

GOOD MORNING: 01/25/19 Farm Direction - Van Trump Report

1 message

The Van Trump Report <reply@vantrumpreport-email.com>

Fri, Jan 25, 2019 at 7:31 AM

Reply-To: Jordan <reply-fecf16707d66077c-1142_HTML-36250946-100003450-2@vantrumpreport-email.com>

To: info@farmdirection.com



Today In History

"Please think about your legacy, because you're writing it every day." - Gary Vaynerchuck

FRIDAY, JANUARY 25, 2019
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Morning Summary: Stocks are slightly higher this morning on better than expected data out of Europe and some fairly strong earnings being reported here in the U.S. Many traders continue to take a "wait-and-see" approach, as next week looks poised to offer up some major headlines. President Trump was scheduled to make his "State of the Union" address, but that has been canceled and won't happen until after the government shutdown ends, which some argue might not happen for a few more weeks. The stock market will also be eager to see headlines from another round of trade talks with the Chinese. If plans remain in tact, Chinese Vice Premier Liu will visit the U.S. January 30-31st. Reports circulating earlier this week, which talked about U.S. leaders canceling meetings with Chinese counterparts is still being dismissed as false or fake news. As we sit here today, the Chinese are still coming in town next week. Perhaps we will learn more about specific details once the two sides conclude their meeting. Interestingly, with U.S.-China trade talks set to start next Wednesday, U.S. Commerce Secretary Wilbur Ross made a statement yesterday that a trade deal is still "miles and miles" off. Also next week, the Fed will be holding their first meeting of 2019. Most everyone suspect the Fed will leave rates "unchanged" at this meeting. The debate seems to be if the Fed will hike rates again during a summer or fall meeting. Most sources I speak with are debating between the July and October meeting as perhaps the next rate hike. Also next week, traders will be digesting a fresh U.S. GDP estimate, and an even greater number of corporate earnings which will include big names like...Amazon, AT&T, Boeing, Caterpillar, Chevron, Exxon, Facebook, General Electric, Harley-Davidson, MasterCard, McDonald's, PayPal, Pfizer, UPS, Verizon, Visa, and the highly anticipated Apple earnings. The trade will also be digesting the latest U.S. monthly employment numbers. I should note, yesterday's weekly U.S. unemployment claims came in at a 49-year low. U.S. employment continues to look very strong. The trade is also going to be paying close attention to crude oil prices. There seems to be a bit more brewing in regard to sanctions impacting Iran and those who do business with them. There's also more uncertainty and moving parts involving Venezuela. To summarize, I suspect if crude oil can gain a bit of nearby momentum, the Fed delivers less hawkish commentary, and a few positive headlines circulate involving Chinese trade, the stock market could find enough tailwind to push itself higher. The question is can it hold and continue to gain on that momentum. There's still a ton of technical hurdles to overcome on the charts and more political hurdles in the path ahead. I remain patient, not wanting to chase the market higher, using rallies to reduce a bit of risk, using bigger breaks as an opportunity to search for bargains.

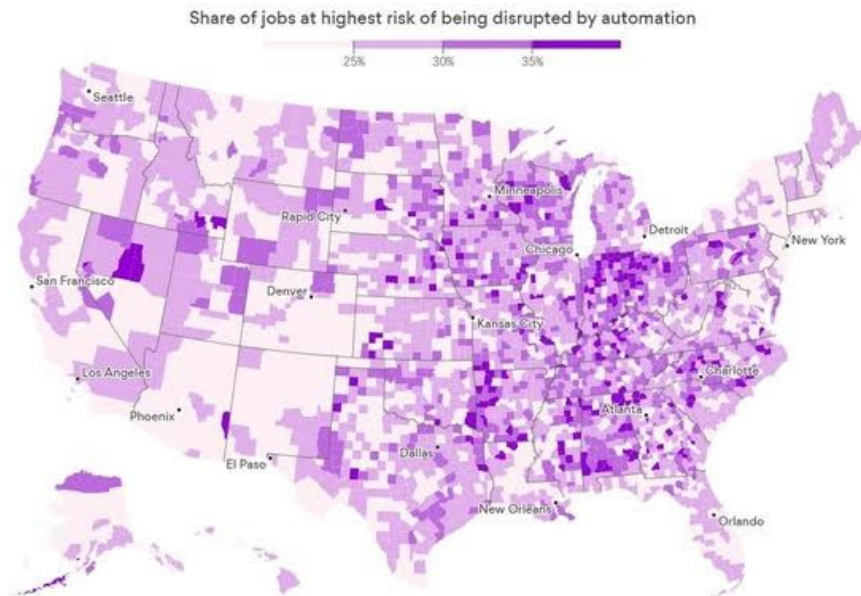
Heartland Jobs at Highest Risk of Being Disrupted by Automation: *The last wave of technological disruption — the IT revolution of the 1980s — created new jobs, but the bulk of the job and wage gains were on the high and low ends of the labor market. Scores of middle-wage, middle-skill jobs in manufacturing, largely in the middle of the country, were automated away or sent abroad. Now, the new wave of automation and AI is projected to hit high- and low-paying jobs in addition to middle-income jobs, says Marina Gorbis, executive director of the Institute for the Future. The next crop of vulnerable jobs — which include middle-wage occupations like trucking and administrative office work as well as lower-wage jobs like waiting tables and farming — are scattered all over the country, but the highest concentration is once again in the heartland, per a new report from the Brookings Institution. Check out all the numbers [HERE](#).*



1924, First Winter Olympics

- On January 25, 1924, the first Winter Olympics take off in style at Chamonix in the French Alps. Spectators were thrilled by the ski jump and bobsled as well as 12 other events involving a total of six sports. The "International Winter Sports Week," as it was known, was a great success, and in 1928 the International Olympic Committee (IOC) officially designated the Winter Games, staged in St. Moritz, Switzerland, as the second Winter Olympics. Five years after the birth of the modern Olympics in 1896, the first organized international competition involving winter sports was staged in Sweden. Called the Nordic Games, only Scandinavian countries competed. Like the Olympics, it was staged thereon every four years but always in Sweden. In 1908, figure skating made its way into the Summer Olympics in London, though it was not actually held until October, some three months after the other events were over. In 1911, the IOC proposed the staging of a separate winter competition for the 1912 Stockholm Games, but Sweden, wanting to protect the popularity of the Nordic Games, declined. Germany planned a Winter Olympics to precede the 1916 Berlin Summer Games, but World War I forced the cancellation of both. At the 1920 Olympics in Antwerp, Belgium, ice hockey joined figure skating as an official Olympic event, and Canada took home the first of many hockey gold medals. Soon after, an agreement was reached with Scandinavians to stage the IOC-sanctioned International Winter Sports Week. It was so popular among the 16 participating nations that, in 1925, the IOC formally created the Winter Olympics, retroactively making Chamonix the first. In Chamonix, Scandinavians dominated the speed rinks and slopes, and Norway won the unofficial team competition with 17 medals. The United States came in third, winning its only gold medal with Charles Jewtraw's victory in the 500-meter speed-skating event. Canada won another hockey gold, scoring 110 goals

