

BEYOND THE WEST: U.S. AGRICULTURE IN A REALIGNING WORLD

Round Table Meeting June 2026





Cultivator Brianna Croft

Mississippi University

Impacts of H-2A Reforms on Farm Performance and Labor Use in Mississippi Sweetpotatoes

Brianna Croft
Mississippi State University

June 17, 2026



MISSISSIPPI STATE
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Department of Agricultural Economics

Labor Issues for Mississippi Sweetpotato Producers

- Mississippi ranks 3rd nationally in sweetpotato production
- Labor costs account for up to 48% of total variable costs for Mississippi sweetpotato producers
- Domestic workers tend to leave farms for nonfarm employment, seeking higher wages and better working conditions

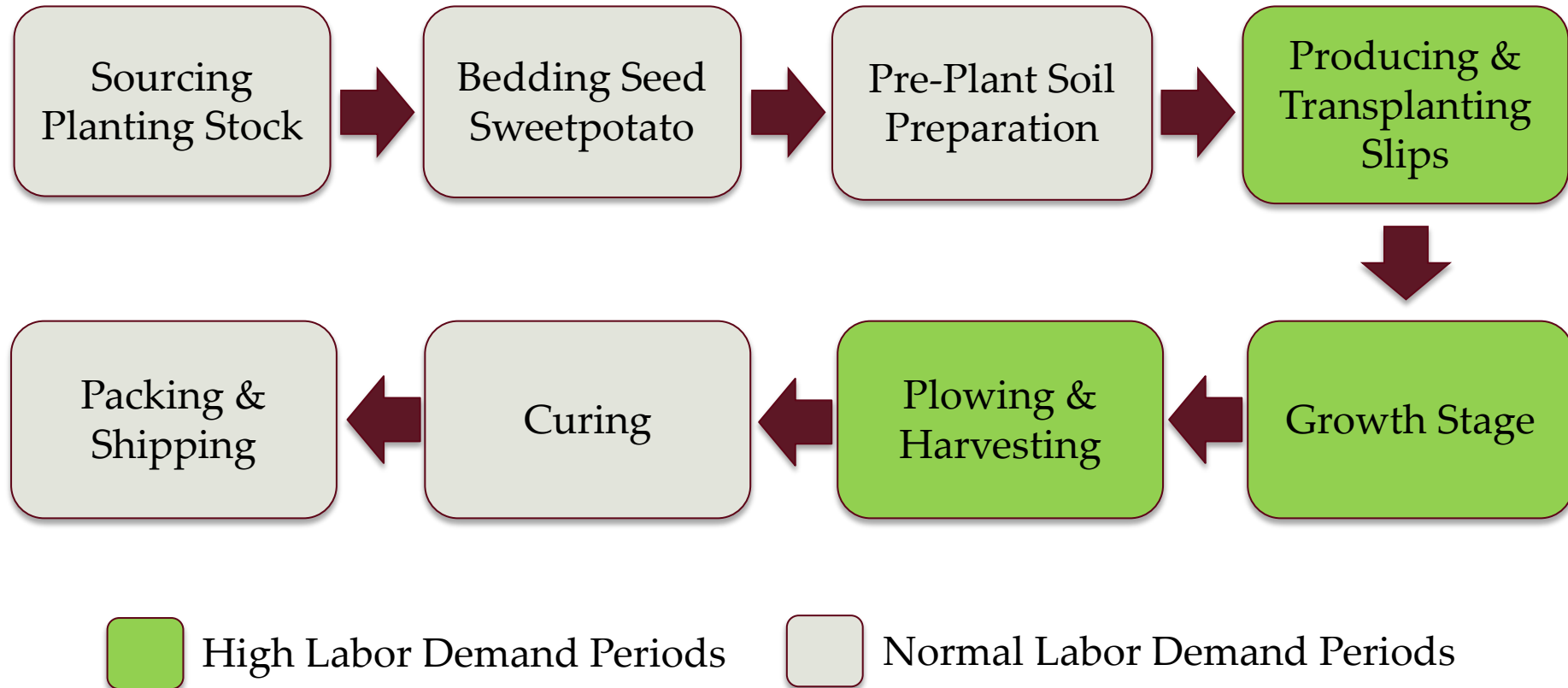


H-2A Program Background

- Allows growers facing domestic labor shortages to hire temporary agricultural workers
- Producers must advertise positions domestically and simultaneously file H-2A applications
- Producer Eligibility:
 - Work is seasonal/agricultural
 - Domestic labor is insufficient
 - H-2A employment will not displace or adversely affect domestic workers' wages



Sweetpotato Commercial Production Process Flow Chart



What This Study Does

- Develops farm-level analysis of H-2A labor allocation across the growing season (i.e. when and how many workers should be brought in)
- Will explore policy recommendations that can improve farm profitability, labor compensation, and labor efficiency for growers



Thank you!

