

National Renderers Association



Feed Industry & Renderers Report

October 20, 2011

Marana, AZ



Hurricane & Earthquake – 1 Week



Consensus – Not Cause of This!



8-25-11

Discuss with you today:

- **Overview of Priority Industry Issues**
- **Food Safety Modernization Act (FSMA)**
- **Safe Feed / Safe Food Certification Programs**
- **AFIA Sustainability Initiative**

Feed & Food Safety

- **1—Food Safety Modernization Act Implementation**
- **2—Safe Feed/Safe Food 3rd Party Certification Recognition**
- **2—*Salmonella* Regulation and Research**
- **1—Dioxin Regulation and EPA Reassessment**

Avail. & Cost Effectiveness of Ing.

- **1—CFTC Rulemaking – speculative position limit exemptions**
- **1—GRAS Proposed Rulemaking and GRAS Notice Process/AAFCO Process**
- **1—Energy Policy - biofuels**
- **2—Farm Bill Negotiation (including CRP Acreage)**

Global Competitiveness

- **2—New Codex *ad hoc* Intergovernmental Task Force on Animal Feed**
- **1—Animal Welfare**
- **1—Trade Agreements (Colombia, Korea, Panama, Trans Pacific Partnership)**

Health, Safety & Environment

- **1—EPA Dust Standards (Particulate Matter)**
- **1—Green House Gas—EPA Efforts**
- **1—EPA Chromium and Manganese Standards**
- **1—OSHA Initiative on Combustible Dust**

Access & Availability of Technology

- **1—Antibiotic Resistance/VFD**



**Commissioner of Food & Drugs Dr. Margaret Hamburg
(left) and Secretary of HHS Kathleen Sebelius**

Food Safety Modernization Act

“Law represents a sea change for food safety in America”

Dr. M. Hamburg, FDA Commissioner

“Most significant change in FDA regulation of Feed since 1958”

Richard Sellers, AFIA

New Law Applies To



All Ingredient Processing



All Feed Manufacturing



Pet Food



Feed & Ingredient Imports



Transportation

New Law Applies To

SEC. 103. HAZARD ANALYSIS AND RISK-BASED PREVENTIVE CONTROLS.

(a) In General- Chapter IV (21 U.S.C. 341 et seq.) is amended by adding at the end the following:

SEC. 418. HAZARD ANALYSIS AND RISK-BASED PREVENTIVE CONTROLS.

(a) In General- The owner, operator, or agent in charge of a facility shall, in accordance with this section, evaluate the hazards that could affect food manufactured, processed, packed, or held by such facility, identify and implement preventive controls to significantly minimize or prevent the occurrence of such hazards and provide assurances that such food is not adulterated under section 402 or misbranded under section 403(w), monitor the performance of those controls, and maintain records of this monitoring as a matter of routine practice.

Hazard Analysis & Preventive Controls

Conduct Hazard Analysis

- **Develop & implement written preventive controls plan: monitoring, verification, corrective actions, record keeping**
- **Regulations due 18 months (July 2012)**
- **FDA may exempt or modify requirements for facilities that are “solely engaged in the production of food for animals other than man”**

Inspections:

- **Inspect registered Facilities according to risk profile**
- **Minimum inspection once every 5 years**
 - >High Risk-within 5 years; every 3 years**
 - >Low Risk-within 7 years; every 5 years**
- **Regulations due 18 months (July 2012)**

Performance Standards

- Review of relevant health data to determine most significant food borne contaminants and where appropriate, contaminant specific performance standards
- Shall exempt or modify requirements for facilities that are “solely engaged in production of food for animals other than man”
- Not less frequently than every two years

AFIA Action Re: FSMA

- **Five Working Groups (50 companies):**
 1. Records and registration;
 2. Hazard ID and risk based prevention programs;
 3. Performance standards;
 4. Mandatory recall and administrative detention; and
 5. Foreign supplier verification/qualified importer program.
- **Guidance Documents**

