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Will You Survive the Biggest Change of All Time?
by Kevin Cavanaugh, President, ICIA

It is an incredible time in the seed industry! Never in the history of the seed industry has so much of the market changed hands in such a short period of time. ChemChina has completed its purchase of Syngenta and appears to be positioning itself as an increasing provider of traits and germplasm to the industry. Dow and Dupont have just completed their merger and will now focus on getting their new company positioned to split into three entities with a renewed focus in each of their three respective areas. Bayer’s purchase of Monsanto appears to be getting closer to reality every day as we hear of Bayer’s assets being offered for sale allowing the purchase to be approved by the Department of Justice.

The reasons for these changes are many but the companies claim an increase in efficiency in running their businesses. They will emerge with more streamlined Research and Development programs with the hope of additional critical mass for more innovation of future products.

These giants in the industry have been good partners with regional and local independent companies. Regional and local companies have strong relationships with customers that are unsurpassed by these giants. On the other hand, these independent companies need new and innovative products to remain competitive. The larger technology companies need to broaden their bandwidth by utilizing these companies to capture a larger footprint for their technologies. So as these changes take place in the industry, the symbiotic relationships between players in the seed industry appear to be as necessary as ever before.

Have you thought about how your company will survive these changes? Do you have a strategy to leverage these new consolidated giants to help your business grow? We know that there are new technologies coming to the marketplace over the next eighteen months that will be game changers. Do you have a plan to capture the benefits of these technologies to help your business grow? Traits like Duracade® for corn rootworm protection, PowerCore® technology with new herbicide options, Qrome® or next generation rootworm events for better insect protection. All of these will play a role in the corn industry in the near future. New herbicide systems for multiple modes of action in soybeans are emerging. Which of these will be successful in your marketing footprint?

ICIA will be with you every step of the way providing you with low cost, accurate testing so you can provide your customers with the highest quality products. ICIA conducts over 61 unique tests on seed to meet its customers’ demands. In addition, depending on the species, there are multiple tests within each testing method.

This is a pivotal time in the seed industry. There are many choices to make and strategies to develop and deploy to help your company be successful. We are all very fortunate to be in an industry that is changing and developing and I encourage you to spend some time this fall developing a strategy for a successful path forward.

Kevin Cavanaugh, Director of Research, Beck’s, Atlanta, Indiana

November 9, 2017
ICIA Board of Directors Meeting
ICIA Conference Center

December 4-7 2017
ASTA Corn & Sorghum and Soybean Research
Chicago, IL

January 8-10, 2018
IPSA Annual Meeting
Indianapolis, IN

January 27-30, 2018
ASTA Vegetable & Flower Conference
San Diego, CA

February 6, 2018
Professional Development Workshop
Marriott North, Indianapolis, IN

February 7-8, 2018
Corn Belt Seed Conference
Marriott North, Indianapolis, IN
In the spotlight for this issue of SeedNews is one of the newest board members for the Association, Matt Nice, National Sales Manager for Thurston Genetics. Though Matt is a new member on the ICIA Board of Directors, he is certainly not new to the seed industry. In fact, Matt fondly remembers the early days of his involvement with seed. Growing up on a small grain and livestock farm near Salem IN, his father was a seed dealer and when the day came for the seed delivery to his father’s farm, Matt got to stay home from school to help unload the truck! (Matt quickly pointed out that this was before shrink-wrapped pallets!)

While still in high school, Matt was able to work in a corn nursery for the man he considers to be his mentor, Larry Roberts was with Migro Seed Inc. “At that time I was very fortunate to work for Larry, he explained many facets of the seed industry to me over the years, from breeding/nursery work to production and sales.” With agriculture and the seed industry already such an integral part of Matt’s life, it was a natural fit for him to go to Purdue to study agronomy. While at Purdue Larry Roberts again guided Matt by suggesting he call Indiana Crop to see if they needed help inspecting fields in the summer. “By walking fields for multiple seed companies, I was able to learn much more about seed production,” said Matt. Matt inspected seed corn for ICIA during three summer breaks while in college.

Matt considers himself very fortunate to work in the seed industry. “I enjoy it because though the industry has seen an enormous amount of change, it remains a relationship transaction. Trust, honesty, and integrity are the roots of the industry. Continued change is inevitable, and commodity prices will continue to be a major influence at the farmgate but needs of a growing population demands the best genetics.”

