New Study Shows Animal Food Industry Contributes Billions to U.S. Economy
NEW STUDY SHOWS ANIMAL FOOD INDUSTRY CONTRIBUTES BILLIONS TO U.S. ECONOMY

ON THE COVER

FEED REGULATORY OUTLOOK FOR 2018

TO NEGOTIATE OR TO RENEGOTIATE? THAT IS THE QUESTION.

CORN, SOY TOP LIST OF INGREDIENTS USED IN LIVESTOCK, POULTRY FEED

HOW DO AFIA MEMBERS RECRUIT AND RETAIN NEW EMPLOYEES?

Send Us Your Story Ideas!
Have a suggestion for a topic we should cover?
Email Victoria Broehm at vbroehm@afia.org or call (703) 558-3579.

Pictured on cover: Over 944,000 people working at more than 6,200 animal food manufacturing facilities across America, like this one in LaVergne, Tennessee, are stimulating the economy and helping keep animals fed.
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ur industry has become a stronger community over the past year. We came together last fall to help our friends recover from back-to-back hurricanes and other natural disasters that destroyed crops, farms and ranches and significantly impacted people's lives. It was wonderful to see our industry bind together to help our friends in need. This has also carried over to integrating in unity in calling for policymakers to push forward policies that support our vibrant and important segment of the food supply and economy.

Leading this united voice on behalf of the industry, the American Feed Industry Association continues to work with the White House, Congress and federal agencies toward achieving sensible changes in the Food Safety Modernization Act and Veterinary Feed Directive that would result in practical and even implementation requirements for the industry. These changes are focused on areas of overburdensome regulations that do not impact animal health, food safety or provide other benefits, and are very costly for the industry.

One area that keeps me awake at night is international trade. Our industry and our producer customers are dependent on trading products and services beyond U.S. borders. In addition, given the industry's tremendous capabilities to produce safe, quality and diverse food options, our contribution to providing food security for a portion of the global population is critical. However, to say this administration's position on trade has caused consternation among the agriculture community would be a vast understatement! Pulling out of the Trans-Pacific Partnership opened the door for others to take our place in the Pacific region and has potentially closed doors for future trade opportunities for the industry. The threat of pulling out of the North American Free Trade Agreement, the tripartite agreement with our number one and two trading partners, our bordering neighbors, would result in a loss of valuable trade markets, a rise in tariffs on U.S. exports, and would greatly diminish America's competitiveness in the global marketplace.

We are so fortunate to have two key allies in Secretary of Agriculture Sonny Perdue and Undersecretary Ted McKinney, representing our interests at the U.S. Department of Agriculture and within the administration. Their agreement of achieving “do no harm” to provisions within NAFTA that have benefited the agricultural community, as well as consumers, and not to abandon this agreement, is critical.

The unity of our industry voice has been exemplified by many members participating in contacting their congressional leaders on these key issues, as well as joining AFIA in meeting with regulatory agencies on issues such as the need to streamline the federal ingredient review process. Thank you for your active participation and support, and more calls will be needed as we move forward.

By now, I hope you are familiar with the first-ever U.S. Animal Feed and Pet Food Manufacturing Industry Economic Contribution Study, which we released at the International Production & Processing Expo in January. We know the immense importance the animal food industry has in producing nutritious and safe food to feed the country's more than 9.6 billion food-producing animals and over 144 million dogs and cats each year.

As a result of this project, recently completed by the Institute for Feed Education and Research, we now have the data to show legislators how the roughly 6,200 American feed mills and pet food manufacturing facilities are supporting their districts and states in contributing jobs, taxes and more to the overall economy. We know the demand for animal food is strong and expected to thrive, but policies at the state and federal levels can greatly impact the industry's ability to do its job. This data is enhancing the power of our united voice in articulating the value our industry provides to those who can make a difference. This data is available for all members to use directly with their representatives at all levels. I encourage you to access the data at bit.ly/econcontribution and share your state and local districts' contributions with your representatives.

Together, we can and will make a difference for the future of our industry and your business!
FOR YOU, WE THINK BIG ON A MICROSCOPIC LEVEL.

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After ending 2017 by passing the largest tax reform package in history, Congress began 2018 with a lengthy to-do list. In the coming months, our nation’s leaders must set spending caps and funding for the government, settle differences on Obamacare subsidies, solve challenges with Deferred Action for Childhood Arrivals, known as “Dreamers,” and do all of this while campaigning for the November midterm elections.

Aside from these issues, President Donald Trump and Republican leaders have signaled they want to work on other policy priorities this year, including welfare reform and a potential infrastructure package, both of which were promised during the 2016 campaign cycle. With a packed agenda and short timeframe to accomplish anything ahead of the elections, many agriculture groups, including the American Feed Industry Association, are maintaining optimism that there will be much progress made before lawmakers move into full-time campaign mode.

Below are a few short summaries on what AFIA members should pay attention to this Congress.

**FARM BILL**

The agriculture community has a lot at stake in 2018, with all eyes focused on the farm bill and potential trade deal exits and renegotiations. Congress has failed to pass an on-time farm bill since 1990, and it seems the 2018 battles have only begun. Shortly before the House left for the holidays, lawmakers passed a sweeping $81 billion disaster aid package, which included provisions to bolster farm bill programs for cotton and dairy farmers, in addition to providing assistance to communities attempting to rebound from the 2017 hurricane, flood and wildfire damage. The provisions would make cotton growers eligible for the Price Loss Coverage program, something they have long desired, and also give dairy farmers more insurance options by lifting the $20 million annual cap on policies for livestock.

But, the Senate mostly stopped the emergency spending package’s momentum. The House-passed disaster aid bill contained a little-known provision that sparked outrage among Democrats and complicates efforts to change farm bill programs. Included in the bill, House leaders inserted language to create a “National Accuracy Clearinghouse,” which would help states ensure that beneficiaries of the Supplemental Nutrition Assistance Program (i.e., the food stamp program) are not collecting benefits in multiple states. Like the larger disaster aid measure, the farm bill provisions also drew bipartisan fire, providing a stark reminder of the deep political fault lines that have made the farm bill a heavier lift with each cycle.

House Agriculture Committee Chairman Rep. Mike Conaway, R-Texas, and his counterpart, Senate Agriculture Committee Chairman Pat Roberts, R-Kan., are under no illusion there’s going to be one extra dime to be spend on farm programs in the next farm bill. Conaway has been tight-lipped on what modifications can be made to current farm programs in light of a very tight spending baseline, while Roberts has told agriculture groups not to expect major new programs or even major rewrites of existing programs.

As Congress will be looking at these and other issues within the farm bill, AFIA would like to see a bill that includes funding for ag research, international market access programs and animal health priorities, which are essential for the success of our members and customers.

**INTERNATIONAL TRADE**

As if the farm bill wasn’t enough, international trade agreements, particularly the North American Free Trade Agreement (NAFTA) and the U.S.-Korea Free Trade Agreement, are both under renegotiation and potential withdrawal by the Trump administration. Agriculture groups in Washington have been working feverishly to articulate why NAFTA is so critical to industry, while recognizing that some modernization needs to occur. Gina Tumbarello, AFIA’s director of international policy and trade, covers these negotiations in more detail in her article on page 12 of Journal.
ANIMAL DRUG USER FEE ACT

The Animal Drug User Fee Act (ADUFA) amended the Federal Food, Drug and Cosmetic Act and authorized the Food and Drug Administration to collect fees to assist the agency in the review of new animal drugs to ensure they are safe and effective for animals and the public. ADUFA is reauthorized every five years by Congress. AFIA is actively working with the two congressional committees with jurisdiction over the FDA to include in the bill several provisions that would benefit the animal food industry. AFIA is supportive of the FDA adopting the American Association of Feed Control Officials’ Official Publication definitions into federal law, which would ease discrepancies on how these ingredients are regulated from state to state. AFIA has also been calling for the bill to address the regulatory burdens placed on medicated feed mills, such as with Drug Establishment Registration and CFR Part 11 compliance (electronic recordkeeping) issues for Veterinary Feed Directives and medicated feeds.

2018 ELECTION CYCLE

Lawmakers are steadily gearing up for the 2018 midterm elections, which are sure to be some of the most closely watched midterm elections in history. One question will likely shape the entire election: will the American people vote to constrain Trump by electing more Democrats into Congress, or will they embolden his policies by putting more Republicans in office?

In the House of Representatives, most polls suggest that Democrats will need to gain two dozen or more seats to take control. GOP lawmakers on the House side expect to lose some seats, but are anticipated to keep the majority and even pick up a few seats in “purple” states, which Trump won handily in 2016. Taking over the Senate will also be a challenge for Democrats—they must defend 26 seats, whereas the Republicans only need to retain eight and gain two seats. Many of these races will be in areas where Democrats remained in control during 2016, but then-candidate Trump won in 2016.

If you thought 2017 was a busy and stressful political year, 2018 might just top it. Agriculture has a lot on the line in 2018, and much of it has to do with what happens in D.C.’s marble buildings. For more information, contact John Stewart, AFIA’s manager of government affairs, at (703) 558-3566 or jstewart@afia.org.

DID YOU KNOW?

The U.S. animal food manufacturing industry generated $297.1 billion in sales in 2016.
As I am now in my final months working for the American Feed Industry Association before my retirement later this year, I can’t help but continue to note the major impact the Food Safety Modernization Act and the Food and Drug Administration’s overly complicated rules that will “cure all of our animal food safety ills” have had on this industry. Having worked on this law’s rules and legislative bills for nearly 10 years, I wholeheartedly disagree that we have problems in need of such inane fixes.

