CONNECTING IN THE GLOBAL MARKETPLACE

Northern Crops Institute



The Northern Crops Institute supports regional agriculture and value-added processing by conducting educational and technical programs that expand and maintain domestic and international markets for northern-grown crops.





DIRECTOR'S REPORT



Mark Jirik
Director

The Northern Crops Institute was originally born in a time of crisis. The founders of NCI were facing an agricultural and economic crisis that was wracking the region and the country when the conversations started about having a center to grow markets and expand value added processing for the region. Our founders knew that the future lay in adapting and changing. I would hope that as the world is in the grip of a global pandemic, and NCI enters its 40th year of existence, our founders would be satisfied with how NCI has changed and adapted, especially over the last year.

In November, someone made a comment that the prior seven months had forced ten years worth of change on the industry. That was certainly true for NCI. Through the tragedy of the global pandemic, we still need to focus on fulfilling our mission of growing markets for our region. Historically, NCI has done that in two ways – our technical services (including product development, quality testing and monitoring) and our programs (which historically focused on in-person courses).

The NCI staff did a tremendous job of pivoting. Changing how we interact with our technical service clients. Converting our courses to online delivery. Developing a host of webinars. Releasing our first technical handbook. Assisting our industry partners as they moved their events online. These are just a sample of the innovative ways that NCI has strived to live up our founder's vision.

NCI also completed our first value analysis – focusing on the impact our courses and tech services from 2018 and 2019 had on our clients and program attendees. The results, highlighted later in this report, give numbers and facts to what those involved have always known – NCI has, and continues to have, an impact on the region, increasing exports and value added activity for the region.

-Mark Jirik, Director

NCC CHAIR'S REPORT



Tregg Cronin
NCC Chair

2020 was an unprecedented year for many amid the global pandemic, the Northern Crops Institute included. For an organization which has traditionally relied on face-to-face meetings, conferences and seminars, drastic changes were needed to maintain relationships and build business. Under the careful guidance of director Mark Jirik, NCI was able to navigate these challenges in impressive fashion by utilizing technology to bridge the gap until some sense of normalcy can return. Participation in several courses were multiples larger than previous years which were only featured in-person, presenting an opportunity for future courses.

All of the Northern Crops Council meetings were held virtually in 2020 as the four member states worked through the various state protocols related to travel and in-person meetings. We are hopeful with the arrival of the

coronavirus vaccine, in-person board meetings will be a possibility at some point in 2021.

If there was one big takeaway amid the chaos that was 2020, it was the work of producing and promoting the regional agriculture in the four state area goes on. Organizations possessing flexibility and adaptability thrived in 2020. The Northern Crops Institute was one of those organizations. We look forward to a brighter future in 2021 and thank you for your steadfast support of the NCI.

-Tregg Cronin, NCC Chair



LEADERSHIP AND LEARNING ARE INDISPENSABLE TO EACH OTHER.

- John F. Kennedy

2020 NORTHERN CROPS COUNCIL (NCC)

The Northern Crops Council is the governing body for the Northern Crops Institute. They dedicate their time and talent to making sure NCI is focused on our mission and properly utilizing the time and resources of the institute. It's members consist of:

Tregg Cronin, Chair | SD Wheat Commission

Jim Bahm | ND Wheat Commission

Adam Carney | MT Wheat & Barley Committee

Tim Dufault | MN Wheat Research & Promotion Council

Kris Folland | MN Soybean Research & Promotion Council

Doug Goehring | ND Department of Agriculture

Kevin Haas | Northern Pulse Growers Association

Jiwon Kim | ND Trade Office

Greg Lardy | North Dakota State University

Peter Matthaei | Dakota Specialty Milling

Tony Schneider | ND Barley Council

Todd Sinner | SB&B Foods, Inc.

