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24 de marzo de 2022

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Notes on Agriculture

Politico

- The European Union has joined the U.S. coalition for [Sustainable Productivity Growth](#), a Vilsack-led initiative that has been framed as an alternative to the EU's own "Farm to Fork" food sustainability strategy. [POLITICO Europe's Gabriela Galindo has the story.](#)
- The Senate Agriculture Committee on Wednesday advanced four nominees to the Commodity Futures Trading Commission, putting the five-member regulatory agency one step closer to having a full slate of commissioners. [Pro Financial Services' Sam Sutton has the details.](#)
- Colin O'Neil will be the new director of public policy and social impact at Bowery Farming, the largest U.S. indoor vertical farming company. O'Neil was previously a legislative director at the Environmental Working Group.
- The National Grain and Feed Association is seeking increased flexibility for acres within the Conservation Reserve Program, warning that the U.S. "needs to produce more grain and oilseeds to offset the loss of Ukraine's grain and sunflowers." [Read the group's letter to Vilsack here.](#)
- Biden is [set to appoint Chef José Andrés](#) as co-chair of the President's Council on Sports, Fitness, and Nutrition, alongside Washington Mystics star Elena Delle Donne.

Agri-Pulse Daybreak

Agri-Pulse

[*EU opens conservation land; U.S. groups urge CRP release*](#)

With the war in Ukraine dragging on, farmers in the European Union are going to be allowed to plant crops on conservation acreage this spring, and there is new pressure on the Biden administration to do the same.

On Wednesday, [the European Commission announced a series of measures](#) to aid the ag sector, including about \$550 million in direct payments "to directly support farmers most affected by higher input costs and the closure of export markets." The commission also will allow farmers to plant crops on



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fallow conservation acreage without taking a cut in what are called “greening payments.”

In the U.S., the American Farm Bureau Federation has joined grain and oilseed processors in [urging USDA to allow cropping of Conservation Reserve Program acreage](#) that is classified as prime farmland or is less environmentally sensitive. Agriculture Secretary Tom Vilsack has so far resisted that idea.

EU justification: “Russia’s war against Ukraine has created a multitude of problems including in relation to global food security,” European Commission Executive Vice-President Valdis Dombrovskis said. “When it comes to food, now is the time for Europe to show its solidarity: to help Ukraine, its people and farmers, as well as vulnerable food-importing countries around the world that face surging prices and potential shortages.”

[The commission said it has proposed an EU Emergency Support Program](#) of about \$360 million Ukraine “to help alleviate the suffering of Ukrainians caused by the Russian invasion.”

By the way: The University of Missouri’s Food and Agricultural Research Institute has released its [new 10-year forecast for the farm economy](#), but the estimates come with a big asterisk: The analysis is based on market conditions in January, well before the war in Ukraine pushed commodity prices much higher.

According to FAPRI, the war could have a number of impacts, including increasing grain and oilseed exports and boosting production expenses for both livestock and crop producers. The economists say it “seems likely that the net impact on crop producers will be positive and the net impact on livestock producers negative.”

[*US-Japan beef deal awaits Japanese government OK*](#)

An agreement reached by U.S. and Japanese negotiators is expected to make it much less likely that strong U.S. beef exports to the country will set off higher tariffs on U.S. shipments as it did last year. But Japanese lawmakers still need to approve the deal, and U.S. trade officials say they don’t know how long that will take.



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The agreement stipulates that three triggers – not just one – will have to be set off before Japan raises its tariff on U.S. beef. Under the new formula, the higher tariffs would be contingent on both U.S. beef exports and the combined exports of all Comprehensive and Progressive Agreement for Trans-Pacific Partnership nations reaching their volume triggers, and on US beef shipments exceeding the previous year’s total.

“The way that we look at this agreement is that it adds a lot of certainty to the market, and it allows the U.S. to meet the demands of Japanese importers,” one official told reporters Wednesday night.

US, Japan reach deal to lessen threat of beef trade interruptions

Agri-Pulse

The U.S. and Japan have reached a deal that would make it less likely that the Japanese safeguard trigger will boost tariffs on U.S. beef, as it has done in the past.