Matt agreed to serve on the ICIA board because of the reputation and history of the organization. He said, “ICIA has long been a very respected and trusted organization. It has always been a stable and positive influence by maintaining a high level of services and education to its members. These services help give continuity to all independent seed companies and brings them closer together.”

At the end of the day, what Matt especially values is family. He and his wife Glenda have two children, Ryan and Kacie. “It’s fun to see them grow and advance in their own careers,” he shared. Matt enjoys fishing – anywhere - but fly fishing in Colorado ranks near the top. He is also an avid Purdue fan. He and Glenda like to travel, and when they aren’t, you will generally find him on his hobby farm where he enjoys growing sweet corn, flint corn and pumpkins.

Thank you, Matt, for joining and serving on the Board!!!
Exciting, educational and entertaining … that about sums up all the goings on at Indiana Crop Improvement during the month of August. We hope most of you got to join us for some of the fun.

August 10th and 11th kicked off the activities with the 3rd Annual Open House and Member Appreciation event. We had quite a crew touring the labs and getting hands on experience with seed testing. Great questions were asked by the tour groups and the ICIA staff was ready with answers. It was an educational and exciting event for both the participants and ICIA staff. Pair that with the great food, and the event was a smashing success.

Following the Open House, we had a record turn-out for the annual golf outing which culminated in a three-way tie for first place. For the non-golfers, we had an entertaining experience at Mission Breakout: Lafayette. Two teams competed in trying to escape different rooms using only their wits and the clues they could uncover in the room. While neither team managed to escape their room, we shared a lot of laughs and had a great bonding experience.

The evening concluded with a fabulous dinner buffet at Coyote Crossing Golf Club. It was a beautiful evening with lots of stories and lingering on the patio.

The annual trait seminar training event was held Friday morning following the Open House. We were close to standing room only in the conference room to hear from the four major trait suppliers, Bayer, Dow, Monsanto and Syngenta. In addition, Joe Becovitz and Don Robison from the OISC provided education, along with valuable CCH credits, on seed labeling and pesticide and seed treatment application. A big thank you to all the presenters and participants!

August also brought three other special event days to the ICIA campus. On August 22nd, we hosted members of the dairy industry for a Dairy Day event and on August 23rd we hosted members of the popcorn industry for a Popcorn Day event. Both groups are interested in ICIA's ability to do Non-GMO and other testing critical in their respective industries. These “Days” focused on vital issues in those industries and ICIA’s ability to serve as a resource to aid these partners in producing quality products.

August 25th, brought a delegation of Argentinian seed producers and lab facility members to ICIA for an afternoon of tours, questions and collaboration. We all had a great time and made some new friends.

ICIA is committed to providing our members with meaningful, educational training opportunities and to helping you with your quality mission. We would love to host your organization for a special day all your own. Feel free to contact Jeanne Storey, storey@indianacrop.org to design a “Day” to fit your needs.

ICIA's 3rd Annual Member Appreciation
Network with colleagues, learn innovative strategies and ideas, and take home new skills and tools to implement within your organizations. This workshop will bring industry experts to the Indianapolis Marriott North on Tuesday, February 6 - the day prior to the Corn Belt Seed Conference, one of the Midwest’s largest seed related meetings.

Plan now to bring your team to gain the latest insight on utilizing the talent of your workforce to drive the results of your organization! The Professional Development Workshop will feature industry experts addressing the topics to benefit those managing today’s ever changing businesses, as well as the teams you lead. The program will offer a general session in the morning, followed by two tracks of breakout sessions in the afternoon covering these specific topics:

- Engaging Today’s New Workforce
- How to Build a Winning Team
- Developing a Leadership Mindset: Getting Results Through Others
- How to Communicate with Impact
- Financials: How Do You Affect the Bottom Line?

Back by popular demand, Cara Silletto, who presented at the 2017 Corn Belt Seed Conference and will bring back the “Millennial Mindset.”

In addition, the workshop features over 35 commercial exhibitors with information about equipment and products for the seed industry; lunch at noon; refreshment breaks; and a social hour at the close of the workshop for networking opportunities in the exhibit hall.

This workshop offers a great opportunity to receive the most current information on topics that directly impact your business. Take advantage of this one on February 6, as well as the educational program offered at the Corn Belt Seed Conference that follows on February 7 & 8.

