

# GLOBAL FOOD SECURITY THROUGH TRADE

2010 ANNUAL REPORT



U.S. GRAINS  
COUNCIL

Developing Markets ■ Enabling Trade ■ Improving Lives



■ 2010/2011 BOARD OF DIRECTORS

*Sitting, left to right:* Julius Schaaf, Wendell Shauman, Terry Vinduska, Don Fast, Rick Fruth  
*Standing, left to right:* Thomas C. Dorr, Mark Seastrand, Bill Kubecka, James Tobin,  
Darrel McAlexander, Ron Gray, Dave Lyons, Alan Tiemann, Jere White  
*Not pictured:* Gerry Salzman



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President and CEO  
U.S. Grains Council

**Rick Fruth**  
Past Chairman  
Ohio Corn Marketing  
Program

## ■ TO U.S. GRAINS COUNCIL MEMBERS:

It's been five decades since the U.S. Grains Council was formed on an idea that by working together we could improve the lives of U.S. farmers and millions of people around the globe, while ensuring a more reliable export market for our crops.

Supported by members, partners and cooperators, who together are the lifeblood of our organization, the Council has seen success every year since its founding. We've promoted U.S. corn, sorghum, barley and their co-products in dozens of countries. We've educated buyers about U.S. grain quality and about the production potential of their livestock, poultry and fish when fed a high-quality diet. We've built strong relationships – partnerships – around the world.

Relationships are surely one of the most important aspects of the Council. Through positive relationships where buyers and sellers speak freely, where trade rules are clear and reliable, and where questions are answered through a quick call or e-mail, we change attitudes. We, ultimately, improve lives through market development and trade.

In 2010, we witnessed a new awareness of U.S. distiller's dried grains with solubles (DDGS), which saw an incredible upswing in exports. China began importing significant amounts of U.S. corn and DDGS. Direct contracts between foreign buyers and U.S. barley farmers are a positive example that may be of significance in other sectors. Programs touting the benefits of sorghum had direct results with sales to Morocco.

Yet, trade barriers in some regions in 2010, like in 2008, shifted trade patterns, distorted markets and hampered efforts of countries to be food secure.

This idea of food security is often draped in a cloak labeled "self sufficiency." We must be clear that food security is considerably broader and includes trade with reliable suppliers who have clear expectations, abide by trade rules and operate in a transparent environment.

Reflect on the Japan hog lift and how that was the beginning of a tremendous relationship between the United States and Japan. We celebrated this special relationship in 2010 by hosting a food security conference in Japan. We talked about harmonized regulations, sound trade policy, a respect for science and more. This led to strong trade ties with Japan. The result is a nation that is food secure through trade with partners like the United States who deliver year after year.

This is perhaps the best example of food security through trade in the world and is a message the Council will continue to share.

Meanwhile we must remain diligent and continue adapting our strategies to a world with an international marketplace that is bigger and more dynamic than at any point in history. We must remain connected on the ground and be active through international offices located in the right regions. This is why we opened an office in Panama that will allow the Council to better focus on Latin America and the Caribbean region.



This is why the Council is learning more about opportunities in India, a country whose economic growth may create markets for U.S. agricultural products in the years ahead. It is important to build relationships while developing the market and align policies that will enable trade, so when the time is right, the United States can fulfill the market's needs and help improve the lives of India's people.

While we look back over the last year in the next few pages, let us also look forward and remember we must be flexible enough to seize opportunities and to approach new markets with open minds and new ideas. Let us support trade agreements and infrastructure improvements that will help us achieve our goal and maintain our position as the world's most reliable supplier of feed grains.

Thank you for your support and encouragement over the last year and in the future. Your investment in the U.S. Grains Council is making a difference in the lives of people the world over and helping ensure the success of farmers and agricultural organizations here at home.

A handwritten signature in black ink that reads "Terry Vinduska".

**Terry Vinduska**  
Chairman

A handwritten signature in black ink that reads "Thomas C. Dorr".

**Thomas C. Dorr**  
President and CEO



# providing a platform

## ■ TAKING THAT FIRST STEP



**U.S.** Grains Council-sponsored events like the Export Exchange 2010 and Southeast Asia Grain Transportation Conference are tremendously successful, as they provide an opportunity for buyers and sellers to meet face-to-face. This interaction builds relationships and trust, and that's what it takes to develop a partnership in agriculture, which ultimately facilitates global trade.

Platforms like the Export Exchange 2010, where deals on the sale of U.S. feed grains are struck with a handshake, are possible because of the reputation the U.S. Grains Council has built over its five decades of service to global agriculture. The Council is a non-biased source of reliable information. It is known for answering questions on feed grains and trade; helping livestock industries be the best they can, and partnering with industry associations that need access to global grain markets to produce affordable, high-quality animal proteins to feed a growing population.

In support of these efforts, the Council conducts dozens of educational sessions in the United States and around the world, bringing in industry experts on everything from animal nutrition to grain storage to feed mill operations. Perhaps most importantly, however, the Council conducts trade missions to connect U.S. agriculture producers with those looking for answers on everything from grain production to specifications on import contracts.

Of the many missions organized by the Council in 2010, the Corn Mission provided an opportunity for U.S. farmers to talk grain quality and yield trends with importers and end-users in Japan, Taiwan and China. End-users and importers have a great deal of faith in farmers and trust them to provide honest, sound answers.

### JANUARY 2010

- The U.S.-Morocco Free Trade Agreement, signed in June 2004, provided the United States a significant market advantage with its recent tariff reduction of U.S. corn.
- A feeding trial using U.S. DDGS concluded in Egypt in the dairy, water buffalo, and poultry sectors and demonstrated performance improvements and savings in feed costs. The results matched those of previous trials orchestrated by the Council.

- The Council helped foster the sale of 200 tons (9,200 bushels) of high beta glucan hull-less barley to Taiwan, having met with the Taiwan Barley Products Industry Association to encourage their interest in food barley and helping deliver samples used to make food products for display at a local food trade show and seminars.

### FEBRUARY 2010

- The Council organized three international teams that included individuals from Taiwan, Morocco, Egypt and Saudi Arabia to travel to the United States for educational seminars on modern U.S. poultry operations and production technology.
- Council representatives traveled to Tokyo for the Corn Outlook Conference. Organized by the Council in cooperation with Japanese corn importers, end-users and industry, the team discussed U.S. and world corn supply, production and demand with attendees.
- "The U.S. Grains Council has the experience and imagination necessary to make things happen," said the Honorable Carole L. Brookins to the Council's International Marketing Conference and Annual Membership Meeting.



1. Following the Export Exchange 2010, a group from Taiwan accompanied Council officials to Indiana to see a U.S. corn operation firsthand.

2. U.S. students spent two weeks in Asia learning about agriculture practices as part of the International Collegiate Ag Leadership program sponsored by the Grains Foundation and FFA.

3. A team of Japanese feed and food barley industry representatives visited the United States to learn about U.S. barley production and supply

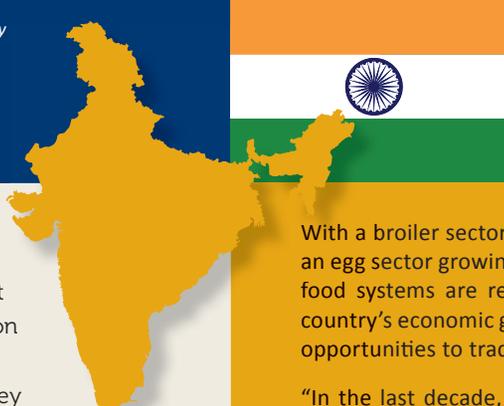
When Japanese importers, for example, asked questions about corn quality, the farmers who planted, managed and harvested the crop were there to assure them that the 2010 corn crop was one of the highest quality crops in recent memory. U.S. producers also shared information about yields, production trends and the ethanol industry. In Taiwan and China, they provided information on distiller's dried grains with solubles and the tremendous feed opportunity the ethanol co-product offers.