Instead of just one trade-volume trigger that raises the tariff on U.S. beef that is in place now, there will be three separate safeguards that need to be set off, and that’s expected to lower the chances that U.S. exporters will be impacted.

The second safeguard trigger being added to the deal stipulates the tariff on U.S. beef cannot go up unless the aggregate beef volume trigger level for all of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership countries is also breached in the Japanese April-March fiscal year. The third condition is that U.S. beef exports to Japan in any year must exceed the amount of exports in the previous year.

The U.S.-Japan Trade Agreement that went into effect in 2020 reduced the likelihood of Japan’s beef safeguard trigger being set off by applying it to a yearly basis instead of a quarterly basis, but that wasn’t enough to prevent a trade disruption.

U.S. beef exports had surpassed the Japanese safeguard trigger of 242,000 metric tons by Mar. 10 last year and Japan raised its tariff on U.S. beef from 25.8% to 38.5% for 30 days to slow down trade and protect Japan’s domestic producers. The preferential Japanese tariff has since dropped to 25%.



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Still, the fact that the higher tariff rate was triggered spurred sharp concern from the U.S., and negotiations started almost immediately to alter the safeguard trigger system.

“This new three-trigger safeguard mechanism will allow American farmers and ranchers to meet Japan’s growing demand for high-quality U.S. beef and will also reduce the probability that Japan will impose higher tariffs on U.S. beef in the future,” a senior USTR official told reporters.

U.S. beef exports to Japan are strong again this year, but the USTR official said Japan’s safeguard trigger isn’t expected to be hit as a result.

The U.S. exported about \$182 million worth of beef to Japan — roughly 23,000 tons — in January, a 4% increase from the same month in 2021, according to the U.S. Meat Export Federation.

It’s unclear when the new safeguard measures will be implemented; Japan’s parliament must first approve them.

U.S. FARM GROUPS URGE SOWING ON PROTECTED LAND AS WAR CUTS OFF UKRAINE SUPPLY

[Reuters](#)

Farm groups are urging the U.S. Agriculture Department to allow farmers the ability to plant on acres set aside for conservation, to help fill the absence of Ukrainian corn, wheat, and sunflower oil amid Russia’s invasion of the country.

In a letter to U.S. Secretary of Agriculture Tom Vilsack on Wednesday, seven agriculture lobbying organizations representing U.S. farmers, feed producers, grain exporters, millers, bakers, and oilseed processors asked the USDA to provide flexibility to farmers to plant crops on more than 4 million acres of “prime farmland” currently enrolled in the Farm Service Agency’s Conservation Reserve Program (CRP) without penalty.

The program pays farmers to fallow land for a 10-year period.

“It remains unclear whether Ukrainian farmers will be able to safely plant crops this spring,” the letter said. “Time is of the essence. The planting window in the United States has already opened.”



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If those acres are planted, at 2021's average corn yield, that could mean an additional 18.7 million tonnes of grain produced.

The letter, signed by the American Farm Bureau Federation, the National Grain and Feed Association, and others, echoes a March 8 request by U.S. Senator John Boozman of Arkansas, as well as calls from agriculture economists.

"This is an emergency, wartime situation," said University of Illinois agricultural economist Scott Irwin. "It's very clear to me that the world needs acres of corn and wheat this spring, and where are we going to find them?"

Some farmers are skeptical about the approach. CRP acres are often set aside because they are difficult to farm, have poor soil, or are environmentally sensitive.

"In my area, everything that is farmable is farmed. We have very little CRP in my neck of the woods. It's only in places you don't want to farm," said Kevin Scott, a corn and soybean farmer in southeastern South Dakota.

The war in Ukraine threatens around 7 million hectares (17.3 million acres), nearly half the nation's planned spring planting region, Agriculture Minister Roman Leshchenko said. Some farmers cannot access farms in conflict zones, while others struggle to find adequate fuel and fertilizer, and exporters are blocked from shipping grain by Russian forces.