NRA & AFIA Ahead of FSMA Curve

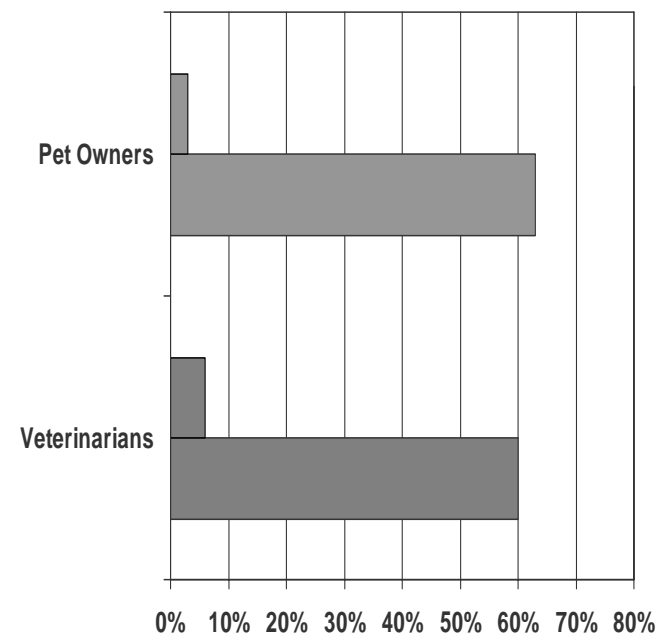
- APPI & Safe Feed/Safe Food will allow participating members to meet FSMA's upcoming requirements
- Opportunity for official recognition

APPI



Pet Food Need/Opportunity

- Pet owners/veterinarians focus on safety
- Survey data – certification program could fill gap
- More than SF/SF was needed
 - Pet food specific needs
 - Consumer marketing push –
 - Specific pet food seal
 - Unified industry voice on safety



How much more confident would you be in the safety of a pet food if the manufacturer was identified as having met the rigorous standards of a voluntary certification program for the handling and processing of food?

Trone Research, 2010

PFMCP

- SF/SF is basis
- Plus pet food specific items
 - Food safety program
 - Microbial control
- Intended for manufacturers and ingredient suppliers



Pet Food Safety Program

- **Program based on principles of HACCP**
 - Hazard analysis completed; hazards identified
 - CCPs/Preventive controls identified
 - Critical limits established
 - CCPs/Preventive controls monitored/verified
 - Corrective actions
 - Records retained
 - Verification
- **Anticipate FSMA requirements**



Microbial Control

- Traffic flow to minimize likelihood of contamination
- Appropriate cleaning procedures
- Appropriate “kill steps” exist and validated
- Minimize post kill step contamination
- Environmental monitoring
- Finished product monitoring



Consumer/Industry Outreach

- **AFIA focus = marketing to industry**
 - Trade press
 - Affiliated groups – endorsements
 - Pet food influencers/retailers (e.g. Petco, PetSmart, Walmart)

- **Certified facilities = direct to consumer**

www.assuredpetfood.org





Our Responsibility, Our Promise: Assuring Pet Food Safety

SEARCH

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[FAQS](#)

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SAFE FOOD IS OUR PROMISE TO PETS

Pets depend on humans to watch out for their safety—even at mealtime. But it's not always easy to know which foods are right for your furry family members. The *Assured & Approved Pet Food Seal* was created by people who have pets, who love pets and who want pet foods to be manufactured with only the highest safety standards.

Our rigorous, *independent tests* require pet food manufacturers to exceed current FDA regulations so you can feel confident about the food you're feeding your pet.





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Pet Owners
Veterinarians
Manufacturers

WHAT THE SEAL MEANS TO YOU



I'm a pet owner



I'm a veterinarian



I'm a manufacturer



Who Certifies

Certification Process

Certified Facilities

CERTIFIED FACILITIES

Choose the brand or type of pet food you are considering to see if it has received the Assured & Approved Pet Food Certification.

Search by Brand or Type of Food

Brand: or Type of Food:

Search by State



Program Rollout

- **AFIA membership = Oct. 7**
 - Applications are coming in
 - First audit in process

- **Pet food industry and media = target Nov. 4**
 - News release
 - Website launch
 - Brief FDA, AAFCO, associations
 - Anticipate media interest



More Than A Current Buzz Word

“Sustainability is an emerging business megatrend, like electrification and mass production, that will profoundly affect companies’ competitiveness and even their survival.”

**~ Davis A. Lubin and Daniel C. Esty
Harvard Business Review**

Feed & Food Industry – Mega Change

- **Global population expansion & increased animal protein demand**
- **Increased U.S. biofuels use of corn & soybeans as primary feedstock**
- **Low grain & oilseed inventories**
- **Increased social interest in food production**
- **Increasing global regulation & trade standards**
- **Limited natural resources for food production**

AFIA Task Force Objectives:

- Define how the U.S. feed industry should contribute the sustainability of the feed and animal production industry and how this effort needs to be organized to be successful.
- Identify what is currently being done in the broader agriculture industry and by whom, with a focus on where and how the feed industry should align with broader efforts.
- Define the role AFIA should play, representing the feed industry, in fulfilling the defined sustainability plan and communicating a proactive and responsive message to the appropriate audiences?

Feed Industry Definition of Sustainability

A sustainable feed industry provides a continuous, safe and nutritious feed supply for poultry, livestock, fish and pets in a manner that optimizes environmental quality and the use of natural resources, while positively affecting the social and economic well-being of customers, their communities and the industry.

