

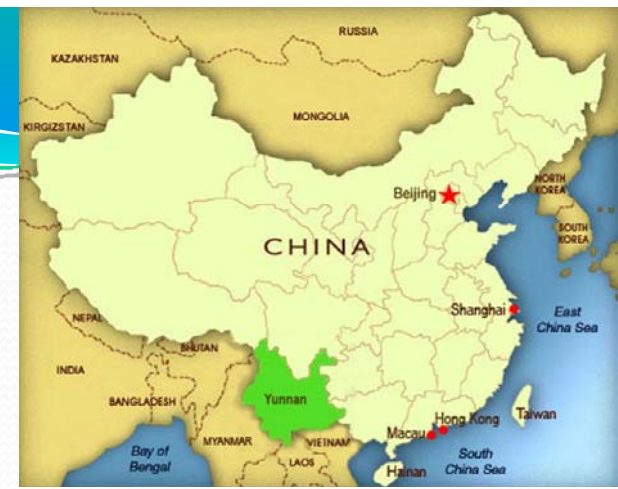


NRA Asia Regional Office 2011 Report

-Activities, Issues and Opportunities



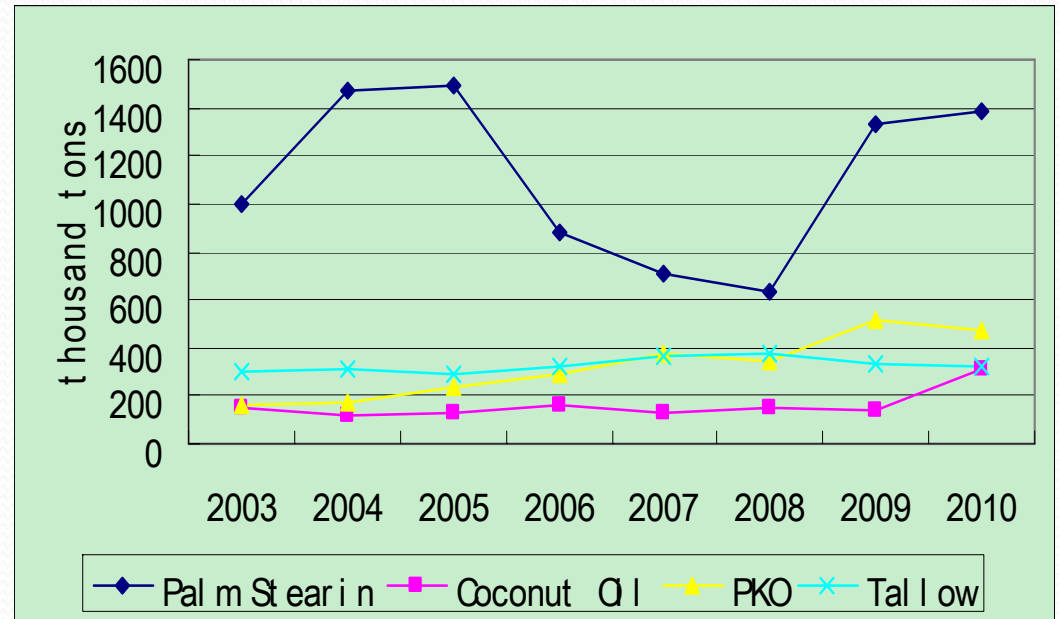
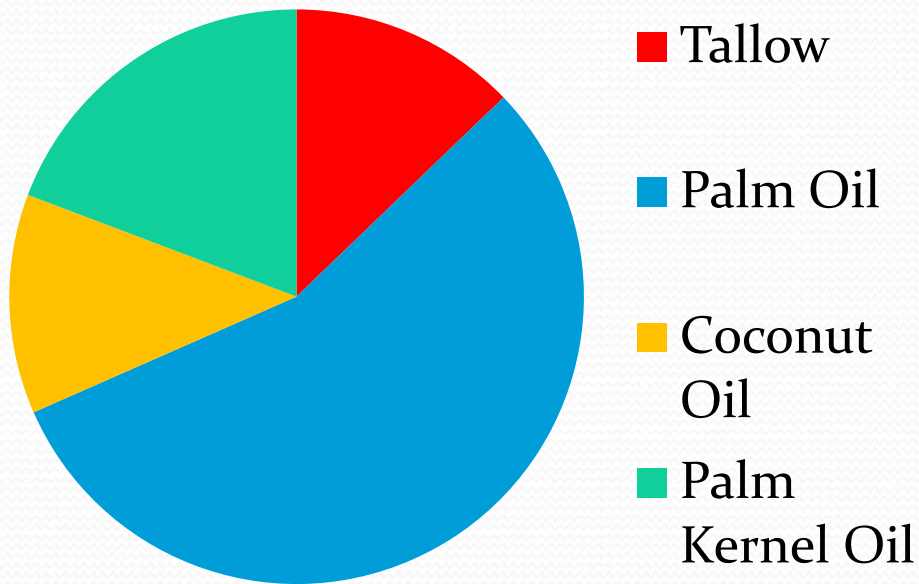
China