Automation is set to hit the heartland the hardest — again



Data: Brookings Institution; Map: Naema Ahmed/Axios

You Can Now Buy a Hospital Room on Amazon: *EIR Healthcare, a New York-based company, is now selling units of its hospital rooms for \$814 a square foot on Amazon.com, which the company claims are faster and cheaper to build than traditional hospital rooms. In addition, they claim these rooms can be built in 30 days or less. Keep in mind, on average the construction of a new hospital costs \$400 per square foot, but at the same time, the price can jump as high as \$1,200 in a place like New York City. They are calling these rooms MedModular and they are going for about \$285,000 per unit on Amazon right now, which are delivered 90% complete. EIR Healthcare claims to be all about the experience of the patient, meaning patient health and happiness is their main goal. These rooms offer fall prevention with features including automatic sliding doors, frosted privacy glass for increased visibility, open shower plan, and grab bars for safe travel around the room. The room also has hospital-associated infection prevention, which includes sliding doors to minimize touchpoints, solid surface materials to prevent bacterial growth, and continuous solid surface floor with floor-to-wall radius transition to minimize crevices. Best of all, these rooms have improved patient experience with daybeds for patients and visitor comfort, smart windows with controls from the bed, and Sky Factory Luminous SkyCeiling. In the long run, EIR Healthcare plans for MedModulars to transform the construction landscape for hospitals and help create a better environment for patients. Click [HERE](#) to purchase one yourself!*

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Back to search results for "medmodular"

MedModular by EIR Healthcare

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and allowing just three goals in five games. Of the nearly 300 athletes, only 13 were women, and they only competed in the figure-skating events. Austrian Helene Engelmann won the pairs competition with Alfred Berger, and Austrian Herma Planck Szabo won the women's singles. The Olympics offered a particular boost to skiing, a sport that would make enormous strides within the next decade. At Chamonix, Norway won all but one of the nine skiing medals.



1961, Kennedy Holds First Live TV News Conference -

On this day in 1961, President John F. Kennedy becomes the first U.S. president to hold a live televised news conference. From a podium in the State Department auditorium, Kennedy read a prepared statement regarding the famine in the Congo, the release of two American aviators from Russian custody and impending negotiations for an atomic test ban treaty. He then opened the floor for questions from reporters, answering queries on a variety of topics including relations with Cuba, voting rights and food aid to impoverished Americans. Ever since his televised presidential debate with Richard Nixon in 1960, Kennedy had been aware of the media's enormous power to sway public opinion. On that day, Kennedy had appeared rested, well-groomed and in control. Nixon, on the other hand, was not as telegenic as Kennedy and appeared sweaty and flustered. His five o'clock shadow created more of a stir than his responses to the moderator's questions. Kennedy knew that, in a televised news conference, his appearance would count almost as much as what he said. On this day in 1961, the president exhibited a calm demeanor and responded to reporters' questions with intelligence and decorum. When discussing the common practice of leaking official information to Cold War enemies, he admitted very ample information [is] given so that the enemy can make a determination as to our strength, but on matters which involve the security of the United States the press and the Executive should attempt to reach a responsible decision. I do not believe that the stamp 'National Security' should be put on mistakes of the administration. But I must say that I do not hold the view that all matters and all information which is available to the Executive should be made available at all times, and I don't think any member of the press does. Kennedy's ability to project charm, intelligence, strength and openness defined the presidential image in the age of mass media.



1995, Near Launching of Russian Nukes -

Russia's early-warning defense radar detects an unexpected missile launch near Norway, and Russian military command estimates the missile to be only minutes from impact on Moscow. Moments later, Russian President Boris Yeltsin, his defense

FARM TANK

Tweets of the Day



Sportsnaut
@Sportsnaut

Following

👁️ 320 pound lineman @khalenNOTkaylen backflipping like it's nothing. 🤪 (via @Luke_Spinman)



minister, and his chief of staff were informed of the missile launch. The nuclear command systems switched to combat mode, and the nuclear suitcases carried by Yeltsin and his top commander were activated for the first time in the history of the Soviet-made weapons system. Five minutes after the launch detection, Russian command determined that the missile's impact point would be outside Russia's borders. Three more minutes passed, and Yeltsin was informed that the launching was likely not part of a surprise nuclear strike by Western nuclear submarines. These conclusions came minutes before Yeltsin and his commanders should have ordered a nuclear response based on standard launch on warning protocols. Later, it was revealed that the missile, launched from Spitzbergen, Norway, was actually carrying instruments for scientific measurements. Nine days before, Norway had notified 35 countries, including Russia, of the exact details of the planned launch. The Russian Defense Ministry had received Norway's announcement but had neglected to inform the on-duty personnel at the early-warning center of the imminent launch. The event raised serious concerns about the quality of the former Soviet Union's nuclear systems.

Upcoming Events

Fri. 01/25 - Export Sales, Cattle on Feed

Mon. 01/28 - Export Inspections

Tues.-Wed. 01/29-01/30 - FOMC Meeting

Thurs. 01/31 - Export Sales, Jobless Claims, Personal Income

Fri. 02/01 - Unemployment, Grain Crushings

Mon. 02/04 - Export Inspections

Tues. 02/05 - Chinese New Year

Thurs. 02/07 - Export Sales, Jobless Claims

Fri. 02/08 - Crop Productions, USDA Supply & Demand

Mon. 02/11 - Export Inspections

Thurs. 02/14 - Valentine's Day

Fri. 02/15 - Retail Sales, NOPA Crush

Mon. 02/18 - President's Day (Some Markets Closed)

Tues. 2/19 - Full Moon, Export Inspections

Wed. 02/20 - Housing Starts & Pmts

Thur. 02/21 - Jobless Claims

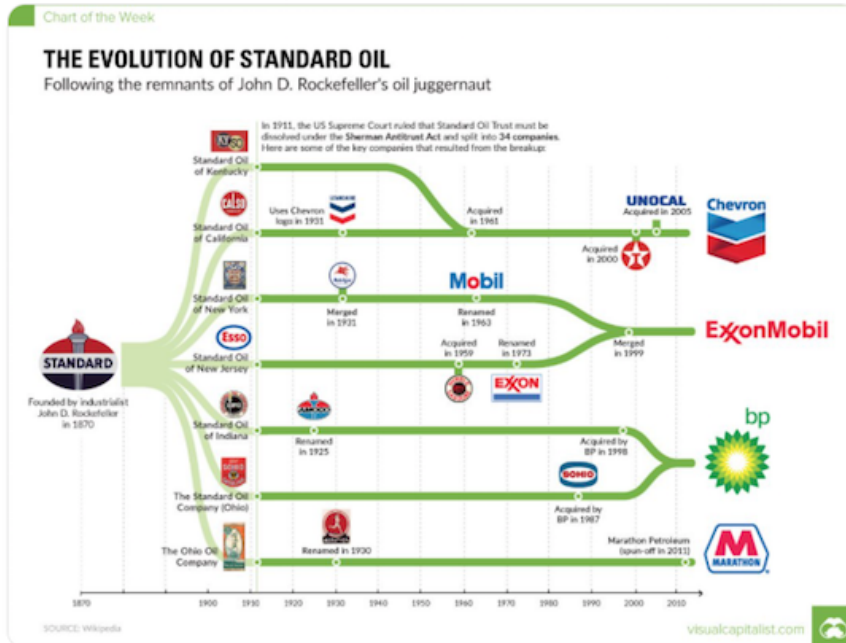
Fri. 02/22 - Export Sales, Cattle on Feed/Cold Storage

Mon. 02/25 - Export Inspections

Thurs 02/28 - Export Sales, Jobless Claims

Chart: The Evolution of Standard Oil

visualcapitalist.com/chart-evolutio...



The number of candidates for the U.S. Democratic presidential primaries in 2020 rose to eight this week, when Senator from California, [#KamalaHarris](#), announced her run on Monday.

statista.com/chart/16748/ca...