The European Union has already eased restrictions on fallow land, offering financial incentives for farmers to plant additional acres.

The USDA-FSA said it had no immediate plan to relax CRP rules, while Vilsack, in a March 10 town hall, did not rule it out.

"I think it's a little premature to make that call, because we really don't know precisely what's going to happen," said Vilsack.

Fertilizer costs, international conflict, supply chain issues holding agriculture back



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FOX4

Prices on everything from homes to fuel are going up between supply chain delays and rising inflation, but consumers could see bigger increases in food prices because farmers are seeing increases in input costs across the board.

“It’s very abnormal,” said Olathe farmer Steve Bowlin. “I’ve never seen it in my life.”

Even with a profession that normally works under the open sky, Bowlin has built a greenhouse structure so that he can get a few-month head start planting vegetables in a climate he can control before his outdoor fields are ready.

“It expands my growing season by two months,” Bowlin said.

He needs as much extra time as he can get because profit margins for farmers right now are wafer thin. Between Bowlin and his son, they farm about 100 acres of row crops and 17 acres of vegetables, of which Bowlin expects to get about 75% of his profit from the vegetable crops.

It’s more labor intensive but starting some produce a few months early means he can harvest and replant multiple times, growing more to sell and saving resources like fertilizer, which has more than doubled in cost in some cases.

Kansas Congressman Rep. Tracey Mann (KS-01) heard complaints like Bowlin’s and joined Kansas Senator Jerry Moran and Democrats and Republicans in both the House and Senate to act the U.S. International Trade Commission to remove duties on fertilizer products imported from Morocco and Trinidad and Tobago.

“Not only are prices high, but you add tariffs on top of that and they become astronomical and so this, if it gets traction, should help our farmers all through the district,” Mann said. “People talk about inflation being six or seven percent, tell that to our Kansas AG producers who are setting a 300 or 400 percent increase in the price of fertilizer over just a few months ago.”

There’s no word yet on if the ITC will make that change so Bowlin said farmers like him can only get creative and save a dollar where they can.

“All of this here was from last years’ profits,” Bowlin said, gesturing to his vegetable crop. “So, we’re starting out blank zero and then going from there.”



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The war in Ukraine also complicates the global agriculture market because they were the fifth-largest exporter of wheat in the world in 2019 and a lot of fertilizer comes from Russia. The fighting going on there now puts all that in jeopardy.

Agronomics in Charts: California avocado season well underway

FreshFruitPortal

California meets about 10% of the nation's annual avocado consumption. According to the California Avocado Commission (CAC), projections for 2022 are at 306-million-pounds, with the Hass variety making up the majority of the harvest.

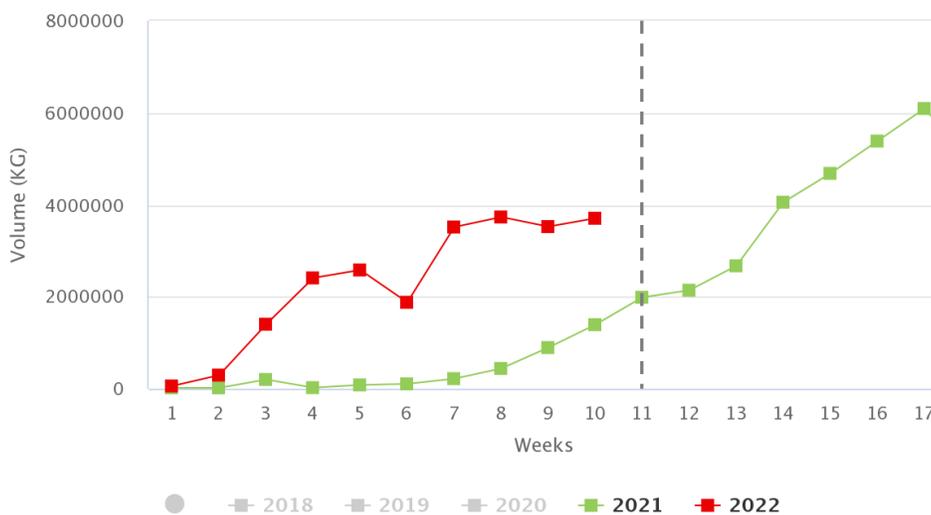
Most of the California avocado season volume is expected to occur mid-April through mid-July, with the season mellowing out from August to October. With its balmy weather and fertile soil, California offers the perfect breeding ground for avocados.