AFIA is looking at reopening the major FSMA rule with an eye toward renegotiating the rules to be more practical—both for the FDA and the regulated industry. While FDA has not agreed with this approach, AFIA has asked FDA to extend the compliance dates until the new rulemaking is final. This effort will benefit both the agency and regulated industry by keeping costs down, as required by federal law, and allow both to reach an agreement on the basic tenets of a tenable animal food safety system at each facility. FDA has so far delayed inspections, and AFIA will continue to work for refinements to specific provisions of the regulations, guidance documents and inspector training.

Let’s look at some major regulatory areas for 2018.

**FOOD SAFETY MODERNIZATION ACT**

AFIA has spent well over $1 million to build and support industry compliance programs with FSMA. This year, nearly all of the animal food industry, including feed, feed ingredients and pet food, must come into compliance with the “Current Good Manufacturing Practice, Hazard Analysis and Risk-Based Preventive Controls for Food for Animals,” a major FSMA rule the agency finalized in September 2015. Although the FDA has said it will not conduct inspections for preventive controls for large firms (those with over 500 employees) until late 2018, firms must still be in compliance, as they will be held responsible in any adulteration event, regardless of whether FDA is inspecting them or not.

Independent analyses that were ignored by the FDA say that, as written, this rule is expected to cost the industry $1 billion. AFIA negotiated with the agency to allow facilities to use their prerequisite and current good manufacturing practice (CGMP) programs to mitigate the risks of identified hazards in their hazard analyses and, therefore, asked not to have to create preventive controls, a move that will likely save the industry more than $800 million annually.

This concept appears nowhere in the rule and is slowly slipping into some FDA FSMA guidance documents and training.

FDA’s overall delay in getting final guidance documents to the industry has been a major setback in helping the industry achieve FSMA compliance. In the absence of these materials, AFIA developed powerful tools for members, including a scientific hazard analysis, example animal food safety plan, qualified individual training video, and continues to publish weekly updates on the rules, including FDA announcements and legal views, as information has become available.

Some firms have asked us, “why renegotiate the rule?” We can only respond that experience has shown with medicated feed that the “devil is in the details,” and the corollary, “inspections are a pain.” Based on what human food facilities are telling us, FDA inspections for the preventive controls portion of the regulations are running three-to-five days. Given the industry has known the major feed hazards for decades and has been mitigating the risks of those, a three-to-five-day inspection at feed mills is a waste of both industry and FDA time. A more reasonable rule would dramatically reduce that inspection time.

In looking at the number and volume of reportable foods for animals over the past several years—or those with the potential for serious adverse consequences or death in humans or animals which must be reported to the FDA—AFIA has found very little evidence that an issue exists. A minuscule number of these, in terms of the nearly one billion tons of feed manufactured in the last five years, relate to the hundreds of tons reported. In AFIA’s estimation of the feed ones, many were human errors and would not have been prevented by any current FSMA rule.

So, why does the FDA continue down this path? One reason is that FDA’s leadership has made a goal of making the human and animal food rules and compliance identical. This goal is unrealistic,
and AFIA looks forward to the day when we can have practical and achievable goals and regulations that reflect the many differences between the human and animal food manufacturing industries (I can still dream about this right up to my retirement.)

AFIA would still like to see some specific changes, including removing the onerous provision in the hazard analysis requirement that requires illness data and scientific reports to make supply chain applied controls preventive controls. FDA should allow firms that may not have preventive controls to adequately demonstrate that the risks and hazards identified can be mitigated by existing plant programs. Is this realistic and achievable? Absolutely!

AFIA has begun to make a strong case to the FDA and through Congress and the White House about these issues, and I believe our goals are achievable.

**VETERINARY FEED DIRECTIVE**

After a full year of major veterinary feed directive (VFD) changes and a review of FDA inspection data, AFIA has concluded that the transition, with some exceptions, has been a success for the animal food industry. The FDA is still tweaking some parts of some animal drug rules and interpretations, but overall, we have come into complete compliance and have disbanded the AFIA VFD working group.

AFIA will continue to review inspection statistics and work with the FDA as issues arise to reach reasonable compromises, but I’m pleased with the overall work by our industry toward achieving major goals to comply with the VFD changes.

**INGREDIENT APPROVAL PROCESS**

The federal and Association of American Feed Control Officials’ (AAFCO) ingredient approval process is one area that is still lagging. A study commissioned by AFIA’s public charity, the Institute for Feed Education and Research, demonstrated that between 2000-05 and 2010-15, there were significant downturns in ingredient approvals at the FDA, despite no rule or policy changes. Firms lost an average $1.75 million per product for every year the FDA did not grant approval and $600,000 in costs annually for each ingredient to gain new approvals.

AFIA has been in dialogue with FDA officials for two years about the changes and delays to the approval process. To the agency’s credit, we acknowledge that the number of applications has increased, but the slowdown in reviews has also increased.

AFIA’s Ingredient Approval and Definition Committee is examining options to boost resources to the FDA to decrease the timeline and gain more ingredient approvals. In the meantime, AFIA is pushing Congress and the FDA to adopt the AAFCO Official Publication into the federal regulations to grandfather those 900 or so ingredients that both FDA’s Center for Veterinary Medicine (CVM) and AFIA agree are safe.

**REGULATORY OUTLOOK**

At the beginning of the year, AFIA believed the new administration’s “regulatory revolution” would review, change or roll back many rules that were viewed as overreach. It’s been slow to happen, but the CVM has asked for comments on rules that present significant regulatory burdens, and AFIA has provided a detailed list, including the Part 11 electronic records and signatures rule and the archaic annual drug establishment registration for medicated feed establishments, which is wholly unnecessary and for which the FDA can withdraw.

At the U.S. Department of Agriculture, where for every one new rule, 15 have been rolled back, great progress has been made. However, it has not been the same at the FDA, where the establishment, other than the commissioner, is still entrenched from the previous, rule-happy administration.

My goal this year is to make the regulatory revolution a reality for our industry. AFIA will be asking for your help. Join us and make our companies more productive and less regulated with better animal food safety.

I look forward to working with AFIA’s new vice president of public policy and education, Leah Wilkinson, to hand over my responsibilities this year and to achieve our stated goals. Because, after all, it’s our voice, our passion and our industry that continues to make AFIA strong and effective after 109 years.

For more information on regulatory efforts, contact Richard Sellers, AFIA’s senior vice president of public policy and education, at (703) 558-3569 or rsellers@afia.org.

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LEGISLATIVE & REGULATORY LEADERSHIP ACTIONS
AUGUST 2017 – JANUARY 2018

A synopsis of the significant AFIA actions in the legislative and regulatory arenas from August 2017 until Jan. 1, 2018. For additional information on any of these items, please contact AFIA staff.

