



IGP Institute



2017 Kansas Soybean Partner Update

Jay O'Neil

IGP Institute Senior Agricultural Economist

+ New Faces



- Kelly Hannigan, Program Services Coordinator



- Trina Adams, Distance Education Coordinator



- Shawn Thiele, Grain Processing and Flour Milling Curriculum Manager



+ KS Soybean Support

- Annual Marketing Grant supports staff and programs
 - Additional marketing integration



+ 2016 IGP Accomplishments



On-site/on-location

- 36 courses, 943 participants, 48 countries

Distance

- 42 courses, 1,009 participants, 33 countries



Total: 78 courses, 1,952 participants, 69 countries

+ Soybean Impact

- To date in 2016, the IGP Institute has trained 180 people in 10 soybean-specific on-site and on-location courses.



+ Soybean Impact



- To date in 2016, the IGP Institute has trained 754 people in 24 soybean-related distance courses.



+ Soybean Impact

- To date in 2016, the IGP Institute has trained 436 people in 10 soybean-related on-site and on-location courses.



+ Soybean Advocacy

- Members of the IGP Institute team advocated the use of Kansas and U.S. soybeans at 26 events domestically and around the globe.

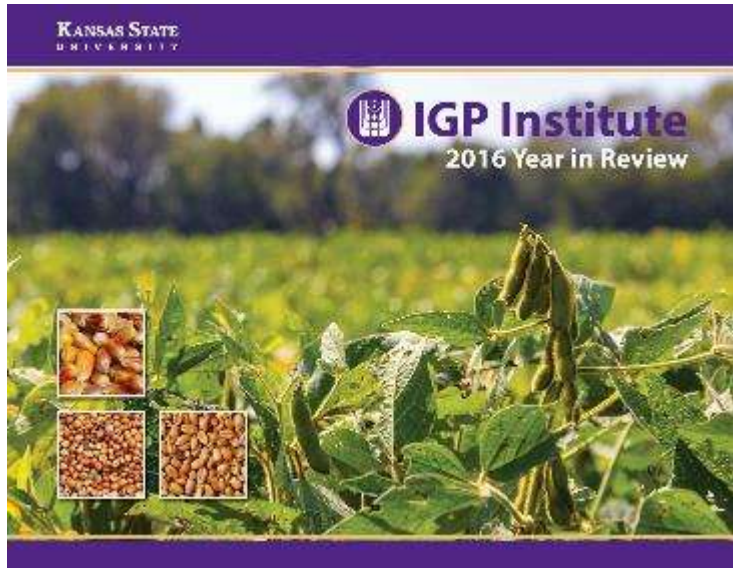
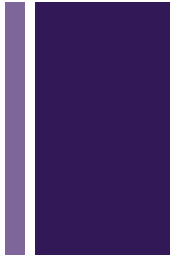


+ KS Soybean Commission Funding

- Through your funding of IGP Institute Conference Center technology and marketing programs, we are putting your producer dollars to good work. We are working every day to be deserving of your funding and your confidence.

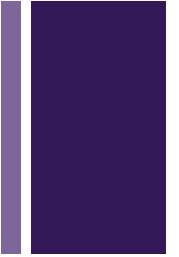


+ Recognizing Our Partnership





- U.S. Election – What it Means to International Trade
- NAFTA (Canada & Mexico)
- Trade Protectionism and Intl'. Retaliation
- China Response
- China Policy on Corn, DDGS and Soybean Imports.
(China Trade Ministry Told to be Ready for Tough
Response in 2017.)



- Growing Global Corn, Wheat & Soybean Production in Black Sea Region
- Monsanto Canada Says Early Maturity Varieties being developed over next 5 Years that will increase Canada Soybean Planted Acres from 7-8 million to 15-18 million acres.