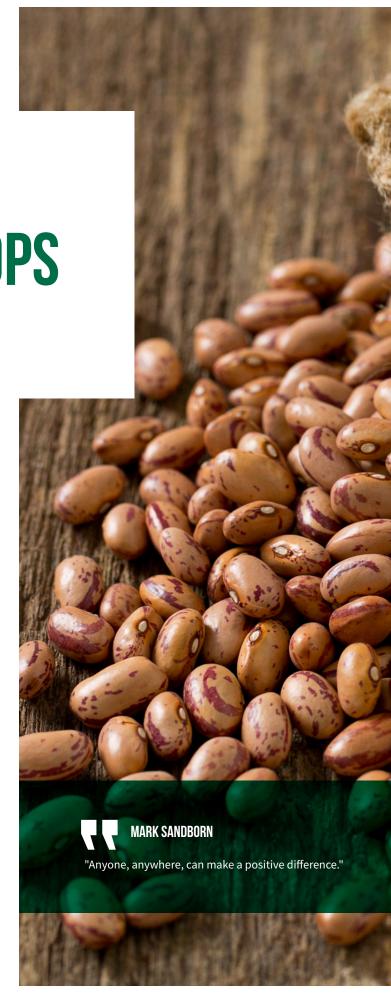
John Swanson | MN Corn Research & Promotion Council

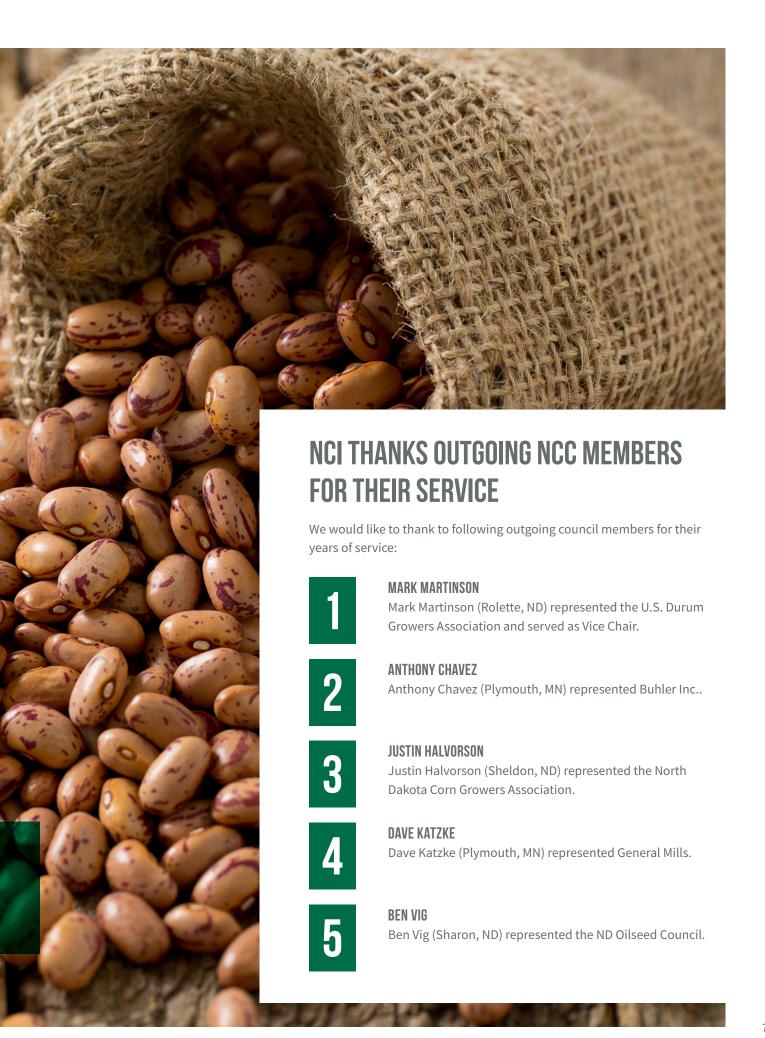
Vance Taylor | North Dakota Mill

Dan Spiekermeier | ND Soybean Council

Bruce Speich | ND Oilseed Council

Chris Wiegert | Healthy Food Ingredients





EDUCATIONAL COURSES



NCI has a strong reputation for providing short courses and other programs that educate global buyers and processors of the crops grown in the Northern Plains. When the COVID-19 Pandemic hit in March of 2020, NCI had just completed two in-person programs with additional courses on the schedule throughout the year. As with everyone in the industry and academia, NCI adapted to deal with the changes that came with the pandemic.

The annual Pasta Production and Technology Course was converted to a live-stream, online format and conducted on schedule from April 28-30 with excellent reviews from the participants. NCI's long-standing flagship course, Grain Procurement Management for Importers, had been offered in-person since 1983, but was converted to an online format with 94 participants from 19 countries. Moving this course to online required countless hours to film lectures and tours of farms and elevators, as well as coordinate the daily live-streamed Q&A sessions to connect the international participants with experts from NDSU and the industry. NCI Pelleting Technology Online is a new course that was conducted November 3-5 with over 70 participants registered from seven countries. Some courses that require hands-on laboratory training were postponed and later cancelled as the pandemic continued.

