

Soy 2020 Indicators

Critical to the soybean industry's success is early identification of which scenario is closest to the course of history as it actually unfolds. The table below contains an initial set of indicators that will signal to stakeholders which scenario is beginning to play out in the marketplace. By monitoring the leading indicators and having strategies in place for each scenario, the industry can get a jump start on the competition.

Indicator	Full Speed Ahead	Shared Success	Off-Shore Migration	Forward to the Past
Formulation and passage of global trade agreement (s) favorable to technology and trait propagation	X	X		
Stronger global protection of intellectual property rights	X	X		
Approval of development/deployment of trait protection technology	X	X		
Accelerated adjunction/mediation of intellectual property disputes	X	X		
Substantial private and/or public sector investment in research for new soybean trait technology	X	X		
Sustained profitability throughout value chain for attribute-specific soybeans	X	X		
Consumer driven actualization of new, commercialized soybean uses hitting the market	X	X		
Major and/or new suppliers developing needed support services for integrated value chains (e.g., risk management tools, incentives, supportive IT, tracking and testing technology)	X	X		

in soybeans				
Formation of integrated value chains in soybean industry	X	X		
Strong soybean industry alignment /collaboration and cooperation	X	X		
Success by industry groups to create technology adoption incentives in production policy and programs	X	X		
Large capital infusion into IP systems, especially for storage and transportation	X	X		
Emergence of farm policies that are crop neutral and promote adoption of innovation		X		
A continued and successful livestock industry	X	X		X
Environmental freedom to operate		X		
Formation of integrated value chains in other crop industries		X	X	
Continued consumer acceptance in innovated practices of soy products		X		
Producers are more market sensitive and business driven		X		
Producers are earlier adopters of technology		X		
Equipment sector focused on technology efficiencies		X		
U.S. maintains strong IP protections globally		X		
Agronomic zones for specific traits		X		
Growth in influence of environmental issue lobbies in the U.S.			X	

Marked shift in investment into developing corn technology			X	
Wide basis indicative of lack of nearby demand			X	
Mindset of growing beans because “we have to,” not because we want/choose to			X	
When plants slow or shut down in U.S. – expansion of crush capacity in other countries			X	
Farmers shift significant soy acres out of production on a sustained basis			X	
Decrease in collaboration within soy industry			X	
Significant innovations in other competing crops			X	
Significant drop in investments for research innovations public and private			X	
Investment in other competing countries			X	
More U.S. farmers buying/developing partnerships in foreign countries for soybean production			X	
Continuance of current government Farm Bill policy, with no success by industry groups to create technology adoption incentives in production policy and programs				X
Lack of investment funds (all sources) in technology development				X
No significant increase in U.S. funding of infrastructure/transportation system repair and improvement				X
Continuance / increase in emphasis on biodiesel production				X
Cost of production off-shore continues to drop				X

Foreign investment in infrastructure increases				X
Continued expansion of ethanol that drives feed costs down and encourages more livestock production on North America - lever DDG's/meal				X
Increased consolidation at farm gate				X