Presidential Bids and Announcements for 2020

Candidates for presidential primaries by announcement date

Democrats 		Date announced	Announced campaign	Formed exploratory committee
Kamala Harris	Senator from California	Jan 21, 2019		
Kirsten Gillibrand	Senator from New York	Jan 15, 2019		
Julian Castro	Former Secretary of Housing & Urban Development, former mayor of San Antonio	Jan 12, 2019		
Tulsi Gabbard	Congresswoman from Hawaii (HI-02)	Jan 11, 2019		
Elizabeth Warren	Senator from Massachusetts	Dec 31, 2018		
Richard Ojeda	Former State Senator from West Virginia	Nov 11, 2018		
Andrew Yang	Entrepreneur	Nov 6, 2017		
John Delaney	Former Congressman from Maryland (MD-06)	July 28, 2017		
Republicans 				
Donald Trump	President of the United States	Feb 17, 2017		

WHAT I'M LISTENING TO:



Lee Brice
"Rumor"



My goal at "The Van Trump Report" is to help readers better identify the moving parts and dynamics associated with the financial markets, geopolitical events, economics, media and culture that is currently influencing and shaping the direction of the agricultural markets. I like to believe I "Challenge the Traditional" and encourage our readers to think outside the box.

I use story telling techniques that are written in an easy to read format to help convey my current thoughts about business, markets, technology, weather, sports and life. I also like to include links, filter the noise, and pass along in-depth research and information that I believe could challenge your current thought process and help you make more informed decisions. In addition I include valuable lessons I have learned from other traders, executives and investors, along with an occasional inspirational piece about life, family and faith.

What I do not do in "The Van Trump Report" is give specific financial advice or tell individuals how to invest or how to specifically hedge. Remember, this information is being read by hedge fund managers, bankers, CEO's, and Ag leaders around the globe, therefore it's NOT tailored to fit your specific individual needs. For specific investment or hedging advice please seek the help of a licensed representative that can better understand your particular situation, individual needs and overall risk tolerance. This information should ONLY be used for educational and entertainment purposes.

My family and I would like to thank you again for your support!

Kevin Van Trump

"I am a recent subscriber to Kevin's



Dennis Bogaards
@dbogfarm

Following

When the big one with the cab dies I resort to the little one with no cab it can quit snowing any time now.



Bolt Marketing LLC
@boltmarketing1

Following

Snow is getting deep. Might have to borrow this to get home.



newsletter, but I'm a long-time reader of many other high-profile marketing services. I am particularly impressed with the thorough manner in which Kevin evaluates every economic aspect, both nationally and internationally, that influences commodity prices. His analysis and conclusions are highly thought out and conveyed in layman's terms so that the reader can comprehend the numerous and often complex interrelationships that impact the markets. Kevin is a real attribute to the agricultural sector."

A.M., FDIC

"As a national federal farm policy administrator and commodity producer, I find it critical to keep updated with what is going on in the real world of agriculture and with the domestic and global markets. Of all the services I've have been privy to or have subscribed to over the past 20 years I've found in the past several months of engaging in your "Farm Direction" services to be the best perception and analysis of what is really happening in today's world. Not only here in the United States, but across the globe as well. US farmers need this type of help and information to assist them in their daily efforts. I commend you for a job well done. Please let me know if I can ever be of any help or assistance to you in the future..."

**L.T., Assistant Deputy Administrator
for Farm Programs USDA**

My Own Personal Truisms

"Not To Trade, is often considered a good trading decision..."

"First Rule of HOLES: When you are in one stop digging..."

"Every looser in Vegas, always walks away from the table thinking he could have done better, the winners on the other hand leave while on top..."

"Bulls make money, Bears make money, but pigs get slaughtered..."

"The markets ability to remain irrational can often times last much longer than your ability to remain solvent..."

I'm more of a long-term player, therefore you will not see me give many short-term suggestions or trade ideas. One of my most important rules is that I always follow my long-term direction. Therefore, as long as I am "bullish" a market I will only play that particular market in one of three ways.

- Option #1 - Conservatively long.
- Option #2 - Aggressively long.
- Option #3 - Sitting on the sideline.

I never initiate a "short" position in a market that I am "bullish" longer-term,



Braden Halladay

@BradenHalladay

Following

A great honor for a great player and an even greater person, proud of you dad! I love you



ESPN

@espn

Following

Sean McVay is young enough to have played against Julian Edelman in 2007 when Miami and Kent State matched up.

SEAN MCVAY AND JULIAN EDELMAN PLAYED EACH OTHER IN COLLEGE



nor do I initiate a "long" position in a market I am "bearish" longer-term.





ActionComplete
@ActionComplete

Following



Not everyone will understand your journey.
That's fine. It's not their journey to make...
[#inspiration](#) [#quotes](#)

**NOT EVERYONE
WILL UNDERSTAND
YOUR JOURNEY.**

THAT'S FINE.

**IT'S NOT THEIR JOURNEY
TO MAKE SENSE OF.**

IT'S YOURS.

neuro mining



As we age, it gets harder and harder to create new neural pathways in the brain. It's the reason kids find it so easy to learn new things, but as adults it often gets more difficult. Doing brain teasers and solving riddles can be an important part of keeping our brain healthy. The more connections we can form, the better our brain will be. I hope this helps provide a little daily fun and exercise. The answer to each riddle or puzzle will be located at the bottom of the report.

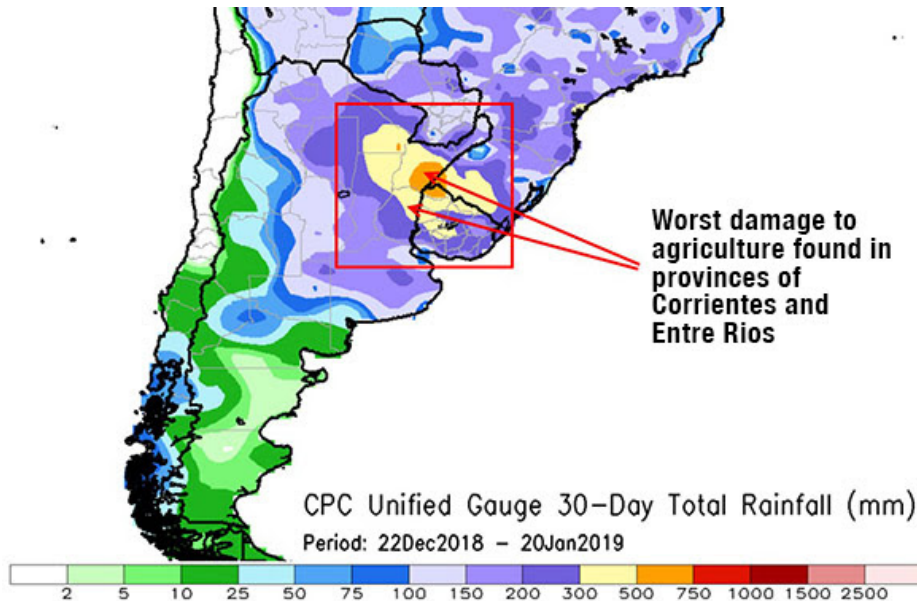
TODAY'S RIDDLE:

I can be cracked, I can be made. I can be told, I can be played. What am I?