For 2021, NCI is planning online courses throughout the year, and hoping to return to in-person courses by August or September. The online courses are allowing us to expand our reach to participants who may not have the opportunity to travel to the U.S.A., even after we have moved past the COVID-19 pandemic.



NCI HOLDS FIRST ONLINE COURSE

This year, the Northern Crops Institute (NCI) held their first online course. The three-day Pasta Production and Technology course ran from April 28th-30th, 2020. This course has typically been an in-person course but given the situation, NCI staff worked to bring the hands-on experience to an online platform. Participants were introduced to the fundamental and applied aspects of pasta production and quality. The course primarily focused on traditional dry durum-based pasta, but also included lectures on using alternative ingredients, and working with refrigerated and frozen pastas. Participants also learned about pasta industry trends, die maintenance and design, and the impact that processing variables has on the quality of the final product.

2021 COURSE SCHEDULE

* Subject to change. TBD = to be determined.

1	HEALTHY SOLUTIONS FOR FOOD BARLEY USES (ONLINE)
Ш	January 26-February 4

10 NCI-INTSOY August TBD

SCHOOL OF WHEAT QUALITY (ONLINE, CLOSED COURSE)
February 22-April 9

HEMP UTILIZATION
August 31-September 2

3 BARLEY TO BEER (ONLINE)
April 1-31

GRAIN PROCUREMENT MANAGEMENT FOR IMPORTERS (FORMAT TBD)
September 13-22

4. RISK MANAGEMENT FOR CONTAINER SOYBEAN & SBM FOR FEED (ONLINE, CLOSED COURSE)

April TBD

BARLEY & MALT QUALITY
September 27-30

5 PASTA PRODUCTION AND TECHNOLOGY (ONLINE)
April 27-29

- 14 FOOD-GRADE SOYBEAN PROCUREMENT (FORMAT TBD)
 October 4-7
- SCHOOL OF WHEAT QUALITY (ONLINE, CLOSED COURSE REPEATED)

 May 24-July 2
- 15 ETHANOL PROCUREMENT FOR IMPORTERS (IN-PERSON)
 October 11-17

7 UNDERSTANDING VEGETABLE OILS - QUALITY & UTILIZATION (ONLINE)

PLANT-BASED TEXTURIZED PROTEIN PRODUCTS (FORMAT TBD)

June 15-17

October 18-22

GRAIN INDUSTRY EMERGING LEADER PROGRAM: MANAGEMENT VS. LEADERSHIP

17

PELLETING TECHNOLOGY (ONLINE)

June 29-July 1

November 2-4

9 DURUM FOODS
July TBD

GRAIN INDUSTRY EMERGING LEADER PROGRAM: MERCHANDISING TO LEADERSHIP

December 14-16

WEBINARS

NCI webinars have shown to be a powerful tools in developing markets, connecting people, and sharing ideas to grow markets for crops grown in the region. The webinars have allowed us to reach audiences and share messages that we would not be able to in an in person course. It eliminates the need for travel, and allows us to plant seeds of innovation in the region and globally.

When NCI rolled out its first "Fullfat Soybean Meal Handbook" in May, the idea of having an in-person course was out of the question, so a series of accompanying webinars was developed in order to enhance the participants experience when reading the materials. These webinars focused on swine, poultry, ruminants, and aquaculture.

Then the question was asked- how can we use this technology to keep in contact with our past course participants, continue showing the value of US crops, and updating people on what is happening with US Markets? In July, our "NCI Market Update" webinars were released – a monthly catchup with different market experts open to any of our past procurement course participants.

NCI's focus on value added process and building domestic markets has also been a challenge as much of that content didn't lend itself to short courses. So a new webinar was born focused on value added agriculture coping with challenging times.

The results have been impressive with 13 webinars in 2020 hosting over 1,200 participants.

2021 will see the "NCI Market Updates" continue and in January, we will be rolling out a new monthly webinar series, "Cereal Innovators" focusing on unique and innovative uses for cereal crops grown in our region and developing a new series called, "The Future of Feeding" looking at livestock development and feeding innovations. Additional webinars series are also in development.



