

**National Policy Efforts
by
Commodity
and
General Farm Organizations:**

Background Information and Comparative Statistics

FAPRI-MU #02-08

Food and Agricultural
Policy Research Institute



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**National Policy Efforts by Commodity and General Farm Organizations:
Background Information and Comparative Statistics
Executive Summary**

Study Design

At the request of the Minnesota and Missouri Soybean Associations, The Food and Agricultural Policy Research Institute (FAPRI) at the University of Missouri – Columbia (MU) conducted a study to learn more about the policy, advocacy and lobbying efforts of national commodity and general farm organizations. The analysis contained four primary objectives focused on collection of statistics related to commodities as well as organizations as well as obtaining information related to organizational structure and the policy and advocacy process.

The US organizations included in this study are: (a) American Soybean Association, (b) National Association of Wheat Growers, (c) National Corn Growers Association, (d) National Cotton Council, (e) National Cattlemen’s Beef Association, (f) National Milk Producers Federation, (g) National Pork Producers Council, (h) American Farm Bureau Federation, and (i) National Farmers Union. Each of these organizations participated in personal interviews and each had the opportunity to engage on the statistics collected from public sources. Background information was collected and included in this study for the Canola Council of Canada, but is not included in aggregate data which is presented.

Commodity Background

Agriculture remains a vital industry within the US and agricultural production occurs on over 932 million acres of farmland throughout the nation. In 2006, cash receipts from farming totaled over \$239 billion dollars with close to \$120 billion coming from the crop sector (including fruits, vegetables, greenhouse and nursery) and \$119 billion associated with livestock and products. See Table 1 for a commodity summary.

State and regional production impact the resources available to address commodity specific issues and the percent of production devoted to the export market will impact the amount of resources needed to market product overseas.

**Table 1
Commodity Summary Statistics**

Commodity, unit	Farm Numbers	Harvested thousand acres	Production billion units	Value of Production billion \$	Exports share of production
	2002				
Corn for grain, bu.	348,590	73,132	11.152	\$26.806	18.3%
Soybeans, bu.	317,611	73,270	3.125	\$18.286	33.3%
Wheat, all, bu.	169,528	48,976	2.025	\$7.392	49.1%
Cotton, all, lb	24,805	12,917	10.764	\$4.822	65.3%
Canadian Canola, lb		12,802	19.424	\$2.500	54.0%
Beef, lb	796,436		41.683	\$35.733	3.0%
Milk, lb	91,989		176.554	\$26.009	
Pork, lb	82,028		27.415	\$13.128	12.5%

Average of 2004-2006, except farm numbers are from 2002. USDA sources.

Commodity/General Farm Organizations

In an effort to provide comparative statistics across organizations, standard information regarding stated purpose of organization, membership and dues collected, revenues, expenses, paid staff, and percent of expenses allocated to compensation and salaries were collected from income tax documents. Additional information regarding states associated with the national organization and PAC contributions were obtained from other public sources. A summary of this information will be combined with aggregate findings from the study in Table 2.

Emerging Themes

Emerging themes from the interviews can be categorized as: (a) organizational structure including membership and governance, (b) policy process, (c) success factors, and (d) top policy priorities and corresponding challenges and opportunities. Organizational structure highlights are contained in Table 2.

Table 2
Organizational Structure and Comparative Statistics
Range and Mean of Data Collected

	Minimum	Maximum	Mean/Avg
States affiliated with National organization*	17	50	34
Paid staff	6	150	44
Membership, dues & assessments (\$) **	\$621,948	\$22,883,068	\$5,962,647
Total revenues (\$) **	\$1,059,144	\$66,832,132	\$21,639,246
Compensation as % of func.less other expenses (%)	38%	93%	55%
Total functional expenses less other expenses (\$)	\$435,874	\$20,223,561	\$6,105,046
Age of Organization	44	110	78
Board/Governing Body Size	14	50	34
Number of registered lobbyists	3	25	10

* One organization also includes Puerto Rico

** \$ revenue figures exclude one lower and one upper outlier

All of the organizations within the study follow a somewhat similar pattern for the development of annual policy priorities, objectives, or resolutions although each employs different methods in pursuing national policy objectives. Eight of the nine organizations in this study employ registered lobbyists on staff with one organization utilizing a contractual arrangement for lobbying its policy priorities. It was apparent in the discussion regarding organizational success that these commodity and general farm organizations are proud of the membership commitment and culture that they are representing. Funding or resources were not cited by any of the organizations as a success factor.

Eight of the nine organizations listed farm policy or more specifically the 2008 Farm Bill as one of their top three policy priorities. Many of these cited a passage of the new bill prior to the March 15, 2008 expiration as an added priority. One theme that was most commonly listed as only a challenge related to a decreasing voice in general for agriculture or agricultural policy including the increasing number of policy makers without a firsthand knowledge of agricultural production.

Many of the organizational representatives cited opportunities for grassroots and members to educate policy makers as a primary opportunity to meet the organizational policy priorities.

National Policy Efforts by Commodity and General Farm Organizations: Background Information and Comparative Statistics

Introduction

Production organizations have been involved in the farm policy process since before the Agricultural Adjustment Act was passed by Congress in 1933. Over the years many local, state, and national organizations have evolved to provide support to the producers and industries involved in agricultural production and to provide information and education to members of Congress with respect to the needs and desires of their constituents.

This report will provide insight into the diverse nature of US agricultural production from both a product and geographic standpoint and provide comparative statistics for the major national commodity and general farm organizations that are currently working to promote policy for the benefit of their members. Additional findings presented in this study focus on the processes, organizational structures, and individuals that serve as the engine for these promotion activities.

Study Design

In November 2007, the Minnesota and Missouri Soybean Association expressed an interest in learning more about the policy, advocacy and lobbying efforts of national commodity and general farm organizations. The Food and Agricultural Policy Research Institute (FAPRI) at the University of Missouri – Columbia (MU) viewed this study as an opportunity to engage national organizations in discussions regarding the various approaches and organizational structures currently in place to promote agricultural policy.

The analysis contained four primary objectives including: (a) collection of statistics describing the commodity or sectors represented by the organizations, (b) collection of statistics regarding the membership and budgetary information of the organizations, (c) background information on the organizations including factors related to mission and vision and organizational structure, and (d) policy, advocacy and lobbying efforts or objectives and processes. Information collected for the first three objectives will be shared as it pertains to each organization within the study. Information related to the fourth objective of policy objectives and processes will only be shared in aggregate to maintain the confidentiality of the organizations and individuals taking part in personal interviews.

Organizations selected for the study were jointly agreed upon by FAPRI-MU and both the Minnesota and Missouri Soybean Associations. The organizations include nine US based organizations and one Canadian based organization. Personal interviews were conducted with each of the US based organizations with background and comparative statistics only collected from the Canadian based organization. The organizations included in this study are: (a) American Soybean Association, (b) National Association of Wheat Growers, (c) National Corn Growers Association, (d) National Cotton Council, (e) National Cattlemen's Beef Association, (f) National Milk Producers Federation, (g) National Pork Producers Council, (h) American Farm Bureau Federation, (i) National Farmers Union, and (j) Canola Council of Canada.

Commodity Background Information

Agriculture remains a vital industry within the US and agricultural production occurs on over 932¹ million acres of farmland throughout the nation. In 2006, cash receipts from farming totaled over \$239 billion dollars with close to \$120 billion coming from the crop sector (including fruits, vegetables and greenhouse/nursery) and \$119 billion associated with livestock and products². Consumer expenditures for food consumed at home accounted for \$553 billion³ in 2006 with an additional \$529 billion added from food away from home. These expenditures represent the value added throughout the food chain.

Sales of agricultural products can be broken out by sales class of the farm and, as Figure 1 represents, over 55 percent of the farms selling agricultural products within the US are making sales less than \$10,000 per year. In addition, as presented in Figure 2, the size of farms can be quite geographically diverse. According to the 2002 Ag Census, average farm size is more likely to exceed 500 acres in the western region of the US and more likely to be less than 180 acres in the eastern region. It is important to keep in mind that these figures are based on average farm size and the definition of a farm, according to USDA/ERS, has remained the same since 1974 and is considered an operation or individual with at least \$1,000 in value of sales of agricultural products within a given year, or that would have normally had at least \$1,000 in value of sales. Activities included in agriculture have been expanded within the past ten years to include operations with five or more horses or ponies, maple syrup, or short rotation

¹ USDA-NASS February 2, 2007 Number of Farms: Economic Sales Class by State

² USDA-ERS December 2007 Farm Income, Costs, and Returns

³ USDA-ERS July 2, 2007 Food CPI, Prices, and Expenditures

woody crops, and represents the USDA's efforts to more accurately represent the diverse nature of US agriculture.