Weather forecasts are centered around the very cold conditions and strong winds currently settled over the Midwest. In northern regions, blowing snow may lead to some blizzard conditions. During the coming weekend, an Alberta clipper-type low will bring significant snow to northwest and central areas either late Sunday or Monday. In the southern Plains, conditions are generally seen as favorable for winter wheat stands and livestock despite colder conditions also in the forecast throughout the region. In Brazil, dryness remains a problem for filling soybeans from Parana north to Mato Grosso and

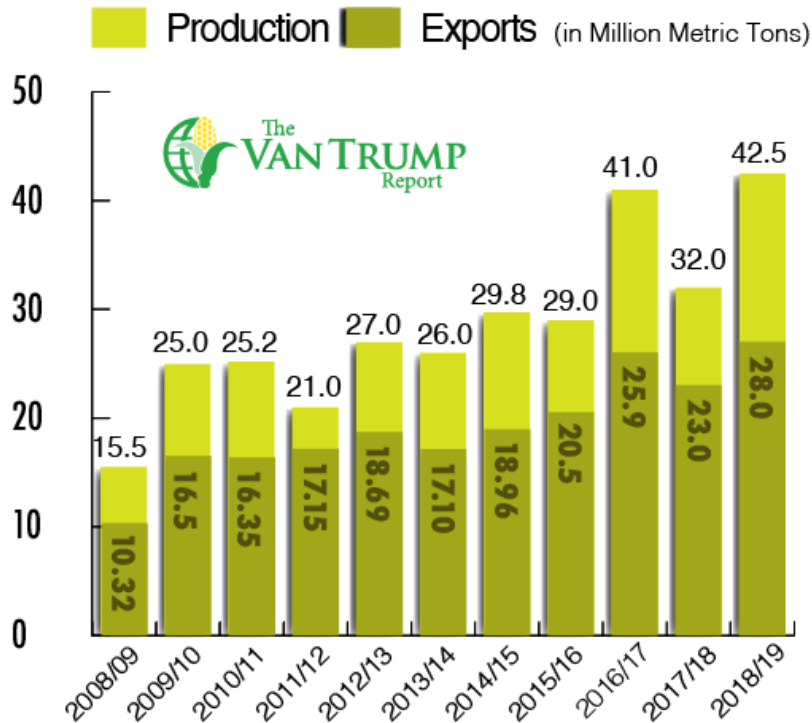
Bahia. Dry weather is favoring the harvest, even though the dryness has forced harvest to advance at an unusually early time. Now, we are getting reports that showers are indicated in Mato Grosso this coming weekend which could provide some needed moisture for the coming second crop corn planting. However, it will likely hinder the current soybean harvest.

First Billion-Dollar Weather Event of 2019: We have a better picture of the flooding currently causing havoc in Argentina. Following three weeks of torrential rain. More than 5.9 million acres of soybeans are submerged. Overall, agricultural damage listed at \$2 billion per Coninagro.



Corn prices slowly grind lower this week on lack of any fresh new headlines. Bears argue that South American weather has somewhat stabilized, which I disagree with, and bulls are a bit disappointed by the fact there's been nothing new in regard to Chinese trade. There's also no new updates from the USDA. Keep in mind, bulls have been waiting on the USDA to reduce their final U.S. yield estimate, and perhaps reduce production estimates for both Argentina and Brazil. Hence, there have just not been a lot of cards flipped over for the bulls to pick up, place in their hand, and raise their bets accordingly. Adding to the lack of bullish cards, the International Grains Council raised its 2018-19 world corn production estimate by +3 MMTs and raised its world corn carryout estimate by +5 MMTs. There's also more evidence of Ukraine exporters gaining more marketshare. The latest data circulating shows Ukraine exports up +60% compared to last year. We are also seeing stiffer competition from Argentina. Here at home, there continues to be more talk of demand growth slowing. Not only are we seeing more export competition, but the latest U.S. ethanol data showed a slight setback in production in comparison to the previous week. I'm afraid until the bulls have something fresh to chew on the corn market is going to grind sideways to slightly lower. As a producer, I'm staying extremely patient. End-users should be taking a hard look at locking in demand. I still believe there are further weather concerns brewing in both Argentina and Brazil, which could catch some bears offside...

Argentina Corn Production & Exports

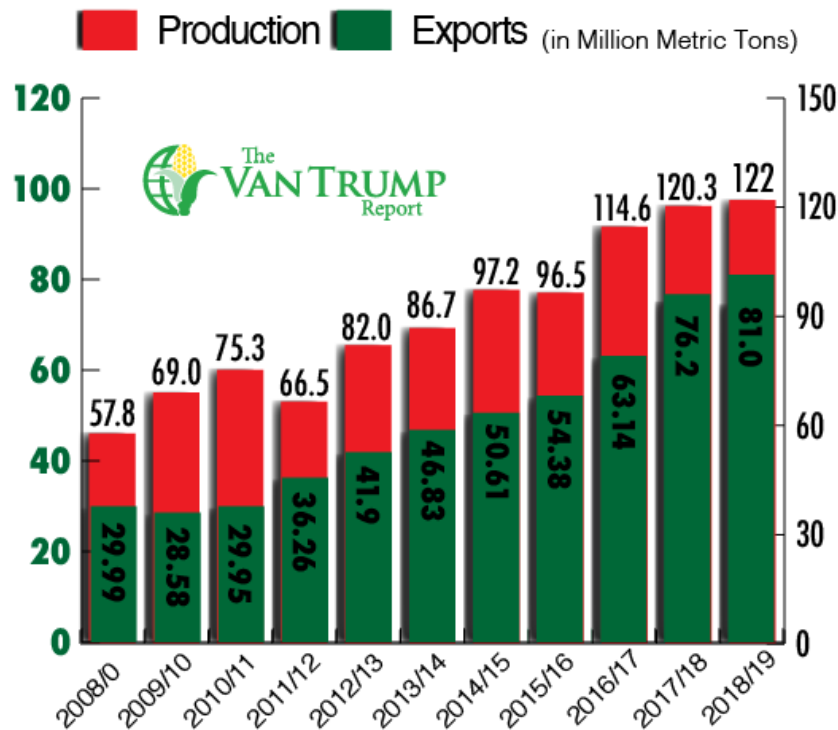


Source: USDA, Updated 01/22/19 WASDE numbers

Soybean prices have essentially gone nowhere this week. Bulls are pointing to continued weather difficulties in parts of South America, particularly too dry in portions of Brazil, and too wet in portions of Argentina. I continue to see that trend staying in place, but the headlines have recently lost a bit of their thunder. Bears are joining too overly burdensome global supplies and the fact we have still seen nothing solid in the way of a major longer-term buying commitment from the Chinese. Perhaps we will see something more positive next week after the Chinese delegation visits the U.S. for extended trade talks. As a producer, I am reminding myself that prices are currently trading near the upper end of the recent six-month trading range. Keep in mind, the new-crop NOV19 contract is trading within 10 cents of its highest close since mid-June of last year. In other words, I know there's a lot of optimism in the air, but perhaps that's why we are trading near the upper-end of the range? As a producer, I continue to keep hedges in place and looking to reduce a bit more risk on the next leg higher. As a spec, I remain on the sideline. I could see a knee jerk to the upside on positive Chinese trade headlines, but I feel that position will be too difficult to navigate. I would consider being a longer-term buyer but only on a much deeper break in price.