Key Focal Points

- 1. Continuously Improve Feed and Food Safety**
- 2. Optimize the Use of Energy and Natural Resources**
- 3. Promote Understanding & Appreciation of U.S. Food Production**
- 4. Maximize Production Efficiency & Productivity**
- 5. Embrace Innovation**
- 6. Support the Community**

Continuously Improve Feed & Food Safety

- **Promote SF/SF Certification Program and/or International SF/SF participation**
- **Support existing and promote adoption of new science-based proven technologies & processes.**

Continuously Improve Feed & Food Safety

- **Promote SF/SF Certification Program and/or International SF/SF participation**
 - *Objective: SF/SF is the accepted industry standard and the number of certified facilities and tonnage produced in certified facilities is significantly more than doubled in 3-5 years (from 2010 base).*
 - **Establish SF/SF Advisory Task Force**



AFIA Feed Safety Stair Steps



Optimize the Use of Energy and Natural Resources

- Provide information and education to the feed industry concerning product life cycle (PLC) responsibility:



Promote an Understanding and Appreciation of U.S. Food Production

- Evaluate existing research on consumer attitudes/values to increase AFIA and industry understanding.
- Educate AFIA members on available resources to increase understanding and appreciation of food production.

Promote an Understanding and Appreciation of U.S. Food Production

- Educate AFIA members on available resources to increase understanding and appreciation of food production.



Promote an Understanding and Appreciation of U.S. Food Production:

Altech Kidzone
learning about farming, food and the environment

Home About Dig In A Day in the Life... Fun & Games Careers More Resources

Welcome
Welcome to Kidzone, a new and fun website which teaches you about food, farming and the importance of healthy eating. Our site offers worksheets, games, and quizzes that will help you learn about life on the farm, the surrounding environment and where your food comes from. This site has been created by Altech in conjunction with Agri Aware, the Irish agri-food educational body.

Find us on Facebook

A Day in the Life of a Horse Trainer and Junior Rider
Cathy has been training, competing and teaching the sport of dressage existing in horses and people all her life. She operates a training center for up and coming riders, including young people just learning the basics. Louise is learning how to ride and jump on his pony Rob.

Altech Kidzone
learning about farming, food and the environment

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Competition and Games

Altech Four Kids - Horse Sports Explained
First Lady of the Commonwealth of Kentucky, Jane Beahar, describes the eight horse sports which make up the Altech PEI World Equestrian Games coming to Kentucky in 2010

Horse Coloring Book
Keep your children busy and teach them about the Altech PEI World Equestrian Games with our horse-themed coloring book. This 12-page booklet features ready-to-color sketches of each of the eight disciplines which will make up the 2010 Altech PEI World Equestrian Games. The whole book is available here as in PDF format for you to print off.
Download it Now!
(PDF format - file size: 495 KB)

Eight World Championships of Horse Sports Explained
The First Lady of the Commonwealth of Kentucky Jane Beahar gives us a simple guide to the eight horse sports which make up the 2010 Altech PEI World Equestrian Games, the world championships which take place in Kentucky, USA, September 25-October 10, 2010. Will you be there?

GAME CORNER
Yonda Farmer
Do you want to experience some country life, like never before? Then here is Yonda Farmer! Run your farm, grow your crops and provide all those with the supplies they need. It's up to you to keep all eaters in this little village happy with your beautiful farm products.
You start off with a little farm providing the baker with his flour to make bread for the villagers. During the game you can upgrade your farm with a chicken coop, stables for

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Careers

Careers in Agriculture
Listen to what these people do everyday and learn about some of the many interesting jobs there are in modern agriculture which help to provide us with the good food today!

Kate
The Nutritionist

Researcher
A researcher is somebody who studies animals and discover new ways to improve the animals health and performance.

Farmer - The Sales Manager
A sales manager is somebody who talks to customers and helps them to decide which kinds of feed products would be best for their animals.

Watch this space for insights into more careers in agriculture... coming soon! If there is an agricultural career that you would like featured here, please send us your suggestion by emailing kidzone@altech.com.

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learning about farming, food and the environment

Home About Dig In A Day in the Life... Fun & Games Careers More Resources

Dig In!
Learning Modules

What is the Dig In Program
The Dig In! resource pack contains 48 lesson plans which are all intrinsically linked to the Science, Geography and SPHE (Social, Personal and Health Education) curricula. The lessons deal with the subjects of Farming, Cattle, Sheep, Pigs, Poultry, Fruits and Vegetables, Cereals and Grasses and Healthy Eating. The lessons also cover environmental subjects which include the Hedgehog, Air, Trees, Water and Soil.