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<th>DECEMBER 2017</th>
<th>AMPLIFICATION</th>
<th>MEMBER VALUE</th>
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<td><strong>INTERNATIONAL STANDARD</strong>: As part of the Food Industry Codex Coalition (FICC), AFIA sent a letter praising the United States’ leadership in the Codex Taskforce on Antimicrobial Resistance (TFAMR) and its representation at the late 2017 TAFMR meeting, held in Jeju, South Korea, in which AFIA’s Leah Wilkinson, vice president of public policy and education, also participated.</td>
<td>Recognizing Codex’s critical role in protecting consumer health and ensuring fair practices in trade, the FICC appreciates Codex’s recent moves to update its policies to help countries implement antimicrobial resistance monitoring and prevention programs. U.S. leadership in TFAMR is critical to ensuring the taskforce stays within its scope, that it renders risk- and science-based recommendations, and meets Codex’s dual mandate of protecting human health while advancing fair trade.</td>
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<td><strong>ANTIBIOTICS</strong>: In a letter to the Food and Agriculture Organization (FAO) of the United Nations and the World Health Organization (WHO), AFIA supported the nomination of Dr. Elizabeth Wagstrom to serve as an expert to the organizations’ consultations on antimicrobial resistance.</td>
<td>Veterinarian Elizabeth Wagstrom has broad experience on the science and policy of foodborne antimicrobial resistance and translating that into implementable programs for producers and would make an excellent choice to be expert on this topic in consultations with the FAO/WHO.</td>
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<td><strong>ANTIBIOTICS</strong>: AFIA sent a letter to the U.S. Department of Agriculture’s (USDA) acting chief scientist Dr. Chavonda Jacobs-Young, thanking her for her response to the WHO’s recently released recommendations regarding the use of antibiotics in animal agriculture.</td>
<td>While there is still more work to be done, the WHO report discounted changes and progress already being made by U.S. farmers and ranchers, along with the entire American agricultural community. AFIA thanked Jacobs-Young for supporting the judicious use of antimicrobials in food-producing animals for disease prevention.</td>
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<td><strong>BIOTECH</strong>: In a letter to the chairs and ranking members of the House and Senate committees on appropriations, AFIA, along with several other organizations, urged Congress to reject any appropriations provisions that could undermine or conflict with the National Bioengineered Food Disclosure Standard Act.</td>
<td>The Food and Drug Administration’s Agricultural Biotechnology Education and Outreach Initiative is critical and long overdue because of the tremendous amount of misinformation about agricultural biotechnology in the public domain. Stakeholders in the value chain have long had to defend the thoroughness and safety of the regulatory system without the addition of the trusted government voice. The groups urged the FDA and USDA to focus the program on educating the public on the safety of ag biotech and the stringent regulatory approval processes as well as the environmental benefits.</td>
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<td><strong>BIOTECH</strong>: AFIA, along with several other organizations, commented on the FDA’s proposed Agricultural Biotechnology Education and Outreach Initiative to help the public better understand the science- and fact-based information about agricultural biotechnology.</td>
<td>The disclosure act is meant to prevent a patchwork of bioengineered food disclosure regulations, which would cause consumer confusion. By rejecting a proposed provision within the Senate’s fiscal year 2018 Agriculture, Rural Development, FDA and Related Agencies Appropriations Act, Congress can maintain the congressionally mandated USDA uniform disclosure standard recently passed into law.</td>
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<td><strong>TRANSPORTATION</strong>: In a letter to United States Trade Representative Robert Lighthizer, AFIA, with many organizations, urged USTR not to eliminate North American Free Trade Agreement (NAFTA)’s trucking provisions.</td>
<td>The American and Mexican trucking industry is vital to safely and efficiently hauling products in both countries. Eliminating NAFTA trucking, including any investment protections, would have long-term negative impacts on the agriculture industry.</td>
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<td><strong>RESEARCH</strong>: AFIA provided comments to the National Institute of Food and Agriculture (NIFA) on areas where it can improve research and education to support the agriculture industry.</td>
<td>AFIA encouraged NIFA to support training of qualified candidates to fill positions within the agriculture industry and to increase funding for extension programs to shrink the gap between science and technology and applications in animal agriculture. AFIA also called for continued research for alternatives to antibiotic use in light of recent changes in regulation.</td>
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**DID YOU KNOW?**
There are more than 5,700 animal feed and more than 500 pet food manufacturing facilities in the United States.
| OCTOBER-NOVEMBER 2017 | TRADE: AFIA signed onto letters to Secretary of Commerce Wilbur Ross and state governors stating that a withdrawal from NAFTA would cause immediate, substantial harm to American food and agriculture industries and the U.S. economy. | WITHDRAWING FROM NAFTA WOULD GREATLY DISRUPT CRITICAL INDUSTRY SUPPLY CHAINS, CLOSE MARKETS, ELIMINATE JOBS AND INCREASE PRICES FOR THE BASIC NEEDS OF AMERICAN CONSUMERS. AFIA URGED THE ADMINISTRATION TO "DO NO HARM" TOWARD FOOD AND AG TRADE WITH NAFTA RENOTEGATION, AND URGED GOVERNORS TO SUPPORT THE INDUSTRY IN ITS COMMUNICATIONS WITH THE ADMINISTRATION. |
| OCTOBER 2017 | MANUFACTURING: As part of the American Manufacturers Coalition, AFIA submitted comments to the Federal Energy Regulatory Commission (FERC) encouraging it to reject Section 403 of the Department of Energy Organization Act's Proposed Rule for Final Action on grid reliability and resilience pricing. | THE AMERICAN MANUFACTURERS SPOKE MUCH PROGRESS HAS BEEN MADE IN TERMS OF LOWER PRICES, RETIREMENT OF INEFFICIENT UNITS, INVESTMENT RISK BEING PLACED ON DEVELOPERS INSTEAD OF WHOLLY ON CONSUMERS, ENHANCED CHOICES, AND GREATER DIVERSITY IN THE GENERATION PORTFOLIO, AND CALLED ON FERC TO REJECT THE PROPOSED RULE. THE GROUPS CALLED FOR THE COMMISSION NOT TO ALLOW THE PROPOSED RULE TO DISTRACT FROM THE COMMISSION'S OBJECTIVE OF ENSURING COMPETITIVE, WELL-FUNCTIONING WHOLESALE ELECTRICITY MARKETS. |
| OCTOBER 2017 | TRADE: Along with several food and agricultural organizations, AFIA sent a letter to all members of the Senate Finance Committee supporting the confirmation of Gregg Doud as chief agricultural negotiator in the Office of the USTR. | DOUD HAS A STRONG AGRICULTURAL UPBRING IN KANSAS AND POSSESSES WELL-HONED AGRICULTURAL DOMESTIC AND INTERNATIONAL TRADE POLICY EXPERIENCE. AFIA BELIEVES HE IS DEDICATED TO DEVELOPING AND ENFORCING FAIR AND REASONABLE TRADE AGREEMENTS TO SUPPORT U.S. AGRICULTURAL EXPORTS AND WILL SERVE THE ENTIRE U.S. AGRICULTURAL COMMUNITY WELL. |
| SEPTEMBER-NOVEMBER 2017 | TRADE: AFIA responded to the USDA's request for information supporting the move of the U.S. Codex Office under the USDA undersecretary for Trade and Foreign Agricultural Affairs. AFIA also called for it to operate as an independent TFAA office. | THE MOVE OF THE U.S. CODEX OFFICE UNDER THE NEW USDA UNDERSECRETARY FOR TFAA WILL ELEVATE THE LEVEL OF ENGAGEMENT AND POLITICAL RESOURCES AVAILABLE BY THE UNITED STATES FOR THE ISSUES BEING CONSIDERED THROUGH CODEX. AFIA BELIEVES IT WILL STRENGTHEN THE COMMITMENT OF THE U.S. LEADERSHIP IN CODEX AT A TIME WHEN SCIENCE-BASED STANDARDS ARE INCREASINGLY IMPORTANT TO ENSURE THE SAFETY OF GLOBALIZED SUPPLY CHAINS AND PROTECT AGAINST UNSCIENTIFIC, NON-TARIFF TRADE BARRIERS THAT HARM U.S. FARMERS AND LIMIT THE TRADE OF PRODUCTS FROM HUMAN AND ANIMAL FOOD MANUFACTURERS. |
| SEPTEMBER-NOVEMBER 2017 | TRADE: As part of the North American Market Working Group, AFIA, along with several food and agricultural organizations, sent a letter to the USTR Ambassador, Secretaries of Agriculture and Commerce, and the Director of the National Economic Council, asking to “do no harm” to NAFTA. In particular, the groups called for a modernized NAFTA to contain a dispute settlement mechanism that will protect U.S. exports from future trade barriers imposed that are counter to the market access goals of the agreement. | MUCH OF OUR FOOD AND AGRICULTURE PRODUCT EXPORT GROWTH TO MEXICO AND CANADA CAN BE ATTRIBUTED TO THE ELIMINATION OF DUTIES AND QUOTAS, BUT MUCH ALSO RELIES ON THE DISPUTE SETTLEMENT MECHANISMS THAT HAVE BEEN PROVIDED UNDER NAFTA. WITHOUT RAPID AND LEGALLY BINDING DISPUTE RESOLUTION, MARKET ACCESS FOR U.S. AGRICULTURAL EXPORTERS TO CANADA AND MEXICO WILL BE ILLUSORY BECAUSE TARIFFS AND NON-TARIFF BARRIERS CAN BE RAISED ARBITRARILY. THEREFORE, IT IS ESSENTIAL TO PRESERVE AND IMPROVE UPON DISPUTE SETTLEMENT PROVISIONS UNDER CHAPTER 19 IN NAFTA, IN WHICH AFIA AND THE ORGANIZATIONS PROVIDED MORE SPECIFIC SUGGESTIONS IN A NOVEMBER FOLLOW-UP LETTER. |
| SEPTEMBER 2017 | USDA: AFIA, in cooperation with other food and agricultural industry stakeholders, sent a letter to the chairman and ranking member of the Senate Agriculture, Nutrition and Forestry Committee urging the expeditious confirmation of USDA nominations that have lagged in the Senate. | WITHOUT SUBCABINET LEADERS IN PLACE AND EMPOWERED TO MAKE DECISIONS, SOME SERVICES AND FUNCTIONS OF THE USDA MAY Languish. AS THE AGENCY WORKS TO IMPLEMENT MAJOR POLICY INITIATIVES, GEAR UP FOR THE NEXT FARM BILL, PROVIDE DIRECTION ON ACTIVE TRADE ISSUES, AND DO ITS PART TO RESPOND TO THE RECENT CATASTROPHIC NATURAL DISASTERS, IT IS VITAL AND INTEGRAL TO OUR INDUSTRY AND THE COUNTRY THAT THESE POSITIONS BE FILLED. |
| SEPTEMBER 2017 | TRADE: The FICC, of which AFIA is a member, sent a letter to the agriculture secretary praising the decision to move the U.S. Codex Office under the authority of the new USDA undersecretary for TFAA. | THIS REORGANIZATION WILL ELEVATE THE VISIBILITY AND STRATEGIC IMPACT OF U.S. CODEX ENGAGEMENT AND STRENGTHEN U.S. LEADERSHIP IN CODEX TO ADVANCE SCIENCE-BASED GLOBAL STANDARDS THAT PROTECT PUBLIC HEALTH AND GUARD AGAINST UNSCIENTIFIC BARRIERS THAT IMPEDE U.S. FOOD AND AGRICULTURE TRADE. |
| SEPTEMBER 2017 | FSMA: AFIA sent a letter to the deputy commissioner of food and veterinary medicine at the Food and Drug Administration formally requesting a reopening of the comment period for the Food Safety Modernization Act Animal Food Current Good Manufacturing Practice, Hazard Analysis, and Risk-Based Preventive Controls for Food for Animals final rule. This request necessitates an extension of the compliance dates. | AS WRITTEN, THE ANIMAL FOOD FINAL RULE IS NEARING A COST OF $1 BILLION ANNUALLY FOR THE COLLECTIVE FEED INDUSTRY, WHICH AMOUNTS TO MORE THAN 2 PERCENT OF THE INDUSTRY’S GROSS REVENUE (AND ALSO EQUATES TO ROUGHLY THE ANNUAL NET INCOME FOR THE FEED INDUSTRY). REOPENING THE COMMENT PERIOD FOR THE FINAL ANIMAL FOOD RULE WOULD ENABLE FDA TO RENOTEGATE SEVERAL OF ITS REQUIREMENTS TO BETTER MATCH THE INDUSTRY’S NEEDS AND ABILITIES AND MEET THE AGENCY’S MANDATE OF A REASONABLE REGULATORY SYSTEM THAT REDUCES RISKS WITH A REASONABLE COST. AT THIS TIME, FDA DOES NOT SEEM RECEPTIVE TO OPENING THE ENTIRE RULE, SO AFIA WILL FOCUS ON SPECIFIC PROVISIONS OF THE REGULATION, GUIDANCE AND TRAINING. |
| TRADE | AFIA submitted two letters to the Canadian Food Inspection Agency making several recommendations on nutrient maximum standards for beef and dairy cattle feed and maximum contaminant levels in animal feeds. The recommendations are based on current scientific and internationally accepted data. In particular, AFIA suggested that the recommendations would help reduce the compliance burden for feed and feed ingredient suppliers exporting to Canada and support fair and competitive trade in the market. |
| INTERNATIONAL STANDARDS: | The Animal Protein and Health Codex Coalition, a subset of the FICC, of which AFIA is a member, sent a letter to Senator Jerry Moran strongly recommending continuing USDA’s assistance by the Foreign Agriculture Service (FAS) to support the work of the African Union’s Interafrican Bureau for Animal Resources Standards and Trade Secretariat (AU-IBAR). The AU-IBAR assists the African Union by participating in and influencing the Codex Alimentarius Commission’s (Codex) process for setting food safety standards and trade, and also helps set animal health standards and trade through the World Organization for Animal Health (OIE). |
| BIO TECH | The Coalition for Safe, Affordable Food, of which AFIA is a member, sent a letter to the acting administrator of the USDA’s Agricultural Marketing Service (AMS), regarding questions being considered in connection with the development of a rule implementing the National Bioengineered Food Disclosure Law. The Bioengineered Food Disclosure Law calls for the establishment of a uniform national disclosure standard for bioengineered food, and prevents a patchwork of state-by-state or other governmental subdivision food labeling requirements that would have driven up food costs for consumers. |