**The graphic below shows the current USDA estimate for Brazilian soybeans being record large. Keep in mind that number is shrinking by the day, but the U.S. government shutdown has kept the USDA from releasing their updated production estimate. I think we can assume something similar to the 2016/17 crop year for Brazil, perhaps 114 to 116 MMTs vs. the current USDA estimate of 122 MMTs. The South American weather uncertainty and the hopes of a Chinese trade deal are currently keeping prices supported.*

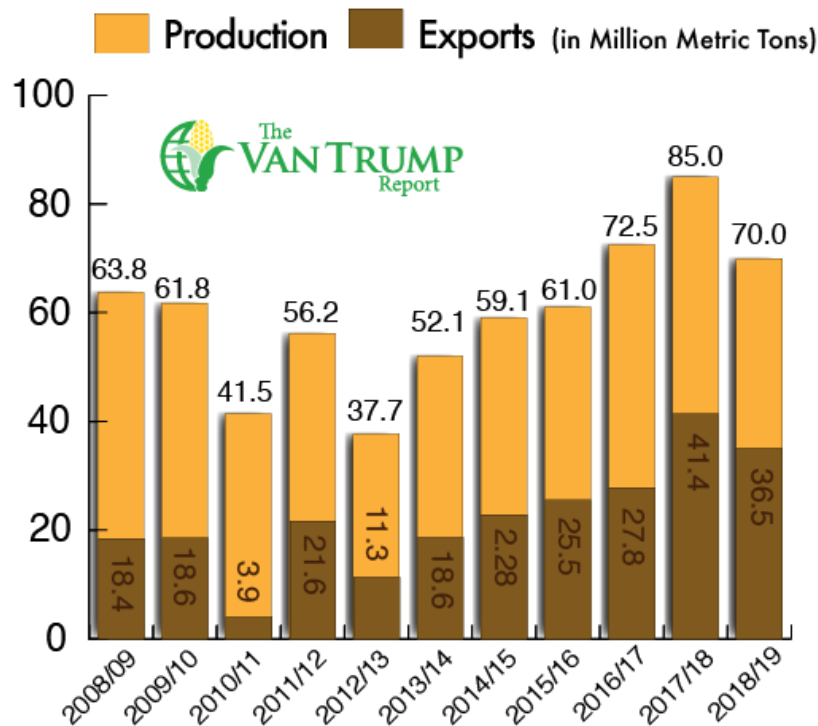
Brazil Soybean Production & Exports



Source: USDA, Updated 01/22/19 WASDE numbers

Wheat prices are up slightly on the year but continue to trade towards the lower-end of their range. Bears continue to trade the burdensome balance sheet, seeing no real jump in U.S. wheat exports. In fact, most suspect the USDA will once again need to cut their current export estimate. Adding to bearish balance sheet arguments, The International Grains Council just raised its 2018-19 world wheat production forecast by +8 MMTs. At the same time they pushed their world wheat ending stock estimate higher by +1 MMTs to 263 MMTs. Bulls have been hoping supplies out of the Black Sea region would be much more limited by this time. Headlines out of Russia seems as if the government is finally starting to limit exports to some degree, but the U.S. still isn't gaining much additional marketshare. Hence, no reason for the bears to let loose. There's also not much in the way of a weather story that's widespread enough to shake the bears. Of course, if China were to step in and announce plans to be sizable buyers of U.S. wheat, then things could change dramatically. As a longer-term, bull, I'm also keeping a close eye on geopolitical tension brewing between Russia and Ukraine. There's also some arguments being made that a fallout in the European Union could be bullish U.S. wheat. As both a producer and a spec, I continue to believe the downside risk is more limited than upside potential. Hence, reason enough to stay long.

Russian Wheat Production & Exports



Source: USDA, Updated 01/22/19 WASDE numbers



> **USMCA Could Boost Export to Canada and Mexico by \$454 Million:** A policy brief recently released by Purdue University found that USMCA would boost U.S. farm exports to Canada and Mexico by about \$454 million compared with NAFTA, driven by higher dairy and poultry sales. But when the retaliatory duties are factored in, it brings U.S. Ag exports to a net loss of \$1.8 billion. The report also suggests U.S. Ag exports would drop \$9.4 billion if USMCA is rejected by Congress and President Trump withdraws from NAFTA. (Source: Purdue Univ.)

> **China's Import of U.S. Pork Halved:** China's imports of pork from the United States more than halved to about 263,000 tonnes in 2018, (Source: Reuters)

> **Plants 'Blink' Similar to Humans:** New research shows that in much the same way that the human eye adjusts to changes in sunlight, plants adjust photosynthesis to protect their leaves from rapid changes in light intensity. This sensory-like regulation operates at low light intensities, which the photosynthesis machinery is most efficient but also most vulnerable to sudden light increases. It's very similar to the way our pupils in our eye adjust to the brightness of light. Amazing! (Source: Science Daily)

> **Having Both Solar Panels and Crops Can Pay Off:** Agrivoltaics can be a money-maker on farms by intermingling solar panels with crops, although crop yields and electrical generation are lower in the dual-use system than if the acres were devoted solely to either crops or a solar array, according to research at the University of Massachusetts Crop Research and Education Center. (Source: Civil Eats)

> **Talk of Large Soybean Acreage Shifts This Year:** We are hearing a lot of folks talk -- particularly from fringe Corn Belt states -- that they are likely to show large acreage swings this year as farmers cut back on soybeans due to low prices. States like Missouri, North Dakota and Kansas have seen rapid expansion of soybean plantings in the past ten years or so and are likely to lead the shift away this year.

> **Farming Simulator is Getting its Own E-Sports League:** Giants Software announced a new Farming Simulator League, which is a competitive tournament for the

enduringly popular PC series *Farming Simulator*. It will consist of 10 tournaments across Europe including big events like Gamescom and Paris Games Week, which will end in a grand final at FarmCon 2020. In addition, the developer is putting up \$280,00 in prize money! Could be a contest to enter for some!

> **A Vegan Burger that Bleeds:** Plant-based "meat" producer Beyond Meat is taking on the beef burger with Beyond Burger, which is a vegan veggie-based patty that is meant to look, cook, taste, and even "bleed" like red meat. The reason for making this is because it's healthier and more sustainable due to red meat can increasing your risk of everything from heart disease to certain cancers. Keep in mind, Beyond Meat says it has sold 25 million burgers worldwide, and the company recently filed for an IPO, which is reportedly worth more than half a billion dollars.

> **Stories Feature is the Future for Facebook:** Facebook CEO, Mark Zuckerberg, told investors last quarter that its Stories feature "is the future" for the platform and will eventually "be bigger" than the News Feed. New reports are saying, over the past year advertisers leveraging Stories have increased budgets dedicated to the format at 124%. Keep in mind, News Feed ads are still the king, but the Stories format is quickly emerging as an ad that can perform in the same league as other ads within Facebook. (Source: CNBC)

> **Billionaire Mario Gabelli Recommends MGM Resorts:** Billionaire value investor Mario Gabelli said that MGM Resorts International stock is "very attractive" and investors should "put a bet on it." He seems to be bullish on the stock because he expects it to grow the online gambling business to offset the slowing growth in Macau. Keep in mind, MGM now has recent partnerships with NBA, WNBA, and NHL due to the legalization of sports betting. Griffon is also a top pick for Gabelli, which he sees a 50% gain for the stock over the next 12 months.

> **Tim Cook Goes to Davos for the First Time:** Apple CEO, Tim Cook, attended the World Economic Forum in Davos for the first time. Details about what he did and who he met with haven't been made public, but pictures have been seen on social media of some of his meetings. According to a picture posted on Twitter, Cook met with Microsoft CEO Satya Nadella and Brazil's right-wing President Jair Bolsonaro for dinner. He also spoke with Armenian Prime Minister Nikol Pashinyan, Dubai's Crown Prince Sheikh Hamdan bin Mohammed, and Sebastian Kurz the chancellor of Austria.

> **Chip Stocks Have One of Their Best Days in a Decade:** Chip stocks surged yesterday as Xilinx, Teradyne, Lam Research and Texas Instruments all beat earnings expectations in their reports Wednesday. Of the 30 chip stocks on the PHLX Semiconductor Index, only Qualcomm finished the trading day in the negative. The PHLX Semiconductor index as a whole was up 5.7% yesterday, which is the seventh-best day for the index in the past 10 years. Keep in mind, the biggest chip maker, Intel, fell over 8% in extended trading on Thursday after missing revenue estimates.