Parent and Teacher Guide
Kidzone is a resource which may be used by teachers and parents alike to supplement classroom work, projects or assignments or indeed as a resource for children to learn about modern agriculture, the natural environment and where and how our food is produced. The program has been developed in line with the school curricula in Ireland however the global reach of this program is obvious.

Module	Age Level
Module 1	4-7 yr olds
Module 2	7-9 yr olds
Module 3	9-11 yr olds
Module 4	11-17 yr olds

The Feedback and Skills...
Please use this feedback in your report, and please do appropriate evaluation like the feedback form in order to view and give.

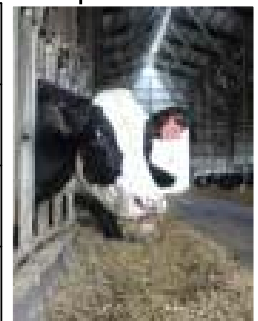
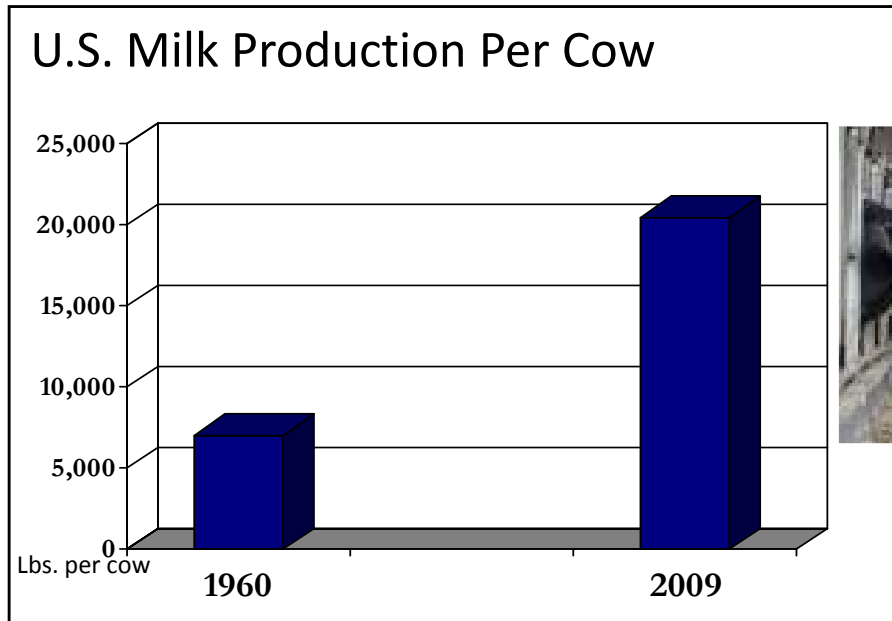
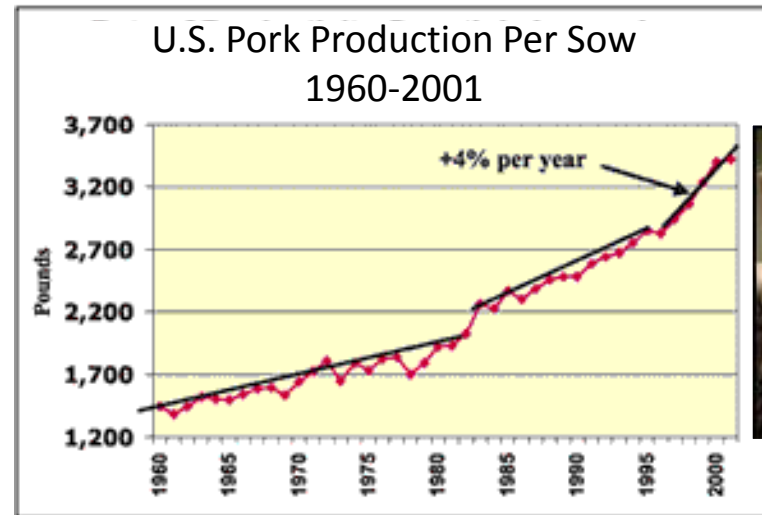
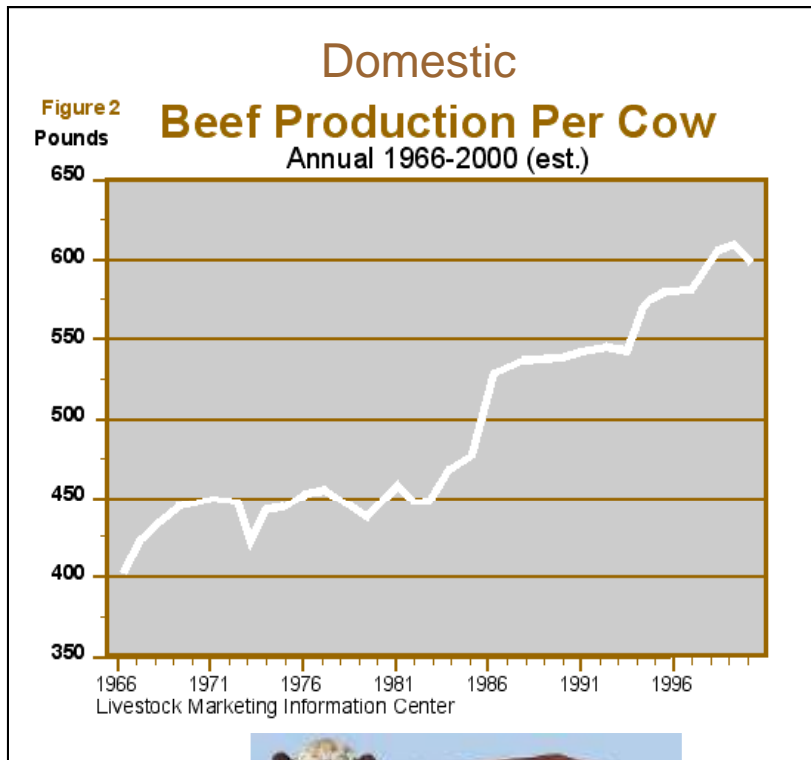
Select from these topics:

- The Farmer
- Cattle
- Healthy Eating
- Sheep

Production Efficiency & Productivity

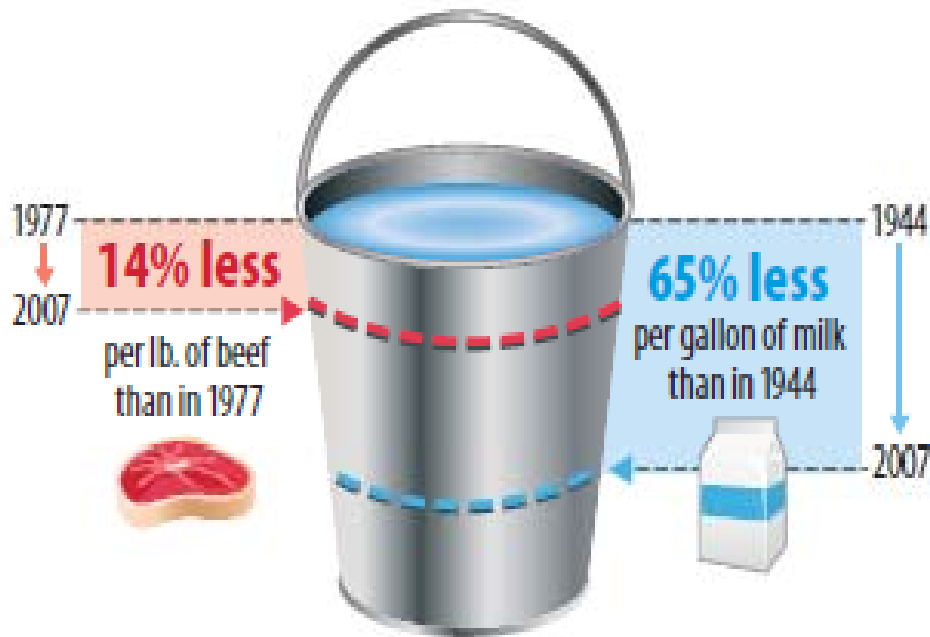
- **Provide information and education on proven science based nutritional practices/technologies to maximize animal health, wellbeing and productivity while minimizing the environmental impact.**