NCI LAUNCHES FULLFAT SOYBEAN MEAL WEBINAR SERIES

The Northern Crops Institute (NCI) held the first installment of its four-part Fullfat Soybean Meal Webinar series titled "Feeding Fullfat Soybean Meal to Swine" on July 22nd, 2020. 180 attendees participated in the live webinar, which brought together people from around the globe to discuss the nuances and implications of feeding fullfat soybean meal to swine. The webinar also provided attendees the opportunity to learn from industry experts as well as the authors of the Northern Crops Institute Fullfat Soybean Meal Handbook. When asked what their thoughts were on the webinar, one participant stated "it was an outstanding and informative webinar". Another mentioned "for me it was very very useful."

HANDBOOKS



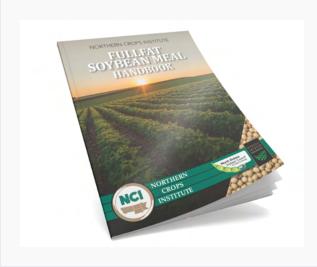
FULLFAT SOYBEAN MEAL HANDBOOK (2020)

In July of 2020, The Northern Crops Institute released the Fullfat Soybean Meal Handbook. The 80-page handbook informs the reader about the processing and feeding of fullfat soybean meal to the major animal groups. Fullfat soybean meal is an excellent source of nutrients and energy, and its value in feed formulations can vary greatly depending on the local costs and availability of commercial soybean meal, non-soy protein products, fat and other ingredients. For some markets, fullfat soybean meal contributes to food security programs in cases of market disruptions. This handbook introduces the reader to the production and feeding of fullfat soybean meal, as a first step in determining if it has potential in their operation – both nutritionally and economically. Each person who receives a handbook also received access to attend four webinars on the feeding of fullfat soybean meal to Swine, Poultry, Ruminants and Aquaculture.

ANCIENT GRAINS HANDBOOK (2021)

Consumers are rapidly becoming familiar with a category of foods known as Ancient Grains and Seeds. Although there is not an official definition of Ancient Grains and Seeds, the category is commonly understood as those grains and seeds that can trace their origins to the earliest times of human utilization and consumption.

The consuming public has been increasingly exploring and purchasing more plant-based foods. In addition, consumers are seeking minimally processed foods with simple, understandable labeled ingredients. Consumers have identified Ancient Grains and Seeds as simple, clean label, back-to-nature foods that are becoming favorite food choices within our health-conscious society. With this in mind, the Northern Crops Institute will be producing an "Ancient Grains and Seeds from the Great Plains" handbook in 2021. The handbook will provide an overview of Ancient Grains and Seeds for the value chain that includes farmers, elevators, millers, food manufacturers and consumers to increase production and consumption of Ancient Grains and Seeds.



FULLFAT SOYBEAN MEAL WEBINAR STATISTICS

Feeding Fullfat Soybean Meal to Swine | July 22nd: -180 live attendees, 64 viewed recording

Feeding Fullfat Soybean Meal to Poultry | August 19th: -125 live attendees, 77 viewed recording

Feeding Fullfat Soybean Meal to Ruminants | September 9th: -98 live attendees, 25 viewed recording

Feeding Fullfat Soybean Meal to Aquaculture | November 18th: -65 live attendees, 25 viewed recording

IMPACT ANALYSIS

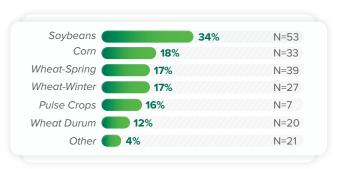
The Northern Crops Institute (NCI) is an effort to support the promotion and market development of crops grown in Minnesota, Montana, North Dakota and South Dakota. NCI is an international meeting and learning center that brings together customers, commodity traders, technical experts, and processors for discussion, education, and technical services. Situated in Fargo, North Dakota, USA, this unique facility is only minutes from the farm fields that yield much of the world's food.

COURSE IMPACT

The Northern Crops Institute offers a variety of courses, webinars, and handbooks that unite customers, commodity traders, technical experts, and professors for discussion and education. During our courses, participants can expect to refresh their expertise and be exposed to existing and new technology, participate in lectures, case histories, laboratory demonstrations and tours and hear from industry experts, government officials and university professors.



As a result of your experience with NCI, how much has your utilization of the following ingredients net increased over the past 2 years?



Survey response from 102 course participants from the 18-19 calendar year

66

Definitely we are more... (buying US Wheat as a result of the course). Value is the quality and price combined. So, yeah, definitely, we think U.S. wheat has a better value compared to Canadian wheat. It's a certain level we can accept the price gap.