Throughout the 2010 Corn Mission, producers talked about policy and trade and how reliable trade rules benefit consumers as they ensure importers access to high-quality grains. They explained how efficient management practices and quality feed increase livestock production output while lowering input costs, which means more food that's affordable to more people.

Missions like this enhance existing partnerships and develop new ones that allow the United States to be in a position to be the reliable supplier to the world. People like to do business with those they know. These efforts and all the programs organized by the Council are then culminated in the hallways and meeting rooms at events like the Export Exchange 2010.



**U.S. GRAINS**  
C O U N C I L



## Strengthening Ties with India

With a broiler sector growing 10-12 percent per year and an egg sector growing 6-7 percent, India's agriculture and food systems are responding in significant ways to the country's economic growth – and over time that may offer opportunities to trade partners.

"In the last decade, India's per capita GDP doubled and it will double again in less than a decade. This economic revolution is driving change and providing extraordinary opportunities for the people of India and those who can enhance their economic growth," said Thomas C. Dorr, president and CEO of the U.S. Grains Council.

By partnering with key organizations, the Council can identify India's needs – and help India better understand what the United States can offer as a reliable trade partner. The Council can establish the principle that food security is possible through partnerships and global trade.

Establishing positive relationships and laying the groundwork for trade policies that are reliable and predictable, the United States will be in a good position to help India's livestock and poultry producers meet the demand of a growing middle class.

### MARCH 2010

Without free trade agreements with countries in Latin America and Southeast Asia, the United States risks losing export competitiveness, Council directors reported during a meeting.

As a direct result of Council programs in conjunction with the United Sorghum Checkoff Program, 7,000 tons (276,000 bushels) of U.S. sorghum was tendered to Morocco for mid-March delivery.

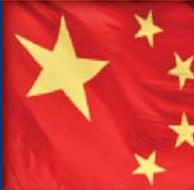
85,000 attendees see U.S. barley, corn and sorghum in cooking demonstrations at FOODEX, the largest annual food expo in Japan.

Chairman Rick Fruth announced the official opening of the Council's newest international office in Panama City, Panama. The USGC Latin America and Caribbean Region office represents a key presence in the region.

Free on Board contracting seminars hosted by the Council in Morocco aim to increase U.S. market share within the region by helping buyers gain more control of their grain buying transactions.

To celebrate the successful relationship between the United States and Japan, which also helped plant the seeds for the U.S. Grains Council 50 years ago, the Council sponsored the Global Food Security Symposium in Tokyo, kicking off the Partners-in-Agriculture events.

### APRIL 2010



# emerging middle class

## ■ RECOGNIZING TRADE AS A SOLUTION

China created a stir in the marketplace when it purchased more than 100,000 metric tons (3.9 million bushels) of U.S. corn in April 2010 – with even more sales on the books. It meant China’s agricultural output could not keep up with demand from its modernizing livestock and poultry production sectors and increased demand for milk, meat and eggs from its emerging middle class. It also meant the U.S. Grains Council’s successful market development efforts led China to the United States, the world’s most reliable feed grains supplier.

China came to recognize that importing feed grains and related products like distiller’s dried grains with solubles (DDGS) is one way to ensure food security, especially since domestic supplies and opportunities to expand internally were limited.

The Council has driven home the opportunity imports offer by partnering with livestock organizations in China and by bringing Chinese producers to the United States. In fact, Chinese dairy farmers on a study

tour of the United States fully grasped the advantage of modern dairy facilities and genetics when they saw it in action. Yet they also understood by including high-quality feed grains and high-protein DDGS, they could maximize output and better meet the demands of their country’s citizens.

The Council’s programs were there to help China’s dairy, poultry and swine producers learn how to use U.S. feed grains and DDGS to maximize their potential and produce more affordable food. It is a story repeated in multiple countries around the world.

By sharing a model of how livestock and poultry producers can be successful, global partners in developing countries become supportive of a system that allows them to have reliable access to those grains. Reliable access means security for people who, in greater numbers, are able to purchase high-quality animal proteins.



### APRIL 2010

■ USDA announced the export sale of 115,000 tons (4.5 million bushels) of U.S. corn to China, with Council sources suggesting additional cargoes may have been booked for China delivery.

■ As part of the Council’s marketing strategy, it sent a grain storage science specialist to Panama and Guatemala to meet with feed millers and discuss grain quality control systems and procedures.

### MAY 2010

■ More than 138 grain traders, purchasing managers and integrators from around the world gathered in Singapore at the Southeast Asia Grain Transportation Conference, which helped foster the sale of 400,000 tons of U.S. corn and co-products.

■ The Council hosted 21 representatives from the Central American feed industry to attend a course in quality control offered by the International Grains Program at Kansas State University.

■ An independent study revealed that USDA’s international market development programs and the work done by agricultural cooperatives like the Council positively impact U.S. agricultural trade.

According to the study, for every additional \$1 expended by government and industry on market development, U.S. food and agricultural exports increased by \$35.



1. Seminars in Japan focused on using U.S. DDGS in fish feed, with feeding trials showing positive results.

2. An Iowa Corn Promotion Board member and Council consultants traveled to Egypt to evaluate DDGS programs and provide strategic direction.

3. Workshops in China included experts from the United States explaining the benefits of U.S. DDGS in livestock operations.

## Sorghum Programs Yield Big

When a 25,000 metric ton (984,000 bushel) shipment of U.S. sorghum arrived in Morocco, the U.S. Grains Council was there with ruminant and poultry nutritionists to ensure the sorghum was assigned proper nutritive values in ration formulation calculations while offering insight on sorghum milling characteristics.

The Council, working with the United Sorghum Checkoff Program, hosted a group of Moroccan feed millers in the United States, so they could better understand how sorghum is grown and the decisions farmers make when deciding what to plant. The result was additional sales to the North African country – with sales reaching 85,000 metric tons (3.3 million bushels) part way through the marketing year.

Building on this success, the Council embarked on informational marketing campaigns to Japan and the Philippines, identified opportunities in Vietnam and maintained key relations with buyers in Mexico. In Egypt, the Council arranged for the delivery of U.S. sorghum for feed trials at one of the largest poultry companies in the country.

The timing of these efforts was ideal, because the Russian grain export ban suddenly created a global shortage of feed wheat – similar to a situation that occurred just a few years ago. Since the U.S. remains open, the Council was in the perfect position to promote U.S. sorghum to those left in the lurch. The result was additional sales to Israel and Spain.

Our reputation as a reliable supplier – and having the expertise to back it up – is a powerful one-two punch that puts U.S. farmers and exporters on top in the global marketplace.

An excellent example of model sharing at work is DDGS.

As a high-protein feed ingredient, DDGS helps end-users reduce input costs and maximize their production capabilities. That means an increased supply of more affordable meat, milk and eggs that are in high demand by populations in developing countries who have additional purchasing power thanks to economic growth.

As global buyers better understood the value of DDGS in 2010, sales soared – reaching an estimated 8 million tons for the year, doubling the sales of just two years ago.