1. Oil Import for Chinese Oleo Chemical Industry and Tallow Update
2. China Feed Industry and Non-Ruminant Protein Export

Imported Oils for Oleo Chemical 2010

Import Volume (MT)



China imported ~327,000 MT from Australia (68%), NZ (30%) and Uruguay (2%) in 2010.

Tallow Market Update

- The ban of tallow from “BSE controlled risk countries” was lifted in July 2010
- Current situation of import requirement negotiation between CFIA and AQSIQ
- Current situation of import requirement negotiation between APHIS and AQSIQ

NRA Activities in Market Access of US Tallow

- NRA sponsored two AQSIQ non-ruminant protein delegations to observe US cattle slaughter house and tallow rendering facilities and negotiate with APHIS in Dec 2011 and Apr 2011
- NRA assisted China Cleaning Industry Association to submit petition through People's Congress to request AQSIQ/MOA finish import requirement for the consecutive forth year in March 2011
- NRA Vice President met with AQSIQ Tallow Issue Leader

AQSIQ Delegation



Promotion of US Tallow in 2010 Annual Convention of China Cleaning Industry Association



Promotion of US Tallow

美国牛油
——世界由此更美好

NRA
NATIONAL RENDERERS ASSOCIATION
美国动物蛋白及油脂提炼协会亚洲部

美国牛油 世界因你而美丽

NRA
美国动物蛋白及油脂提炼协会亚洲部
National Renderers Association

美国牛油
世界由你而美丽!

牛油做香皂的可塑性强，不容易融化，全透明皂的必需油脂。

NRA
NATIONAL RENDERERS ASSOCIATION
美国动物蛋白及油脂提炼协会亚洲部

2010年7月22日，中国质量监督检验检疫总局与农业部联合发布2010第73号公告，宣布有条件恢复从美国、加拿大等国家进口牛油。

Use of tallow in China's chemical and energy industries

- 一、肥皂及洗涤用品：干洗皂，纺织用皂，化妆品用皂
 - 透明皂的配方一般设有牛油的比例添加量(下限)
- 二、硬脂及其他脂酸：
 - 轮胎制造业
- 三、脂肪醇的用途：
 - 表面活性剂；杀菌剂，防腐剂，纤维柔软剂
 - 增塑剂；聚氧乙烯增塑剂
 - 化妆品及医药：乳化剂和软膏体基质，化妆品中的香料和膏体类基质
 - 润滑油添加剂 ● 叶面蒸发防止剂
- 四、脂肪酸的用途：
 - 树脂及塑料助剂 ● 油墨助剂 ● 抗静电剂 ● 橡胶用添加剂 ● 润滑油添加剂
 - 纤维改性剂 ● 泡沫稳定剂、乳化剂、增稠剂 ● 防腐剂
- 五、生物柴油：(Biodiesel)