Brianna Croft
Graduate Student
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Cultivator Rundong Peng

Michigan State University

Drought Shocks, Imports, and US Retail Beef Prices

Market Dynamics, Biological Constraints, and the
Buffering Role of International Trade

Fram Foundation Round Table 2026

Rundong Peng
Michigan State University

Rundong Peng

Education:

- BS, Mechanical Engineering, Purdue
- MS, Agricultural Economics, Purdue
- PhD, AGECC, Michigan State University

Focus:

- Commodities
- High-Dimensional Time Series
- Agricultural Policy
- Impact Evaluation with Machine Learning

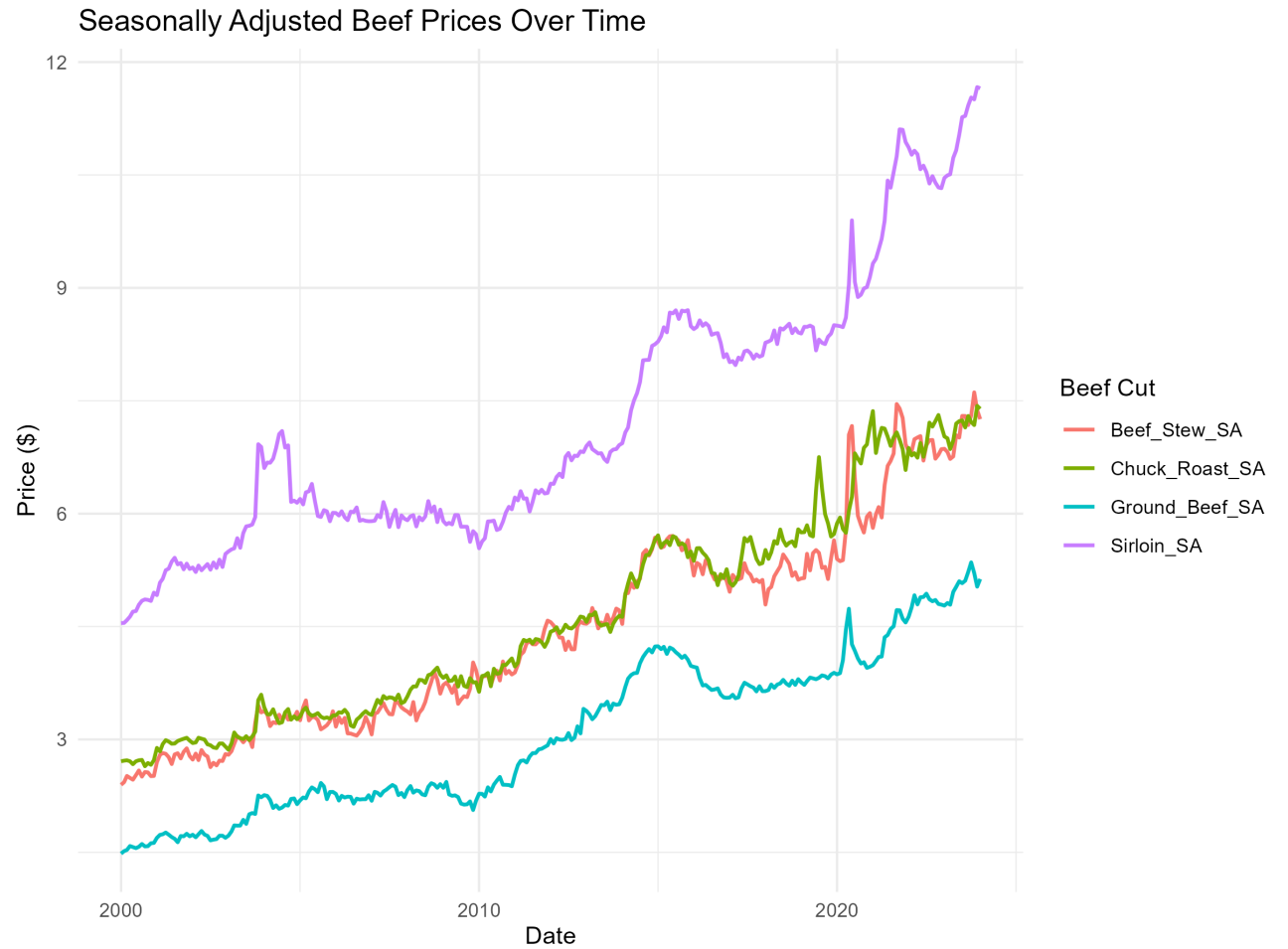
Career Goal:

- Quantitative Market Strategy
- Data-Driven Risk Advisory
- Impact Evaluation for Policy & Trade



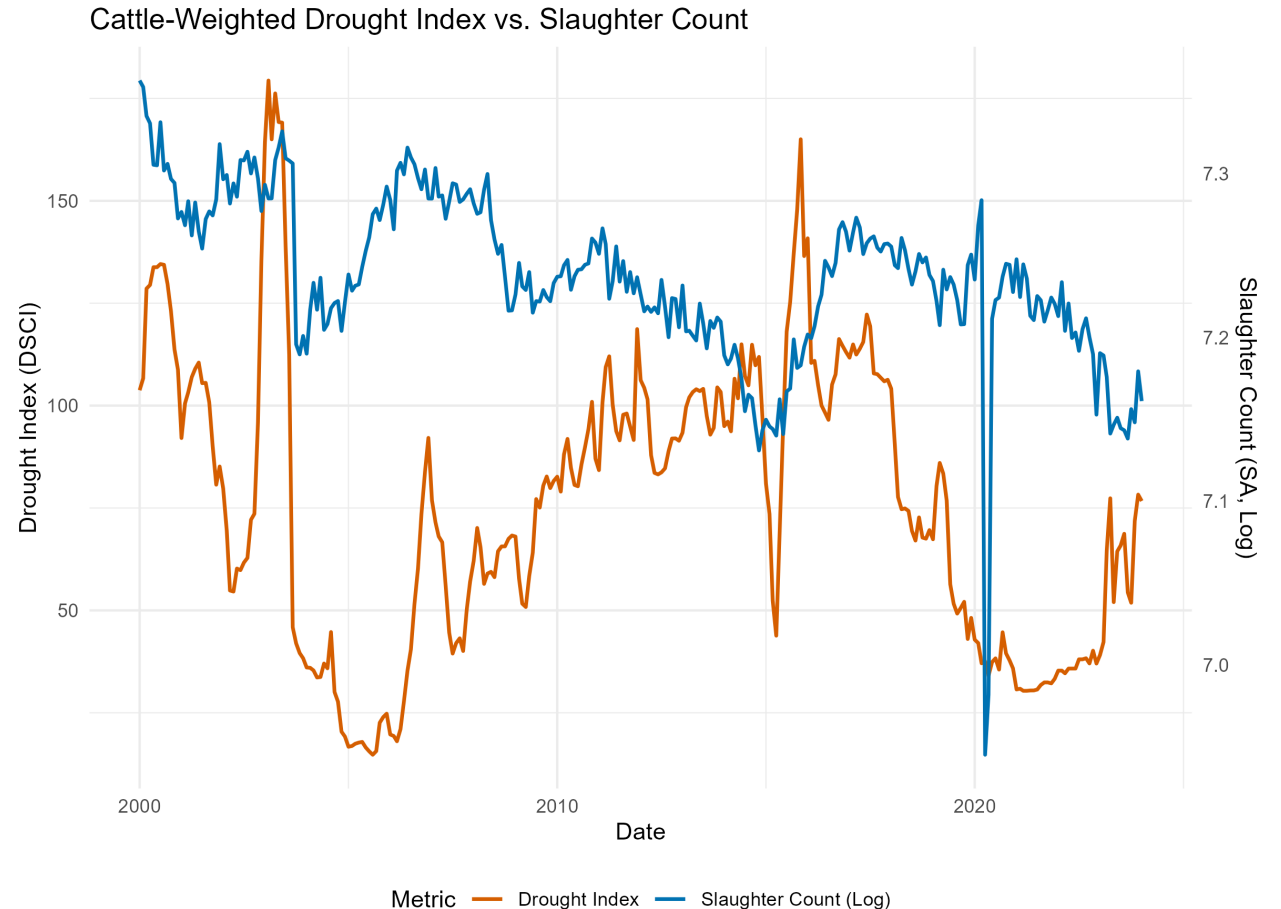
Segmented Retail Market

- Premium cuts (Sirloin) maintain distinct pricing tiers over middle meats (Chuck, Stew) and ground beef.
- Price volatility indicates heterogeneous responses to supply shocks across different segments.