The foundation for this success came from a Council initiative that began by educating animal nutritionists about the nutritional and economic benefits of DDGS – nutritionists who may have never before heard of the ethanol co-product. The Council also helped customers address regulatory issues because many countries had never before imported DDGS.

As the level of trust grew in the potential for DDGS, the Council supported feeding trials so locals would have an opportunity to see, touch and experience it for themselves.

Whether in Chile, Taiwan, Egypt, Japan, Canada, Jordan, China, Vietnam, Malaysia, Indonesia or Thailand, these real-world feeding trials were a tremendous demonstration of the viability of this feed product. It showed them how DDGS could lower feed costs, increase production and improve their bottom line while producing more affordable food. It instilled confidence that DDGS could indeed be another component in feed rations that importers could rely upon through trade.



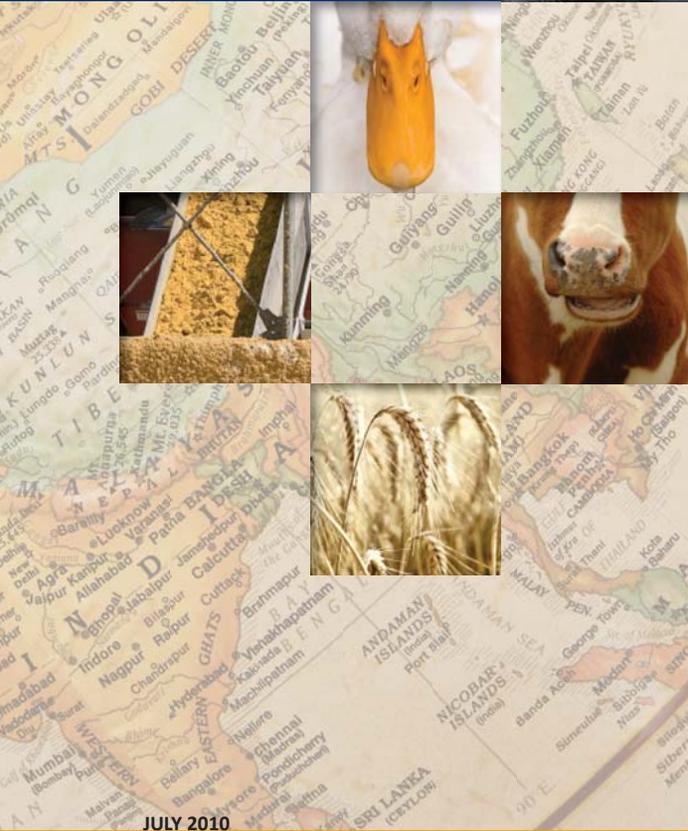
### JUNE 2010

- U.S. sorghum farmers' investments in international marketing efforts pay dividends, as Morocco went from importing no U.S. sorghum in the 2009 marketing year to more than 96,000 tons (3.8 million bushels) in the 2010 marketing year through May.
- In collaboration with the Japanese aquaculture industry, the Council is conducting a U.S. DDGS feed trial with rainbow trout at a commercial aquaculture farm in Japan.
- The Council embarked on an informational marketing campaign championing the advantages of U.S. sorghum to feed millers in Japan and the Philippines.
- The Council conducted DDGS marketing workshops in Dublin, Madrid and Rotterdam in an effort to introduce buyers and sellers to one another and to market the United States' ability to meet the needs of each country.
- The United States transmitted a proposal to the International Maritime Organization to classify DDGS as a non-hazardous material – a proposal researched and put together by the Council.
- Brewery representatives from the Dominican Republic traveled to North Dakota to meet with barley farmers and gain a better understanding of the barley supply chain.



# meeting global demand

■ BEING THE RELIABLE SUPPLIER



Disruptions and price distortions in global grain markets following Russia's grain export ban and restrictions put in place by the Ukraine following its grain shortage influenced global grain prices and availability for some feed grains buyers.

This created another stir in the marketplace as trade routes and patterns were suddenly disrupted. It also offered an opportunity to exporters in the United States – and was a stark reminder about the importance of being an open, reliable trade partner.

This is a key story the Council shares around the world – that the United States will remain open, will maintain transparent trade rules and will have a reliable export system.

This is a compelling message when others back away from their commitments or adopt policies that make trade difficult.

Regulations and policies must be conducive to trade – not hinder it. While this message may be simple, it is challenging on a global level. The Council encourages importers and trade associations around the world to work with their local government to keep trade rules fair and open.

## FTAs Key to Growth

While the United States steps up to fill demand left by Russia and Ukraine, U.S. exporters face challenges elsewhere due to unratified free trade agreements (FTAs) – while other ag exporters boldly move forward on FTAs and in the process get an advantage in the marketplace thanks to import duties that are eliminated or reduced.

For example, unratified FTAs with Colombia and Panama reduced U.S. feed grain sales to those countries, with several hundred million dollars lost

JULY 2010

AUGUST 2010

■ A vessel carrying 15,000 tons of U.S. DDGS and 10,000 tons of U.S. corn gluten feed arrived in Spain, closely following a Council seminar held in the country.

■ Sponsored by the Council in cooperation with the U.S. Embassy in Tokyo, a team of Japanese biotech experts traveled to the United States to see U.S. corn production firsthand and meet with U.S. regulatory agencies.

■ The chairman of Shanghai JC Intelligence Co. Ltd. told those at the Council's 50th Annual Board of Delegates Meeting that his organization anticipates China will import roughly 1.7 million tons (67 million bushels) of corn in 2010,

5.8 million tons (228 million bushels) in 2011 and as much as 15 million tons (591 million bushels) in 2015.

■ Seven recent purchases of U.S. corn by Tunisia drove the U.S. market share in the country from 0 to 39 percent, the Council reported.

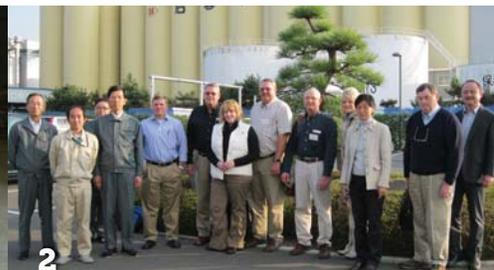
■ Sponsored by the Council, leading Vietnamese agriculture industry representatives traveled to the United States to learn how to utilize U.S. feed grains and made purchases of U.S. equipment, breeding stock and animal health products.



1. The Council helped organize a Nebraska Agriculture Trade Delegation visit to Taiwan where an agreement was signed for future sales of U.S. grains.



2. The 2010 Corn Mission delegation traveled to Japan, Taiwan and China where they discussed U.S. corn and DDGS quality and supply and assessed market conditions.



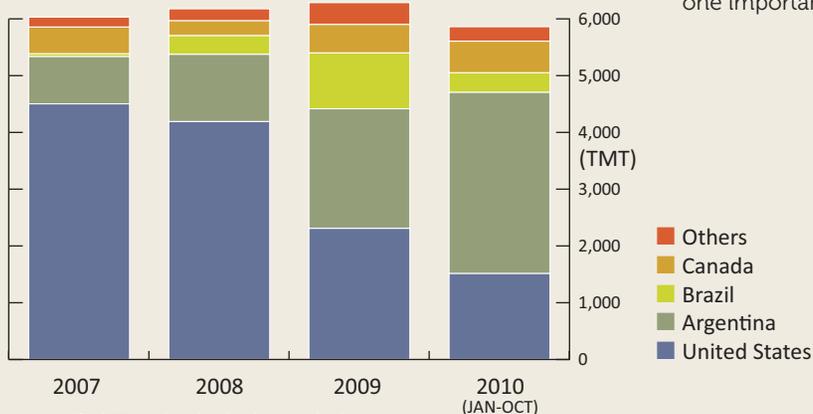
3. U.S. corn is observed while being unloaded in the Longkou Port in the Shandong Province of China.