Further information, including workshop registration and hotel information is available on the meeting website at www.cbsconference.org or contact Susan Overdorf at overdorf@indianacrop.org or call the ICIA office at 866-899-2518.

In an effort to keep you informed of the latest trends and changes in agriculture, each year the Corn Belt Seed Conference planning committee identifies key topics that will enhance your businesses and deliver solutions for the ag industry as a whole. This year’s conference, set for February 7-8 at the Indianapolis Marriott North, Keystone promises to deliver up-to-the-minute information you won’t want to miss! The program is full of educational sessions and networking opportunities, including University of Florida’s, Kevin Folta bringing "Consumer Communication vs. Consumer Dictation," that will impact your approach to today’s ever-changing challenges in the industry.

The two day conference opens with Karen Plaut, Interim Dean of the School of Agriculture at Purdue University. She will bring exciting information to share regarding Purdue’s solid role in Midwest agriculture. The Wednesday awards luncheon will honor outstanding industry individuals, including ICIA's highest honor, the Crops and Soil Merit Award. The afternoon kicks off with breakout sessions you’ll want to be a part of! Track One will feature the latest developments on Dicamba and “What Exactly is a Biological?” while Track Two will focus on “Crispr/CAS, Plant Breeding Innovation” and “UAV: Digital Agriculture.”

You won’t want to miss the evening social reception, which provides a great opportunity to network and enjoy conversation with friends and colleagues. Following the social, plan to continue your conversations and networking with an optional activity at “The Main Event.” This local venue in the Keystone area offers fun activities, great food and plenty of drink options for your group! Transportation will be provided.

Thursday morning we will hear the latest about the “Midwest Farm Economy,” learn results of the “Large Commercial Survey” and receive an update on the Farm Bill.

Make plans now to join us for another great Corn Belt Seed Conference in February 2018!
“ICIA designs our trainings to be as interactive and discussion based as possible,”

ICIA Hosts Illinois Seed Trade Seed Workshop

Ten seed labs and over 40 seed analysts attended a seed testing workshop on August 29, 2017. Seedling evaluation of corn and soybeans, a discussion of the new AOSA rules, Palmer amaranth, ELISA testing, native seed testing, and seed identification were covered in the workshop. The Illinois Seed Trade tries to hold a seed testing workshop once a year, and ICIA is a member of this group.

As we gear up for our fall soybean inspections each of our inspectors undergoes some form of training. In previous years, we have had one general training session for soybean inspectors, but as ICIA continues to tailor inspections specific to individual customers, we have broken up training sessions. This assures we can provide training specific to each seed company. Additionally, our geographic footprint continues to expand and we now are holding trainings outside of the home office.

“ICIA designs our trainings to be as interactive and discussion based as possible,” said Wes Delks, ICIA Field Inspection Programs. We want our inspectors to walk away from our training sessions feeling confident to complete their field inspection workload. An inspector comprehension test is given at the end to evaluate how effective our training has been and if additional time needs to be spent with that individual. Based on the test scores of the 2017 soybean inspectors I can ensure you our field staff is knowledgeable in their duties and ready for fall soybean field inspections. If one of our inspectors can be of service to you, give ICIA a call at 866-899-2518.

ICIA Provides Two-Week Seed Testing Sessions for Kuwait

Ms. Laila Al-Mulla from the Kuwait Institute for Scientific Research (KISR) recently visited the ICIA laboratories for a two-week native seed testing training session. Species from many plant families were discussed during testing in the lab. In addition, a tour of Spence Restoration Nursery and a lecture on seed certification of native species by Dr. Stan Young, retired director of the Utah Seed Certification Agency from Utah were included in the training. Kuwait has received Gulf War reparations of 3 billion dollars from Iraq, and is trying to reestablish its damaged ecosystems throughout the country. The Kuwaiti’s are in the process of developing a native seed industry and all that goes with seed production and measuring the quality of native species.

CSS 2017 & SEED EXPO

Plan to visit ICIA at booth #505 during the CSS 2017 & Seed Expo! Submit your Corn Belt Seed Conference attendee registration or exhibitor reservation before we see you in Chicago and you will be entered to win a $100 Visa Gift Card! Visit www.cbsconference.org to register or contact Susan at overdorf@indianacrop.org.
In this forum I will describe how the Office of Indiana State Chemist (OISC), and the Indiana State Seed Lab (The Lab) in particular are working toward science based and a common sense regulatory environment. And, I’ll throw in some of my opinions along the way.