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The agencies have been busy over the past few months reproposing rules that have been rolled back, as well as providing enforcement guidance on rules that have not been targeted for elimination or reform. Where appropriate, deadlines were extended and temporary waivers were granted to assist industry in complying with new regulations.

**OSHA – THE WORKPLACE INJURIES AND ILLNESS TRACKING RULE IS NOW IN FORCE**

After several delays, the Occupational Safety and Health Administration’s (OSHA) controversial rule to Improve Tracking of Workplace Injuries and Illnesses became effective Dec. 15, 2017. This reporting requirement applies to establishments with 250 or more employees that are currently required to keep OSHA injury and illness records and establishments with 20-249 employees that are classified in certain industries with historically high rates of occupational injuries and illnesses. Feed and feed equipment manufacturing facilities are covered under “manufacturing,” and therefore, if they have 20 or more employees, they are required to comply with this rule.

The following OSHA-approved state plans have not yet adopted the requirement to submit injury and illness reports electronically: California, Maryland, Minnesota, South Carolina, Utah, Washington and Wyoming. This means establishments in these states can still continue to file a written Form 300A.

OSHA allowed employers to report their 2016 OSHA Form 300A data through the Injury Tracking Application (ITA) until midnight Dec. 31, 2017. Starting Jan. 4, employers are allowed to report their Calendar Year (CY) 2017 Form 300A data electronically to OSHA through the ITA. Employers can view their submitted CY 2016 Form 300A summary information, but they cannot edit or submit additional 2016 data on the website. OSHA is currently reviewing the other provisions of its final rule and intends to publish a notice of proposed rulemaking to reconsider, revise or remove portions of the rule sometime this year.

On Jan. 2, the Department of Labor (DOL) published its final rule that adjusts the civil monetary penalties assessed or enforced in its regulations for inflation. This annual adjustment is required under the Federal Civil Penalties Inflation Adjustment Act Improvements Act of 2015, which requires the DOL to annually adjust its civil money penalty levels for inflation no later than Jan. 15 of each year. Any penalties assessed after Jan. 2 will be approximately 2.04 percent higher than 2017 rates.

**DOT – ELECTRONIC LOGGING RULE GOES INTO EFFECT**

The major regulatory issue for the Department of Transportation is the Federal Motor Carriers Safety Administration’s (FMCSA) Electronic Logging Device (ELD) rule, which is intended to create a safer work environment for drivers by making it easier and faster for them to track records of duty status data.

The final rule became effective Dec. 17, 2017, but the agency granted a limited 90-day waiver from the ELD requirement for those transporting agricultural commodities, as defined in the Federal Motor Carrier Safety Regulations, which includes livestock. While livestock feed is not considered an agricultural commodity by definition and does not qualify for the 90-day waiver, it falls under the definition of “farm supplies” and qualifies for the 150-air mile radius hours of service exemption.

There has been some confusion surrounding the 150-air mile radius hours of service exemption, stemming from a lack of clarification on what hours are actually exempt from the hours of service rules (i.e., loaded miles, empty miles, loading and unloading time). The FMCSA has communicated to industry their intentions to release a guidance document in early 2018, which should clarify that all hours for trips inside the 150-air mile radius will qualify under the exemption. Drivers delivering livestock feed should only be required to log hours of service if they go beyond the 150-air mile radius. For those that don’t make deliveries outside of the 150-air mile radius, ELDs are not required to be installed.

**EPA – AGENCY WITHDRAWS WOTUS, MOVES FORWARD WITH FARM AIR EMISSIONS REQUIREMENTS**

Rescinding the Waters of the U.S. (WOTUS) rule has been one of the Environmental Protection Agency’s (EPA) most significant regulatory decisions over the past year. The mandate, proposed and finalized by the Obama administration in 2015, expanded federal clean water act permitting and enforcement jurisdiction over streams and tributaries and posed serious challenges for agriculture. In addition to facing litigation in federal court, the EPA is moving to propose a replacement rule in 2018.

In light of likely federal court action on the rule this year, it is not yet clear whether EPA will be able to issue a final clean water rule soon. As a safety measure, EPA proposed late in 2017 a delay in the effective date of the WOTUS rule to at least 2020, in order to give the agency time to work through a range of policy and legal issues.

On a related concern for AFIA members’ customers in animal agriculture, EPA has spent time responding to a federal appeals court decision in 2017 that reversed the agency’s eight-year-old exemption for farms to report air emissions of ammonia and hydrogen sulfide from manure under the Superfund and community “right to know” laws. As the agency moved forward in January with clarifying the impact of the court’s decision, animal agriculture associations requested full relief from reporting requirements from both EPA and Congress. In January, EPA filed a motion with the D.C. Circuit Court of Appeals to further delay issuance of the mandate. No reporting is required until the Court issues its order, or mandate, enforcing its decision to eliminate the reporting exemptions for farms.

For more information on these rules and other environmental, health and safety issues, contact Gary Huddleston, AFIA’s director of feed manufacturing and regulatory affairs, at (703) 666-8854 or ghuddleston@afia.org.
AAFCO UPDATE

AAFCO Mid-Year Meeting Tackles New Ingredient Definitions, Model Bill and More

Over 320 people, representing 43 states, joined in the Association of American Feed Control Officials’ mid-year meeting this past January, where they discussed the latest regulatory proposals under consideration at the state and federal levels and reviewed definitions for ingredients to be published in the association’s annual Official Publication (OP), the legal listing that states follow to allow ingredients on commercial feed labels.

AAFCO’s Ingredient Definitions Committee (IDC), the working body responsible for reviewing and making recommendations on ingredient definitions before they are voted on by the full membership and added to the OP, met to discuss several definitions. Of note, on Jan. 22, the AAFCO membership approved:

- Moving the following six definitions from “tentative” to “official” status: 9.10 Poultry By-Product Meal; 9.14 Poultry By-Products; 9.57 Poultry; 9.71 Poultry Meal; 36.14 Direct-Fed Microorganisms; and 60.117 Dried Black Soldier Fly Larvae.
- Publishing two new official food additive petitions: 33.17 Gamma-Linolenic Acid Safflower Oil and 73.045 Pyrophyllite.
- Adding three new definitions to be published under “tentative” status: T73.311 Hydrogenated Glycerides, T73.051 Iron Tartrates, and T60.117(B) Dried Black Soldier Fly Larvae.

(Tentative definitions may be used in commerce, provided there is not an official definition listed in the OP, and generally remain in that status until they are reviewed and moved to official status at the next AAFCO meeting.)

As a reminder, the current definition for hydrogenated glycerides under 33.19 is published under the “Fats and Oils” section and does not include its use as a binder and lubricant in the pelleting of feed (i.e., pelleting aid) as is required in the new tentative 73.311 definition. The industry has been working with the Food and Drug Administration to correct an error which unintentionally left off this specification when the definition was published in 2012.

Other highlights from the meeting include AAFCO accepting several editorial changes to its Model Bill and Regulations. The membership also approved amended definitions for “pet” and “specialty pet,” and requirements for companies to follow when using marketing guarantees on certain non-structural carbohydrate fractions, and for making claims regarding these substances, on the labeling of pet foods. Unless otherwise required by its model bill, AAFCO now allows companies to voluntarily add guarantees for dietary starches and sugars, in terms of using claims such as “less” or “reduced” carbohydrates, dietary starches or sugars, instead of “low.”