## Contracts An Option for Barley

between 2008 and 2010. The Association of Southeast Asian Nations (ASEAN) ratified an FTA with China, and similar agreements with other global players are on the table. While the United States made progress with South Korea and is targeting other trade deals,

### COLOMBIA TOTAL GRAIN IMPORTS



An unratified FTA with Colombia has resulted in reduced U.S. feed grain sales to the country.

future U.S. feed grain and agriculture product sales are at risk in some regions. Once trading patterns are established it is much more difficult for U.S. products to penetrate the market.

We must continue efforts that promote and encourage open and fair trade – and FTAs are one important avenue.



Representatives from breweries in Costa Rica, Guatemala and the Dominican Republic came to the United States in 2010 to meet barley growers and better understand production trends and market forces, especially since there is increased competition between barley and other crops for acres.

These breweries contacted the U.S. Grains Council for ways to manage risks they were facing due to tight global malt supplies. A great way to manage that risk is to contract a portion of their needs directly with U.S. barley farmers. This guarantees the breweries access to a reliable supply, while also guaranteeing U.S. barley producers a good market.

The Council shared with these breweries the success story of an arrangement between a brewery in Mexico that contracted with U.S. barley growers over the last two years.

By working with these breweries, the Council helped establish positive relationships that turned into partnerships between buyers and growers – partnerships that procure more of their malt needs out of the United States.

### SEPTEMBER 2010

- Israel purchased 40,000 tons (1.6 million bushels) of U.S. sorghum, with intentions to purchase more in the near future. The purchase was a direct result of the recent agricultural export ban in Russia and the short supply of grain in Ukraine.
- The Council organized a meeting of U.S. grain exporters with key customers in Malaysia, Indonesia, Thailand and the Philippines to conduct seminars, workshops and one-on-one consultations that helped foster the sale of U.S. DDGS.
- As part of the Council's effort to open the Egyptian market to U.S. grain sorghum, the Council tendered 60 metric tons (2,400 bushels) of the grain for commercial feed trials to be conducted at a poultry operation in the country.
- The Council sponsored a team of Korean educators to travel to the United States to study how agricultural biotechnology is developed, tested, approved and utilized to broaden their understanding on the safety and benefits of biotech crops.
- A team of Japanese opinion leaders, sponsored by the Council, toured family farms in Missouri and Iowa to receive a firsthand look at U.S. corn production and learn more about how biotechnology is helping corn farmers meet the growing grain demand.
- With help from the Council, Egyptians are finding commercially produced buffalo milk in their supermarkets for the first time, creating health benefits and value for consumers and opportunities for increased U.S. grain exports to Egypt.



# visionary thinking

## ■ BUILDING FROM A SOLID FOUNDATION



At a set of tables at the front of a hotel ballroom in Boston, Mass., in July 2010, were 20 past chairmen of the U.S. Grains Council. It was the largest ever gathering of former chairmen. Beside them was Elbert Harp, the only living person who was at the table where the organization now known as the U.S. Grains Council was drawn out on paper in the late 1950s.

Of course making the Council a reality took some effort. Harp reminded those at the 50th Annual Board of Delegates Meeting that in the early 1950s, there were no national feed grains organizations. That changed in 1955 when the Grain Sorghum Producers Association was organized in response to an over supply and lack of markets for sorghum. With Bill Nelson as its executive director, the organization began working with the U.S. Department of Agriculture's Foreign Agricultural Service (FAS) in 1958.

What is now the National Corn Growers Association was formed in 1957, with Walter Goepfinger serving as

president. When the sorghum producers learned about the existence of this new national corn organization in 1959, Harp said, the Grain Sorghum Producers Association invited Goepfinger and his board to meet in west Texas.

The meeting was held around a dining room table. "We often laughed that the U.S. Feed Grains Council was actually born on our kitchen table," Harp said.

In 1959 another significant event happened that helped move the U.S. Grains Council from something on paper to a chartered organization: the famous hog lift to Japan.

The hog lift came after two typhoons totaled Japan's Yamanashi prefecture, the most important livestock-producing region in the country.

The lift came about through an idea from a Master Sergeant in the U.S. Air Force who passed it on to an agricultural attaché at the U.S. Embassy in Tokyo, who

### SEPTEMBER 2010

■ Brewing industry representatives from Costa Rica and Guatemala participated in a Council-sponsored barley quality tour in North Dakota and Montana to learn about opportunities to contract their barley needs directly with U.S. growers.

■ A 12,000-ton shipment of U.S. DDGS arrived in Tunisia, just a couple of days ahead of a one-day DDGS conference held in the country that was organized in part by the Council.

### OCTOBER 2010

■ The Council concluded its annual China Corn Tour, estimating production for 2010 at 158 million tons (6.2 billion bushels), an increase over 2009. The Council has conducted the tour since 1996.

■ Producers, suppliers, importers and end-users of DDGS and coarse grains from around the world gathered in Chicago for the Export Exchange 2010, the event to Get answers. Make contacts. Build business.

■ Countries who signed on to the Cartagena Protocol on Biosafety reached an agreement on supplementary text that will establish rules and procedures for liability and redress in case of damage to biological diversity resulting from living modified organisms.

■ A workshop co-sponsored by the Council introduced Taiwanese women to bakery products made from U.S. barley and wheat flour and emphasized the nutritional characteristics of barley.



1

1. All living past chairmen of the U.S. Feed Grains Council gathered at the Council's 50th Annual Board of Delegates meeting in Boston.



2

2. U.S. swine arriving in Japan five decades ago helped launch the U.S. Grains Council. This event was one of several celebrated during the Partners-in-Agriculture program.



3

3. Japan's Minister of Agriculture of Forestry and Fisheries Hiroataka Akamatsu was one of several dignitaries that spoke at the Global Food Security Symposium sponsored by the Council.



## Partners-in-Agriculture

When the U.S. Grains Council was founded, the U.S. cooperator program was in its infancy. Success for the program grew quickly, but nowhere is it better high-

lighted than the special agricultural relationship between the United States and Japan – a relationship that has resulted in more than \$280 billion in U.S. agriculture and food products sales to Japan during the last 50 years.

Partners-in-Agriculture commemorated the success of the cooperator program, the relationship between the United States and Japan, the famous hog lift, the 50th anniversary of the Council and the 50th anniversary of the Iowa-Yamanashi sister-state relationship.

As part of the commemoration, the Council sponsored a Global Food Security Symposium in Japan that featured numerous dignitaries, including U.S. Secretary of Agriculture Tom Vilsack and Japan's Minister of Agriculture of Forestry and Fisheries Hiroataka Akamatsu.

The symposium showcased the 50-year experience of Japan and the United States and how Japan achieved food security through trade.

To encourage others to continue down this path, the Council launched an initiative at the symposium that emphasizes food security through global trade that is built upon partnerships and harmonized trade policy. It set the stage for the year and supports the Council's mission to achieve with its mission of developing markets, enabling trade and improving lives.

helped work out the details and received enthusiastic support from Goepfinger.

Through the cooperation of the FAS, the Japanese agricultural attaché in Washington, Iowa farmers, the Commodity Credit Corporation, which donated grain, and the Japanese government, 36 hogs and 60,000 bushels of corn were sent to Japan.