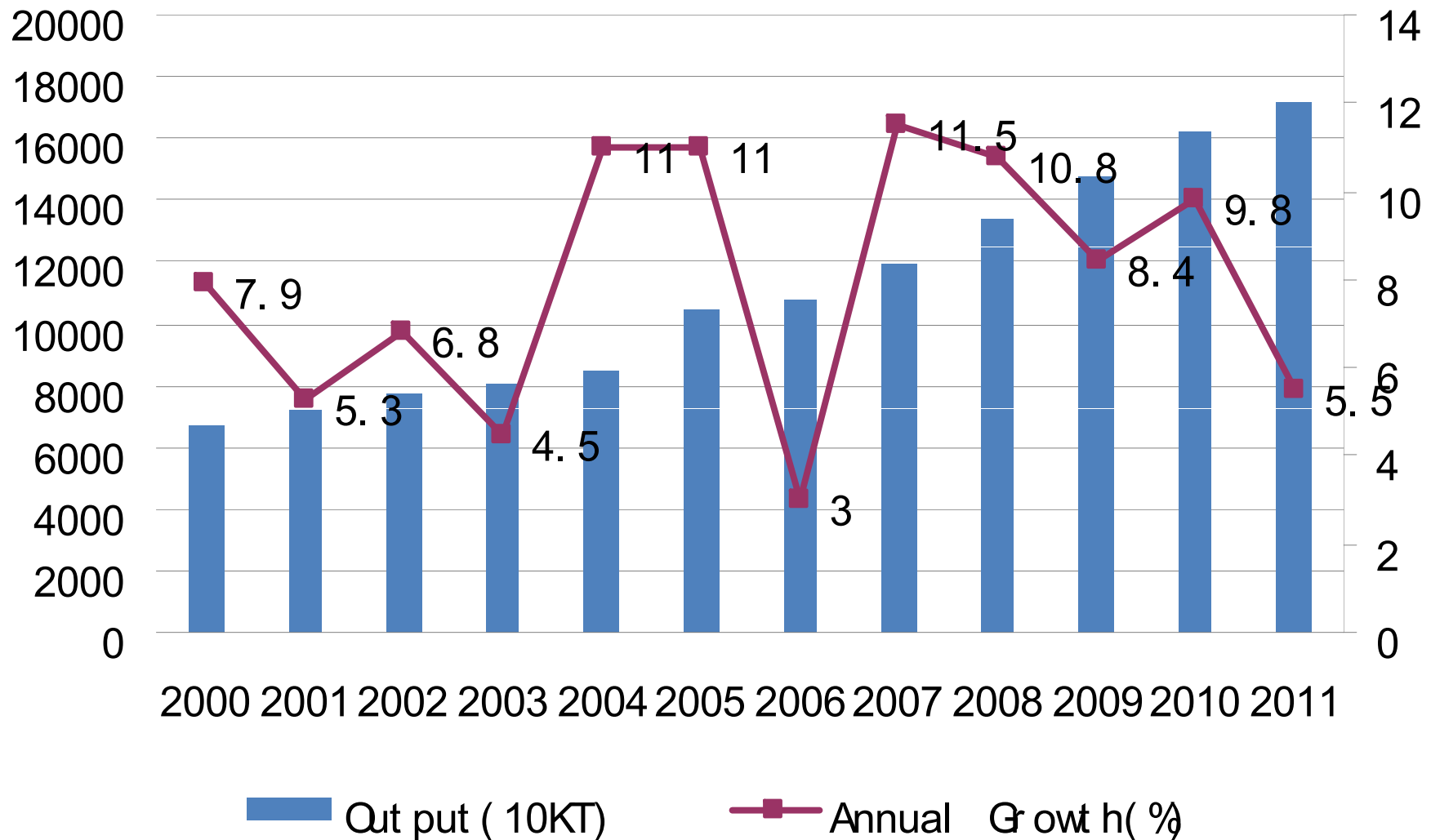


Booth Design in 2011 Annual Convention of China Cleaning Industry Association in Beijing