Figure 1

U.S. Number of Farms by Sales Class:

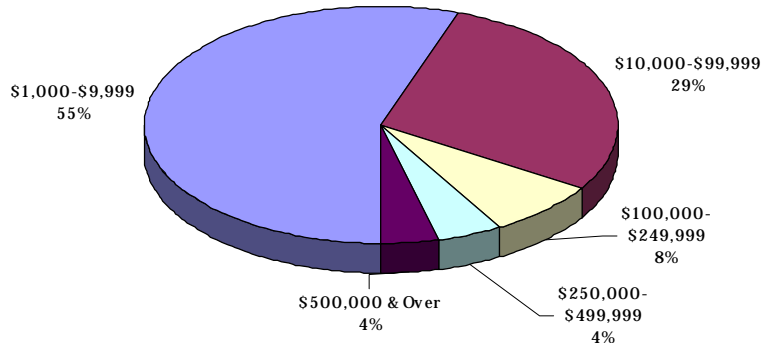
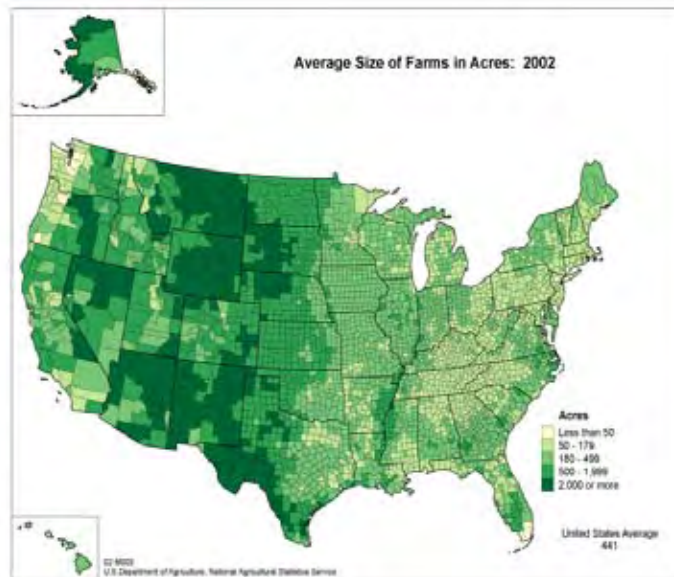


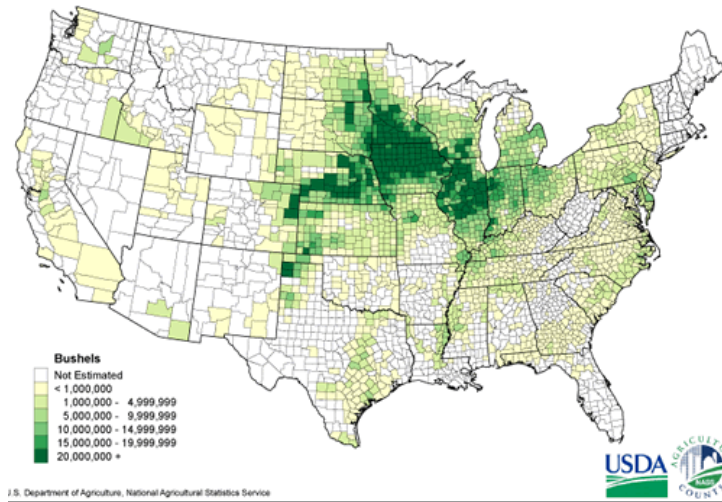
Figure 2



The following section provides supply and utilization information as well as value of production data and geographic representation of production of the major US commodities comprising this study. We realize there are many important agricultural products not detailed in this section and their omission only reflects the parameters and scope of this study. The commodity detail that

Corn for Grain

Production by county, 2005



	Corn Farms Number 2002	Planted thousand acres	Harvested thousand acres	Yield bushels per acre	Production thousand bushels	Price \$ per bushel	Value of Production thousand \$	Value of Production share
United States	348,590	80,345	73,132	152.5	11,152,012	2.37	26,805,740	
1 Iowa	52,806	12,700	12,417	173.3	2,152,333	2.32	5,039,807	18.8%
2 Illinois	41,032	11,717	11,567	162.0	1,871,433	2.43	4,703,729	17.5%
3 Nebraska	23,889	8,283	7,983	157.3	1,256,067	2.31	2,938,618	11.0%
4 Minnesota	31,782	7,367	6,917	164.7	1,138,567	2.23	2,621,852	9.8%
5 Indiana	24,156	5,700	5,560	159.7	887,427	2.39	2,151,854	8.0%
6 Ohio	23,898	3,317	3,107	153.3	475,590	2.37	1,158,577	4.3%
7 Kansas	9,552	3,367	3,110	133.3	414,250	2.42	994,648	3.7%
8 Wisconsin	29,021	3,683	2,767	142.3	394,400	2.38	971,403	3.6%
9 South Dakota	11,446	4,533	3,773	115.3	440,630	2.16	914,894	3.4%
10 Missouri	15,655	2,917	2,827	137.0	386,390	2.37	913,820	3.4%

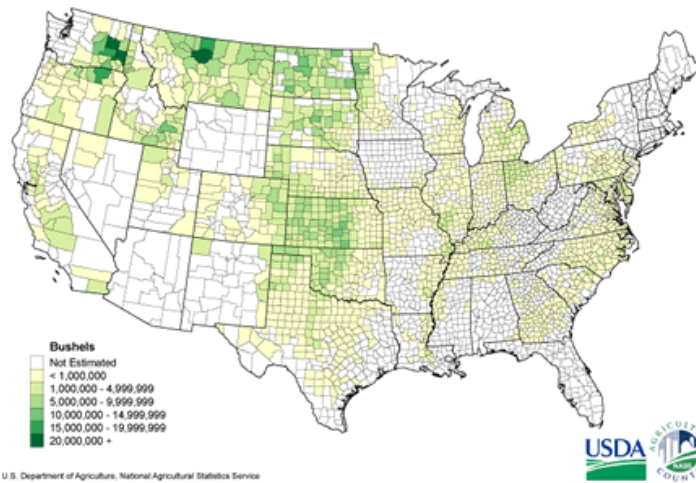
Average of 2004/05-2006/07 crop years, except farm numbers are for 2002. Sourced from USDA-NASS.

	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08 ¹
Supply	<i>Million bushels</i>					
Beginning stocks	1,596	1,087	958	2,114	1,967	1,304
Production	8,967	10,089	11,807	11,114	10,535	13,074
Imports	14	14	11	9	12	15
Total	10,578	11,190	12,776	13,237	12,514	14,393
Disappearance						
Food, alcohol, and industrial use	2,320	2,517	2,666	2,961	3,464	4,532
Seed use	20	21	21	20	24	23
Feed and residual use	5,563	5,795	6,157	6,155	5,598	5,950
Exports	1,588	1,900	1,818	2,134	2,125	2,450
Total	9,491	10,232	10,662	11,270	11,210	12,955
Ending stocks	1,087	958	2,114	1,967	1,304	1,437
Exports, share of production	17.7%	18.8%	15.4%	19.2%	20.2%	18.7%

¹ February 2008 World Agricultural Supply and Demand Estimates

All Wheat

Production by county, 2005



	Wheat Farms Number 2002	Planted thousand acres	Harvested thousand acres	Yield bushels per acre	Production thousand bushels	Price \$ per bushel	Value of Production thousand \$	Value of Production share
United States	169,528	58,082	48,976	41.3	2,024,990	3.69	7,391,931	
1 Kansas	24,236	9,933	9,033	36.3	328,567	3.71	1,206,482	16.3%
2 North Dakota	12,908	8,695	8,300	34.7	287,395	3.82	1,083,015	14.7%
3 Montana	5,504	5,370	5,158	33.6	172,907	3.93	675,028	9.1%
4 Washington	3,414	2,297	2,242	62.9	140,950	3.83	532,134	7.2%
5 Oklahoma	9,611	5,867	4,033	30.3	124,700	3.80	458,607	6.2%
6 South Dakota	5,007	3,298	2,856	40.1	115,373	3.82	431,730	5.8%
7 Idaho	2,736	1,255	1,195	81.6	97,538	3.69	353,411	4.8%
8 Minnesota	7,023	1,766	1,692	47.7	80,472	3.84	309,451	4.2%
9 Texas	9,031	5,783	2,633	29.0	79,367	3.75	281,837	3.8%
10 Nebraska	6,674	1,833	1,703	37.3	63,630	3.72	237,467	3.2%

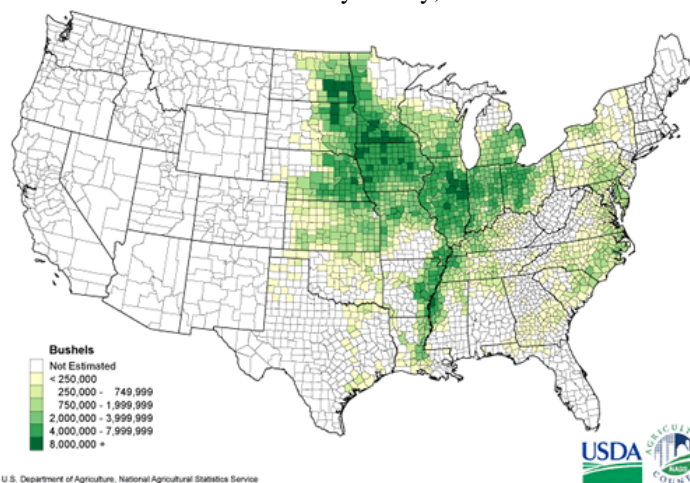
Average of 2004/05-2006/07 crop years included preceding fall planted acres, except farm numbers are for 2002. USDA-NASS.