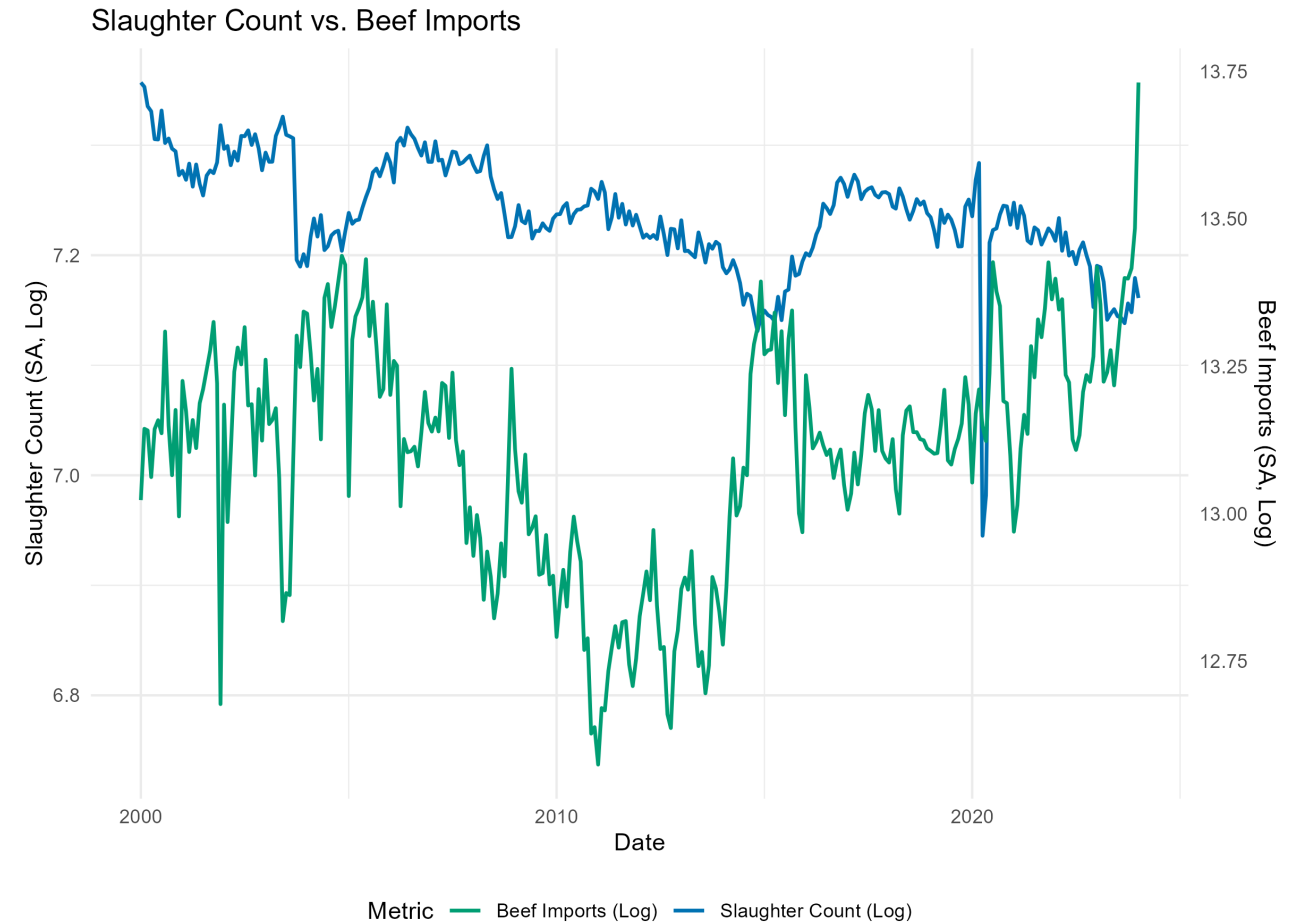
The Biological Lag of Drought

- Hydrological shocks force liquidation, delaying the true supply deficit.
 - Short-Term: Drought causes immediate herd liquidation (maintained/elevated slaughter).
 - Long-Term: A missing calf crop results in severe supply deficits years later.