China's Feed Industry

Output of Chinese feed in the last 10 years



Export of Non-Ruminant Proteins

- Registration with MOA and AQSIQ
- Update of on-Port PCR test for Ruminant DNA
- Ban over use of animal proteins in ruminant feeds
- Avian Influenza on PBM and FeM in VA, PA, TX, AR
- Taxation issue of Rendered Proteins, especially FeM
- China's National Standards Rendered Products:
 - (1) Meetings and negotiations;
 - (2) Demonstration trials
 - (3) Sponsoring 2 delegation of key “feed specialists” in MOA system to meet NRA members, observe US rendering practice, and discuss quality indices of rendered products with NRA members.

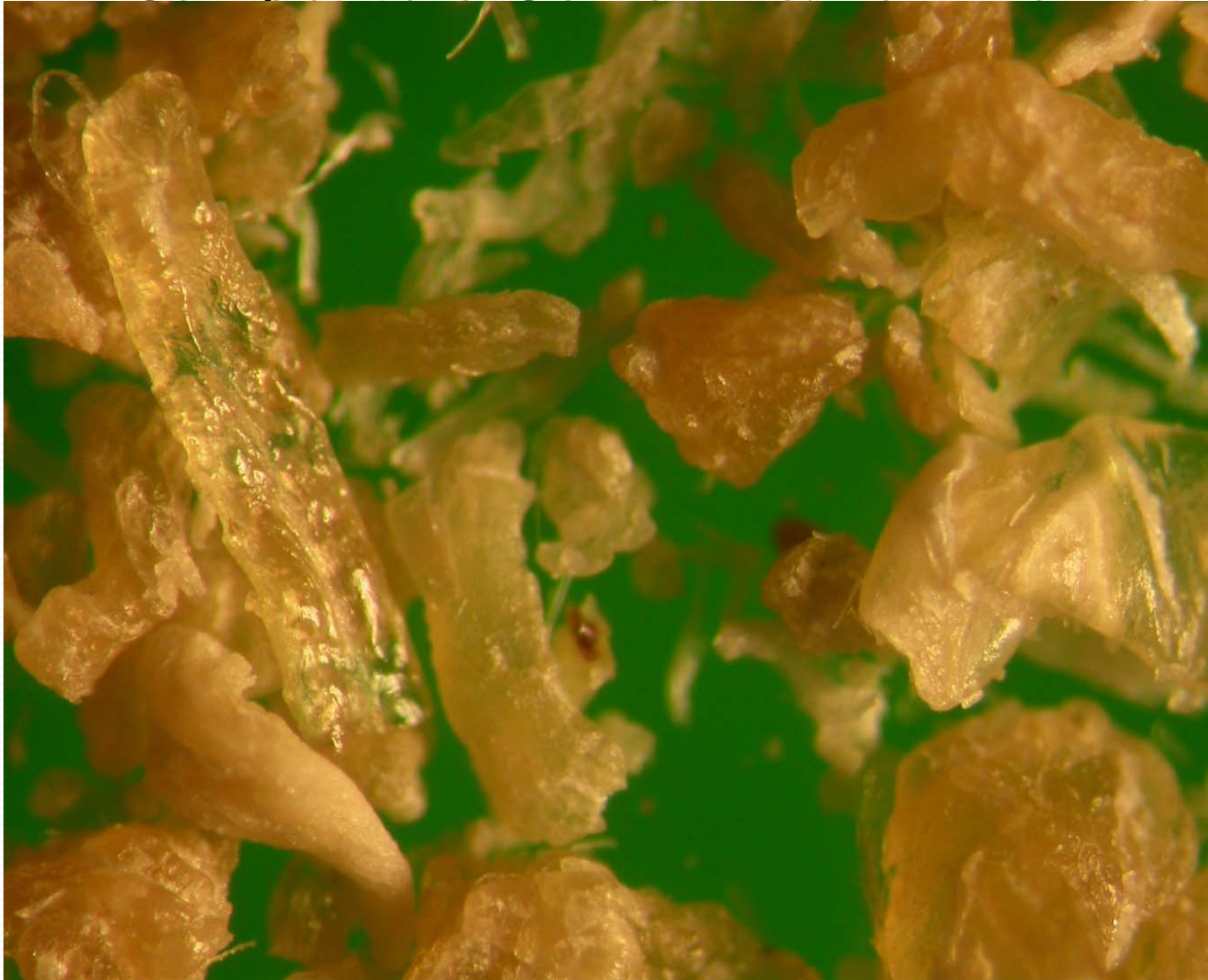
Promotional Activities for Non-Ruminant Protein

