grains in a variety of storage sites. This dry formulation is an insect growth regulator that stops larval development that is ideal for water challenged situations.

**Make sure your grains stay clean with Diacon®-D IGR.
Call 800.248.7763 or visit BugFreeGrains.com to learn more.**



*In laboratory setting

Always read and follow label directions. Diacon and Diacon with design are trademarks of Wellmark International. Central Life Sciences with design is a registered trademark of Central Garden & Pet Company. ©2017 Wellmark International.

 
CENTRAL Life Sciences®

ALBAUGH CUSTOMIZED SEED TREATMENT TECHNOLOGY

Seed treatment performance and coverage brought to you by Albaugh Customized seed treatment solutions based on your needs and micro-climate brought to you by your Seed Retailer.



Albaugh is Delivering Value Through:

- 1. Innovation:** Addressing current and future critical gaps by crop segment through enhancements to current inventions
 - BIOs[™] Insecticide 100 providing New and Novel Wireworm Solutions
 - CoAXium[™] Wheat Production System driven by Aggressor[™] herbicide
 - Customized seed treatment offers
 - Collaboration that delivered an enhanced chickpea seed treatment offer for growers
- 2. Performance:** Delivering products today that address customer & market needs proven performance against competitive seed treatment offers
- 3. Value:** Delivering robust customized seed treatment offers based on proven performance