By chance, when a call from the Japanese agricultural attaché came to FAS seeking assistance following the typhoons, Nelson and Harp were there. The attaché explained that Japan was experiencing a critical, long-term shortage of feed grains. Nelson took the call and assured the Japanese attaché that U.S. farmers could meet all of Japan's needs. Trade teams from Japan began arriving in the United States to visit with farmers and examine U.S. grain production soon after.

The assurance from Nelson combined with the cooperation of the hog lift pushed all involved to

formally create an organization to represent all U.S. feed grains and work with the FAS to develop markets, help other countries and support U.S. farmers.

The Council was chartered on July 1, 1960, with Goepfinger becoming its first chairman. One of its first international offices opened, appropriately, in Japan in 1961, where the Council promoted the benefits of meat, milk and eggs to consumers and the benefits of feed grains and proper nutrition for livestock and poultry. This was visionary thinking at the time and led the Council forward as it expanded and grew.

For a more detailed history – and video of the 20 past chairmen session from the 50<sup>th</sup> Annual Board of Delegates Meeting – go to [www.grains.org](http://www.grains.org).



### NOVEMBER 2010

Two broiler feeding trials getting underway in Egypt helped introduce U.S. sorghum in the market by demonstrating the proper feeding value of sorghum.

The Council's 2010 Corn Mission explored the success and opportunities in diverse corn markets — from established markets in Japan and Taiwan to China's emergence as a leading market for DDGS and a new buyer of corn.

As a result of the Council's educational efforts, Jordan's largest dairy producer contracted for the country's first imports of DDGS — the first-ever DDGS sale into an Arabic Middle Eastern nation.

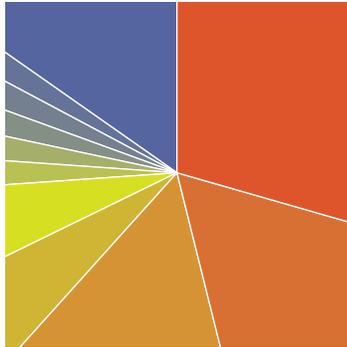
While the Japanese market may be difficult to penetrate, those attending the Council's Barley Mission to Japan learned there are some opportunities that could make increasing U.S. market share possible.

### DECEMBER 2010

The United States and South Korea reached an agreement in bilateral free trade talks, allowing the U.S.-Korea Free Trade Agreement to move forward and represent an ocean of opportunity for both countries.

The Colombian government announced a reduction in tariffs of the import of U.S. DDGS, opening the door for more purchases of the product.

U.S. bulk shipments of corn gluten feed and corn gluten meal will be exempt from new shipping rules as the result of an industry effort spearheaded by the Council.

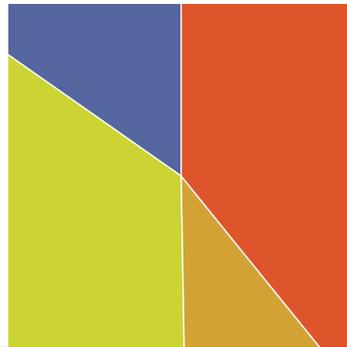


**Top U.S. Customers**

Japan	14,343.1	<b>29.6%</b>
Mexico	7,998.6	<b>16.5%</b>
Korea	7,561.6	<b>15.6%</b>
Taiwan	2,949.0	<b>6.1%</b>
Egypt	2,935.3	<b>6.1%</b>
China	1,157.5	<b>2.4%</b>
Canada	1,100.6	<b>2.3%</b>
Venezuela	1,076.8	<b>2.2%</b>
Colombia	999.9	<b>2.1%</b>
Dominican Republic	890.6	<b>1.8%</b>
Other	7,392.1	<b>15.3%</b>

**TOTAL 48,405.1 TMT**

Marketing Year Ending August 31, 2010  
 Source: USDA, FAS Export Sales, Marketing Year Final Report

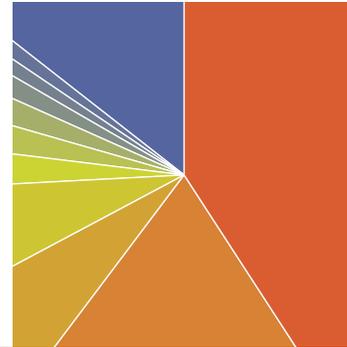


**U.S. Utilization**

Feed & Residual	131,045.5	<b>39.4%</b>
Food, Seed & Industrial (excluding ethanol)	34,799.8	<b>10.5%</b>
Food, Seed & Industrial: Ethanol	116,033.4	<b>34.9%</b>
Exports	50,472.5	<b>15.2%</b>

**TOTAL 332,351.1 TMT**

Marketing Year Ending August 31, 2010  
 Source: USDA, WASDE, November 2010

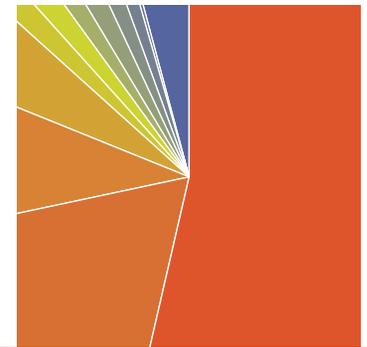


**World Production**

US	333,011	<b>41.0%</b>
China	158,000	<b>19.4%</b>
EU-27	57,147	<b>7.0%</b>
Brazil	56,100	<b>6.9%</b>
Argentina	22,500	<b>2.8%</b>
Mexico	20,374	<b>2.5%</b>
India	16,680	<b>2.0%</b>
South Africa	13,420	<b>1.7%</b>
Ukraine	10,500	<b>1.3%</b>
Canada	9,561	<b>1.2%</b>
Others	115,110	<b>14.2%</b>

**WORLD TOTAL 812,403 TMT**

Local Marketing Years  
 Source: USDA, Grains: World Markets and Trade, November 2010



**World Exports**

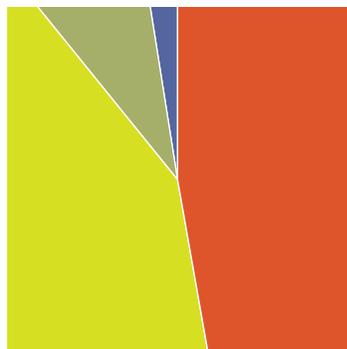
US	49,887	<b>53.8%</b>
Argentina	16,771	<b>18.1%</b>
Brazil	8,623	<b>9.3%</b>
Ukraine	5,072	<b>5.5%</b>
South Africa	1,586	<b>1.7%</b>
EU-27	1,500	<b>1.6%</b>
India	1,500	<b>1.6%</b>
Paraguay	1,388	<b>1.5%</b>
Serbia	1,343	<b>1.4%</b>
Thailand	1,000	<b>1.1%</b>
Canada	184	<b>0.2%</b>
Others	3,843	<b>4.1%</b>

**WORLD 92,697 TMT**

Year Ending September 30, 2010  
 Source: USDA, Grains: World Markets and Trade, November 2010



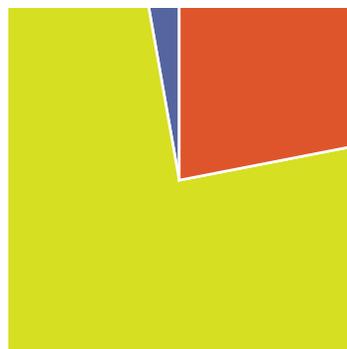
2009 2010



### Top U.S. Customers

Canada	36.8	<b>47.4%</b>
Japan	32.4	<b>41.8%</b>
Mexico	6.5	<b>8.4%</b>
Taiwan	1.9	<b>2.4%</b>
<b>TOTAL</b>	<b>77.6</b>	<b>TMT</b>