U.S. Ag Productivity

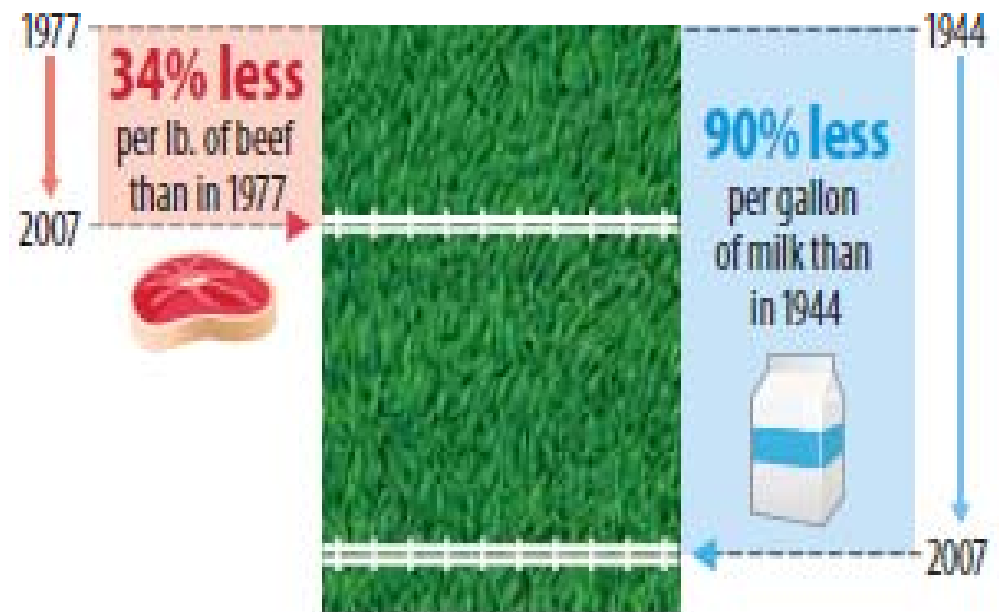


Sustainability Through Technology

Water Usage

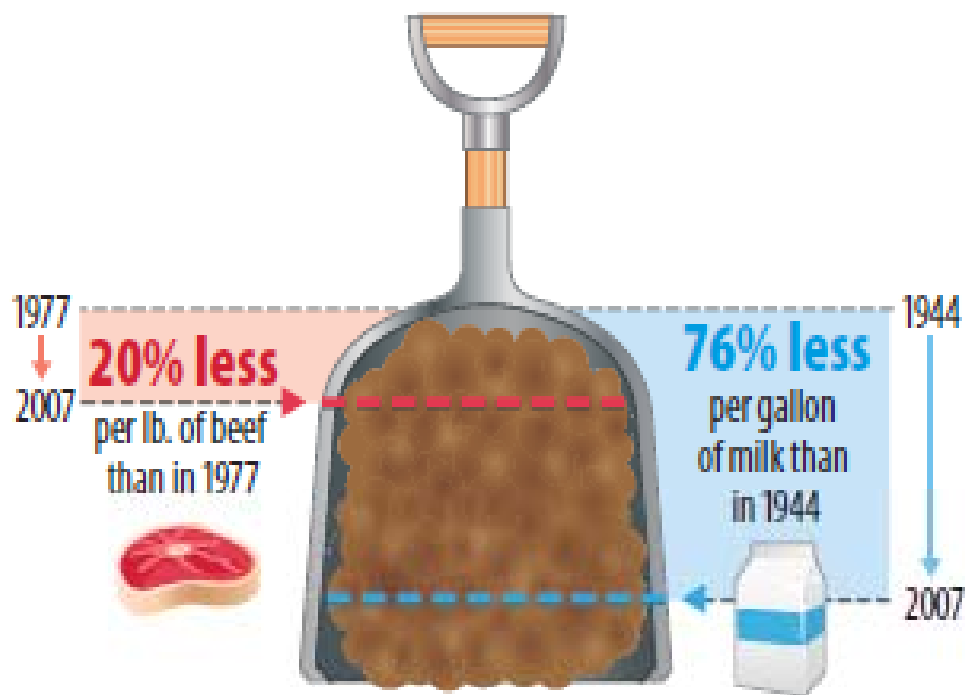


Land Usage

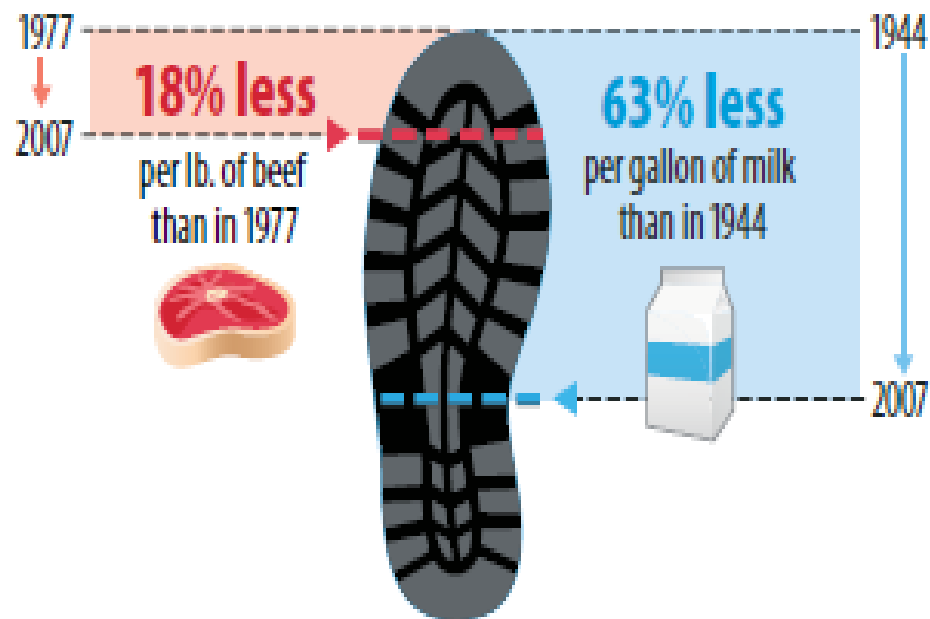


Sustainability Through Technology

Manure Production



Carbon Footprint



Embrace Innovation

- **AFIA will provide a forum for the presentation and discussion of emerging sustainable Food Production technologies.**

The Challenge that Lies Ahead