"

IMPACT ANALYSIS

TECHNICAL IMPACT

The Northern Crops Institute offers a variety of courses, webinars, and handbooks that unite customers, commodity traders, technical experts, and professors for discussion and education. During our courses, participants can expect to refresh their expertise and be exposed to existing and new technology, participate in lectures, case histories, laboratory demonstrations and tours and hear from industry experts, government officials and university professors.



Since we started these conversations (with NCI), we have probably gained at least 50% in volume."

- Technical Service Client

As a result of your experience with NCI, how much has your utilization of the following ingredients net increased over the past 2 years?



Survey response from 15 technical service clients from the 18-19 calendar year

Overall Investments

Our research shows that clients have increased their overall investment activity by 16% within ND, MN, MT, and SD after their experience working with NCI.

Survey response from 15 technical service clients from the 18-19 calendar year



Testimonies

66

To be honest, I didn't know what to expect, but it was amazing. First of all, the members groups were great and to see the whole supply chain and where the grains come from the farmers to the trains or through the port and from there to our country, it was pretty amazing to see it. It was an amazing experience. I came back and I was full of energy.

66

...and I must say, our understanding was almost transcendental, if I could call it, it was really amazing. It was another level. I would advise anybody who was looking to work with this kind of technology to participate in this course.

"

CONNECTING IN THE GLOBAL MARKETPLACE

The Northern Crops Institute is an international meeting and learning center that unites customers, commodity traders, technical experts, and professors for discussion and education.

The Northern Crops Institute is a globally recognized facility. In the past year, we had the privilege of educating 1,026 live participants and 424 non-live participants from 55 different countries through our courses, webinars and recordings of both. It is through these avenues that we work to expand and maintain domestic and international markets for northern-grown crops.

During last years courses and webinars, participants had the opportunity to virtually tour farms and facilities, engage in virtual demonstrations, attend a variety of lectures from university professors and technical experts in the industry and much more.

At the Northern Crops Institute, we believe that crops grown in the northern-tier of the U.S. are valued by perceptive worldwide customers and will stand the test of quality against competitors. We also believe that adapting to new trends and technologies is necessary to remaining vital to the agricultural industry. This years record participation showed us that we can persevere through anything, and allowed us to truly connect in the global marketplace.





COURSE PARTICIPANT

"And I must say, our understanding was almost transcendental, if I could call it, it was really amazing. It was another level. I would advise anybody who was looking to work with this kind of technology to participate in this course."



DID YOU KNOW? 19% of the course participants surveyed who attended a course between 2018-2019 had the role of CEO, GM, COO or Manager withing their organization.

1,026

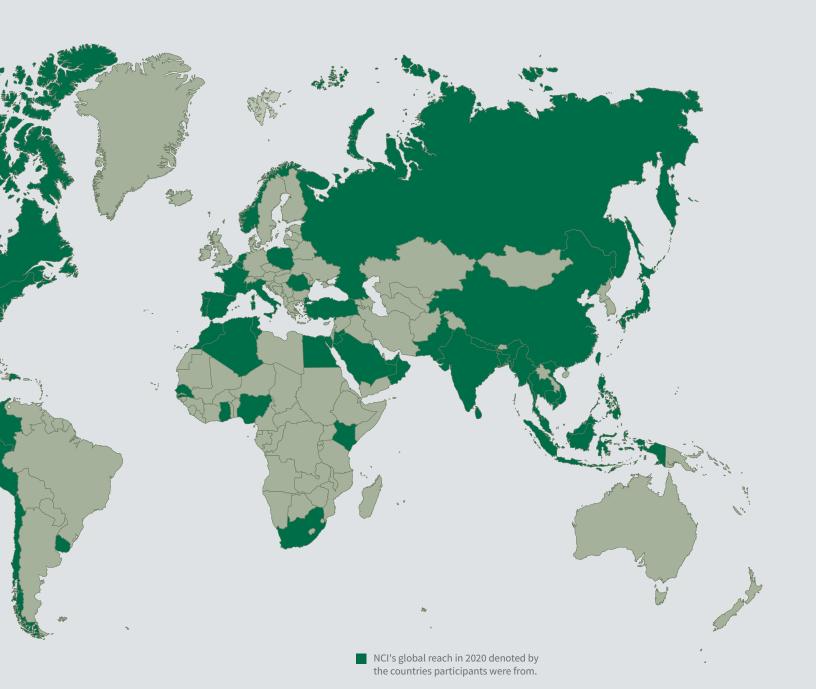
LIVE PARTICIPANTS

and 424 non-live participants from



COUNTRIES

attended or watched the recording of an educational course or webinar hosted by the NCI in 2020.