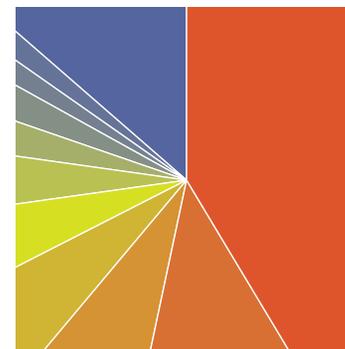
Marketing Year Ending August 31, 2010  
 Source: USDA, FAS Export Sales,  
 Marketing Year Final Report



### U.S. Utilization

Feed & Residual	1,045.1	<b>22.1%</b>
Food, Seed & Industrial	3,570.7	<b>75.6%</b>
Exports	130.6	<b>2.8%</b>
<b>TOTAL</b>	<b>4,724.6</b>	<b>TMT</b>

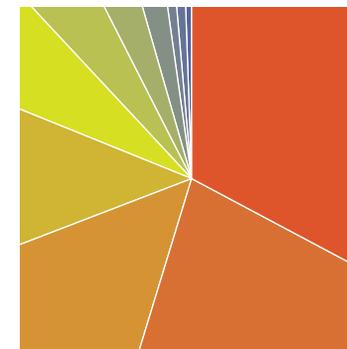
Marketing Year Ending May 31, 2010  
 Source: USDA, WASDE, November 2010



### World Production

EU-27	61,980	<b>41.4%</b>
Russia	17,900	<b>12.0%</b>
Ukraine	11,800	<b>7.9%</b>
Canada	9,517	<b>6.4%</b>
Australia	7,909	<b>5.3%</b>
Turkey	6,500	<b>4.3%</b>
US	4,949	<b>3.3%</b>
Morocco	3,800	<b>2.5%</b>
Iran	2,600	<b>1.7%</b>
China	2,500	<b>1.7%</b>
Others	20,230	<b>13.5%</b>
<b>WORLD</b>	<b>149,685</b>	<b>TMT</b>

Local Marketing Years  
 Source: USDA, Grains: World Markets  
 and Trade, November 2010

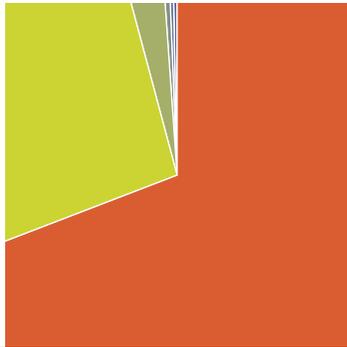


### World Exports

Ukraine	5,752	<b>32.9%</b>
Australia	3,867	<b>22.1%</b>
EU-27	2,500	<b>14.3%</b>
Russia	2,086	<b>11.9%</b>
Canada	1,203	<b>6.9%</b>
Turkey	800	<b>4.6%</b>
Argentina	549	<b>3.1%</b>
Kazakhstan	354	<b>2.0%</b>
US	151	<b>0.9%</b>
India	150	<b>0.9%</b>
Others	80	<b>0.5%</b>
<b>WORLD</b>	<b>17,492</b>	<b>TMT</b>

Year Ending September 30, 2010  
 Source: USDA, Grains: World Markets  
 and Trade, November 2010



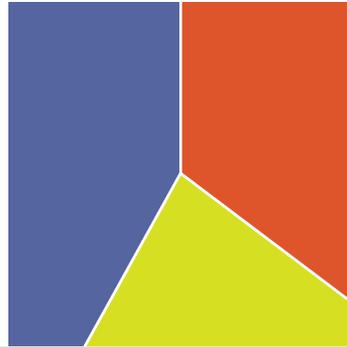


### Top U.S. Customers

■ Mexico	2,269.3	<b>69.9%</b>
■ Japan	870.3	<b>26.8%</b>
■ Morocco	97.6	<b>3.0%</b>
■ Israel	5.9	<b>0.2%</b>
■ Canada	1.0	<b>0.03%</b>
■ Korea	0.3	<b>0.01%</b>

**TOTAL 3,244.4 TMT**

Marketing Year Ending August 31, 2010  
 Source: USDA, FAS Export Sales, Marketing Year Final Report

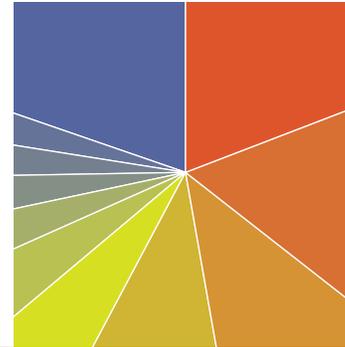


### U.S. Utilization

■ Feed & Residual	3,556.2	<b>35.4%</b>
■ Food, Seed & Industrial	2,286.1	<b>22.7%</b>
■ Exports	4,216.6	<b>41.9%</b>

**TOTAL 10,058.9 TMT**

Marketing Year Ending August 31, 2010  
 Source: USDA, WASDE, October 2009

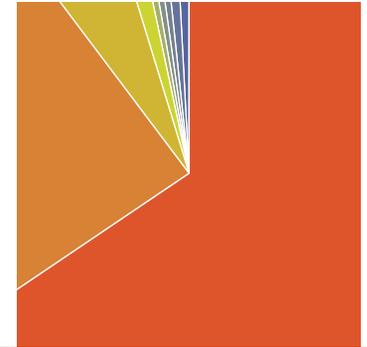


### World Production

■ Nigeria	11,500	<b>19.3%</b>
■ US	9,728	<b>16.3%</b>
■ India	6,980	<b>11.7%</b>
■ Mexico	6,250	<b>10.5%</b>
■ Argentina	3,629	<b>6.1%</b>
■ Sudan	2,630	<b>4.4%</b>
■ Ethiopia	2,084	<b>3.5%</b>
■ Brazil	1,825	<b>3.0%</b>
■ China	1,650	<b>2.8%</b>
■ Australia	1,600	<b>2.7%</b>
■ Others	11,637	<b>19.6%</b>

**WORLD 59,513 TMT**

Local Marketing Years  
 Source: USDA, Grains: World Markets and Trade, November 2010



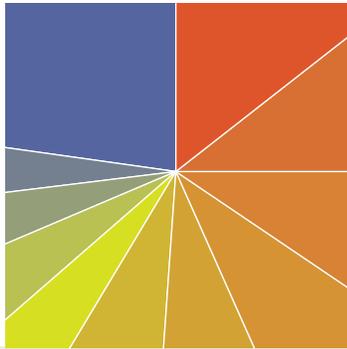
### World Exports

■ US	4,084	<b>65.6%</b>
■ Argentina	1,507	<b>24.2%</b>
■ Australia	350	<b>5.6%</b>
■ India	75	<b>1.2%</b>
■ Nigeria	50	<b>0.8%</b>
■ Brazil	25	<b>0.4%</b>
■ China	41	<b>0.7%</b>
■ South Africa	40	<b>0.6%</b>
■ Others	50	<b>0.8%</b>

**WORLD 6,222 TMT**

Year Ending September 30, 2010  
 Source: USDA, Grains: World Markets and Trade, October 2010