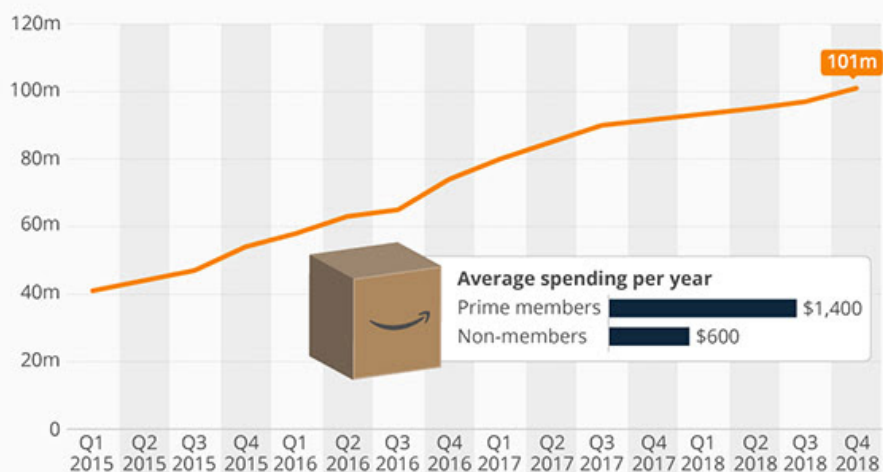
> **Craigslist Brought in \$1.034 billion in 2018!** After extensive research of Craigslist ad counts in almost 90 markets, AIM estimates Craigslist brought in \$1.034 billion in 2018, which would be an increase of nearly 50% from their 2016 revenue. The report reads, "Large markets accounted for the vast majority of the revenue - \$981 million. Mid-size markets delivered \$44 million; small markets, just \$10 million." Keep in mind, AIM projected the annual revenue for Craigslist to be only \$7 million when it started studying ads in 2003. The most interesting part of this study is 99% of Craigslist revenue is coming from the United States. In addition, Craigslist declined to comment on AIM's research.

> **Australia's Record Heatwave Hit New Highs:** Temperatures in Adelaide hit 119 degrees F (46.6 Degrees C) Thursday, the hottest temperature recorded in the country since records began 80 years ago. The country's intense heatwave has seen animals dying of thirst, including scores of wild horses. (Source: The Guardian)

> **Amazon Passes 100 Million Prime Members in the U.S.:** According to estimates published by Consumer Intelligence Research Partners, the number of Prime members in the U.S. has grown from 54 million to 101 million over the past three years. More importantly though, the Prime program looks to be very effective at achieving its main goal: creating loyal customers and getting them to spend money. CIRP estimates that Prime members spend an average of \$1,400 a year on Amazon, compared to \$600 for non-members. Incredibly, Amazon has managed to get 101 million Americans to spend \$119 per year on a Prime Membership. Wow!

Amazon Passes 100 Million Prime Members in the U.S.

Estimated number of Amazon Prime members in the U.S.*



* at the end of the respective quarter

Source: Consumer Intelligence Research Partners

statista

FROM THE FIELD

Central Missouri – I just wanted to shoot a couple quick thoughts and possibly questions out to your readers. We took the time to listen to the iSelect Tiger Fiber Hemp podcast and found ourselves interested in potentially growing industrial hemp. It sounds like it could be lucrative venture if you get connected to the right supply chain. I have heard that 2019 industrial hemp is now an insurable crop in Missouri but at the same time I have heard it's still illegal to grow. Sounds like the one company getting ahead of the curve is releasing their baseline numbers next Wednesday. We are excited to find out what is possible in this market and want to try to get the jump on the guys not willing to try anything new because that's not us. If anyone has any knowledge don't hesitate to share as we are all new to the hemp game....

Southwest Iowa – We are a very small farm, we have been doing row crops for as long as I can remember, and it's worked most years but I'm really having to sharpen my pencil for next year because our ground isn't that great. I don't yield top end, but it does average. If we produce average at these prices with the inputs, we haven't locked in we are in the red. I could probably rent the ground and be about scratch so I'm not excited about that. We do have a few head of cattle which help supplement on bad years. My thoughts this year is we grow grain for feed and silage and try and take our cattle to finish. It might be a little more work but I think it's our best shot at making a few bucks in the black this year.

Northern Florida – We run cattle and sell bulls. We got out of the row crops several years ago and it's been good for several years. Especially after reading all the stories about how tough harvest was for all these farmers. There really wasn't a great market to sell corn anyway and a lot of years it could get taken out by either nasty storms or heat. We would feed a lot of it so we figured with the deflated prices and negative returns why not let everyone else grow it, take the risk and we will buy it cheap. We weathered hurricane Michael this last year and only lost a few head, so we feel blessed. I could sit here and rattle off all the crop we could have lost (corn, cotton, peanuts) etc but like I said we shut all that down to focus primarily on cattle.

CROSSING WIRES

A place to share intelligent thoughts...

Scientists Create Transgenic "Buffer" Bird for Protection From Bird Flu: *Humans don't usually get the flu directly from animals, but human outbreaks of bird and swine flu can and do happen. In fact, scientists are so concerned that the next great pandemic could arise from a deadly strain of wild bird influenza that they've created what will hopefully be our feathered saviors: Gene-edited chickens that are totally resistant to the flu. From what I understand, this first batch of "transgenic" chicks is expected to hatch sometime in 2019 at the Roslin Institute at the University of Edinburgh in Scotland, with the goal being for these hatchlings to serve as a "buffer between wild birds and humans. I'm told scientists believe if these chickens are able to prevent influenza virus crossing from wild birds into chickens, we could stop the next pandemic at the source. Read more [HERE](#).*

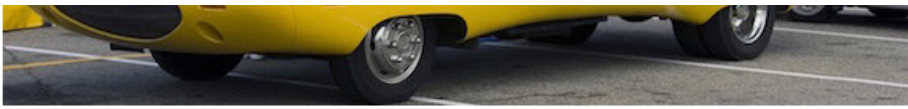
Queens New York is Home to 138 Unique Languages... For Now: *According to the Endangered Language Alliance (ELA), one area in a U.S. state is home to more languages than any single place on Earth. There are 800 languages spoken throughout New York City, but the borough of Queens is Earth's language champion: a whopping 138 unique languages are spoken in that borough alone. In fact, you may be more likely to hear a super-obscure language in Queens than you are in the small, remote village the language came from. According to endangered language experts, we're sitting in an endangerment hot spot where we are surrounded by languages that are not going to be around even in 20 or 30 years. Read more [HERE](#) and find out why that is.*

How Climate Change Could Alter American Business Models: *The storylines dominating climate change news are usually doom and gloom, but corporate America sees some new ways to integrate a warmer world into its business models. I'm told that's the conclusion gleaned from disclosures from more than 7,000 companies worldwide, with 1,800 in the U.S. that were collected by CDP, a London-based nonprofit that asks companies to report their environmental impact. From what I understand, many of those that filed reports with CDP said they believe climate change can bolster demand for their products. For instance, as climate changes there will be expanded markets for products for tropical and weather related diseases including waterborne illness,' wrote Merck & Co. Also, as more disasters hit communities, the iPhone will even be more vital to people's lives, Apple predicted. Bottom line... the companies' reports show expected climate-change expenses that could become so big and detrimental that they provoke a real changes in corporate America and they see government responding with regulations. Read more [HERE](#).*