The AAFCO Pet Food Committee also met to discuss progress on the pet food label modernization work group, which is looking at revamping several components of the pet food label.

The AAFCO annual meeting is slated for July 29-Aug. 1, in Ft. Lauderdale, Florida. A non-medicated feed labeling workshop will be held July 27-28, prior to the AAFCO meeting. For more information on the AAFCO annual meeting, visit aafco.org.

For more information on the latest AAFCO activities, contact Leah Wilkinson, AFIA’s vice president of public policy and education, at (703) 558-3560 or lwilkinson@afia.org.
The 2018 state legislative session is expected to be an active one, despite three states not being in session and some sessions lasting a short five weeks. The American Feed Industry Association’s Feed Regulatory Committee recently conducted a survey of state feed control officials which found that many of the 35 states that responded are anticipating changes to their feed laws or regulations this year.

As of press time in late January, below are some of the highlights on state legislative and regulatory activity. AFIA members should stay tuned to FeedGram for biweekly updates on these and other emerging issues.

- **Arizona, Kentucky, Maryland, New Hampshire, Utah, and Washington** – AFIA expects these states will update their commercial feed regulations to reflect the current version of the AAFCO model regulations.
- **Michigan** – AFIA anticipates the state senate to pass legislative changes to bring the commercial feed law in line with the Food Safety Modernization Act (FSMA).
- **New Mexico** – The state is considering a bill, which AFIA is opposed to, that will increase fees on pet foods registered in the state from $2 to $100 to pay for a spay/neuter program for low income individuals.
- **Oklahoma** – The state is currently reviewing a proposal to increase the license fee from $20 to $50 per commercial feed facility to better fund the commercial feed program.
- **South Carolina** – The state is expected to move forward with a bill, which AFIA staff helped draft in 2017, that would modernize the commercial feed law and move from product registration to facility licensing and tonnage reporting.
- **Tennessee** – The Tennessee Department of Agriculture is interested in instituting a feed penalty matrix, whereby firms that violate the nutrient guarantees listed on their feed labels would be required to pay a fine based on the expected value of the guarantee per ton. AFIA is opposed and in consultation with the department.
- **Wisconsin** – The state feed program is reviewing the tonnage inspection reporting requirements in hopes of streamlining the requirements.

If you hear of bills or rules being proposed or to get involved in states where changes are being considered, contact Richard Sellers, AFIA’s senior vice president of public policy and education, at (703) 558-3569 or rsellers@afia.org; John Stewart, AFIA’s manager of government affairs, at (703) 558-3566 or jstewart@afia.org; and Leah Wilkinson, AFIA’s vice president of public policy and education, at (703) 558-3560 or lwilkinson@afia.org.

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**STATE UPDATE**

The top ingredient in aquaculture diets is soybean meal and in horse diets is wheat midds.
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In 2010, the United States joined a new round of negotiations on what is now known as the Trans-Pacific Partnership (TPP), a trade agreement negotiated by 12 Pacific Rim countries representing 40 percent of global gross domestic product (GDP). The United States contributed heavily to new standard-setting language and helped shape obligations in the final text that would have forever changed the way the country negotiated moving forward, holding trading partners to new, higher expectations.

In 2012, three pending free trade agreements (FTAs) were implemented: the U.S.-Korea Free Trade Agreement (KORUS), the U.S.-Colombia Trade Promotion Agreement (CTPA), and the U.S.-Panama Trade Promotion Agreement (TPA). The long-awaited implementation of these three FTAs brought significant value, not only to the U.S. feed industry, but to the U.S. agricultural industry as a whole.

In 2013, the United States began negotiating the Transatlantic Trade and Investment Partnership (T-TIP) with the European Union, intending to sway the EU toward greater acceptance of science-based risk management regulations and provide a mechanism to hold them to it.

In 2017, Donald Trump became the 45th president of the United States, effectively changing U.S. trade policy. As one of his first actions, Trump signed a presidential memorandum permanently withdrawing the United States from the TPP. The memorandum also instructed the U.S. Trade Representative (USTR) to “begin pursuing, wherever possible, bilateral trade negotiations to promote American industry, protect American workers and raise American wages.” Since then, negotiations of the T-TIP with the European Union halted. The White House subsequently started renegotiating the North American Free Trade Agreement (NAFTA), and KORUS is next on the list of trade agreements to be modified.

While the United States is withdrawing from trade agreements, halting current trade agreement negotiations, and renegotiating existing trade agreements, the rest of the world is moving forward, negotiating their own trade deals and developing a trade environment that is slowly leaving the United States behind. For example, the Canada-European Union Comprehensive Economic and Trade Agreement (CETA) went into force in September 2017, negotiations on a Japan-EU Economic Partnership Agreement concluded in December 2017, and the newly renamed Comprehensive and Progressive TPP is being finalized with the remaining members to the original TPP.

U.S. agriculture, including the feed industry, is one of the few industries in the United States that enjoys a trade surplus. It also has a growing demand overseas to capture. The question remains if the administration is choosing to move away from multilateral agreements, such as TPP, and toward bilateral agreements, per the memorandum Trump signed when he came into office, when will we start to see movement toward negotiating new bilateral agreements when the United States has spent the past year focused on renegotiating existing trade agreements?

This may prove to be another interesting year for trade. Will the United States be able to successfully renegotiate NAFTA, or will it pull out of NAFTA? Will it make major modifications to KORUS, and how long and intensive will the discussions surrounding these modifications be? Even more telling, will the United States continue to seek out renegotiating existing agreements, or will it seek out new bilateral agreements, such as with Japan?

Stay tuned, as the American Feed Industry Association continues to play a major role to protect our hard-won markets. Also, if these discussions are of interest to you, consider joining the AFIA International Trade Member Interest Group. Be sure to also share how these trade agreements impact your company—both positively and negatively—with AFIA staff so we can ensure your voice is heard as these negotiations develop.

For more information on international trade, contact Gina Tumbarello, AFIA’s director of international trade, at (703) 558-3561 or gtumbarello@afia.org.
GMO Answers is an initiative committed to answering consumers’ questions about genetically modified organisms (GMOs), biotechnology and the science behind how our food is grown. Launched as GMOAnswers.com by the Council for Biotechnology Information (CBI) in 2013, the web resource has welcomed and answered more than 1,300 questions on a wide range of topics. Our goal is to be a trusted resource that makes educational information available to consumers in an easily accessible and understandable way. Website visitors are invited to ask questions of our experts and evaluate the science and evidence for themselves. GMO Answers is committed to answering all questions submitted to the site, no matter the tone or content.

We now have more than 200 experts—farmers, academics, nutritionists and dietitians, scientists, along with representatives from our member companies—who answer questions for the GMO Answers program. All experts volunteer their time to help dispel myths about GMOs and explain the science behind this important tool in agriculture. In addition to the experts program, we also have an ambassadors program, which encourages our experts to speak publicly and conduct media interviews on behalf of the program.

Below are a few sample questions GMO Answers has received recently about animal feed: What are the alternatives to genetically modified animal feeds? And, can you address the effects shown from genetically modified feed on the stomach of animals as seen in this study?

We are seeing more questions about GMOs and animal feed on our website and on social media and are committed to addressing them.

The GMO Answers program has been successful in being a resource—providing many downloadable materials, from information sheets and infographics, to social media images and booklets. One of our most popular resources is our GMOs in Animal Agriculture booklet, which is a compilation of all the site’s questions and answers about the connection between GMOs and animal agriculture. We’ve also developed a new “GMOs and Animal Feed” infographic (above). These and other resources are available in the “Infographics and Downloadable” section of the website.

On average, there are nearly 3,000 visitors that come to the GMO Answers website every day, and we’ve had millions of website visitors since its launch. In addition, GMO Answers has a strong presence on social media, with an active Twitter feed @GMOAnswers and Facebook page, along with a very robust Pinterest page. We also have a blog on Medium.com, which allows our experts and guest columnists to write on a variety of issues that are timely and relevant to the ongoing discussion on GMOs. We also work very closely with the mainstream media to make sure that industry and science are represented in news articles about this issue.

GMO Answers is funded by CBI members, including BASF, Bayer, DowDuPont, Monsanto and Syngenta.

For more information or to get involved, contact Michael Stebbins, director of external engagement for CBI and GMO Answers, at (202) 312-9290 or mstebbins@bio.org.
Farmers and ranchers have a long history of adopting the latest innovations to grow the crops and livestock that sustain a robust food and agriculture system. For example, enzymes added to feed improve digestibility and feed conversion efficiency, and drones have improved crop production.

To support continued innovation in food and agriculture, Congress created the Foundation for Food and Agriculture Research (FFAR) in the 2014 Farm Bill as a new model for agriculture research funding. FFAR builds unique partnerships to support innovative science and leverages an initial taxpayer investment of $200 million with equal or greater matching funds from non-federal partners for every grant awarded.

American Feed Industry Association members are on the front lines of one FFAR priority: The Protein Challenge, a collaborative research effort to enhance the economic, environmental and social sustainability of diverse protein production. AFIA members know firsthand how changes in the regulatory environment and shifts in consumer preferences drive the need for innovative science to meet growing global demand for high-quality protein.

This is why FFAR partnered with the Animal Agriculture Alliance and the Food Marketing Institute (FMI) in 2017 to support a study examining consumer preferences, beliefs and willingness to pay for certain poultry production practices. The study’s aim is to generate knowledge supporting farmers, ranchers and food companies as they consider changing practices to include the production of cage-free eggs and “slow-growing” broiler chickens. We already know these changes can drastically affect economic vitality, animal and farmworker health, and food system sustainability.