	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08 ¹
Supply	<i>Million bushels</i>					
Beginning stocks	777	491	546	540	571	456
Production	1,606	2,345	2,158	2,105	1,812	2,067
Imports	77	63	71	81	122	90
Total	2,460	2,899	2,775	2,726	2,505	2,613
Disappearance						
Food use	919	912	910	915	933	945
Seed use	84	80	78	78	81	86
Feed and residual use	116	203	182	160	125	110
Exports	850	1,158	1,066	1,003	909	1,200
Total	1,969	2,353	2,235	2,155	2,049	2,341
Ending stocks	491	546	540	571	456	272
Exports, share of production	52.9%	49.4%	49.4%	47.6%	50.2%	58.1%

¹ February 2008 World Agricultural Supply and Demand Estimates

Soybeans

Production by county, 2005



	Soybean Farms	Planted	Harvested	Yield	Production	Price	Value of	Value of
	Number	thousand	thousand	bushels	thousand	\$ per	Production	Production
	2002	acres	acres	per acre	bushels	bushel	thousand \$	share
United States	317,611	74,254	73,270	42.6	3,125,057	5.94	18,285,982	
1 Iowa	48,752	10,133	10,083	50.7	510,800	5.96	2,987,016	16.3%
2 Illinois	41,571	9,850	9,800	48.2	472,275	6.09	2,836,416	15.5%
3 Minnesota	29,347	7,183	7,033	40.7	285,883	5.90	1,654,288	9.0%
4 Indiana	25,212	5,550	5,527	50.2	277,300	5.99	1,640,650	9.0%
5 Nebraska	20,074	4,850	4,807	48.8	234,777	5.71	1,331,507	7.3%
6 Ohio	26,327	4,533	4,507	46.3	208,827	5.98	1,235,579	6.8%
7 Missouri	21,687	5,033	4,993	40.0	199,683	5.92	1,169,262	6.4%
8 South Dakota	11,593	4,000	3,940	34.3	135,243	5.67	751,360	4.1%
9 Arkansas	5,250	3,113	3,073	36.0	110,767	6.07	674,874	3.7%
10 Kansas	13,622	2,950	2,880	36.7	105,040	5.74	591,601	3.2%

Average of 2004/05-2006/07 crop years, except farm numbers are for 2002. Sourced from USDA-NASS

	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08 ¹
Supply	<i>Million bushels</i>					
Beginning stocks	208	178	112	256	449	574
Production	2,756	2,454	3,124	3,063	3,188	2,585
Imports	5	6	6	3	9	6
Total	2,969	2,638	3,242	3,322	3,642	3,165
Disappearance						
Crush	1,615	1,530	1,696	1,739	1,765	1,835
Exports	1,044	887	1,097	947	1,080	1,005
Seed, feed, and residual	131	109	193	187	182	165
Total	2,791	2,525	2,986	2,873	3,027	3,005
Ending stocks	178	112	256	449	615	160
Exports, share of production	37.9%	36.1%	35.1%	30.9%	33.9%	38.9%

¹ February 2008 World Agricultural Supply and Demand Estimates

Canadian Canola

Canola production areas in gold



U.S. harvested acres, 2002



	Canola Farms	Planted	Harvested	Yield	Production	Price	Value of
	Number	thousand	thousand	pounds	thousand	US \$ per	Production
	2002	acres	acres	per acre	pounds	cwt.	thousand US \$
Total Canada		13,073.0	12,801.7	1,515.3	19,423,827	12.87*	2,499,846*
1 Saskatchewan			6,170.0	1,367.6	8,494,526		
2 Alberta			4,106.7	1,752.7	7,206,182		
3 Manitoba			2,395.0	1,455.8	3,509,913		
4 British Columbia			65.7	1,455.8	97,715		
5 Ontario			37.0	1,723.3	60,817		
Total U.S.	3,831	1,101.5	1,067.5	1,392.5	1,487,659	10.76	153,130
1 North Dakota	3,145	676.7	665.3	1,437.0	937,193	11.08	97,061
2 Montana	147	269.0	258.8	1,346.7	418,254	10.47	44,669
3 Minnesota	285	39.3	32.3	1,216.7	38,357	10.33	3,764
4 Other States	254	326.0	307.2	1,491.3	490,989	10.55	52,494
North America		14,174.5	13,869.2		20,911,485		*

Average of 2004/05-2006/07 crop years. Sourced from USDA and Statistics Canada.

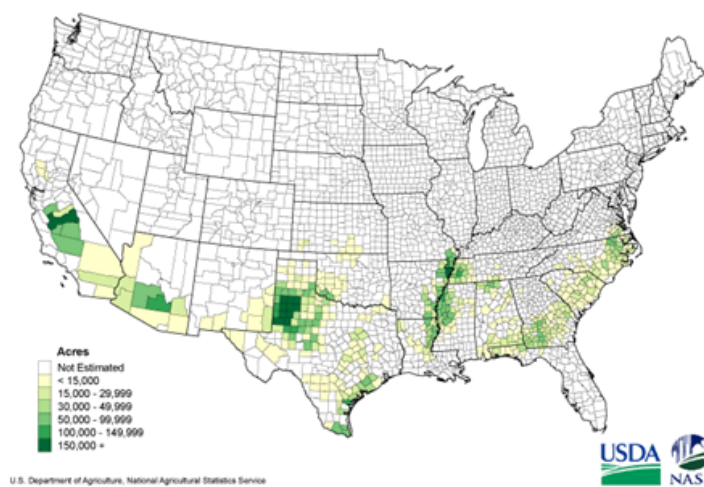
* Canadian price is Pacific Coast, #1 Canada, not comparable to U.S. farm price.

Canada Only						
	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08 ¹
Supply	<i>million lbs</i>					
Beginning stocks	2,644.8	1,970.4	1,342.2	3,497.7	4,423.4	4,011.3
Production	9,713.0	14,923.3	17,032.5	20,900.5	19,836.0	19,287.2
Imports	529.0	535.6	235.8	306.4	447.4	614.9
Total	12,886.8	17,429.2	18,610.6	24,704.6	24,706.8	23,913.4
Disappearance						
Domestic crush	4,903.9	7,471.6	6,680.3	7,544.3	7,888.1	8,375.2
Seed, feed & waste	736.1	341.6	912.5	815.5	736.1	771.4
Exports	5,276.4	8,273.8	7,520.0	11,921.4	12,071.3	11,901.6
Total	10,916.4	16,080.4	15,194.4	20,281.2	20,695.6	21,048.2
Ending stocks	1,970.4	1,342.2	3,497.7	4,423.4	4,011.3	2,865.2
Exports, share of prod	54.3%	55.4%	44.2%	57.0%	60.9%	61.7%

¹ Source: Statistics Canada, forecast updated Jan 24, 2008

All Cotton

Planted acres of *upland* cotton by county, 2004



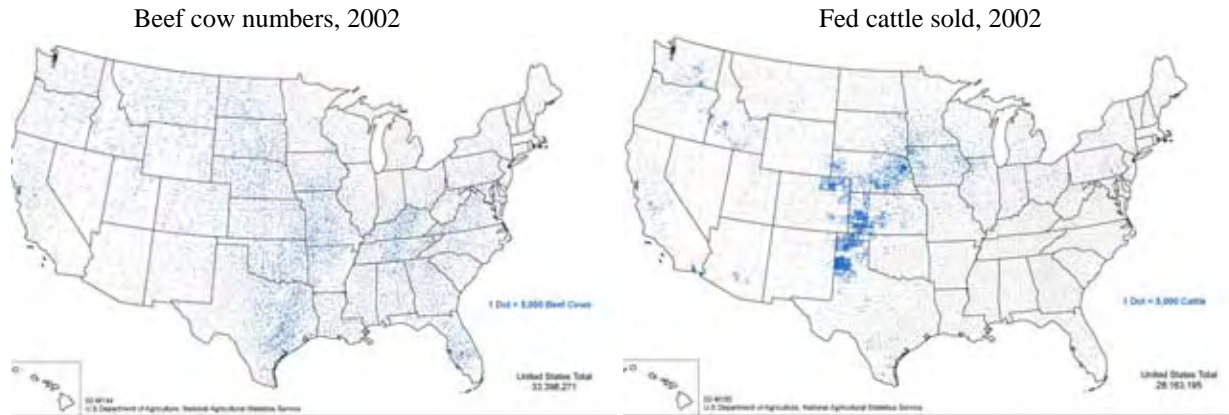
	Cotton Farms	Planted	Harvested	Yield	Production	Price	Value of	Value of
	Number	thousand	thousand	lbs	thousand	\$ per	Production	Production
	2002	acres	acres	per acre	480 lb bales	lb	thousand \$	share
United States	24,805	14,111	12,917	833.3	22,196	0.45	4,822,306	
1 Texas	8,897	6,067	5,017	699.3	7,327	0.44	1,554,086	32.2%
2 Arkansas	1,192	1,043	1,033	1,058.3	2,272	0.45	490,823	10.2%
3 Georgia	3,216	1,303	1,287	780.3	2,090	0.46	465,667	9.7%
4 Mississippi	1,596	1,183	1,173	904.0	2,200	0.44	463,964	9.6%
5 California	1,393	425	423	1,329.7	1,211	0.57	323,244	6.7%
6 North Carolina	2,091	805	800	821.7	1,361	0.45	294,559	6.1%
7 Tennessee	920	623	618	897.7	1,158	0.45	249,518	5.2%
8 Louisiana	1,072	582	573	897.0	1,075	0.45	232,728	4.8%
9 Missouri	596	440	437	984.7	893	0.44	189,926	3.9%
10 Alabama	1,320	558	548	683.3	779	0.45	167,122	3.5%

Average of 2004/05-2006/07 crop years, except farm numbers are for 2002. Sourced from USDA-NASS.