Take a Glimpse into the Future of Urban Auto-Free Zones: *If you decide to drive in downtown Oslo, be forewarned: You won't be able to park on the street. By the beginning of this year, the city finished removing more than 700 parking spots—replacing them with bike lanes, plants, tiny parks, and benches—as a major step toward a vision of a car-free city center. Without those parking spots, and with cars banned completely on some streets, few people are driving in the area. "There are basically no cars," says Axel Bentsen, CEO of Urban Sharing, the company that runs Oslo City Bike, the local bike-share system. The city's changes are designed, in part, to help improve air quality and fight climate change, but the difference in the quality of life is more immediate. To help support the shift, the city made "massive improvements in public transport and making cycling safe and comfortable. I suspect this could be a blueprint moving forward. Read more [HERE](#) on what your urban areas may look like in the near future.*

Oscar Mayer's Wienermobile Looking for New Drivers: *Oscar Mayer is searching for its next set of Wienermobile drivers and the company is looking to hire six new "Hotdoggers" to drive their 27-foot hotdog across the country. From what I understand, the one-year position would begin June 2019, with drivers traveling coast to coast representing the company by doing media interviews, charity events and more along the way. I should mention, the company asks that applicants should have a BA or BS, preferably in public relations, journalism, communications, advertising, or marketing. I'm told resumes are being accepted through Jan. 31, so if you are interested in a job you can relish... apply [HERE](#).*

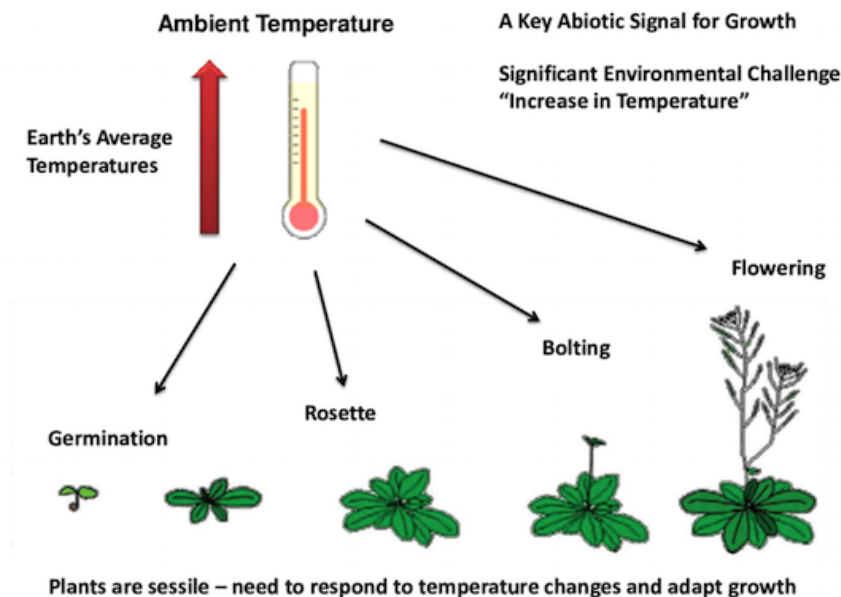






Team of Scientist Believe They've Found "Master Control" for Plants

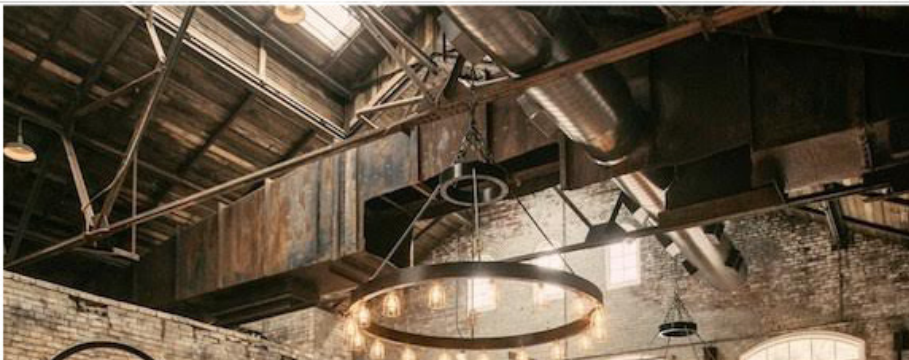
Ambient growth temperatures profoundly influence almost every facet of plant development. With increasing talk about rising global temperatures there are more scientists measuring temperature impacts on plant phenology, distribution, diversity, and yield. Researchers are now seeking to enhance their molecular understanding of how plants sense and respond to temperatures, with a hope that new technologies can be developed to assist plants in coping with warming temperatures and climates. Leading the way is Meng Chen, Ph.D., associate professor of cell biology at the University of California, Riverside, whose team is focused on exploring the role of phytochrome B, a molecular signaling pathway that may play a pivotal role in how plants respond to rising temps. I should mention, how plants experience temperature during the day, until recently, has remained somewhat of a mystery to researchers, but in a paper published in [Nature Communications](#), Chen and colleagues at UCR describe the genetic triggers that prepare plants for growth under different temperature conditions. It's worth noting that plants grow following the circadian clock, which is controlled by the seasons and all of a plant's physiological processes are structured to occur at specific times of day. With that in mind, researchers chose to use *Arabidopsis*, a member of the mustard Brassicaceae family, which includes cultivated species such as cabbage and radish as their model plant. As I mentioned above, researchers have been puzzled for years by the fact *Arabidopsis* senses an increase in temperature during the evening, yet the phytochrome signaling pathway is what senses temperatures during the daytime. In fact, during this particular study, Chen and his team concluded that without this "photoreceptor" acting appropriately the response in plants is significantly reduced and heat during the day can cause a major problem. I should mention that beyond identifying the function of phytochrome B, Chen's work also points to the role of *HEMERA*, a transcription activator that turns on the temperature-responsive genes that both control and protect plant growth. According to Chen, he believes the team found the master control for temperature sensing in plants. Moving forward, researchers will further expand this study by adding more complexity with the hopes of one day being able to help better control and regulate their internal temperatures, making them more adaptive to new environments. (Source: [news.ucr.edu](#), [nature.com](#), [arabidopsis.com](#))



Kentucky Bourbon Towns Becoming the Napa Valley of Whiskey

Bourbon fans seem to be flooding into Kentucky to visit distilleries as 1.2 million poured through the doors in 2017, which is a 20% jump from 2016 and almost double the number in 2014, according to the Kentucky Distillers Association. This large boost in people visiting these distilleries seems to be coming from everyone buying into this entire "bourbon experience." Whiskey lovers are starting to want a wide variety of whiskey-themed activity experiences from whiskey-themed boutique hotels in downtown Louisville to trendy restaurants with whiskey lists and whiskey flavored foods to fleets of tour buses taking people from distillery to distillery. Nearly 25 new distilleries have opened in the last five years throughout Kentucky, which makes a total of 73 distilleries in the state. The most popular areas for distilleries in Kentucky are in Louisville with 16, the Bardstown area with 8, and Lexington and Frankfurt with 5 each. Today, Bourbon is a \$3.3 billion industry as the new generations of hipsters are willing to pay over \$50 retail for a bottle of whiskey. Keep in mind, the bourbon industry experienced a large shortage in demand for many decades as only 455,000 barrels were produced in 1999. Bourbon production has increased more than 275% since then producing 1,715,541 barrels in 2017. In addition, Kentucky Bourbon and Tennessee whiskey exports rose 14% in 2017, making it