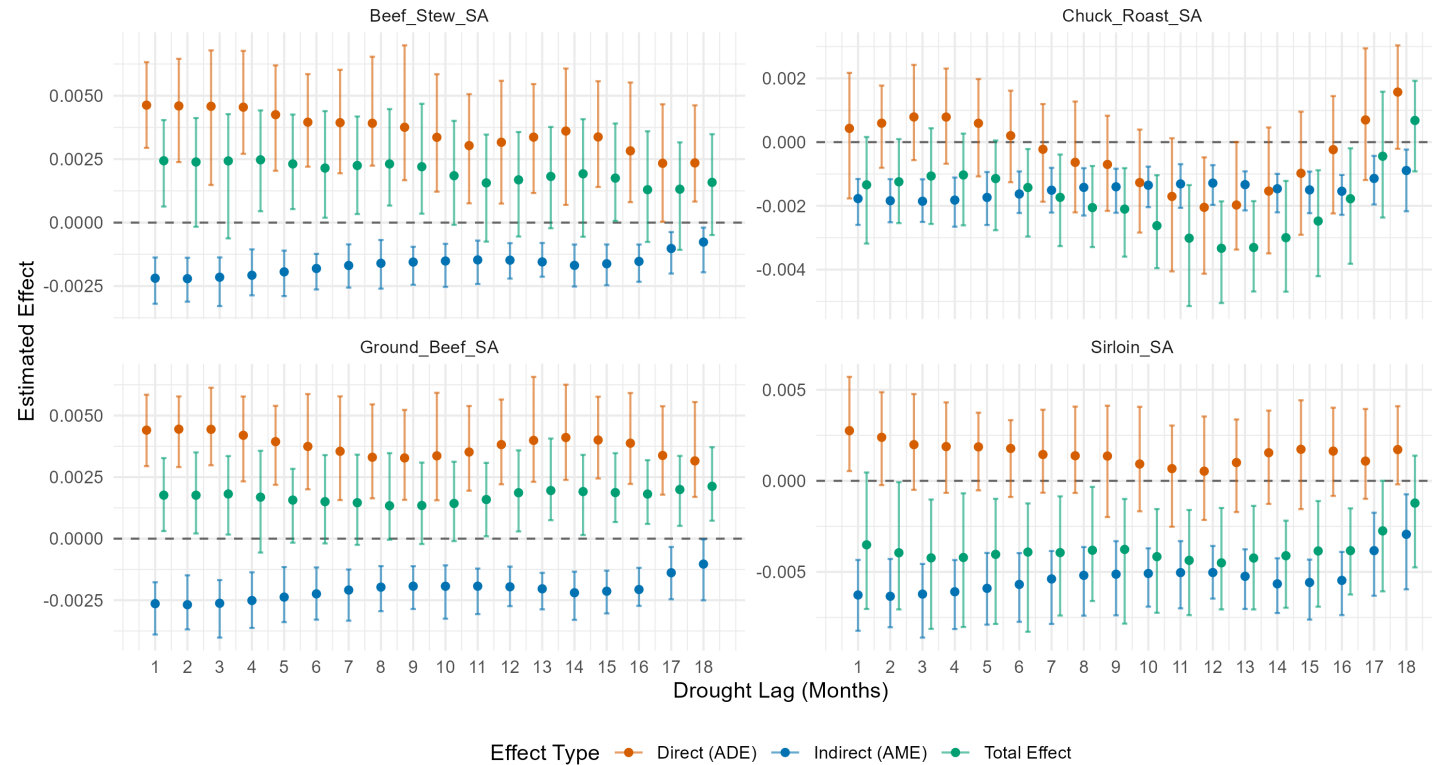
International Trade as a Buffer

- Imports act counter-cyclically to domestic slaughter volumes.
 - When domestic supply contracts, imported lean trimmings rise to meet demand.
 - Imported lean beef is blended with domestic fatty trim to stabilize the ground beef supply.