	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08 ¹
Supply, all cotton	<i>thousand 480 lb bales</i>					
Beginning stocks	7,448	5,385	3,450	5,495	6,050	9,480
Production	17,209	18,255	23,251	23,890	21,588	19,030
Imports	67	45	29	28	19	20
Total	24,724	23,685	26,730	29,413	27,657	28,530
Disappearance, all cotton						
Mill use	7,273	6,266	6,691	5,871	4,946	4,600
Exports	11,900	13,758	14,436	17,549	13,010	15,700
Total	19,173	20,024	21,127	23,420	17,956	20,300
Unaccounted	-166	-211	-108	60	110	30
Ending stocks	5,385	3,450	5,495	6,050	9,477	8,200
Exports, share of production	69.1%	75.4%	62.1%	73.5%	60.3%	82.5%

¹ February 2008 World Agricultural Supply and Demand Estimates

Cattle and Calves



	Beef Farms Number 2002	Beef Cows Number 2002	Value of Ending Inv. thousand \$	Production thousand lbs	Average Price \$ per cwt	Value of Production thousand \$	Value of Production share
United States	796,436	33,398,271	91,471,951	41,682,616	87.57	35,733,435	
1 Texas	131,506	5,545,824	11,196,667	7,170,023	88.17	6,144,658	17.2%
2 Nebraska	20,991	1,915,107	6,022,333	4,567,694	90.30	3,830,456	10.7%
3 Kansas	27,616	1,539,636	5,657,333	3,995,604	87.83	2,913,518	8.2%
4 Oklahoma	50,465	2,050,866	4,442,833	2,055,623	99.13	2,079,998	5.8%
5 Colorado	10,801	720,400	2,686,833	1,883,788	107.00	1,865,094	5.2%
6 South Dakota	15,515	1,694,091	3,941,333	1,529,345	92.37	1,491,085	4.2%
7 Iowa	23,313	987,670	3,519,500	1,720,675	87.70	1,402,514	3.9%
8 Missouri	56,057	2,108,452	3,962,167	1,170,459	94.83	1,231,851	3.4%
9 California	12,497	735,045	6,449,333	1,969,708	68.80	1,219,151	3.4%
10 Montana	11,821	1,497,915	2,662,000	974,759	96.27	965,764	2.7%

Average of 2004-06 calendar years, except farm and cow numbers are for 2002. Sourced from USDA-NASS.

	2002	2003	2004	2005	2006	2007
	<i>Million head</i>					
Beef cows (Jan. 1)	33.13	32.98	32.86	32.92	32.99	32.89
Cattle on feed (Jan. 1)	14.05	13.22	13.81	13.75	14.13	14.27
Cattle and calves (Jan. 1)	96.72	96.10	94.89	95.44	96.70	97.00
	<i>Million pounds</i>					
Beef supply						
Beginning stocks	605.5	691.3	518.1	637.4	571.0	630.0
Imports	3,217.6	3,005.9	3,679.2	3,599.0	3,086.0	3,165.0
Production	27,192.0	26,339.0	24,650.0	24,787.0	26,258.0	26,515.0
Total	31,015.1	30,036.3	28,847.4	29,023.4	29,915.0	30,310.0
Beef disappearance						
Domestic use	27,877.0	26,999.9	27,749.7	27,754.0	28,139.0	28,260.0
Exports	2,447.7	2,518.2	460.3	698.0	1,146.0	1,450.0
Total	30,324.7	29,518.1	28,210.0	28,452.0	29,285.0	29,710.0
Ending stocks	691.3	518.1	637.4	571.0	630.0	600.0
Exports, share of production	9.0%	9.6%	1.9%	2.8%	4.4%	5.5%

Sourced from USDA-ERS.

Hogs and Pigs

Breeding herd inventory, 2002



Hogs and pigs sold, 2002



	Hog Farms Number 2002	Hogs Sold Head 2002	Value Ending Inv. thousand \$	Production thousand lbs	Average Price \$ per cwt.	Value of Production thousand \$	Value of Production share
United States	82,028	184,997,686	5,901,522	27,415,266	48.50	13,127,549	
1 Iowa	11,275	41,232,492	1,695,667	7,732,115	49.93	3,465,307	26.4%
2 North Carolina	2,332	42,018,621	766,367	3,823,576	49.30	2,015,228	15.4%
3 Minnesota	6,390	18,618,300	795,000	3,228,463	49.23	1,529,260	11.6%
4 Illinois	4,313	11,178,721	383,867	1,600,138	49.63	862,819	6.6%
5 Nebraska	3,594	8,993,521	295,500	1,384,347	50.17	715,111	5.4%
6 Indiana	4,603	8,221,628	322,533	1,468,742	47.63	676,854	5.2%
7 Oklahoma	2,256	7,264,319	189,120	1,259,131	42.43	568,277	4.3%
8 Missouri	3,752	9,288,986	225,700	1,183,803	44.00	538,923	4.1%
9 Ohio	4,976	4,609,153	157,247	816,501	47.80	382,935	2.9%
10 Kansas	1,939	3,512,384	151,530	777,634	45.73	353,208	2.7%

Average of 2004-06 calendar years, except farms and head sold numbers are for 2002. Sourced from USDA-NASS.

	2002	2003	2004	2005	2006	2007
<i>Million head</i>						
Breeding herd (Dec. 1)	6.20	6.06	6.01	5.97	6.01	6.09
Market hogs (Dec. 1)	53.52	53.50	54.43	55.01	55.44	56.40
Pigs per litter (head)	8.85	8.88	8.94	9.01	9.08	9.19
Hog imports	5.74	7.44	8.51	8.19	8.76	9.86
Hog exports	0.21	0.17	0.17	0.15	0.16	0.13
<i>Million pounds</i>						
Pork supply						
Beginning stocks	536.1	533.0	532.0	542.8	494.0	514.0
Imports	1,070.7	1,185.2	1,099.5	1,025.0	989.0	1,001.0
Production	19,685.0	19,966.0	20,529.0	20,705.0	21,075.0	21,959.0
Total	21,291.8	21,684.2	22,160.5	22,272.8	22,558.0	23,474.0
Pork disappearance						
Domestic use	19,146.0	19,435.5	19,437.2	19,114.0	19,070.0	19,754.0
Exports	1,612.2	1,716.7	2,180.5	2,665.0	2,974.0	3,160.0
Total	20,758.2	21,152.2	21,617.7	21,779.0	22,044.0	22,914.0
Exports, share of production	8.2%	8.6%	10.6%	12.9%	14.1%	14.4%

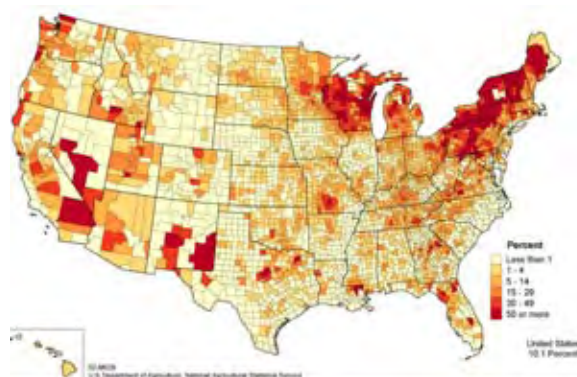
Sourced from USDA-ERS.

Dairy

Milk cow inventory, 2002



Value of milk and other dairy products as percent of agricultural products sold, 2002



	Dairy Farms Number, 2002	Milk Cows thousand head	Milk Per Cow lbs	Production Million lbs	All Milk Price \$ per cwt.	Value of Production thousand \$	Value of Production fraction
United States	91,989	9,055.7	19,494	176,553.7	14.76	26,008,790	
1 California	2,793	1,753.3	21,453	37,619.7	13.41	5,032,239	19.3%
2 Wisconsin	16,886	1,240.0	18,373	22,783.0	15.27	3,470,465	13.3%
3 New York	7,388	647.0	18,435	11,924.3	15.37	1,830,544	7.0%
4 Pennsylvania	9,629	559.0	18,672	10,435.7	16.37	1,704,750	6.6%
5 Idaho	982	455.7	22,035	10,049.7	13.60	1,357,367	5.2%
6 Minnesota	6,474	455.3	18,059	8,220.3	15.03	1,234,128	4.7%
7 Michigan	3,013	311.7	21,571	6,726.7	15.00	1,005,197	3.9%
8 New Mexico	377	336.3	21,124	7,108.7	13.83	978,493	3.8%
9 Texas	2,080	324.7	20,099	6,532.0	14.97	971,793	3.7%
10 Washington	1,208	238.3	23,059	5,496.0	14.47	795,067	3.1%

Average of 2004-06 calendar years, except farm numbers are for 2002. Sourced from USDA-NASS.