the largest export category among all U.S. distilled spirits with more than \$1.1 billion in revenues. These bourbon towns didn't seem to take off until Kentucky Owl revealed its plans to build a \$150 million distillery, which led to Stolichnaya vodka recently purchasing them. The new facility will sit on a 420-acre site at Cedar Creek Quarry and will be called "Kentucky Owl Park," which will be the home to a distillery with a capacity of 1.5 million proof gallons and an elaborate visitor experience. A visitor might get a distillery tour in the morning, eat a lakeside lunch, see a live-music show in the afternoon and sleep in a boutique hotel room that night, all without leaving the property. Rudy Costello, the CEO of Stoli group, says, "It's about creating that overall experience. We see the tourism in that area already, and I don't think we've even scratched the surface." Kentucky Owl broke ground in November 2017 and it plans to open the first phase of the site in 2020. The Kentucky bourbon industry has a half-dozen distilleries lie within a few minutes from where Kentucky Owl Park will be, and all of them are building amenities like restaurants, visitors centers, parks and hotels to cater to a new class of whiskey tourist. In addition to Kentucky Owl's new distillery, Bulleit bourbon parent company Diageo plans to build a new \$130 million distillery on 144 acres in Lebanon, KY, which is about 65 miles southeast of Louisville. Diageo officials said the goal is to start production in 2021 that will reportedly be capable of producing 10 million proof gallons of liquor each year, which is the equivalent of 3.8 million 9-liter cases. The Bardstown Bourbon Company is another distillery where you can experience the rich history of bourbon, explore our state-of-the-art distillery, and enjoy the local hospitality on a 100 acres of active farmland. One of my favorite distilleries I found that is helping make this push in Kentucky, much like what Napa Valley has been achieving for decades is Castle & Key Distillery in Frankfort, KY. Castle & Key was built by the bourbon industry's founding father, Colonel E.H. Taylor, in 1887, which was designed to resemble a medieval castle. By 1972, the historic castle distillery structure had been abandoned, and it remained abandoned standing in deteriorating condition for more than 40 years. Will Arvin and Wesley Murry recently purchased and remodeled Castle & Key to give it a look and feel that is modern with Victorian and Neoclassical touches. Below in order is the Castle & Key Distillery, The Bardstown Bourbon Company Distillery, and the plans for Kentucky Owl Park. This is a trip I look forward to taking in the future when the area is more developed!





KENTUCKY OWL PARK



Another One Worth Passing Along

I don't want to get into any major theological discussions or heated religious debates here in the report, but I thought this was a very interesting e-mail sent my direction. I encourage everyone to read and pass along.

Jesus Christ "One Solitary Life,"

*He was born in an obscure village
The child of a peasant woman
He grew up in another obscure village
Where he worked in a carpenter shop
Until he was thirty when public opinion turned against him
He never wrote a book
He never held an office
He never went to college
He never visited a big city
He never travelled more than two hundred miles
From the place where he was born
He did none of the things
Usually associated with greatness
He had no credentials but himself*

He was only thirty three

*His friends ran away
One of them denied him
He was turned over to his enemies
And went through the mockery of a trial
He was nailed to a cross between two thieves
While dying, his executioners gambled for his clothing
The only property he had on earth*

*When he was dead
He was laid in a borrowed grave
Through the pity of a friend*

*Twenty centuries have come and gone
And today Jesus is the central figure of the human race
And the leader of mankind's progress
All the armies that have ever marched
All the navies that have ever sailed
All the parliaments that have ever sat
All the kings that ever reigned put together
Have not affected the life of mankind on earth
As powerfully as that one solitary life.*

Interesting Bible Facts

- There are more than 168,000 Bibles either sold or given to someone in the United States every day.
- 25 million. That's about the number of Bibles that are sold each year in the United States. That's more than double the amount that was sold annually in the 1950s.
- Over 100 million Bibles are printed every year. Consumers in the United States will purchase 25% of those newly printed Bibles every year.
- The percentage of Americans who own at least 1 Bible, whether it was given to them or purchased: 92%. Two-thirds of owners, regardless of religious affiliation, say that the Bible holds the meaning of life.
- The Gideon's International distributed 59,460,000 Bibles worldwide last year. That's more than 100 Bibles per minute.
- Zondervan, a leading Bible publisher, has more than 350 different versions of the Bible that are in print right now. In the world today, there are more than 80,000 different versions of the Bible. There are 900 different versions of the Bible just in English.
- The best selling and fastest growing version of the Bible in the United States is the NIV.
- 82%. That's the percentage of people who regularly read the Bible who will reach for a King James Version before any other.
- The average American Christian owns 9 Bibles and wants to purchase more. For this reason, the Bible is actually excluded from book bestsellers lists because the top spot would never change. The Bible is always the #1 best seller year-after-year.
- YouVersion, a top downloaded Bible app for mobile devices, has over 100 million total downloads and counting. It was one of the first 200 apps that were available on iTunes. It's also been a top 100 free app for several consecutive years.
- More than 66,000 people are using a Bible app at any given second. 3 people share a Bible verse on their social network every second as well.
- Isaiah 53:5 is the most shared Bible verse on the internet today.



**"But he was wounded for our transgressions,
he was bruised for our iniquities:
the chastisement of our peace was upon him;
and with his stripes we are healed."**

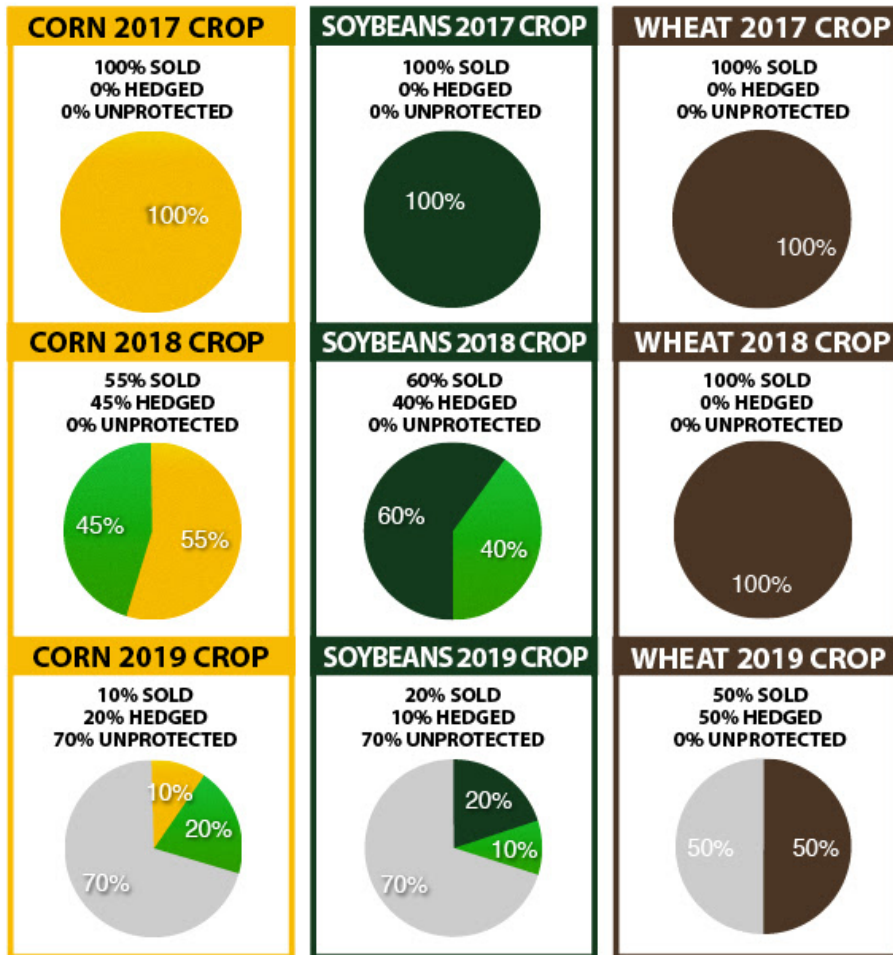
Isaiah 53:5 (KJV)

King James Bible Online .org

ANSWER to riddle: A Joke.

CASH SALES & HEDGING TOTALS

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