Our goal is to support a successful poultry production system that continues to benefit from the feed industry while providing choices for consumers, in an economical and sustainable manner. Working with industry associations is one way FFAR ensures the research we fund is carried through the supply chain to benefit producers and consumers.

In fact, one of the Foundation’s most important practices is incorporating input from stakeholders into research program development. In 2017, FFAR held two livestock-focused events with thought leaders from academia, industry, farm groups and government to identify opportunities for high impact and collaborative research. It was a pleasure to have AFIA’s President and CEO Joel G. Newman and Vice President of Membership and Public Relations Sarah Novak participate in our Sustainable Livestock Production event.

Another FFAR priority is antimicrobial stewardship. We are working to establish an industry-led consortium that supports actionable research and training to mitigate antimicrobial resistance in agriculture settings. The consortium will align diverse partners through precompetitive research in the development of decision-support tools, non-antibiotic alternatives and an improved understanding of the economic, social and behavioral factors that influence stewardship. This program will offer partners an opportunity to shape critical research, leverage resources and make decisions that will inform policymakers and the public.

At FFAR, we’ll continue to feed the research pipeline and look to partners like those of you within the feed industry to see new innovations through to implementation. We look forward to working with AFIA to ensure our research supports your efforts to meet global protein demands.

To learn more about the Protein Challenge and how to work with FFAR, contact Tim Kurt, Ph.D., FFAR’s scientific program director, at tkurt@foundationfar.org or visit foundationfar.org/challenge/protein-challenge.

Written by Sally Rockey, Ph.D., Executive Director, Foundation for Food and Agriculture Research

Did You Know?

The U.S. feed industry employs over 944,000 Americans. Workers in the U.S. feed industry earned $55.9 billion in 2016.
Over the past year, the Institute for Feed Education and Research (IFEEDER) has made one thing a priority: communication. How can IFEEDER effectively communicate the value of the animal food manufacturing industry to key public and policymaker audiences? And, how can the Institute better communicate to its donors so they understand the rich benefits they receive from their industry charity?

This past November, IFEEDER sought to answer the latter question by publishing its first-ever annual report. This report summarized many of IFEEDER’s 2017 accomplishments, including the:

• culmination of a research project with the University of Minnesota to create a one-of-a-kind, generic hazard analysis tool for facilities to use when making their individual animal food safety plans, as required by the Food Safety Modernization Act.

• development of three training modules with the Center for Food Integrity to assist American Feed Industry Association members in speaking with friends and family on the use of antibiotics in animal agriculture, genetically modified ingredients in animal feed, and agriculture’s true environmental impact.

• development of a tool that will save feed manufacturers, ingredient processors and pet food manufacturers money in compliance costs, reduce the burden of undue regulatory requirements, and provide continuity between the industry and Food and Drug Administration on FSMA’s hazard analysis risk requirement.

Since the annual report’s publication, IFEEDER also completed its economic contribution and animal food consumption studies, two yearlong, high-priority research projects for the industry, which you can learn more about in separate articles in this issue on pages 17-20.

As the industry looks to stay one step ahead of those influencers who are shaping the public dialogue about animal agriculture, more work still needs to be done to ensure the industry has the data and research it needs to effectively communicate with public and policymaker audiences.

Two of the several projects IFEEDER is working on this year are two consumer research projects aimed at providing food manufacturers, restaurants and retailers with the data they need to make more informed policy decisions. One examines the tradeoffs and ramifications that adopting “No Antibiotics Ever” policies would have on animal welfare. The other surveys consumers’ knowledge and beliefs about cage-free eggs and the slow-growth production of broilers and compares that with their willingness to pay for such attributes. The results of both studies, expected later this spring, will help the industry better separate fact from fiction when it comes to debunking misperceptions surrounding these production facilities.

IFEEDER recently revamped its website to better recognize its donors, and it now supports credit card contributions. AFIA encourages you to check it out and learn more about these and other ongoing and recently completed research and education projects.

For more information, contact Joel G. Newman, IFEEDER president and AFIA’s president and CEO, at (703) 558-3562 or jnewman@afia.org.
More than 6,200 animal food manufacturing facilities across America produce millions of tons of animal food annually, helping farmers and ranchers keep their livestock and poultry growing well and Americans’ pets happy and healthy. But that is not all they do. These facilities generate billions of dollars in sales and taxes and employ hundreds of thousands of hard-working Americans. Now, newly released research from the Institute for Feed Education and Research (IFEEDER) quantifies exactly how vital this industry is to the U.S. economy.

In early 2017, IFEEDER commissioned Decision Innovation Solutions (DIS), an economic research and analysis firm, to conduct a first-ever economic analysis of the U.S. animal feed and pet food manufacturing industry. The study sought to provide American Feed Industry Association members with a better understanding of the industry’s contribution to local, state and national economies, while providing AFIA’s legislative and regulatory staff with third-party data to use in meetings with policymakers.

“For the past few decades, the animal food industry has spoken about the value and service it provides to its customers in producing some of the safest, highest quality animal food on the planet,” said Paul Phillips, IFEEDER’s 2017-18 chairman of the Board of Trustees. “Now, we have the data to prove to our nation’s leaders that this industry is an integral part of the agricultural economy, providing hundreds of thousands of jobs and generating billions of dollars in taxes and revenue to support local and state communities.”

Using IMPLAN, an economic data management and statistical software tool, DIS analyzed 2016 economic data from the Bureau of Labor Statistics, the National Agricultural Statistics Service and other government and non-government sources. The study focused on the entire animal food manufacturing industry’s contribution to the economy, not just AFIA members, particularly focusing on the final sales of livestock feed and pet food. Under DIS’s recommendation, ingredient manufacturers and suppliers were only included in the total animal food production costs, not in the final sales or jobs numbers, since those would have greatly increased the size and scope of the study.

The results were staggering. In 2016, the U.S. animal food manufacturing industry contributed $297.1 billion in U.S. sales, including roughly $102 billion in value-added contributions; over $22.5 billion in local, state and national taxes; and over 944,000 jobs.

Five states in particular—Missouri, California, Texas, Pennsylvania and Iowa—topped all economic measures, contributing a combined roughly 337,000 jobs, $105.2 billion in total sales and roughly $8.3 billion in local, state and national taxes. In addition, several congressional districts (KS-2, IA-4, IA-2, KS-1 and NE-3) located in the Midwest or plains states, where a majority of livestock and poultry are raised, also rose to the top, providing a combined nearly 98,000 jobs, $32.7 billion in total sales and roughly $2.1 billion in taxes to the economy.

The DIS report listed a number of factors that play a role in the animal food industry’s ongoing economic output and said the odds are good the industry will adapt and grow stronger.
Upon the report’s release in January at the 2018 International Production & Processing Expo, Joel G. Newman, IFEEDER’s president and AFIA’s president and CEO, said, “We hope that this report will illuminate the significant contributions our industry is having on the economy. Our nation’s leaders need to move forward with achieving sensible state and federal regulations so that the animal food manufacturing business can continue to thrive, and with it, U.S. animal agriculture as a whole can thrive.”

AFIA plans to use this data as part of its ongoing outreach to policymakers, allied groups and the public throughout 2018. As part of its outreach, AFIA has created a number of communications materials to assist members when speaking about the value of this industry with their respective members of Congress. AFIA members should visit afia.org/feedindustrystats to see the full report and view an interactive map, which lists the industry’s economic contribution by congressional district and state. They should also visit afia.org/commstoolkit for a complete social media toolkit and graphics.

For more information or questions on the study, contact John Stewart, AFIA’s manager of government affairs, at (703) 558-3566 or jstewart@afia.org

“For the past few decades, the animal food industry has spoken about the value and service it provides to its customers in producing some of the safest, highest quality animal food on the planet. Now, we have the data to prove to our nation’s leaders that this industry is an integral part of the agricultural economy, providing hundreds of thousands of jobs and generating billions of dollars in taxes and revenue to support local and state communities.”

— Paul Phillips
IFEEDER’s 2017-18 Chairman of the Board of Trustees
What ingredients are most commonly used in animal diets? Although the answer is relatively simple, the way of determining it is a bit complex, given diets vary by region and animals require different nutrients at various stages of their lives. A new report now provides the animal food industry the most comprehensive analysis ever seen of the ingredients used and the amount consumed by the top nine livestock, poultry and aquaculture species in the United States.

In years past, the American Feed Industry Association used data from the U.S. Department of Agriculture’s National Agricultural Statistics Service on the number of animals processed for food each year and, working backwards, estimated a general diet per animal species to get the total amount of food consumed by livestock and poultry. In 2017, the Institute for Feed Education and Research (IFEEDER) commissioned Decision Innovation Solutions (DIS), an economic research and analysis firm, to build on that work by conducting a more thorough analysis.

“The latest animal consumption report provides us with more precise and comprehensive data by species, region and in total about the types of ingredients used in animal diets, giving us a clearer picture about the massive amounts of food consumed by livestock, poultry and aquaculture across the industry,” Phillips said. “It is clear that the U.S. animal food manufacturing industry is at the critical intersection of plant and animal agriculture.”

Working with roughly 25 industry and university subject matter experts, DIS determined the specific diets fed to animals at all stages throughout their lives, from birth to production, and adjusted them for regional dietary differences, due to the availability of ingredients and best management practices.