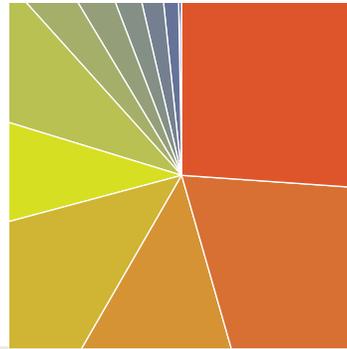


**Top U.S. Corn Gluten Customers**

Turkey	255,485	14.6%
Ireland	185,329	10.6%
Israel	164,208	9.4%
Egypt	153,933	8.8%
Indonesia	136,522	7.8%
Canada	130,463	7.5%
Spain	87,940	5.0%
Colombia	83,630	4.8%
Chile	80,483	4.6%
Mexico	73,209	4.2%
Others	392,886	22.5%

**TOTAL 1,744,088 MT**

Marketing Year Ending August 31, 2010  
Data Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics

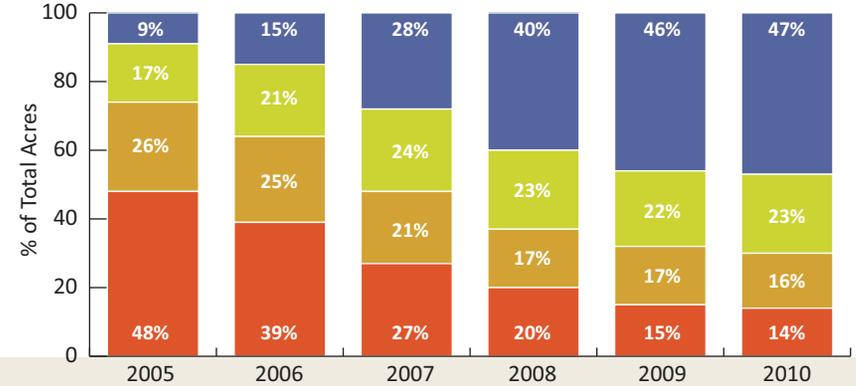


**Top U.S. Distiller's Grains Customers**

China	2,173,607	26.2%
Mexico	1,607,288	19.4%
Canada	1,061,696	12.8%
SEA	1,029,621	12.4%
Other ASIA	736,300	8.9%
Middle East	710,564	8.6%
EU	265,115	3.2%
Central America	230,485	2.8%
North Africa	176,080	2.1%
South America	159,492	1.9%
Caribbean	117,626	1.4%
S. Asia	7,183	0.1%
Other	8,102	0.1%

**TOTAL 8,283,159 MT**

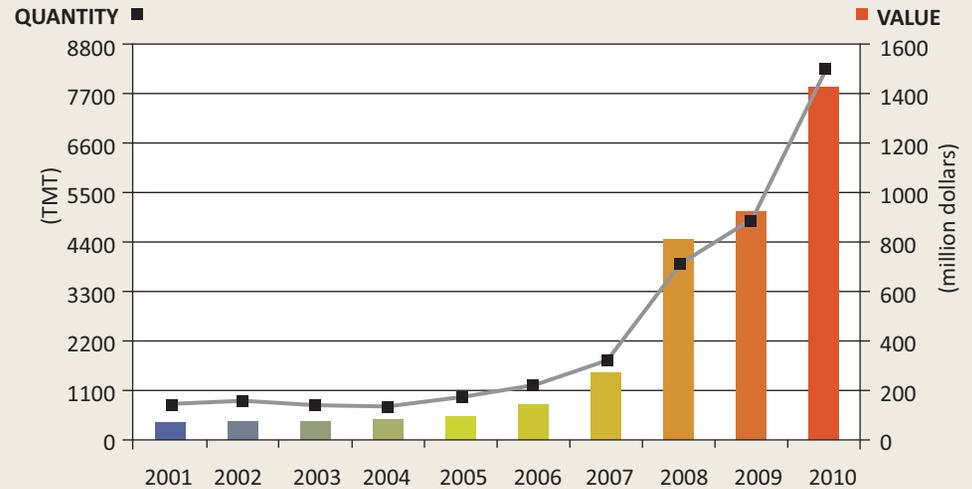
Marketing Year Ending August 31, 2010  
Data Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics



**U.S. Biotech Corn Acres**

Stacked Trait ■ Insect Resistant ■  
Herbicide Resistant ■ Non-Biotech ■

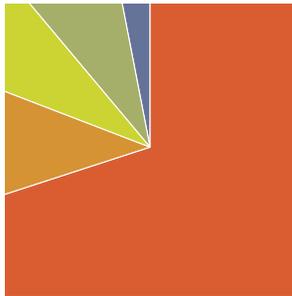
**Distiller's Grains Exports, Quantity and Value**



Marketing Year Ending August 31 for each year.  
Data Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics

## FINANCIALS

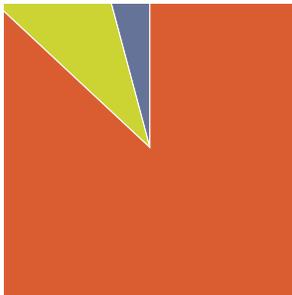
### Private-Industry Member (Domestic) Investment



■ Corn	\$3,905,763	70%
■ Agribusiness	612,777	11%
■ Others	449,424	8%
■ Sorghum	421,500	8%
■ Barley	167,759	3%

**Total** **\$5,557,223**

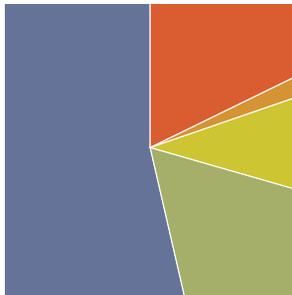
### USDA Resource Allocation



■ Corn	\$13,394,687	87%
■ Sorghum	1,445,521	9%
■ Barley	575,324	4%

**Total** **\$15,415,532**

### Sources of Cash and Other Support



■ Member Financial Cash Support	\$5,107,799	18%
■ Other Financial Cash Support	449,424	2%
■ Member Goods & Services Non-Cash Support	2,950,000	10%
■ Foreign Third Parties Goods & Services Non-Cash Support	4,890,000	17%
■ USDA Financial Cash Support	15,415,532	54%

**TOTAL** **\$28,812,755**

### Value of Worldwide Programs

SOURCE	FY 2009	FY 2010
<b>Cash</b>		
Agribusiness Financial Support	519,039	612,777
Producer Financial Support	3,983,580	4,495,022
<b>Total Member Cash Financial Support</b>	<b>4,502,619</b>	<b>5,107,799</b>
<b>Other Cash Support</b>		
(Meetings, Interest, Special Projects)	<b>419,160</b>	<b>449,424</b>
<b>USDA Foreign Agricultural Service Fund</b>		
Foreign Market Development (FMD)	4,940,653	5,021,584
Market Access Program (MAP) and others	7,943,548	10,393,948
<b>Total USDA/FAS Cash Funds</b>	<b>12,884,201</b>	<b>15,415,532</b>
<b>Total Cash Financial Support from all Sources</b>	<b>17,805,980</b>	<b>20,972,755</b>
<b>Non-Cash</b>		
Member Goods and Services Contributions	2,900,000	2,950,000
Foreign Third Party Goods and Services Contributions	4,875,000	4,890,000
<b>Total Non-Cash Support</b>	<b>7,775,000</b>	<b>7,840,000</b>
<b>TOTAL</b>	<b>25,580,980</b>	<b>28,812,755</b>