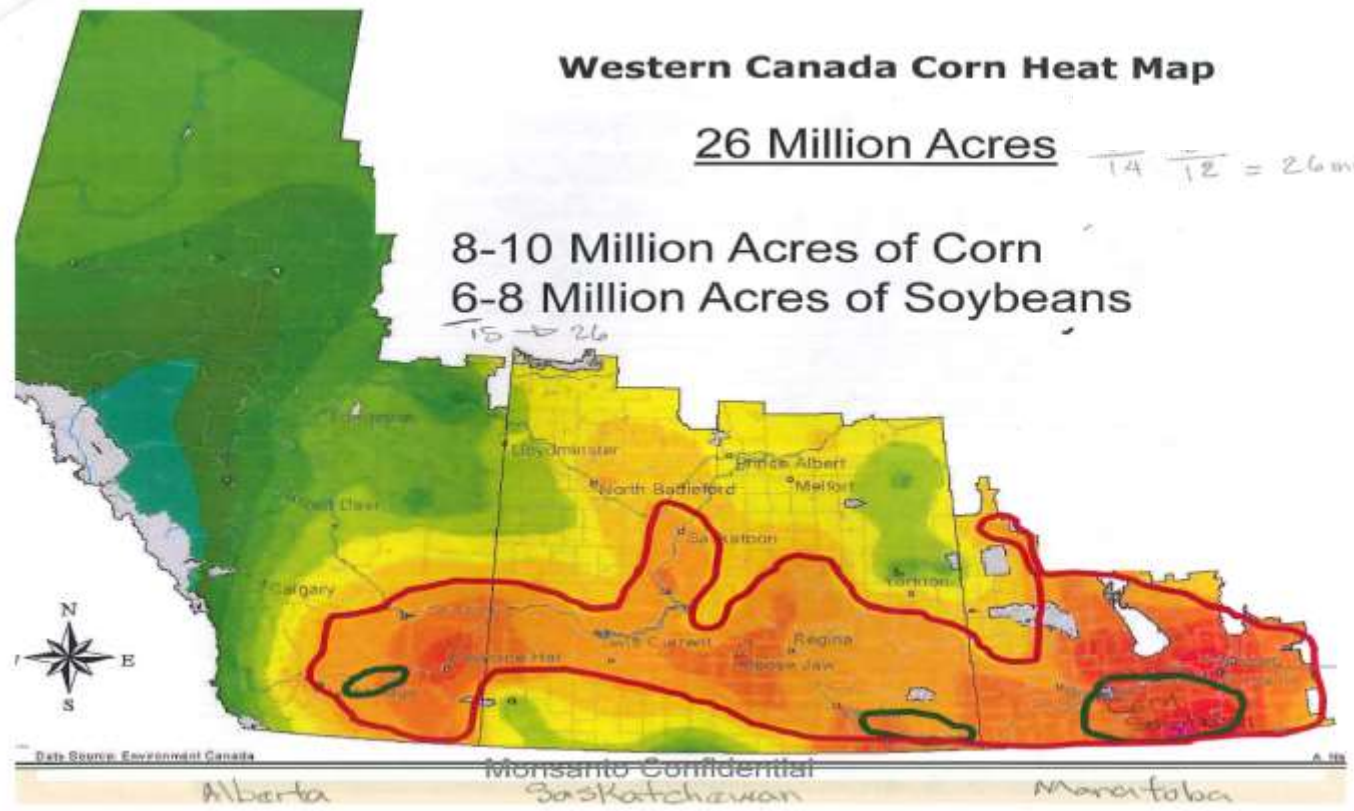


Western Canada Corn Heat Map

26 Million Acres

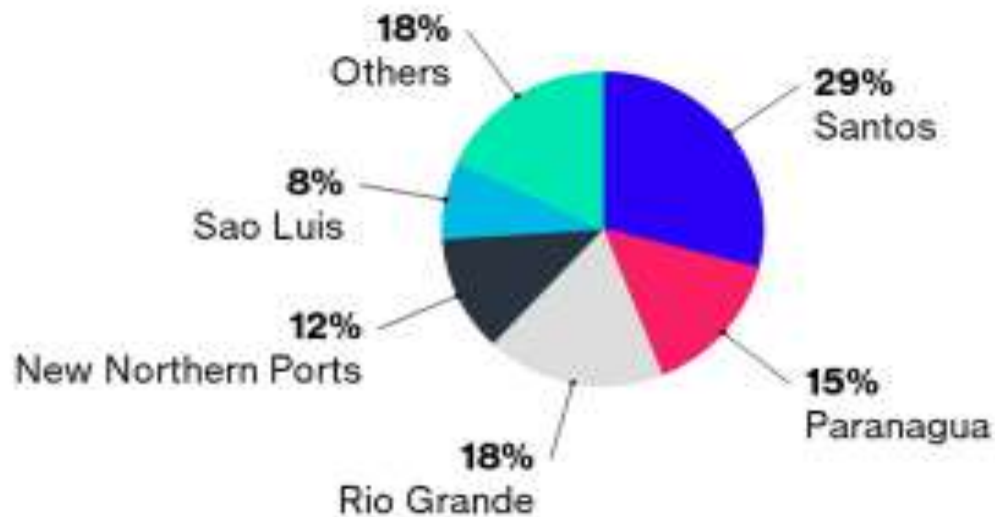
$$\frac{14}{12} = 26 \text{ mil}$$

8-10 Million Acres of Corn
6-8 Million Acres of Soybeans



Brazil's Soybean Trail

Shipments by port, in % of total exports*



Source: Anec

*From Jan.-Nov. 2016

Bloomberg 



Private Investment in infrastructure

- Cargill, Bunge and LDC to Build \$4-bln 580-mile RR from Sinop, Mato Grosso to River Barge Loaders in Itaitube



FIGURE 3.1 Soybean export routes are beginning to shift towards northern Brazil



Source: USDA, AMS, Brazil Soybean Transportation, August 10, 2011, 1.

Panama Canal – Shipping Routes

- Suez Canal Discounting Tolls- more Competitive
- Artic Route
- Going Around The Cape

New freight opportunities interest China along the Northern Sea Route (NSR) as ice recedes. In 2010 four ships took the route. Last summer 71 vessels did so. Each ship that takes the route must, at certain points, be accompanied by an ice-breaker, so it is unclear how soon the NSR will be suitable for mass transit, if at all <http://recon.st1mw823d>



Substituting for #shipping? 'China freight train' in first trip to Barking
#rail #maritime #substitution #economics



'China freight train' in first trip to Barking - BBC News

China launches a direct rail freight service to London, as part of its drive to develop trade and investment links with Europe.

bbc.co.uk

First Train from China to UK made trip in 18 Days over 12,000 km, reportedly half the time of a Vessel and much more timely than Amtrak.

+ Thank You

- The IGP faculty and staff say . . . Thank You!



BIOGRAPHY