Looking at 2016 data, DIS found that approximately 236.3 million total tons of animal food were fed to nine animal species, including: 74.7 million tons to cattle on feed; 56.3 million tons to broilers; and 46.3 million tons to hogs. Corn, the most abundantly produced crop in the United States, made up slightly more than half of the total amount of animal food consumed, but when added with soybean meal and dried distiller’s grains with solubles (DDGs), represented more than 75 percent of all feed tonnage provided in 2016.

One of the more interesting things DIS reported on was the many other ingredients that are used in animal diets besides these top commodities. For instance, at least 1 percent of all tonnage fed to livestock and poultry in 2016 came from: wet distiller’s grains, bakery meal, corn gluten feed, cottonseed meal, wheat midds, grain sorghum, soybean hulls and oats.

The report also found that five states—Iowa, Texas, Nebraska, North Carolina and Minnesota—topped the country for the sheer amount of animal food consumed, with 21.1 million tons, 17.3 million tons, 15.4 million tons, 12.6 million tons, and 11.3 million tons, respectively.

Upon the report’s release in January at the 2018 International Production & Processing Expo, Joel G. Newman, IFEEDER’s president
and AFIA’s president and CEO, said, “Through continuous improvements and the adoption of new technologies and best practices, our industry is making our animal food products revered as the ‘gold-standard’ around the world. I hope that our nation’s leaders will recognize this and move forward with responsible, science-based policies.”

AFIA plans to use this data as part of its ongoing outreach to policymakers, allied groups and the public throughout 2018. As part of its outreach, AFIA has created a number of communications materials to assist members when speaking about the value of the industry with their respective members of Congress. AFIA members should visit afia.org/feedindustrystats to see the full report and view an interactive map, which lists the top consuming livestock, poultry and aquaculture species and ingredients consumed by congressional district and state. They should also visit afia.org/commstoolkit for a complete social media toolkit and graphics.

For more information or questions on the study, contact John Stewart, AFIA’s manager of government affairs, at (703) 558-3566 or jstewart@afia.org.

What is it like to work in the feed industry? What happens at an animal food manufacturing facility? When it comes to talking about the American animal food manufacturing industry, pictures and personal stories help the American Feed Industry Association communicate the value of the industry the best.

As we look to the campaigns and projects AFIA has on tap this year, including communicating the results of the recently released economic contribution and animal food consumption reports for the Institute for Feed Education and Research and the overhaul of the AFIA website, we could use your help gathering original photos from your facilities and employee stories that are representative of the feed industry. Photos and stories will help us better explain what the feed industry does and who we are to both policymakers and the public.

Below are examples of the types of photos we are looking for:

- Ingredients
- Finished feeds
- Feed mills
- Employees working
- Transportation
- Equipment
- Manufacturing processes
- Environmental sustainability
- Working with ranchers and farmers
- Animals being fed

All identifying company marks will be removed from the photos, and a photo release must be signed for AFIA and IFEEDER to use them throughout its digital and print marketing materials. In addition, if you have some exemplar employees who would be willing to share their stories of what it is like to work in the industry, we would love to speak with them.

For more information, contact Codi Coulter, AFIA’s communications coordinator, at (703) 666-8851 or ccoulter@afia.org.
MARKETING COMMITTEE TO TACKLE WEB REDESIGN, CRISIS COMMUNICATIONS IN 2018

The American Feed Industry Association’s Marketing Committee provides counsel and expertise to members, assists in marketing the value of AFIA, develops strategic marketing and communications recommendations on behalf of the association, and supports the marketing of the third-party certification programs, including the Safe Feed/Safe Food Certification Programs.

Over the past few years, the committee has recommended AFIA join or work with various industry groups to help the association better meet its overall goal of reaching out to consumers as part of the sustainability initiative. In addition, the committee has assisted with the redesign of FeedGram, AFIA Journal and provided feedback on AFIA’s various social media initiatives.

In the coming year, the committee will be assisting with the redesign of the afia.org website, implementation of an industry-wide crisis communications plan, as well as developing an overall branding strategy for AFIA.

Committee members generally meet in person twice per year—one during the spring committee meetings and again at AFIA’s office near Washington, D.C., in the fall. They also meet via conference call as needed. There are currently a few openings on the committee, so if you are interested in joining, please contact the AFIA staff liaison.

For questions or to express interest in joining the committee, contact Sarah Novak, AFIA’s vice president of membership and public relations, at (703) 558-3574 or snovak@afia.org.
AFIA Trade Committee Is Working to Ensure Members’ Voices Are Heard in Trade Discussions

The American Feed Industry Association had a busy year in 2017 on the international front. Donald Trump became the 45th president of the United States, effectively changing U.S. trade policy. Shortly after taking office, Trump signed a presidential memorandum permanently withdrawing the United States from the Trans-Pacific Partnership. He also quickly halted negotiations on the Transatlantic Trade and Investment Partnership with the European Union. The White House started renegotiating the North American Free Trade Agreement, and initiated discussions for the modification of the U.S.-Korea Free Trade Agreement, which are to be made in 2018. The United States downscaled the diplomatic staff of the U.S. Embassy in Havana, Cuba, and expelled 15 officials from the Cuban embassy in Washington D.C. Welcome to a new trade world!

In addition to addressing these developments and working with the various government agencies to ensure the U.S. animal food manufacturing industry’s concerns are heard and taken into consideration, AFIA has also continued to address regulatory restrictions that keep U.S. animal food products from capturing more market share abroad.

In October, AFIA’s International Trade Committee (ITC) met and discussed a number of issues. The committee met with the U.S. Department of Agriculture’s Animal and Plant Health Inspection Service’s National Import/Export Services staff on several lingering impediments to trade for our industry, such as the various markets that continue to have ruminant-origin ingredient bans, Chinese facility registration requirements, and protocols for new market access, just to name a few.

The future growth of the U.S. animal food manufacturing industry lies in exports, whether it be the exports of more animal protein or feed additives and technology to help countries become more efficient and sustainable commercial food producers. Working together with committed partners will enhance the value of this industry. It is important for AFIA members to be aware of the industry’s growth opportunities, the policy and regulatory constraints facing the industry, and how to navigate the regulatory requirements for destination countries.

AFIA’s ITC is a platform for members to strategize on these developments, as well as share information on the exchange of goods and services between countries, the rise to a world economy, supply and demand, and the effects on our industry. Member participation helps to develop AFIA’s policies on trade, ensuring that industry concerns and issues are accurately addressed within the appropriate government agencies.

For questions regarding the International Trade Committee, please contact Gina Tumbarello, AFIA’s director of international policy and trade, at (703) 558-3561 or gtumbarello@afia.org
NEW YEAR BRINGS CHANGES TO SF/SF PROGRAM ADMINISTRATION, DATABASE AND CODES

The American Feed Industry Association’s Safe Feed/Safe Food (SF/SF) Certification Program closed out another successful year. As time progresses, change is inevitable, and the program recently welcomed changes to its administration, added a new certifying body, went to a new database, and updated a couple of codes, and more is in store for 2018.

Kori Chung, AFIA’s legislative and regulatory assistant, is now the AFIA administrative contact for all issues and concerns related to SF/SF certifications (FSC32, FSC34, FSC36 and International Safe Feed/Safe Food). Paul Davis, Ph.D., AFIA’s director of quality, animal food safety and education, serves as the program’s technical advisor. Both Chung and Davis have been working diligently for the past few months in preparation for this transition.

AFIA recently added Food Safety Net Services (FSNS) as a certifying body for FSC36 audits to better serve participating rendering facilities. FSNS is the fifth certifying body recognized by AFIA to complete FSC36 SF/SF audits. An updated listing of the program's certifying bodies, along with the key contacts, can be viewed on the website at safefeedsafefood.org. More information on FSNS can be found at fsns.com.

In October 2016, the Safe Quality Food Institute (SQFI), an industry partner on the program, chose ReposiT rak®, Inc., a provider in compliance management and track and trace solutions for food, pharma and dietary supplement safety, to manage its database. The partnership benefits SQFI’s thousands of registered suppliers, in addition to its certification bodies and auditors, in managing the audit process from the initial request and payment through to the collection of results and reporting.

As part of the initiative, ReposiT rak hosts and provides exclusive access to SQFI’s audit results database. The move should provide SQFI stakeholders with a fast and friendly experience and allow them access to a broader product safety platform. ReposiT rak enables new compliance capabilities and easier registration for all users.

Companies already certified in the FSC36 certification program will continue to use the Reliance assessment database until further notice. A couple of updates have recently gone into effect on some of the audit codes. Beginning Jan. 2, FSC32 and FSC34 audits will be conducted to the SQF Code, Edition 8. The SQFI website provides many resources to ensure those certified facilities are fully prepared to comply with the new standard.

Our International Safe Feed/Safe Food partner, FAMI-QS, and its team of experienced and active experts, revised its code in order to better ensure feed safety and quality of specialty feed ingredients. Subsequently, FAMI-QS published its Code of Practice Version 6, which went into effect Oct. 2, 2017.

If you have questions about this information or need information about Safe Feed/Safe Food certifications, contact Paul Davis, Ph.D., AFIA’s director of quality, animal food safety and education, at (703) 650-0146 or pdavis@afia.org, or Kori Chung, AFIA’s legislative and regulatory assistant, at (703) 666-8862 or kchung@afia.org.

Our research-proven products and technical expertise are the result of more than 75 years of science, innovative technology, and on-farm experience.
In January, the American Feed Industry Association released the results of its annual charitable giving survey, revealing a sharp increase over 2016 in the animal food industry’s total donations and volunteer hours in support of charities and community organizations. AFIA member company employees donated a collective 92,000 hours of their time to supporting community service projects in 2017—a 124 percent increase from 2016. AFIA member companies, including company-employee matches, also donated over $44 million to an expansive list of community causes.