- Demonstration trials with cobia, bull frog and pampano
- Co-sponsored seminars in Yueyang (Hunan Province), Wujiang (Jiangsu Province), Beijing and Zhangzhou (Fujian Province) in Feb, Mar and July



Promotional Activities for Non-Ruminant Protein

- Microbial Characterization of US Products from Competitors-US FeM vs. FeM from other sources



Promotional Activities for Non-Ruminant Protein

- Microbial Characterization of US Products from Competitors-US PBM vs. PBM from other sources



Promotional Activities for Non-Ruminant Protein

- Customer delegations



Promotional Activities for Non-Ruminant Protein

Reception for customers of US non-ruminant proteins by Secretary of Agriculture of Virginia



Indonesia



Wayang Kulit Shadow Puppet-National Culture and Art of Indonesia

Commercial Feedmill Indonesia

No.	Company	Number of Plant	Yearly Prod 2008	Yearly Prod 2009	Yearly Prod 2010	Yearly Prod 2011
1	PT. Charoen Pokphand	10	2,400,000	2,440,000	3,000,000	3,200,000
2	PT. Japfa Comfeed	10	1,550,000	1,620,000	2,200,000	2,200,000
3	PT. Cheil Jedang Superfeed	3	660,000	500,000	700,000	765,000
4	PT. Wonokojo Jaya Corp	2	348,000	400,000	380,000	520,000
5	PT. Cargill Indonesia	3	426,000	287,000	600,000	650,000
6	PT. Sierad Feedmill	2	276,000	400,000	420,000	450,000
7	PT. Malindo Feedmill	3	360,000	56,000	420,000	450,000
8	PT. Mabar Feed Indonesia	2	180,000	200,000	240,000	255,000
9	PT. Sinta Prima Feedmill	1	180,000	180,000	240,000	250,000
10	PT. Gold Coin Indonesia	3	168,000	180,000	180,000	180,000
11	PT. Panca Patriot Feedmill	1	120,000	140,000	180,000	190,000
12	PT. Universal Agribisnisindo	1	96,000	120,000	120,000	132,000
13	PT. Berlian Unggas/Cargill	1	60,000	0	0	0
14	PT. Wellgro Feedmill	1	36,000	36,000	36,000	38,000
15	PT. Metro Inti Sejahtera	1	36,000	36,000	36,000	38,000
16	PT. Wirifa Sakti-Surabaya	1	72,000	40,000	96,000	102,000
17	PT. Citra Ina Feedmill	1	36,000	42,000	42,000	45,000
18	PT. Cibadak Indah	1	30,000	30,000	30,000	35,000
19	PT. Siba Prima-Solo	1	24,000	24,000	24,000	26,000
20	PT. Kerta Mulya Sari Pakan	1	18,000	18,000	24,000	26,000
21	PT. Seta Kencana Feedmill	1	24,000	24,000	36,000	40,000
22	PT. Manggis Feed	1	18,000	18,000	24,000	26,000
23	PT. New Hope Indonesia	2	18,000	24,000	48,000	53,000
	Self Mixing (Layer& swine)		500000	500,000	550,000	745,000
	TOTAL *	53	7,636,000	7,315,000	9,626,000	10,416,000