Seed Treatments, including neonic’s and biologicals. OISC is working on a new lab that will be able to test for viability of biological seed treatments. This lab is still several months off, but the plan is to be able to test viability using proven methods. With the large influx of biologicals and some newer petrochemical treatments being more concerning to humans in contact with the seed, I have completed a label review and study of all common treatments. The study revealed that more personal protective gear was required in the lab when handling seed treated with some of these products. The Lab has implemented this plan and so has the Inspection Crew. This study will be updated every other year to make sure we are as safe as possible. Have you reviewed your safety guidelines for handling treated seed?

Weeds, weeds and more weeds? I think in the seed industry we all know about weeds our clients fight. Giant Ragweed, Marestail, Palmer Amaranth and Waterhemp are the big four in fields now. At the present time none of these weeds are on the Indiana Noxious Weed Seed list.

The Indiana State Noxious Weed Seed List was created in 1955, proposed in 1957, passed into law in 1957 and hasn’t really been updated since. I believe one update may have happened in 1983 but I can’t readily determine what that change was, possibly adding Canada Thistle. The “BIG FOUR” weeds were not even thought of in 1955. And chemical resistance? Not hardly! Today it is a very different world. We look for these weed seeds in every sample we test now. The most common that we see are the Amaranthus family (Palmer Amaranth, Waterhemp, Powell Amaranth, Redroot Pigweed, Tumble Pigweed, etc). Many of you know this family simply as pigweed. Each of these species seeds look the same; there is no way to tell them apart without benefit of seeing the plant they were harvested from. I believe it is a dangerous oversimplification to try to separate each of these sub species from the amaranth family as a whole. In the Lab and with the help of Purdue Weed Science we have tested hundreds of Amaranthus seeds. Roughly 20% end up either being Palmer and Waterhemp – or – other sub species acting like Palmer. Most recently, Powell Amaranth showed the same resistance pattern as Palmer Amaranth and it took 12 weeks to tell them apart in the grow-out. Additionally, some of the regular Redroot Pigweed is showing resistance as well. If we are finding other sub species acting like Palmer, which we are, then it is imperative to keep these weed seeds out of the seed supply. OISC will be introducing a rule update to freshen up the noxious weed seed list. We will be requesting to add all Amaranthus species, with exceptions for the native flower Amaranthus, and the vegetable Amaranthus.

We also are looking into weeds that we can removed from the noxious weed list. Turnabout is fair play. If we have weeds on the list that simply are not an issue anymore, we should remove them. Just because we’ve always done it that way is no way to manage a noxious weed list. I want this list to be reviewed every three to five years and updated if necessary so that our Indiana list is current with federal lists and what issues are facing Indiana agriculture. The Indiana Seed Law is a consumer protection law, the list needs to reflect that and consider all citizens of Indiana that purchase seed. Farmers, gardeners, landscapers, homeowners – all should be considered.
## Soybeans

<table>
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<th>Test</th>
<th>Germination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warm Germ</td>
<td>90.5%</td>
</tr>
<tr>
<td>Cold Test</td>
<td>90.5%</td>
</tr>
</tbody>
</table>

## Corn

<table>
<thead>
<tr>
<th>Test</th>
<th>Germination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warm Germ</td>
<td>96.5%</td>
</tr>
<tr>
<td>Cold Test</td>
<td>94.2%</td>
</tr>
</tbody>
</table>

The above test averages represents scores on carryover lots tested. For current wheat crop the average germ is 94.7% for this season. Germinations for both treated lots and untreated lots of wheat have been strong with little disease.

As harvest begins, we are looking forward to another busy testing season within our different labs. Our approach is still the same in that we are very dedicated in providing superior testing services in a timely manner. Whether the testing is within the Genetic lab, Native and small seed lab, or our conventional seed lab we appreciate your business and look forward to assisting you with all your testing needs.

If you have any questions or if we can be of any assistance, contact Kevin Seward or Susan Dadacz as we receive and process your samples for the various testing needs. You may contact either of us at 866-899-2518 or email at seward@indianacrop.org or dadacz@indianacrop.org.

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Seed Quality Update Test Results
October 1, 2017