Mediation Analysis: The Trade Offset

Mediation Analysis: Direct, Indirect, and Total Effects
Path: Drought -> Imports(SA) -> Price(SA)



- Trade offsets the frictional costs of drought for ground beef.
 - Direct Effect: Frictional costs push prices UP.
 - Indirect (Import) Effect: Lean imports bring prices DOWN.
 - Result: Prices are relatively stabilized for ground beef consumers.

Strategic Implications for Industry

- Key Takeaways:
 - Sirloin and high-value cuts bear the brunt of long-term domestic supply deficits.
 - The ground beef market is largely insulated by global trade flows.
 - TRQs (Tariff-Rate Quotas) for lean beef imports is critical for price stability and consumer protection during drought liquidations.





Session Four | How Global Regulatory Barriers Are Affecting U.S. Agriculture

Round Table Meeting June 2026

Please remember to follow Chatham House Rule.



SESSION FOUR SPEAKERS



Vonnie Estes

Vice President, Innovation
International Fresh
Produce Association (IFPA)



Carlos González

Vice President
Global Regulatory Affairs
Hill's Pet Nutrition



Brian Arnold

Senior Export Trader
The DeLong Co., Inc.



Jason Hafemeister

Acting Associate Administrator
USDA Foreign Agricultural
Service (FAS)



Moderator Jim Schweigert

**President
Gro Alliance, LLC**



Vonnie Estes

**Vice President, Innovation
International Fresh Produce Association
(IFPA)**



How Global Regulatory Barriers Are Affecting U.S. Agriculture

When Good Intentions Meet Global Supply Chains

June 17, 2026

Vonnie Estes
VP Innovation



**The Issue Is Not
Regulation.
It's Fragmentation.**

Most requirements are reasonable individually.

The challenge is multiple non-aligned systems around multiple areas.

- Food Safety
- Sustainability
- Traceability
- Packaging
- Labor
- Carbon



Why Regulatory Fragmentation Matters in Produce

Operational Reality

- Perishable products
- Short marketing windows
- Multiple export markets
- Different customer requirements

California berry grower → US, EU, UK, Japan, Canada

Key Regulatory Barriers Impacting U.S. Produce

Barrier Type	Example Markets	Impact on U.S. Produce Exporters
GMO Restrictions	EU, China, Japan	Market bans, labeling, traceability hurdles
Phytosanitary Standards	EU, Asia, S. America	Costly protocols, shipment delays, rejections
Pesticide MRLs	EU, Korea, Taiwan	Lower limits, fragmented rules, market loss
Sustainability Reporting	EU, UK, Canada	New data, audits, risk of exclusion
Labor/Social Compliance	EU, UK, Germany	Audits, documentation, reputational risk
Packaging/Plastics	EU, Latin America	Packaging redesign, higher costs
Food Safety/Traceability	EU, China, Japan	Digital systems, rapid recall capability
Tariff/Non-Tariff Barriers	China, India	Sudden market loss, price volatility
Origin Labeling	EU, Middle East	Complex documentation, shipment delays
Allergen/Novel Food	EU, Australia	Delayed approvals, labeling changes



Case Study #1: Pesticides

EPA compliance does not guarantee export compliance.

- Different MRLs across markets
- Market-specific production programs
- Regulatory divergence increases cost and complexity



Case Study #2: Packaging

Reducing packaging waste and reducing food waste often conflict

- EU PPWR and EPR mandates
- Recycled-content requirements
- Plastic reduction targets
- Trade-offs with shelf life and food safety



Case Study #3: Gene Editing

Market uncertainty becomes investment uncertainty.

- Disease resistance and climate resilience
- Reduced pesticide use
- Divergent regulatory acceptance across countries
- Innovation stalls when destination rules differ



1

**Build Traceability
Before You're
Forced To**

The future is proof,
not promises.

Why it matters:
Market access
increasingly depends
on trusted data.

2

**Design for Multiple
Markets**

Assume requirements
will continue to diverge.

Why it matters:
Flexibility is becoming
a competitive
advantage.

3

**Engage Early in
Regulatory
Development**

Don't wait until rules are
finalized.