158000 aqufeed

Seminar on Poultry & Aqua Nutrition in Indolivestock Expo

<Use of Rendered Proteins and Fats in Poultry Feeds> by Dr. Jeff Firman

<Recent Development in Poultry Nutrition> by Dr. Jeffray Firman

<Trend of Warmwater Marine Aquaculture and Feed Development> by Dr. Kenneth Webb

<Importance of Non-Essential Amino Acids and Other Nutrients in Rendered Animal Proteins> by Peng Li



Booth at Indolivestock Expo 2011



Grand Reception at Consul General Bauer's Residence in Surabaya



Vietnam



AP Photo



- MBM Campaign Update
- Activities

Animal feed demand 2001 - 2009

Livestock *Source : report from MARD (a)*

Unit: 1,000 mt

Year	Complete	concentrate	Total	Convert to complete feed	Average increasing (%)	Ratio % complete feed & home mix
2001	1,950	350	2,300	3,000	15.3	27.0
2005	3,238	702	3,940	5,344		38.9
2006	4,361	747	5,118	6,600	23.5	41.6
2007	5,300	825	6,125	7,776	17.8	45.8
2008	6,482	684	7,166	8,534	9.7	47.6
2009	6,597	968	<u>7,565</u>	9,503	<u>11.4</u>	<u>50.4</u>
Average					<u>15.5</u>	

Animal feed demand by 2020 (MMT)

Animal feed	2009	2010	2015	2020
Completed feed & home mix		15.825	18.575	20.688
Concentrated feed		3.193	4.649	5.433
Feed additives		0.738	1.087	1.273
Livestock feed		19.756	24.311	27.394
In which : complete feed demand	9.503	10.956	16.360	19.213
Aqua feed (MMT)	2.8	3.0	4.0-4.5	5.5-6.0
<u>Total</u>	<u>12.3</u>	<u>14.0</u>	<u>21.9</u>	<u>25.2</u>

*Source : report from MARD (a)
and VFA*

Imported feedstuff (2006 – 2009)

Year	2009		2008	2007	2006
	Qty (1000 mt)	Value (Million \$US)	Qty (1000 mt)	Qty (1000 mt)	Qty 1000 mt)
Fish meal, Shrimp meal, squid meal	133.2	124.3	153.8	41.1	54.8
Meat and bone meal	382.4	154.95	210.0	162.3	84.1

Source from VFA (b)

Export of Non-Ruminant Proteins

- Import permit
- Emerging issue of zero tolerance on Salmonella and Ecoli

Seminar on Poultry & Aqua Nutrition in Ho Chi Minh City

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Philippines

Issues

- Strong competition from EU

Planned activities

- Poultry & Aqua Seminar in Manila on June 14, 2011



Demonstration Trial in Philippines on Use of US MBM in Milkfish Feed



MBM inclusion rate:
30% in freshwater cultured milkfish
22.5% in seawater cultured milkfish
Digestibility of MBM:
88-92% for fish cultured in both
environmental conditions

Asian Strategies in 2012

- Maintenance of uninterrupted ruminant MBM export to Indonesia and Philippines and possible expansion
- Tallow import requirements in China mainland
- MBM ban in Vietnam
- Non-ruminant MBM and PBM ban in Korea and Taiwan
- Promotion of animal fat biodiesel
- Technical services with emphasis on formulation software-assisted promotion and raw material examination by microscopy and NIR

Acknowledgements

- IMDC members that provide samples, information, help with tours are highly appreciated.