COMMUNICATION







NCI COMMUNICATION TEAM ADAPTS AND ACCELERATES THROUGH CHALLENGING YEAR

In a normal year, NCI would be hosting courses and trade teams with buyers from around the world, highlighting the value of the crops grown in the region. The pandemic turned 2020 into a very different year.

It showed us that we can be agile and adapt to any of the circumstances thrown our way. It also helped us learn and grow. One of the biggest challenges this past year was figuring out how to best educate the global marketplace via avenues that were not in-person. With that in mind, the communications team worked with our program managers to develop and deliver courses through a variety of online virtual formats, each that best fit the particular course. To convey our message virtually, we ended up developing a variety of pre-recorded video demonstrations that were used during each of the courses to show our processing technology and lab testing equipment. We also developed virtual farm and plant tour videos to be used during the courses.

Additionally, NCI has started a series of online market updates for overseas buyers, allowing them to visit with experts on the latest market conditions and help them make good buying decisions and grow the relationship back to the U.S. Each of the webinars was recorded and participants that couldn't attend live were able to view them online. This was the first year the NCI has dabbled into webinars and based on the response we have gotten see a need form more of them in the future.

While this year has been a challenge, NCI has been able to adapt and overcome. We have learned new skills which have allowed us to help other organizations transition their programs or conferences online. We've stepped up behind the scenes with technology, assisting with the following groups with webinars, conferences and video work:

- •Minnesota Association of Wheat Growers
- •North Dakota Agricultural Association
- •North Dakota Grain Growers Association
- •North Dakota Wheat Commission
- •Northern Plains Sustainable Ag
- •U.S. Durum Growers Association
- •And more!

Now that 2020 is past us, we look forward to what 2021 has to offer. We are excited for the work we will be doing and look to become a resource to the industry. We encourage you to reach out to us with any questions, and are more than happy to help!

A video library of our webinar and course recordings can be found at: northern-crops.vids.io.

NCI EXPANDS TECHNICAL SERVICE CAPABILITIES

The Northern Crops Institute is equipped with a variety of analytical and technical equipment used to process, develop and evaluate northern-grown crops. This year we added to our capabilities.

NCI is excited to add additional services to our capabilities. This year, we added an Armfield Deodorizing unit to complement the solvent extraction system that we can use for a variety of oilseeds, including soybeans, sunflower, and canola. So in addition to creating defatted meal, we can more efficiently produce a refined vegetable oil for our clients. A 26" stone mill by New American Stone Mills will give NCI the ability to mill various hard wheats and ancient grains to be used in breads, tortillas, snacks and other products. The demand for both of these processes has increased, so not only does this help our client services, but also gives us the opportunity for strengthening short courses, webinars and other educational materials.





NCI RECEIVES CARES ACT FUNDING

NCI took advantage of Federal CARES Act Funding for technology upgrades, allowing state agencies to improve communication and educational services. We were able to secure funding for upgrades to our auditoriums and meeting rooms at the main site and feed production center. Equipment for these rooms included multiple fixed cameras, in-ceiling microphones, speakers, and control panels. We also received portable video cameras, teleprompters, backdrop screens, and created a full video and audio recording studio. These systems will allow us to better reach our audience, our tech clients, and support our industry partners. An example is a portable AV cart that can be used to connect directly to clients during processing with a remote-controlled boom camera and TV display. We can bring people right into our lab! Funds were also used to insure adequate work-from-home capabilities to NCI employees to improve staff communication. A special thanks to the NDSU Ag Affairs and Ag Budget office for their support.





PROCESSING AND PRODUCT DEVELOPMENT

If you need to test an ingredient or get assistance with product or process development, then pilot-scale processing at the Northern Crops Institute might be your solution.

WE'RE HERE FOR YOU.

NCI's technical staff has worked with food processors and ingredient suppliers, large to small, established to start-up, from all over the globe.

WE'VE GOT EXPERIENCE.