	2002	2003	2004	2005	2006	2007
Milk production, <i>million lbs</i>	170,063	170,394	170,934	176,929	181,798	185,599
	<i>Million pounds, milk-fat basis</i>					
Total fat supply	6,224	6,236	6,273	6,476	6,708	6,849
Fluid use	1,606	1,680	1,707	1,708	1,717	1,733
Whole milk	621	617	597	573	560	564
2% milk	368	370	375	378	385	400
1% and skim milk	78	77	77	79	83	85
Other	539	615	659	678	689	684
Product use	4,338	4,248	4,301	4,476	4,670	4,746
American cheese	1,181	1,156	1,204	1,225	1,259	1,248
Other cheese	1,188	1,208	1,256	1,308	1,379	1,420
Butter	1,099	1,008	1,011	1,093	1,175	1,249
Other	869	876	830	850	857	830
Farm use and residual fat	280	309	265	292	322	370

Sourced from USDA-ERS.

follows includes information related to: (a) corn, (b) soybeans, (c) cotton, (d) wheat, (e) canola, (f) beef, (g) pork, and (h) milk and dairy products.

Within each supply and utilization table information is provided for the past seven years with the February 2008 World Agricultural Supply and Demand Estimates (WASDE) report from USDA serving as a source of information for the 2007/08 crop. In addition to providing overall value of production by commodity for 2004-06 averages, the included tables provide information on the top ten states contributing to this value. The maps provide insight into the areas within the US where production of each commodity is most prevalent. Many commodities are quite regionalized in their production, such as cotton or canola, while beef production or beef cows can be found in a majority of states, as can milk production.

Review of the detail presented in the preceding section provides insight into the potential organizational structures and policy objectives that might be expected for many commodity and general farm organizations. State and regional production impact the resources available to address commodity specific issues and the percent of production devoted to the export market will impact the amount of resources needed to market product overseas. Inversely, a small percentage of production devoted to the export market may indicate an area of market opportunity for a commodity or organization to allocate developmental resources. The recent growth in the biofuel and renewable fuel industry has created both domestic and export opportunities for ethanol and biodiesel thus impacting the raw commodity available for both domestic and international consumption. In addition, it should be noted that the information presented in these supply and utilization tables only provide insight into the bushels or pounds of a commodity that is consumed either domestically or available for the export market and does not account for the value added component of these industries that may be heavily impacted by marketing and development activities occurring within organizations.

Figure 3 provides a summary overview of the commodity detail.

Figure 3
Commodity Summary Statistics

Commodity, unit	Farm Numbers 2002	Harvested thousand acres	Production billion units	Value of Production billion \$	Exports share of production
Corn for grain, bu.	348,590	73,132	11.152	\$26.806	18.3%
Soybeans, bu.	317,611	73,270	3.125	\$18.286	33.3%
Wheat, all, bu.	169,528	48,976	2.025	\$7.392	49.1%
Cotton, all, lb	24,805	12,917	10.764	\$4.822	65.3%
Canadian Canola, lb		12,802	19.424	\$2.500	54.0%
Beef, lb	796,436		41.683	\$35.733	3.0%
Milk, lb	91,989		176.554	\$26.009	
Pork, lb	82,028		27.415	\$13.128	12.5%

Average of 2004-2006, except farm numbers are from 2002. USDA sources.

Commodity/General Farm Organizations

The information provided in this section has primarily been obtained through public sources such as IRS 990 forms, Federal Election Commission reports, or the websites of each organization. In an effort to provide comparative statistics across organizations, standard information regarding stated purpose of organization, membership and dues collected, revenues, expenses, paid staff, and percent of expenses allocated to compensation and salaries were collected from income tax documents. Additional information regarding states associated with the national organization and PAC contributions were obtained from other public sources. These statistic sheets were shared with each of the organizations involved in the study to provide an opportunity for feedback on accuracy or for more details that might be related to organizational structure and affiliations.

Many of the organizations contained within this study are national organizations affiliated with and supported by a multitude of state organizations. These include the: (a) American Soybean Association, (b) National Association of Wheat Growers, (c) National Corn Growers Association (d) National Cattlemen’s Beef Association, (e) National Pork Producers Council, (f) American Farm Bureau Federation, and (g) National Farmers Union. The National Cotton Council of America and the National Milk Producers Federation are structured in a format that is more representative of the producer and industry segments comprising their membership. The Canadian Canola Council is represented by provinces. The US commodity organizations are presented by commodity type

(crop or livestock derived) in alphabetical order, followed by the two general farm organizations and the one Canadian commodity organization.

It is important to note that while accurate, the information provided in IRS Form 990 is not the most inclusive or detailed for describing the annual financial activity of an organization. The statistics shared in this report provide an aggregate method for viewing each organization, realizing that each organization within this study is quite unique with respect to revenue sources and expense categories. We would also refer the reader to each organization's website for annual reports, specific policy positions, and additional detailed information.

All of the organizations within this study qualify as 501(c) not-for-profit organizations with specific classifications (as noted) including: (5) Labor, Agriculture and Horticulture, (6) Business League or Chamber of Commerce, or (3) Religious, Educational, Charitable, Scientific, or Prevention Foundation.

American Soybean Association (ASA)

Website: www.soygrowers.com

Year Established: 1920

Mission: Increase market opportunities and value for US soybean farmers through domestic and international policy advocacy, based on direction set by farmer members. Efforts guided by our commitment to produce food, feed and energy in an environmentally sustainable manner.

IRS Classification: 501 (c) (5)

Organizational type: Association of 25 state associations comprised primarily of individual soybean producers.

Checkoff Organization: United Soybean Board (USB/QSSB), separate organizational structure although funding was combined with ASA for 2006.

Additional Information: Portion of revenue associated with USDA/FAS funding of the US Soybean Export Council for the development of markets on a worldwide basis (\$12,085,964), as well as funding of the World Initiative for Soy in Human Health (WISHH) (\$1,582,268), and funding for the United Soybean Board (\$2,419,960). Adjusted revenue available for Membership and Policy of ASA accounting for these sources is \$4,218,253. Correspondingly, total adjusted expenses available for Membership and Policy of ASA is \$4,296,071.

Additional Affiliated Organizations: World Initiative for Soy in Human Health (WISHH), State/Regional Soybean Associations

American Soybean Association

Statement of Program Services:

1. Development of markets on a worldwide basis for U.S. soybeans and soybean products in conjunction with the Foreign Agricultural Service of the USDA.
2. ASA partners globally on research, market development, and promotion with soybean and other groups having common long-term objectives.
3. ASA is involved with partners and customers in maintaining existing markets, building emerging markets and identifying new market opportunities for soybeans/soy products.
4. ASA promotes the soybean industry to policy makers/ influencers so they recognize it as a major contributor to the U.S. economy.

States within the United States affiliated with organization:

AL, AR, GA, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, NC, ND, NE, OH, OK, SC, SD, TN, TX, VA, WI

Based upon 2006 Tax filing

Paid staff:	21	Compensation and salary as a % of functional expenses less other expenses*:	43.42%
Membership dues and assessments:	\$823,687	Functional expenses less other expenses*:	\$2,631,347
Revenues**:	\$20,306,445	Total functional expenses **:	\$20,329,027

Locations: St. Louis, Missouri
International Marketing Offices
Washington, DC (independent contractor)

PAC contributions to political campaigns in 2004:

PAC contributions to political campaigns in 2006:

Affiliated organizations:

W.J. Morse Foundation
Stephen M. Yoder Foundation

*IRS Form 990, line 44 - line 43; **Not equivalent to operating revenues or expenses, see Additional Information on previous page or contact organization for annual operating revenue and expenses.

Sources:

IRS Form 990

Organization Website

Federal Election Commission

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National Association of Wheat Growers (NAWG)

Website: www.wheatworld.org

Year Established: 1950

Mission: NAWG unites U.S. wheat growers to create beneficial policies for wheat growers; effective relationships with industry; and profitable opportunities through research and technology.

IRS Classification: 501 (c) (6)

Organizational type: Federation of 20 state associations comprised primarily of individual wheat producers.

Checkoff Organization: US Wheat Association, separate organizational structure.

Additional Information: Wheat PAC based on additional voluntary funding providing One Voice for Wheat.

Additional Affiliated Organizations: NAWG Foundation established in 1978.

National Association of Wheat Growers

Statement of Program Services:

1. NAWG holds meetings and conferences which provides the opportunity to bring information (technology, practices, scientific findings, marketing and environment) from industry, government and academia directly to grower members.

