

A Critical Supply Chain **We Don't Control**

The raw materials behind America's food supply run through some of the world's most unstable regions.

~50%

of global seaborne sulfur originates in the Middle East

Source: S&P Global

78%

of U.S. animal feed vitamins are imported from China

Source: AFIA

~70%

of the world's crop protection ingredients are produced in China

Source: American Farm Bureau Federation



The Passage That Feeds America

The United States is one of the most productive agricultural nations on earth. But the raw materials that make productivity possible tell a different story.

Nearly half of the world's seaborne sulfur moves through the Persian Gulf. More than a third of global urea exports transit the Strait of Hormuz. When that strait closes, the materials that supply global fertilizer production stop moving.

Source: S&P Global

Missing Ingredients

The vitamins that keep American livestock healthy are made almost entirely in China. So are the chemicals that protect American crops from pests and disease.

These aren't isolated exposures. They are the compounded result of decades of decisions that prioritized low-cost global sourcing over supply chain resilience.

A nation whose food security depends on its most vulnerable foreign supplier isn't as food-secure as it looks.

Sources: AFIA | American Farm Bureau Federation



The Path Forward

The forces squeezing American families and farmers are global, geopolitical, and slow to reverse. That doesn't mean there's nothing to be done. But it does mean that solving the problem starts with a clear understanding of the root causes and a willingness to act on them.



Homegrown

Help American farmers access homegrown inputs.



Build Capacity

Invest in domestic fertilizer, vitamin, and crop protection production to reduce exposure to foreign disruptions.



Strategic Reserves

Develop strategic reserves for critical agricultural inputs before the next disruption forces the issue.