The CAC had projected about 6-8 million pounds in January and February but yields of around 40 million were recorded by March 7. The year kicked off with robust growth due to rains, dry spells, however, have returned and growers are looking forward to more rains to help with avocado sizing. Week 10, this season, saw volumes of around 3.7 K tonnes, around three times the volume recorded in Week 10 of 2021.



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Avocado Volumes by History in the US | From California-South



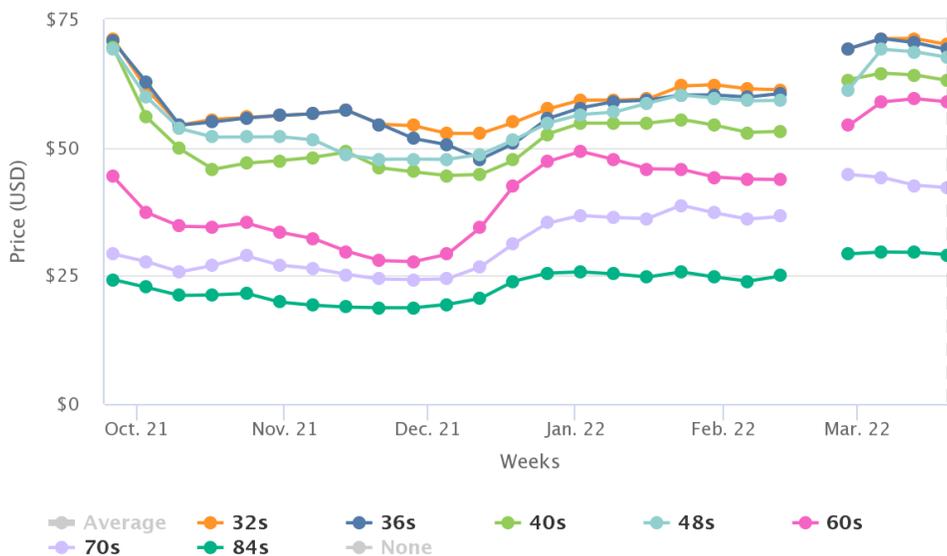
(Source: USDA Market News via Agronometrics. Agronometrics users can view this chart with live updates here)

Many trees, especially in the South have been bearing size-70s and 84s rather than the 48s and 60s that retailers have a preference for. The graph below accentuates the effect of size on pricing. Sizing is expected to improve come April.



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Avocado Prices by Size (As Reported) in the US | Hass



(Source: USDA Market News via Agronometrics. Agronometrics users can view this chart with live updates here)

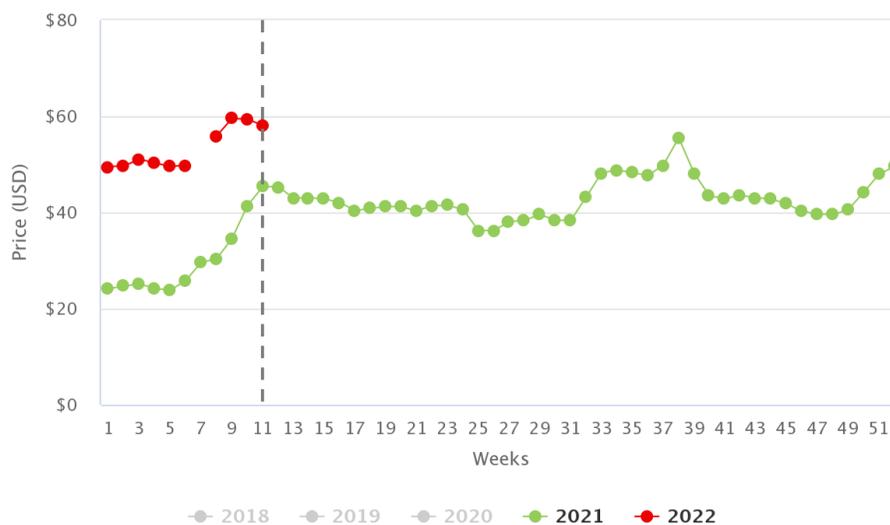
Due to a lack of freezes or strong winds this season, the produce has been faring well. “We are hoping for good rainfall totals in March to help the fruit size-up for growers. We want a good distribution of sizing by mid to late April, which is when we typically see the first major uptick in harvest volume of locally-grown avocados in preparation for Cinco de Mayo.” says Doug Meyer, senior vice-president of sales and marketing for West Pak Avocado.”