Why it matters:
Practical input is most
valuable before
decisions are made.

4

**Invest in Innovation
Anyway**

The answer to
regulatory complexity is
not standing still.

Why it matters:
Technology, genetics,
biologicals, AI, and
better packaging remain
key competitive tools.



Thank You

Let's keep fighting for fresh!



Vonnie Estes | VP Innovation, IFPA





Carlos González

**Vice President Global Regulatory Affairs
Hill's Pet Nutrition**



The background of the slide is a dark green, semi-transparent overlay on a photograph of a rural landscape. The photograph shows rolling green hills, a small farmstead with several buildings, and a winding road or path. The overall tone is agricultural and serene.

The Agricultural Canary

Navigating Global Trade, Sustainability,
and Pet Food Regulations

Carlos A. González

The Traceability Mandate

From Farm to Bowl

The Hurdle: EU Deforestation Regulations and GMO laws demand traceability and physical segregation from the elevator to the extruder.

The Opportunity: By building a unified digital infrastructure, U.S. commodities become the safest, most compliant choice for global buyers - turning a regulatory burden into a premium market advantage.



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The pet food sector upcycles millions of tons of agricultural by-products into premium, high-value sustainable exports.



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Insects are the ultimate upcyclers, but growth is stifled by a patchwork of slow global approvals.



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Arbitrary state-level bans on lab-grown protein fracture domestic markets and block US R&D leadership.

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The Data Burden

The global push for carbon reporting places a heavy, uncompensated data-collection burden on producers.

The Opportunity

The premium pet food market can pay farmers directly for regenerative practices, creating an incubator that offsets the steep costs of global compliance.

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HPAI Outbreaks

A shared burden. Avian Influenza doesn't just impact poultry; strict regionalization rules can paralyze pet food exports.



Strict Limits

Rigid mycotoxin limits (e.g., Zearalenone at 0.2 ppm) turn climate-driven mold issues into hard regulatory barriers.



A United Front

The US Ag sector must continue advocating for science-based limits and testing to prevent SPS measures from becoming weaponized barriers.

The Canary in the Coal Mine

The regulations and restrictions hitting the pet food industry today will inevitably hit bulk grains and produce tomorrow.





Brian Arnold

**Senior Export Trader
The DeLong Co., Inc.**



The DeLong Co., Inc.

Farm Foundation Roundtable

Brian Arnold

Session Four: How Global Regulatory Barriers
Are Affecting U.S. Agriculture

1 – Who We Are

The DeLong Co., Inc. is a 6th-generation, family-owned agricultural business headquartered in Clinton, Wisconsin. For over **110 years**, we have been a trusted leader in agricultural and logistics, continuing to meet the needs of farmers, producers and the global market.

- **Founded in 1913**, we bring over a century of expertise and reliability to the industry
- **Family-driven leadership**: 14 active family members contribute to our mission daily
- **Expansive presence**: With 39 locations across the U.S., we have built a robust infrastructure that delivers excellence from local communities to international markets

Our Vision – **We Cultivate Prosperity**

Our Values:



INTEGRITY



FAMILY



INNOVATION



GROWTH



QUALITY



3 – What We Do

At The DeLong Co., Inc., everything we do is rooted in our core values and vision. Our six divisions are designed to support the agricultural and logistics industry with **exceptional quality and service**.



Seed



Agronomy



Grain



Exports



Transport



Wholesale

Why We're Trusted as Industry Leaders:

- **#1 containerized agricultural exporter in the U.S.**
- **88 million bushels exported annually** (including Organic, GMO, Corn, Soybeans and DDGs)
- **51 million bushels of storage capacity** to support farmers year-round
- **\$1.9 billion in annual sales**, a testament to our scale and success
- Recognized as **#3 in containerized agricultural exports nationally**





Four Barriers Reaching the Farm



Land Use / EUDR

- Plot-level geolocation + deforestation-free attestation — EU, Dec 30, 2026
- U.S. is low-risk: deforestation check is trivial; burden is data capture in a commingled system



Biotech / Gene Editing

- EU NGT Category 1 (≤ 20 edits): administratively chosen, not science-derived — an arbitrary market-access line
- Low-Level Presence (LLP): one unapproved event contaminates the supply — Starlink, MIR162 set the precedent; gene editing is next