Abengoa BioEnergy Trading U.S.	CoBank, ACB	Illinois Corn Growers Association	Minnesota Corn Growers Association	Quality Technology International Inc.
Absolute Energy LLC	Consolidated Grain and Barge Co.	Illinois Corn Marketing Board	Minnesota Corn Research &	RBC Logistics LLC
Advanta U.S. d.b.a	Corn Growers Association of North	Illinois Department of Agriculture	Promotion Council	Remington Seeds LLC
Crosbyton Seed Company	Carolina Inc.	Illinois Farm Bureau	Minnesota Department of Agriculture	Renewable Products Marketing Group
Ag Processing Inc. (AGP)	Corn Marketing Program of Michigan	Illinois Renewable Fuels Association	Missouri Corn Growers Association	Rycom Trading Ltd.
AgMotion Inc.	Corn Producers Association of Texas	Indiana Corn Marketing Council	Missouri Corn Merchandising Council	SCAFCO Grain Systems
Agniel Commodities LLC	Corn Products International Inc.	Indiana Farm Bureau Inc.	Monsanto Company	Seedburo Equipment Company
AgReliant Genetics LLC	Corn Refiners Association	International Feed	Monsanto/Corn States Hybrid	South Dakota Corn Growers Association
Amaizing Energy Denison LLC	Custom Marketing Company, Inc.	Iowa Corn Growers Association	Service LLC	South Dakota Corn Utilization Council
American Farm Bureau Federation	Deere & Company	Iowa Corn Promotion Board	Montana Wheat & Barley Committee	South Dakota Farm Bureau Federation
American Seed Trade Association	DeKalb County Farm Bureau	Iowa Farm Bureau Federation	National Barley Growers Association	Syngenta
Archer Daniels Midland Company	DeLong Co. Inc.	J.D. Heiskell & Company	National Corn Growers Association	Syngenta Seeds Inc.
Arkansas Corn and Grain	Dow AgroSciences LLC	Kansas Corn Commission	National Sorghum Producers	Tate & Lyle Ingredients Americas Inc.
Sorghum Board	Elanco Animal Health	Kansas Grain Sorghum Commission	Nebraska Corn Board	Texas Corn Producers Board
Arkansas Farm Bureau	Feed Management Systems Inc	Kellogg	Nebraska Department of Agriculture	Texas Farm Bureau
BASF Plant Science	Flint Hills Resources Fairbank LLC	Kentucky Corn Promotion Council	Nebraska Farm Bureau Federation	Texas Grain Sorghum Association
Bayer CropScience	Flint Hills Resources Iowa Falls LLC	Land O'Lakes Inc.	Nebraska Grain Sorghum Board	Texas Grain Sorghum Producers Board
Beck's Superior Hybrids	Flint Hills Resources Menlo LLC	Lansing Trade Group	North Dakota Barley Council	The Hale Group, Ltd.
Big River Resources LLC	Flint Hills Resources Shell Rock LLC	Little Sioux Corn Processors	North Dakota Corn Utilization Council	The Scoular Company
Boehringer Ingelheim Vetmedica Inc.	Furst-McNess Company	Los Angeles Harbor Grain Terminal	Northwest Grains International LLC	Touton USA Limited
Bratney Companies	Gavilon	Louis Dreyfus Commodities	Novus International	Trans Coastal Supply Company Inc
Bunge North America Inc.	Glacial Lakes Energy LLC	Louisiana Soybean & Grain Research	Ohio Corn Growers Association	United Sorghum Checkoff Program
C&D (USA) Inc.	Golden Grain Energy	& Promotion Board	Ohio Corn Marketing Program	United Wisconsin Grain Producers LLC
Carbon Green BioEnergy LLC	Granite Falls Energy LLC	Macon County Farm Bureau	Ohio Farm Bureau Federation Inc.	Valero Marketing & Supply Company
Cargill Inc.	Green Plains Renewable Energy Inc.	Macquarie Bank Limited	Pasternak, Baum & Co. Inc.	Virginia Corn Board
Case IH	GROWMARK Inc.	Marinex Grains Inc.	Patriot Renewable Fuels LLC	Washington Grain Commission
Ceroilfood (New York) Inc.	GSI Group LLC	Maryland Grain Producers	Phibro Ethanol Performance Group	Western New York Energy LLC
CF Industries Inc.	H & B Specialties Inc.	Utilization Board	Pioneer Hi-Bred, A DuPont Business	Wisconsin Corn Promotion Board Inc.
Channel	Hawkeye Gold LLC	McCaulay Dalton and Company USA LLC	Platinum Ethanol LLC	Wyffels Hybrids Inc.
CHS Inc.	Homeland Energy Solutions	Midwest Shippers Association	POET	Zeeland Farm Services Inc.
CME Group	Idaho Barley Commission		Premium Ag Products Cooperative	

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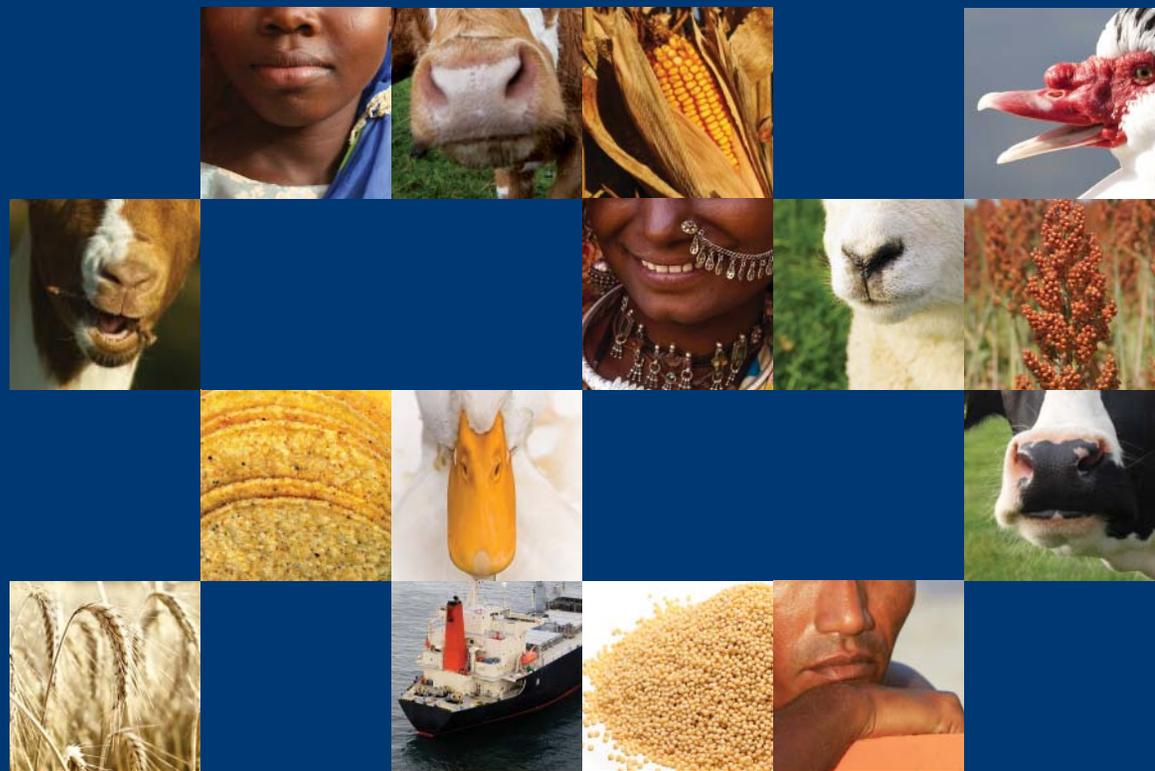
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