2. NAWG's weekly newsletter "Report from Washington" conveys legislative and federal information to its member NAWG represents the wheat growers legislative priorities set forth by its members.

3. NAWG conducts research and special projects to develop new uses and improved strains for wheat and wheat products, and good farming and farm marketing practices and conservation issues.

States within the United States affiliated with organization:

AL, AZ, CA, CO, ID, KS, KY, MD, MN, MT, NC, ND, NE, OK, OR, SD, TX, VA, WA, WY

Based upon 2006 Tax filing

Paid staff:	5	Compensation and salary as a % of functional expenses less other expenses*:	51.22%
Membership dues and assessments:	\$882,233	Functional expenses less other expenses*:	\$946,788
Revenues**:	\$1,059,144	Total functional expenses **:	\$1,056,862

Locations: Washington, DC

PAC contributions to political campaigns in 2004: \$68,000

PAC contributions to political campaigns in 2006: \$47,745

Affiliated organizations:

National Association of Wheat Growers Foundation

*IRS Form 990, line 44 - line 43; **Not equivalent to operating revenues or expenses, see Additional Information on previous page or contact organization for annual operating revenue and expenses.

Sources:

IRS Form 990

Organization Website

Federal Election Commission

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National Corn Growers Association (NCGA)

Website: www.ncga.com

Year Established: 1957, Merger with National Corn Development Foundation (NCDF) in 1996/97

Mission: Create and increase opportunities for corn growers.

IRS Classification: 501 (c) (5)

Organizational type: Individual memberships (joint state-national) in 48 continental states and federation of 48 affiliated state organizations including 23 checkoff boards and 25 grower associations located in 28 geographic states.

Checkoff Organization: 23 state-based checkoff programs invest voluntarily in NCGA with a majority of checkoff programs offering a right of refund for individual producers.

Additional Information: Corn PAC funded by separate and voluntary individual contributions.

Additional affiliated organizations: NCGA is a member organization of the US Grains Council.

National Corn Growers Association

Statement of Program Services:

The associations purpose is to enable corn growers in conjunction with other organizations and corn industry participants to expand markets, production and worldwide demand for corn. The association shall be an advocate for corn growers. This may be accomplished through informational and education activities, engaging in market development, research and promotion activities as well as education and lobbying governmental officials to influence corn policies.

States within the United States affiliated with organization:

AL, AR, CO, GA, IA, IL, IN, KS, KY, LA, MD, MI, MN, MO, MS, NC, ND, NE, NY, OH, OK, PA, SC, SD, TN, TX, VA, WI

Based upon 2006 Tax filing

Paid staff:	36	Compensation and salary as a % of functional expenses less other expenses*:	65.81%
<hr style="border-top: 1px dashed black;"/>			
Membership dues and assessments:	\$621,948	Functional expenses less other expenses*:	\$3,933,744
Revenues**:	\$8,770,892	Total functional expenses **:	\$8,174,739
<hr style="border-top: 1px dashed black;"/>			

Locations: St. Louis, Missouri
Washington, DC

PAC contributions to political campaigns in 2004: \$11,500

PAC contributions to political campaigns in 2006: \$28,100

Affiliated organizations:

National Corn Growers Association Foundation

*IRS Form 990, line 44 - line 43; **Not equivalent to operating revenues or expenses, see Additional Information on previous page or contact organization for annual operating revenue and expenses.

Sources:

IRS Form 990

Organization Website

Federal Election Commission

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National Cotton Council (NCC) of America

Website: www.cotton.org

Year Established: 1938

Mission: To ensure the ability of all segments of the US cotton industry to compete effectively and profitably in the raw cotton, oilseed and value added product markets at home and abroad.

IRS Classification: 501 (c) (6)

Organizational type: Member organization comprised of seven segments of industry including cotton producers, cooperatives, ginners, cottonseed, merchants, warehouses, and manufacturers.

Checkoff Organization: Cotton Research and Promotion Program under the oversight of the Cotton Board, separate organizational structure.

Additional Information: Cooperatives were added in 1964 and in 1969 a producer segment, the American Cotton Producers, was created and is still contained within NCC to give additional voice to producers.

Additional Affiliated Organizations:

National Cotton Council of America

Statement of Program Services:

1. Technical Services - Coordinates government & private research, provides information to regulatory agencies on health & safety matters, develops packaging standards and coordinates pest suppression/eradication efforts.

2. Foreign Operations - In cooperation with the US Dept. Of Agriculture, works to increase exports by helping to arrange government credit for foreign customers, sponsors visits by trade teams and brings foreign mill customers to the US.

3. Economic Services - Studies major end-use markets to help guide research & market development. Details analysis of Cotton's supply. Demand, production, costs, prices & other factors affecting markets, impacts studies to aid in attaining reasonable regulations.

4. Communication Services - Explains the major role cotton played in the economy of the US in terms of employment, world trade energy conservation productivity, and food value of cottonseed. Participants with other groups to help improve the image of cotton as a whole.

States within the United States affiliated with organization:

*NA

Based upon 2006 Tax filing

Paid staff:	73	Compensation and salary as a % of functional expenses less other expenses*:	53.26%
Membership dues and assessments:	\$12,283,387	Functional expenses less other expenses*:	\$10,738,367
Revenues**:	\$16,685,898	Total functional expenses **:	\$12,525,357

Locations: Memphis, Tennessee
Washington, DC

PAC contributions to political campaigns in 2004: \$141,695

PAC contributions to political campaigns in 2006: \$145,579

Affiliated organizations:

*IRS Form 990, line 44 - line 43; **Not equivalent to operating revenues or expenses, see Additional Information on previous page or contact organization for annual operating revenue and expenses.

Sources:

IRS Form 990

Organization Website

Federal Election Commission

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National Cattlemen's Beef Association (NCBA)

Website: www.beef.org

Year Established: 1898, Merger with Beef Industry Council in 1996

Mission: Mobilize all U.S. cattle and beef industry participants to prosper amid growing competition by solidifying U.S. beef's position as the world's most preferred protein.

IRS Classification: 501 (c) (6)

Organizational type: Federation of 45 state beef councils, representing 64 state affiliates, with membership consisting of breeders, producers, feeders, and industry affiliates.

Checkoff Organization: Cattlemen's Beef Board with oversight provided by Federation of State Beef Councils within NCBA.

Additional Information: One Vision is a long range beef industry plan for 2010 resulting from multiple stakeholder input.

Additional Affiliated Organizations: American National Cattlemen's Association, Cattlemen's Beef Board, Federation of State Beef Councils for multiple states, US Meat Export Federation.

National Cattlemen's Beef Association

Statement of Program Services:

1. To promote the common business interests of the beef industry in the United States.
2. Increase consumer demand for beef through consumer marketing programs for research, education, promotion and information.
3. To conduct checkoff funded activities in compliance with the Beef Promotion Research Act and Order dated July 18, 1986.

States within the United States affiliated with organization:

AL, AR, AZ, CA, CO, FL, GA, HI, IA, ID, IL, IN, KS, KY, LA, MD, MI, MN, MO, MS, MT, NC, ND, NE, NM, NV, NY, OH, OK, OR, PA, SC, SD, TN, TX, UT, VA, WA, WI, WV, WY

Based upon 2006 Tax filing

Paid staff:	150	Compensation and salary as a % of functional expenses less other expenses*:	93.38%
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Membership dues and assessments:	\$3,161,685	Functional expenses less other expenses*:	\$435,874
Revenues**:	\$66,832,132	Total functional expenses **:	\$67,433,117
<hr/>			

Locations: Denver, Colorado
Washington, DC
Chicago, Illinois

PAC contributions to political campaigns in 2004: \$160,630

PAC contributions to political campaigns in 2006: \$136,434

Affiliated organizations:

CATL Fund
National Cattlemen's Building Corp.
National Cattlemen's Foundation
National Cattlemen's Association PAC

**IRS Form 990, line 44 - line 43; **Not equivalent to operating revenues or expenses, see Additional Information on previous page or contact organization for annual operating revenue and expenses.*

Sources:

IRS Form 990

Organization Website

Federal Election Commission

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National Milk Producers Federation (NMPF)

Website: www.nmpf.org

Year Established: 1916

Mission: NMPF is a farm commodity organization representing most of the dairy marketing cooperatives serving this nation. NMPF members market the majority of the milk produced in the U.S., making the NMPF the principal voice on national issues for dairy cooperatives and their dairy farmer members.

IRS Classification: 501 (c) (6)

Organizational type: Federation of 31 dairy cooperatives, associate members and affiliated members representing dairy producers and ancillary organizations.

Checkoff Organization: No checkoff in place. Voluntary CWT program administered by NMPF for supply management.

Additional Information: NMPF PAC provides opportunity to make sure the dairy producer's story is told on Capitol Hill.

Additional Affiliated Organizations:

National Milk Producers Federation

Statement of Program Services:

1. Various research in beef and dairy products were sponsored to help improve the production, marketing, and quality of dairy products which are of interest to the dairy farmers
2. Annual convention - held to promote interests of dairy farmers and to facilitate the sharing of valuable industry information among members
3. The "cooperatives working together" program was designed to balance the supply of milk with demand within the united states and, thereby, assist in stabilizing the price of milk, the program involves up to three elements; herd retirement, dairy product export assistance, and reduced production marketing.