Jay O'Neil
Senior Agricultural Economist
International Grains Program, Kansas State University
Manhattan, Kansas, USA

Jay graduated from San Jose State University in 1973 with a degree in Political Science-International Relations.

He has 44 years' of trading and management experience in the Grain industry. Jay started out of college with Continental Grain Company in San Francisco, CA.

He worked 4 years with Continental Grain as a Grain Trader on the West Coast of the United States. Then 7 years with the Pillsbury Company of Minneapolis, MN as an Export Grain Merchandiser and Director of Overseas Grain Sales.

He served 3 years with the Ferruzzi Group of Ravenna Italy, in their New Orleans office, managing Feed Grain exports from the U.S.

Jay was with Bartlett Grain Company for 17 years managing a Grain Trading Group and served as General Manager of the Transportation and Export Divisions.

For the past twelve years Jay has operated his own Private Consulting Company and traveled to 44 different countries on market and business development projects. Jay publishes a private weekly ocean freight and transportation report.

Jay is currently employed as the Senior Agricultural Economist for the International Grains Program at Kansas State University in Manhattan, Kansas and has enjoyed his work here for the past ten years.

Jay served for many years on the NGFA (National Grain & Feed Assoc.) Trade Rules committee. Jay is also a past Chairman of the NAEGA (North American Export Grain Assoc.) Contracts and Arbitration Committee and is an emeritus member of this committee.

Jay continues to serve as an arbitrator with the NAEGA Trade Association.