Our technical staff has experience in a wide variety of crops and food production including milling, pasta production, baking, soyfoods, oilseed extraction, and extruded foods. We can make a variety of baked products, tortillas, breakfast cereals, long and shortgood pasta, snack foods, soy milk and tofu, and texturized vegetable protein and meat analogs. NCI also manages a livestock feed production center with full-fat extrusion and pelleting available. Additionally, we can assist with analytical and testing services and staff will travel worldwide to assist in the uses of northern-grown

WHAT WE OFFER

We offer cost effective service fees, confidentiality, complete services including purchase of ingredients (specialty ingredients are supplied by client - other ingredients provided at cost) and laboratory for proprietary use (upon approval).

TO LEARN MORE OR CONTACT US WITH QUESTIONS, VISIT:

WWW.NORTHERN-CROPS.COM/TECHNICAL-SERVICES

OUR TEAM

We're here to assist you.



TECHNICAL TEAM

David Boehm | Technical Director Kim Koch, Ph.D. | Senior Feed, Milling and Extrusion Specialist

Neil C. Doty, Ph.D. | Business Development Manager

Rilie Morgan | Process Project Manager Rachel Carlson | Food Scientist Minwei Xu | Food Scientist

Mary Niehaus | Food Technologist

EDUCATIONAL PROGRAM TEAM

Brian Sorenson | Program Manager Nick Sinner | Program Manager Krista Jansem | Program Coordinator

COMMUNICATIONS TEAM

Grant Christian | Communications & Marketing Manager

Dorothy Pihlaja | Communications & Marketing Specialist

ADMINISTRATIVE TEAM

Janel Brooks | Accountant Lynn Stadum | Administrative Assistant

EXECUTIVE TEAM

Mark Jirik | Director

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NorthernCropsInstitute



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THANK YOU NORTHERN CROPS INSTITUTE SUPPORTERS

Thank you to all who supported NCI programs and activities in 2020. An additional thanks to our:

2020 AGRIBUSINESS SPONSORS

Arrow K Farms

Brushvale Seed Inc.

Buhler Inc.

Dakota Growers Pasta Co. Inc

David and Susan Katzke

Healthy Food Ingredients

North Dakota Farmers Union

North Dakota Grain Dealers Association

North Dakota Grain Growers Association

North Dakota Soybean Growers Association

North Dakota Trade Office

Northern Canola Growers Association

Northern Pulse Growers Association

ProSeed

Red River Commodities

Richland IFC

Red River Valley Sugarbeet Growers

SB&B Foods

U.S. Durum Growers Association





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Online Barley to Beer Course

April 1-30, 2021

This course provides participants with information on how to successfully choose high quality malting barley, as well as a basic understanding of the malting process and the brewing of beer, through networked lectures and video tours.





More Details

Participants will have the chance to tune into pre-recorded seminars, watch virtual brewery and malt tours, as well as engage with presenters during four live Q&A sessions! This course is perfect for craft brewers looking to expand their knowledge.



Major Topics

Beer History • Barley Breeding

- Basics of Brewing Introduction to Malting Beer Styles Terrior
- HopsPerspectives of a Craft MaltsterVirtual Brewery Tours
- Virtual Malt Plant Tours



Who Should Attend

This course is beneficial for craft brewers, craft maltsters, researchers, and anyone looking to learn more about barley and beer!

REGISTER NOW

Registration Fee: \$250.00

Final Registration Deadline: March 31, 2021

Register online at northern-crops.com



Questions?

If you have any questions, or would like more information on this course, please contact Program Coordinator, Krista Jansen at krista:j.jansen@ndsu.edu.





More Details

This course focuses primarily on traditional dry durum-based pasta; however, non-traditional ingredients and fresh pasta are also covered through lectures and demonstrations.



Objectives

Learn from industry professionals about the fundamentals of pasta production, quality assurance, die manufacturing, and maintenance. Gain important understanding of ingredient quality and how it impacts pasta processing and quality.



Who Should Attend

This course will benefit managers, supervisors, technicians, and others responsible for plant production, maintenance, production development, quality assurance, and sales of high quality pasta products.

REGISTER NOW

Registration Fee Before March 15, 2021: \$800.00 Registration Fee After March 15, 2021: \$900.00

Final Registration Deadline: April 5, 2021

Register online at northern-crops.com



What About Groups of Three or More?

From now until the registration deadline, groups of three or more from the same company will receive a \$100.00 discount per participant. For more information or to receive the promotional code, please contact Program Manager, Brian Sorenson at brian.sorenson@ndsu.edu.