States within the United States affiliated with organization:

*NA

Based upon 2005 Tax filing

Paid staff:	15	Compensation and salary as a % of functional expenses less other expenses*:	51.07%
Membership dues and assessments:	\$91,112,948	Functional expenses less other expenses*:	\$3,835,392
Revenues**:	\$92,735,104	Total functional expenses **:	\$92,634,976

Locations: Arlington, Virginia

PAC contributions to political campaigns in 2004: \$38,000

PAC contributions to political campaigns in 2006: \$49,500

Affiliated organizations:

**IRS Form 990, line 44 - line 43; **Not equivalent to operating revenues or expenses, see Additional Information on previous page or contact organization for annual operating revenue and expenses.*

Sources:

IRS Form 990

Organization Website

Federal Election Commission

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National Pork Producers Council (NPPC)

Website: www.nppc.org

Year Established: 1964 from the National Swine Growers Council

Mission: Enhancing opportunities for the success of U.S. pork producers and other industry stakeholders by establishing the U.S. pork industry as a consistent and responsible supplier of high quality pork to the domestic and world market.

IRS Classification: 501 (c) (5)

Organizational type: 43 state associations are members comprised primarily of pork producers.

Checkoff Organization: Oversight provided by National Pork Board, separate organizational structure.

Additional Information:

Additional affiliated organizations:

National Pork Producers Council

Statement of Program Services:

1. Washington D.C. Office - An office in Washington, D.C. to monitor government activities and to interact with development of laws and regulations affecting pork producers.
2. Foreign Market - Promotion efforts aimed at increasing foreign outlets for American pork products.
3. Research/education - provide production methods education to pork producers.

States within the United States affiliated with organization:

AL, AR, AZ, CA, CO, CT, DE, FL, GA, IA, ID, IL, IN, KS, KY, LA, MD, ME, MI, MN, MO, MS, MT, NC, ND, NE, NH, NV, NY, OH, OK, OR, PA, SC, SD, TN, TX, UT, VA, WA, WI, WV

Based upon 2005 Tax filing

Paid staff:	39	Compensation and salary as a % of functional expenses less other expenses*:	41.87%
<hr style="border-top: 1px dashed black;"/>			
Membership dues and assessments:	\$1,082,521	Functional expenses less other expenses*:	\$6,095,298
Revenues**:	\$12,701,912	Total functional expenses **:	\$12,265,968
<hr style="border-top: 1px dashed black;"/>			

Locations: Washington, DC
Urbandale, Iowa

PAC contributions to political campaigns in 2004: \$64,500
PAC contributions to political campaigns in 2006: \$106,797

Affiliated organizations:

American Pork Export and Trading Co.

*IRS Form 990, line 44 - line 43; **Not equivalent to operating revenues or expenses, see Additional Information on previous page or contact organization for annual operating revenue and expenses.

Sources:

IRS Form 990

Organization Website

Federal Election Commission

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American Farm Bureau Federation (AFBF)

Website: www.fb.org

Year Established: 1919

Mission: AFBF is the unified national voice of agriculture, working through our grassroots organization to enhance and strengthen the lives of rural Americans and to build strong, prosperous agricultural communities.

IRS Classification: 501 (c) (5)

Organizational type: Federation representing 50 State Farm Bureaus.

Checkoff Organization: Not applicable.

Additional Information: Farm Bureau of Puerto Rico also a member of AFBF. Missouri was first state organization of County Farm Bureaus.

Additional Affiliated Organizations:

American Farm Bureau Federation

Statement of Program Services:

1. American Farm Bureau Federation: Promotes and advocates for economic, social, and educational interest of its members
2. Farm Bureau News: Provides farmers with current information concerning legislative and marketing matters

States within the United States affiliated with organization:

AK, AL, AR, AZ, CA, CO, CT, DE, FL, GA, HI, IA, ID, IL, IN, KS, KY, LA, MA, MD, ME, MI, MN, MO, MS, MT, NC, ND, NE, NH, NJ, NM, NV, NY, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VA, VT, WA, WI, WV, WY

Based upon 2005 Tax filing

Paid staff:	85	Compensation and salary as a % of functional expenses less other expenses*:	37.89%
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Membership dues and assessments:	\$22,883,068	Functional expenses less other expenses*:	\$20,223,561
Revenues**:	\$25,118,298	Total functional expenses **:	\$23,854,311
<hr style="border-top: 1px dashed black;"/>			

Locations: Washington, DC

PAC contributions to political campaigns in 2004:

PAC contributions to political campaigns in 2006:

Affiliated organizations:

- American Agricultural Communications System, Inc.
- American Agricultural Insurance Agency, Inc.
- American Agricultural Insurance Company
- American Agricultural Marketing Association
- American Farm Bureau, Inc.
- American Farm Bureau Benevolence Association
- American Farm Bureau Foundation for Agriculture
- American Farm Bureau Insurance Services, Inc.

*IRS Form 990, line 44 - line 43; **Not equivalent to operating revenues or expenses, see Additional Information on previous page or contact organization for annual operating revenue and expenses.

Sources:

IRS Form 990

Organization Website

Federal Election Commission

FAPRI-MU Report #02-08

National Farmers Union (NFU)

Website: www.nfu.org

Year Established: 1902

Mission: National Farmers Union believes that good opportunities in production agriculture are the foundation of strong farm and ranch families, and strong farm and ranch families are the basis for thriving rural communities. Vibrant rural communities, in turn, are vital to the health, security and economic well-being of our entire national economy.

IRS Classification: 501 (c) (3)

Organizational type: Federation representing 32 state chapters comprised primarily of agricultural producers.

Checkoff Organization: Not applicable.

Additional Information:

Additional Affiliated Organizations: The Farmers Educational and Cooperative Union of America in Greenwood Village, CO. This is a 501 (c) (5) organization with \$3,195,925 in Total Revenue in 2006, \$3,755,441 in Total Functional Expenses, and 30 paid staff.

National Farmers Union

Statement of Program Services:

1. Organization funded studies and provided other services for project regarding carbon sequestration.
2. Organization provided educational scholarships to various universities.
3. Organization provided a multi-state educational web site for specialty products of Farmers Union New Generation Co-ops and others in order to improve technical assistance for greater small business development.

States within the United States affiliated with organization:

AK, AR, CA, CO, CT, IA, ID, IL, IN, KS, MA, ME, MI, MN, MO, MT, ND, NE, NH, NM, OH, OK, OR, PA, RI, SD, TX, UT, VT, WA, WI, WY

Based upon 2006 Tax filing

Paid staff:	0	Compensation and salary as a % of functional expenses less other expenses*:	
<hr/>			
Membership dues and assessments:	\$0	Functional expenses less other expenses*:	\$8,900
Revenues**:	\$40,222	Total functional expenses **:	\$13,972
<hr/>			

Locations: Denver, Colorado
Washington, DC

PAC contributions to political campaigns in 2004: \$51,273

PAC contributions to political campaigns in 2006: \$34,640

Affiliated organizations:

The Farmers' Educational and Cooperative
The Farmers Educational Foundation Union of America

*IRS Form 990, line 44 - line 43; **Not equivalent to operating revenues or expenses, see Additional Information on previous page or contact organization for annual operating revenue and expenses.

Sources:

IRS Form 990

Organization Website

Federal Election Commission

FAPRI-MU Report #02-08

Canola Council of Canada

Website: www.canola-council.org

Mission: The Canola Council of Canada is a national trade association whose mission is to foster a regulatory, policy and business climate based upon innovation, resilience, and creation of superior value for a healthier world; allowing the industry to grow 15 “million tonnes” of market demand and production by 2015. Members include canola growers, crop input suppliers, grain handling companies, exporters, processors, food and feed manufacturers and governments.

Organizational type: Canadian national trade association representing producers, input suppliers, processors and marketers.

Additional Information: 25 council staff provides support with consulting services provided by 7 individuals/organizations, regular membership with voting rights at the annual meeting of the Canola Council of Canada is open to Canadian companies or individuals. Affiliate membership is open to all companies or individuals with all membership benefits except voting privileges. Top three policy priorities are related to trade, variety registration, and mandatory consumer labeling. There is a 17 member board of directors and a 5 member executive committee. A voluntary industry levy is paid by processors and exporters amounting to over 47 percent of the Council’s funding sources. Canola grower checkoff exists in each of the Prairie provinces. According to the organization’s 2005-2006 Annual Report, total revenues for 2005 were reported at \$5,386,151 and core revenue collected from levy funds collected on seed crushed or exported, interest, and membership fees. Total expenses for 2005 were reported at \$5,120,846 with \$1,270,211 in expenses for salaries and benefits, or 25% of total expenses.