In the year **2050**,
the world **population**
will require

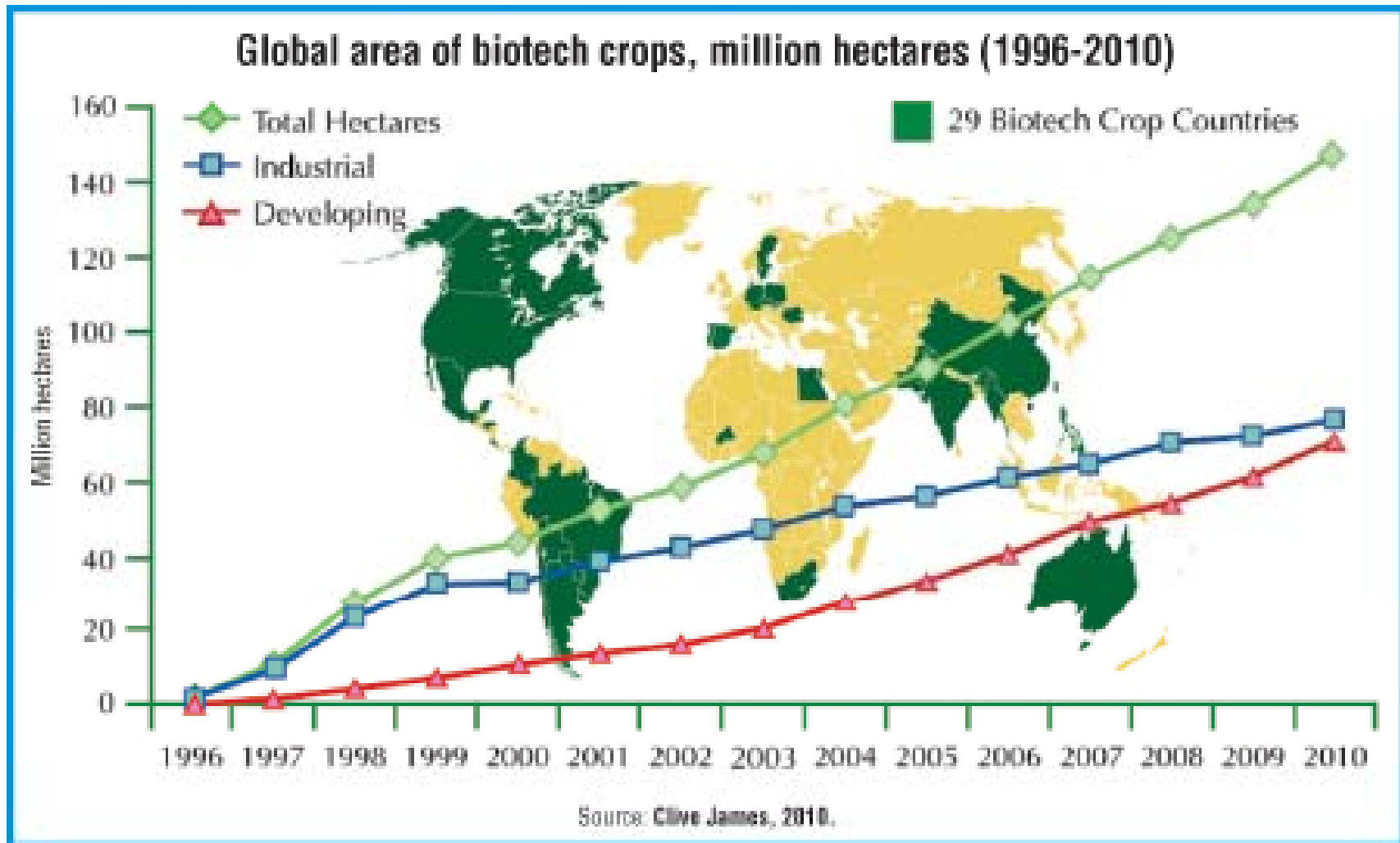


100%
more **food**,¹ and



70%
of this food must come from
efficiency-improving **technology**²

Biotech Crops in Global Market



Support the Community

- **Encourage community involvement by AFIA members.**
- **AFIA serve as the collection point for AFIA membership's collective community involvement, financial contributions and employment impact on the community.**