High price rates have been trending so far in this season; prices in week 11 were in the vicinity of \$58.13 per package, a 28 percent climb compared to last year. “The last couple of years, we’ve had some wind events that have been pretty serious,” Phil Henry, president of Henry Avocado Corp., Escondido, Calif said in an industry publication. “We’re irrigating, so we think fruit size will be OK,” he says. “It just costs more money.” he adds



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Avocado Prices by History (As Reported) in the US | Hass



(Source: USDA Market News via Agronometrics. Agronometrics users can view this chart with live updates here)

Scant supplies from Mexico enabled California to have an earlier start to the season. Harvest will continue to ramp up through April. Avocados are deemed the ‘green gold’ and command premium prices from retailers. It takes 14 to 18 months to grow a single California Avocado and one California Avocado tree can produce up to 200 avocados (or 100 pounds of fruit) per season.

Going forward, a strong demand is expected for California avocados this season and while April through July are peak volume months, some varieties and regions will have supplies through the end of summer/early fall.

In our ‘In Charts’ series, we work to tell some of the stories that are moving the industry. Feel free to take a look at the other articles by clicking here.

All pricing for domestic US produce represents the spot market at Shipping Point (i.e. packing house/climate controlled warehouse, etc.). For imported fruit, the pricing data represents the spot market at Port of Entry.

You can keep track of the markets daily through Agronometrics, a data visualization tool built to help the industry make sense of the huge amounts of data that professionals need to access to make informed decisions. If you found the information and the charts from this article useful, feel free to visit



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us at www.agronometrics.com where you can easily access these same graphs, or explore the other 21 commodities we currently track.

How Consumer Attitudes Toward Food Are Shifting as Inflation Impacts Spending Habits

GO Banking Rates

Americans are cutting back on dining out (again), according to a new study. And this time, it's not due to the pandemic or shutdowns of food establishments. It's due to rising costs and economic uncertainty.

The EY Future Consumer Index, which polled more than 18,000 consumers globally, discovered that more than half said that rising costs are affecting their ability to purchase goods. Prioritizing "experiences" over physical goods is a key trend, which isn't surprising after people spent the past two years, largely, at home.

Even though 42% of consumers said they intend to cook at home more, 20% said they are seeking "cheaper alternatives for fresh food." Meanwhile, 19% said they are looking for cheaper versions of packaged food. Well over half (57%) also indicated they would be willing to sacrifice choice in grocery brands if it meant paying less overall.

However, price isn't the only thing that matters when it comes to choosing brands. Worldwide, 26% place the environmental impact of brands ahead of affordability (24%). Millennials and Gen Z especially seek out brands that align with their values, including a commitment to sustainability. More than half (52%) of respondents overall said they are paying more attention to the social impact of their purchases, while 56% are paying attention to the environment effects.

To continue to make the right choices where it matters, including investing in experiences, consumers are cutting back in key spending areas. According to a press release from EY.com, consumers are spending less on clothing (38%), beauty and cosmetics (35%) and alcohol (30%).



Competition bill could carry high-skilled immigration changes

Roll Call

Following the advancement of legislation to shore up U.S. global competitiveness, senators expressed optimism the bill could serve as a bipartisan vehicle for long-awaited changes to the legal immigration system.