Emerging Themes from Personal Interviews

FAPRI-MU personally contacted representatives from each of the nine US organizations to request a personal interview related to their organization and its pursuit of policy objectives. FAPRI-MU also wishes to thank every one of these organizations for their willingness to participate and hospitality in responding to this request. Information regarding the study was shared with each organization prior to the interview along with a list of the questions that would be used to guide the direction of the discussion. Figure 4 provides a replica of the interview questions. Individuals involved in the study were chosen based on their position in the company and their ability to provide detail regarding policy processes and objectives and overarching vision of the organization.

The information discussed during the interviews and subsequent findings will be presented in an aggregate nature to maintain confidentiality of the individuals and organizations taking part in the study. Information provided in previous sections was acquired from public sources or with organizational permission. Emerging themes from the interviews will be discussed in four frameworks comprised of: (a) organizational structure including membership and governance, (b) policy process, (c) success factors, and (d) top policy priorities and corresponding challenges and opportunities.

Organizational Structure

The organizations comprising this study have been collectively providing leadership for the past 100 years. Organizational establishment dates range from 1898 to 1964 with many of the organizations formed in the 1950's and 1960's growing out of existing state or regional organizations. Many of the organizations have undergone organizational restructuring with a majority of the restructuring in recent years focusing on mergers or a conscious effort to provide a broader, more unified voice.

Seven of the nine US organizations studied have a strong state association or organization focus. The balance of governance structure between the state and national organizations is varied within the group. Membership in some state organizations also results in membership in the national organization. In most of these cases the national organization is aware of the individual members comprising the organizations. In other cases, state organizations maintain the membership base and the state organization or association is a member of the national organization. The balance between the state and national organizations is unique for each of the organizations in this study. Most state associations

determine their own membership rate and state governance structure and many national organizations base delegate and board representation on a formula related to commodity production.

All of the organizations within the study maintain some form of board or committee for primary governance and policy formation or resolution. The average governing body or board size was approximately 34 members with representation and voting rights determined in manners similar to delegate or committee structure. A majority of the organizations were comprised of non-voting advisory councils or committees associated with specific areas or policy priorities. There are generally less than 10 advisory councils/committees per organization with membership on each committee averaging between 10 to 15 members. A few organizations maintain committees with 75 to 150 members on certain committees. Some committees are represented by joint membership from other affiliated organizations closely aligned to either the checkoff or export and market development components of the commodity/industry.

Several of the organizations refer to delegates which are drawn from individual membership in either the national or state organizations. Delegates are primarily responsible for generating the first pass at national policy initiatives with responsibility for final adoption primarily resting with the governing board/committee. Within the governing board/committee an executive structure is most often present. This executive structure is generally represented by officers or an executive board. This executive structure is most often comprised of 3 to 5 individuals most commonly referred to as President, CEO, Executive or Senior Vice President, Vice President, Secretary/Treasure, etc. Each organization implements revolving terms for the executive body with some requiring members to serve in each of the executive roles.

Paid staff also comprises a significant role in most organizations serving as primary sources of information, education, and communication with members, the board, the executive body, and policy makers. In looking at organizations with similar structures, the average number of paid staff per organization was 44 with a wide range of 6 to 150.. This would not take into account any contractual arrangements the organization might have with other individuals or companies to provide services. Two organizations have contractual arrangements for lobbying efforts, one of these also has additional paid staff as registered lobbyists. Additional contractual arrangements were noted for legal and accounting services. Additionally, this staff structure is most often correlated with number of members, member states, or membership fees and dues.

Six of the seven US commodities represented by organizations in the study utilize checkoff or other processes for funding market and product development or research and include: (a) corn, (b) soybeans, (c) cotton, (d) wheat, (e) beef, and (f) pork. In most cases a separate organization is in place to provide oversight for these activities and in all cases an organizational structure is in place to maintain a clear division between market and product development and policy promotion. The purpose of this study was not focused on the checkoff or other similar processes and we would refer the reader to the numerous Boards and state and federal legislation governing these processes for more detail. We address this topic only in an effort to highlight the additional organizational and commodity complexity added by these processes.

Policy Process

All of the organizations within the study follow a somewhat similar pattern for the development of annual policy priorities, objectives, or resolutions although each employs different methods in pursuing national policy objectives. Policies are first discussed, debated and proposed at the broadest level based on the state, cooperative, or industry segment. This discussion and debate is further developed at the national level before final adoption of the policy priorities by the governing body or board. This pattern has remained relatively constant for each of the organizations in the study. Organizational mergers were cited by two of the organizational representatives as reasons why those involved in the process has broadened or an increased and as a result, an internal disclosure process has been implemented to add discipline to the policy process. One organizational representative noted that a smaller, more focused group was providing policy direction while another organization highlighted the increased need for staff resources and policy background to add depth and insight into the policy development process to coincide with a more complex environment.

Once policies priorities or resolutions are adopted by a governing body or board, executive committees, officers, government relations staff, or external consultants are responsible for educating members of Congress and federal agencies on the importance of their organizational policy priorities for their constituents. Eight of the nine organizations in this study employ registered lobbyists on staff with one organization utilizing a contractual arrangement for lobbying its policy priorities. The number of registered lobbyists working on behalf of an organization ranged from 3 to 25 individuals with the mean/average number of registered lobbyists per organization between 9 and 10 individuals. We note that the number of registered lobbyists per organization may increase to include

more organizational staff members in compliance with new lobbying reporting rules effective January 2008.

Input from members in individual constituent groups is also noted as a vital component for the promotion of policy priorities and objectives. Annual events on Capitol Hill are planned by many organizations to provide an opportunity for members to interact with policy makers and to add a face or voice to policy efforts. Many state organizations or cooperatives also pursue their own policy objectives with members of Congress and federal agencies.

Success Factors

We asked the representatives of each organization what they thought the main factor or factors of success were for their organization. The term *grassroots* was used by half of the organizations with other terminology including *caring states, one voice for the industry, strong state associations, voluntary nature of checkoff, staff resources, communication, collaboration with other commodity/farm organizations, nationwide, producers in every state, core values, producers united, and large member base* surfacing during the discussion. It was apparent in the discussion regarding organizational success that these commodity and general farm organizations are proud of the membership commitment and culture that they are representing. Funding or resources were not cited by any of the organizations as a success factor.

Policy Priorities, Challenges, and Opportunities

Eight of the nine organizations listed farm policy or more specifically the 2008 Farm Bill as one of their top three policy priorities. Many of these cited a passage of the new bill prior to the March 15, 2008 expiration as an added priority. Export, WTO, or global policies were the second most mentioned policy priority followed closely by environmental or regulatory policy priorities, including energy or renewable resources. Other top priorities for these organizations included biotechnology, transportation, appropriations, immigration reform, and tax structures.

Two themes emerged most predominantly regarding opportunities and challenges facing these top policy priorities. These two themes included the upcoming presidential election and the Farm Bill process. The timeframes for each of these events were noted as providing both opportunities and challenges. International trade was also cited as both an opportunity and challenge. One theme that was most commonly listed as only a challenge related to a decreasing voice in general for agriculture or agricultural policy including the increasing

number of policy makers without a firsthand knowledge of agricultural production. An additional challenge listed by some organizations included maintaining a relevance in numerous states. Competition among commodities for agricultural land or acreage was cited as a challenge as were WTO obligations, biotechnology approval, public research funding, a lack of courage, and holding the government accountable for reflecting agricultural interests. Many of the organizational representatives cited opportunities for grassroots and members to educate policy makers as a primary opportunity to meet the organizational policy priorities. The profit potential provided by increased trade was noted by many as an additional opportunity.

Conclusion

Most of the organizations we met with were hoping to glean information from this study that would be useful as they are undergoing their own strategic planning efforts. While comparison of the organizations involved in this study is somewhat limited due to the unique organizational structures and cultures associated with the commodity, industry, or states and members within the organization, some common themes emerged with respect to structure, policy process, success factors, and policy priorities.

The most common emerging themes among all the US organizations included a commitment of the membership base, a diligent policy process beginning at the broadest level, adopted by a governing body, and promoted by an executive body, staff, and consultants. Primary differences among groups relate to funding sources, state or individual member structure, and policy priorities. Age of the organization, geographic nature of production, and need to educate policy makers regarding the specifics of agricultural production were also noted as factors contributing to organizational evolution and restructuring that has occurred for many organizations within recent years.

**Figure 4 - National Policy Efforts by Commodity and General Farm Organizations:
Background Information and Comparative Statistics
Personal Interview Questions**

1. When was your organization established?
2. What would you say is the primary mission of your organization?
3. Can you give a brief overview of the structure of your organization including membership, funding sources, and management structure?
4. How does your organization determine its policy positions?
 - a. What roles are played by individual members, their delegates, boards and staff?
 - b. Has this process changed since the inception of the organization?
5. How does your organization seek to promote its policy objectives?
 - a. Does the organization use registered lobbyists?
 - b. What roles are played by organization officers, members, and staff?
6. Is there one factor that you feel has most contributed to your organization's success in promoting policy objectives?
7. Has a shift in the demographics of your members or policy makers had an impact on how your organization pursues policy objectives?
8. Can you share your organization's current top 3 policy objectives from a national perspective?
9. What do you see as the biggest challenge and best opportunity for your organization to meet these top 3 objectives within the timeframe you have in mind?