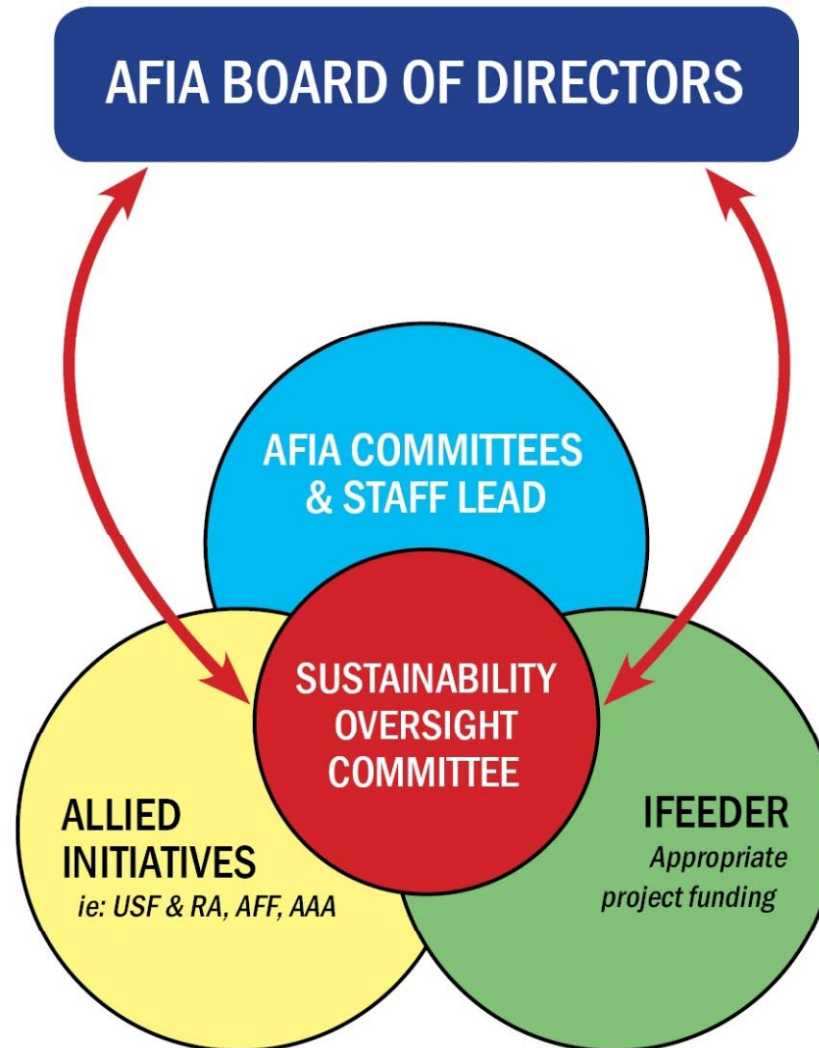
Communicate to Targeted Audiences

- How feed and food safety is being continuously improved and what it means to them.
- How the feed industry is responsibly using energy and natural resources and what it means to them.
- Identify feed industry spokespeople to promote the message for specific topics.
- How nutrient utilization is being continuously improved and what it means to them.
- The feed industry's comprehensive community support and what this means to them.

Collaborate with the Food Industry

- On issues related to food safety.
- On issues related to responsible use of energy and natural resources.
- On education of the industry, government and consumers
- On issues related to nutrient utilization.
- To support technologies consistent with our industry sustainability objectives.
- On issues related to supporting the community.

AFIA Sustainability Initiative



AFIA's 4 Promises to Our Members...

Thank you!
Discussion

Our 4 Promises to our members...

We Will Provide Expert
Legislative & Regulatory
Leadership.



Our 4 Promises to our members...

We Will Offer Confidential
Individual Staff Expertise
on Demand.



Our 4 Promises to our members...

We Will be the Active
Voice for the Total Feed
Industry.



Our 4 Promises to our members...

We Will Offer Unparalleled
Member Services



Salmonella Research & Survey

- Proactive approach to key regulatory focus
- 4000 blind samples of feed & ingredients across country
- Publish if do not find 8 serotypes FDA identified (others not pathogenic to animals)
- Dr. Meeker & NRA partners in this effort
- Funded by NRA/APPI, Pork Board, NGFA, Corn Refiners, IFEEDER, USPEA, and ARS