The Senate voted Wednesday to move forward with resolving differences between its bill and the House-passed version. Both measures would provide funds to boost American manufacturing and scientific research to better compete with China and other global powers.

Chief among those differences are a slate of immigration provisions added by the House that would create a new visa category for entrepreneurs. They also would exempt foreign citizens with doctoral degrees in science, technology, engineering and math, or STEM fields, from annual green card limits.

These limits have pushed foreign-born graduates of American universities out of the country and kept professionals from populous nations like India and China waiting more than a decade for green cards to become available.

Sen. Ben Ray Luján, D-N.M., a vocal proponent of efforts last year to pass a path to citizenship for undocumented immigrants, said he would support including the House-passed immigration provisions in the final version of the competition bill, citing workforce shortages in key industries.

He and other colleagues, including those in the Congressional Hispanic Caucus, “are pursuing every opportunity that we have to make progress on immigration reform,” he said Wednesday.

“I’m certainly hopeful that the Senate is open to those provisions,” Luján said. “It still doesn’t solve everything, and it still doesn’t solve the challenge associated with those specific visas. But it makes progress, and it’s forward-looking from a workforce perspective.”

Sen. Tammy Baldwin, D-Wis., one of 13 co-sponsors on the Senate’s competition bill, also said Wednesday she would support the House’s immigration additions, highlighting the challenges universities face in retaining foreign-born graduates under the current immigration scheme.



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The immigration provisions could even garner support from some Senate Republicans, who have historically refused to support other efforts at immigration changes without significant increases in border security funding.

“If there’s broad support for the provisions, then I’m absolutely open to including it,” said Sen. Todd Young, R-Ind., another co-sponsor on the Senate bill. “More broadly in terms of skills-based immigration reform, I think it’s essential to maintaining our national competitiveness.”

Sen. John Cornyn, R-Texas, a member of the Judiciary Committee that has jurisdiction over immigration matters, said he was “certainly open” to the House-passed immigration provisions on high-skilled visas.

He cautioned, however, against adding materials that could bog down the bill as the two versions are reconciled, thwarting its chances of passing.

“That’s been our history. So I support targeted bills where there is common ground,” he said Wednesday.

Immigration measures have historically struggled to garner broad bipartisan support in Congress; the Senate version of the competition bill passed with more Republican support than the House bill did.

“What’s really important is getting this thing across the finish line, because this is a national security issue,” Sen. Mark Kelly, D-Ariz., another co-sponsor, said when asked about his support for the immigration additions.

Sen. Rob Portman, R-Ohio, a bill co-sponsor and the ranking member of the Homeland Security and Government Affairs Committee, said he had not yet reviewed the House’s immigration provisions but warned his colleagues to “be careful and not overload this bill.”

Baldwin struck a similar tone: “What I’ve told leadership is, just get something through. Get something that everybody can agree on, and pass it through.”

Bipartisan efforts revived

If the House-passed immigration provisions survive the conference process between the two chambers, it could pave the way for significant immigration changes to be signed into law for the first time in decades.



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In addition to the proposed changes for entrepreneurs and doctorates in STEM fields, the House-passed bill would establish deportation protections for Hong Kong residents who fear persecution by Chinese authorities and give residents of the Xinjiang Uyghur Autonomous Region second-priority refugee status.

Senate Democrats attempted last year to pass legislation that would put millions of undocumented immigrants on a path to permanent residency through the reconciliation process, which would allow filibuster-proof legislation.

However, those efforts have stalled amid intraparty disagreements, and Senate Democratic Whip Richard J. Durbin has indicated party leaders are unlikely to try again this year.

But on Wednesday, Durbin, who chairs the Judiciary Committee, and Cornyn both said they had restarted bipartisan talks with each other to identify immigration bills where they have “common ground.”

“I don’t know if this is the right vehicle,” Durbin said of the competition and innovation bill, “but I’ve talked to Sen. Cornyn about a bipartisan conversation.”