Sustainability Cert & Chain of Custody

- Voluntary schemes (ISCC, sustainable soy) are now mandatory — certification is the gate, not the premium
- Segregation requires two separate drying systems — infrastructure most first handlers don't have



Grading Standards / Phytosanitary

- Weed seeds, seed coats — ambiguity overcome, but barriers cleared are quickly replaced
- Non-standardized physical standards create subjective barriers with no defined compliance path



The Producer Will Tell You Something Different

10%

Grower participation — DeLong Climate Smart Program

\$20–75

Per-acre direct payment offered to participants

< 20 hrs

Annual time commitment — one afternoon per year

Most growers will not participate without a quantifiable benefit TODAY — not a potential future benefit.

- Field boundaries, yield data, and practice records are proprietary — producer reluctance is structural, not irrational
- LLP liability falls on the entire supply chain — not just the seed company — and remains open-ended
- Any market friction creates winners and losers; uneconomical grain flow is immediate
- 45Z chain-of-custody likely requires IP origination — most middlemen run one drying system, not two
- No program scales without day-one, bankable per-acre return — economics must come first
- Cost lands on the first handler and farmer; value flows to the buyer — that asymmetry must be solved



Risk, Opportunity & the Ask



RISK

- Basis splits: documented vs. undocumented supply — divergence already visible in soy
- LLP: one unapproved event contaminates the supply chain; liability open-ended, no agreed threshold
- Standards tighten on the instrument cycle — target moves without a policy act
- 45Z chain-of-custody may require IP at a scale current infrastructure cannot support



OPPORTUNITY

- U.S. low-risk EUDR status makes deforestation compliance nearly automatic
- Verified provenance capability earns the premium lane — first movers set the basis
- Climate-smart practices bankable under 45Z and as CI advantage in EU biofuel markets
- IP and container programs already exist — scale what we have



THE ASK

- One interoperable traceability standard — industry-led, not 20 buyer-imposed versions
- Science-based MRL and NGT thresholds tied to risk — not the detection instrument
- Economics that pay the farmer TODAY — without it, participation stays at 10%
- Infrastructure investment so IP at scale is physically possible, not just policy-desired



Acronym Reference

Regulatory & Policy

EUDR EU Deforestation Regulation

NGT New Genomic Techniques (EU gene-editing regulation)

GMO Genetically Modified Organism

MRL Maximum Residue Level / Limit

CBAM Carbon Border Adjustment Mechanism

RED III Renewable Energy Directive (3rd iteration)

SPS Sanitary and Phytosanitary (WTO agreement)

TBT Technical Barriers to Trade (WTO agreement)

CSDDD Corporate Sustainability Due Diligence Directive

CSRD Corporate Sustainability Reporting Directive

LCFS Low Carbon Fuel Standard (California)

Trade & Supply Chain

LLP Low-Level Presence

LMO Living Modified Organism (Cartagena Protocol)

AIA Advance Informed Agreement (Cartagena)

MFN Most Favored Nation (WTO principle)

ILUC Indirect Land Use Change

IP Identity Preserved

CI Carbon Intensity

DDS Due Diligence Statement (EUDR)

SAF Sustainable Aviation Fuel

DDGS Distillers Dried Grains with Solubles

45Z Clean Fuel Production Credit (U.S. tax code)

MENA Middle East and North Africa

Organizations & Programs

WTO World Trade Organization

IGTC International Grain Trade Coalition

GAFTA Grain and Feed Trade Association

FAO Food and Agriculture Organization (UN)

EFSA European Food Safety Authority

USDA FAS U.S. Dept. of Agriculture, Foreign Agricultural Service

NPPO National Plant Protection Organization

OECD Organisation for Economic Co-operation and Development

TRACES Trade Control and Expert System (EU)

ISCC International Sustainability & Carbon Certification

RSB Roundtable on Sustainable Biomaterials

CBD Convention on Biological Diversity

COP-MOP Conference of Parties / Meeting of Parties (Cartagena)



Thank You!

The DeLong Co., Inc.





Jason Hafemeister

Acting Associate Administrator
U.S. Department of Agriculture (USDA)
Foreign Agricultural Service (FAS)



QUESTION AND ANSWER

Please submit your questions on the meeting app.



Jim Schweigert

Gro Alliance, LLC



Vonnie Estes

International Fresh
Produce Association



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