AFIA members identified a number of charities involved in education, civil service, agriculture, health and collegiate grants/research as key causes they supported. Eighty-nine percent of respondents donated to hunger relief charities, 81 percent to education programs, and 82 percent to university research, grants and graduate schools. In total, AFIA members donated to more than 200 charities in 2017, including the American Heart Association, local agricultural and youth associations, the Boys & Girls Club, Big Brothers Big Sisters, United Way and more.

“Our members really came together last year in a big way, giving back to many of the agricultural communities impacted by the hurricanes and other natural disasters, as well as supporting agricultural education programs in schools,” said AFIA President and CEO Joel G. Newman. “We are proud to see our members donating their time and resources to building stronger communities.”

AFIA established a Sustainability Task Force in 2009, which identified four key sustainable focal points designed for communication and collaboration between organizations, companies and associations, including one that focuses on supporting the community. The feed industry defines sustainability as: the ability to provide 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.

The informal poll, conducted at the close of each year, tallies community service hours and funds donated by participating companies. A higher number of respondents to the 2017 survey contributed to the jump in reported hours and dollars donated. All AFIA member companies are invited to participate, but the statistics are not reflective of all AFIA members. This year’s results only include data from 2017.

To learn more about sustainability in the feed industry, visit afia.org/sustainability. For more information about the survey, contact Victoria Broehm, AFIA’s director of communications, at (703) 558-3579 or vbroehm@afia.org.

DID YOU KNOW?
The U.S. feed industry contributed $22.5 billion in local, state and federal taxes in 2016.
The American Feed Industry Association brought together the country’s largest gathering of liquid supplement leaders, hearing from experts on the latest news, research and innovation happening in the field and recognizing outstanding individuals, at its 47th annual Liquid Feed Symposium, held Sept. 12-14, 2017, in Louisville, Kentucky. The conference highlighted the pivotal role that liquid feed has in fueling America’s livestock industry with its theme, “Run for the Roses.”

“This year’s Liquid Feed Symposium brought together more than 170 specialized and highly engaged individuals within the liquid feed industry to hear new ideas from speakers and discuss ways to strengthen business relations and, ultimately, the industry,” AFIA said in a statement. “The high degree of commonality and camaraderie in the liquid feed group makes this a unique, can’t-miss event.”

In a discussion on sustainability in the protein industry, Nicole Hoffman-Johnson, chief sustainability officer of the OSI Group, highlighted the need for transparency and shared values to building consumer trust. She also discussed the core principles that define sustainable beef, according to the Global Roundtable for Sustainable Beef: natural resources, people and the community, animal health and welfare, food, and efficiency and innovation.

LFS covered a number of other hot topics, including:

• An update on federal regulatory, trade and policy issues by Leah Wilkinson, AFIA;
• A discussion of medications and antibiotic use in liquid supplements by Paul Klink, Ph.D., Elanco, retired; and Jason Sawyer, Ph.D., Texas A&M University;
• Discussions of cattle nutrition by Tryon Wickersham, Ph.D., Texas A&M University; Jeff Carroll, Ph.D., U.S. Department of Agriculture; Mark Lyte, Ph.D., Iowa State University; and Chad Paulk, Ph.D., Kansas State University;
• Cattle industry segment updates from Dr. Gordon Jones, Central Sands Dairy; Debbie Lyons-Blythe, cattle rancher and blogger; and Ivan Pedigo, Gold River Feed Products;
• An ingredients outlook by John Cropley, ED&F Man Liquid Products, LLC;
• A weather report by Art Douglas, Ph.D., Creighton University; and
• A cattle industry outlook by Randy Blach, Cattle Fax.

Other highlights from the symposium included the induction of Joe Saini into the Liquid Feed Hall of Fame (see page 36 of Journal) and a live auction of fine Kentucky bourbons, which raised over $5,500 for the Kenny Berg Research and Education Fund that supports feed industry-specific projects conducted by land grant universities and colleges. AFIA’s Liquid Feed Committee also recognized Leanna Nail, AFIA’s former director of administration, who retired last December, for her 17 years of service with the committee and LFS.

The 48th annual Liquid Feed Symposium will take place in San Diego, California, Sept. 11-13, 2018.
AFIA’s EMC Learns to Move with Purpose, Raises Funds for Scholarship

The American Feed Industry Association’s annual Equipment Manufacturers Conference (EMC) brought more than 40 attendees to Orlando, Florida, Nov. 2-4, 2017. The event, hosted by the AFIA Equipment Manufacturers Committee, focused on assessing risk management in the equipment manufacturing industry, while providing opportunities to network and raise money for the EMC scholarship fund.

Attendees heard from a diverse lineup of speakers on a variety of topics, including an update on policy issues being discussed in Washington, D.C., a presentation on safety labels, a panel discussion with AFIA’s Production Compliance Committee and more. Dan Klein, author of My 3:59, a story about Dan’s mission to live each day in the present, gave the keynote address on moving with purpose.

“Attendees have said the 2017 Equipment Manufacturers Conference was informative and relevant, making it a huge success,” said Gary Huddleston, AFIA’s director of feed manufacturing and regulatory affairs. “The speakers all provided great education for attendees, and Dan Klein really motivated attendees to push past their limits and reach for their goals.”

In addition to the educational program, the event kicked off with the annual four-person scramble golf tournament, which raised nearly $8,500 for the EMC scholarship fund, which offers scholarships to students pursuing feed industry-related degrees. AFIA also recognized the first-place team, comprised of Andy Bishop of Kalmbach Feeds, Mike Gauss of Kent Nutrition, Tim Lease of WL Port-Land Systems, and Gary Huddleston of AFIA. The Equipment Manufacturers Committee partners with the Institute for Feed Education and Research to provide the scholarship fund.

The 2018 Equipment Manufacturers Conference will take place Nov. 7-9 in San Antonio, Texas.
The 2018 International Production & Processing Expo, held Jan. 30-Feb. 1 in Atlanta, Georgia, had more than 31,000 attendees from around the globe who participated in educational programs and activities and visited more than 1,200 exhibitors across 521,000 square feet of exhibit space. The American Feed Industry Association has been a proud sponsor of IPPE and its predecessor conferences for many years, and over the past decade has joined with the U.S. Poultry & Egg Association and the North American Meat Institute to build the conference into one of the largest trade shows in the world.

AFIA hosted three programs at this year’s IPPE—the annual Pet Food Conference, Feed Education Program and a Preventive Controls Qualified Individual (PCQI) training course—providing networking and educational opportunities on many topics impacting the animal food manufacturing industry.

The 11th annual Pet Food Conference, held Jan. 30, brought together more than 300 industry leaders to discuss everything from modernizing pet food labels to evaluating new pet food ingredients, helping them tackle the latest challenges in the evolving marketplace. “AFIA’s Pet Food Conference provides a forum for leaders in the industry to discuss and learn about the top pet food trends,” said Leah Wilkinson, AFIA’s vice president of public policy and education. “We had a full house and some great speakers who sparked lively discussions at this year’s conference.”

Attendees heard from seven experts from associations, private entities and universities, who discussed a variety of topics, including international trade, challenges and opportunities in the ingredients supply, modernization of the American Association of Feed Control Officials pet food labeling regulations, animal health and more.

At the Feed Education Program, held Jan. 31, approximately 100 feed facility managers, operations personnel and mill personnel heard from industry leaders on the latest federal regulations impacting their businesses. The half-day program provided attendees with an overview of the latest environmental, food safety and workplace safety rules and regulations affecting the animal food manufacturing industry. It also covered the latest guidance from the Food and Drug Administration on compliance with the Food Safety Modernization Act and provided attendees with information on the tools they need to help their businesses comply with the regulations. In addition, attendees heard about the Institute for Feed Education and Research’s latest research project that is analyzing whether certain salmonella serotypes are present in feed, as well as a presentation on how plant control systems can assist facilities with FSMA compliance.

“Our industry is constantly evolving to ensure we are producing safe animal food in compliance with all state and federal regulations,” said Gary Huddleston, AFIA’s director of feed manufacturing and regulatory affairs. “The Feed Education Program provides a great forum for industry leaders to discuss new technology, as well as...
learn about regulatory compliance requirements for animal food manufacturers.”

In addition to the educational portion of the program, AFIA announced Sanderson Farms of Collins, Mississippi, as the 2017 Feed Facility of the Year award winner. More details on the FFY program and the 2017 winners can be found on page 33.

AFIA held the PCQI training course Jan. 30-Feb. 2. As part of FSMA, animal food manufacturing facilities are required to have one or more PCQIs in each facility to develop and apply an animal food safety plan. This course provides the “standardized curriculum” recognized by the FDA as adequate for PCQI training and is one way animal food manufacturing facilities can meet current federal regulatory requirements.

“AFIA is committed to offering its members detailed and timely resources and training for compliance with the Food Safety Modernization Act,” said Huddleston. “Participants in recent trainings have left with a thorough understanding of the PCQI rule and how to comply with the requirements in their facility, showing the immense value that this program provides to participants.”

In addition to these three events, AFIA’s President and CEO Joel G. Newman participated in a panel discussion following a screening of “Food Evolution,” a new documentary that dispels myths about the use of genetically modified crops in agriculture. AFIA staff also participated in a number of media interviews and Facebook Live events. Visit AFIA’s Facebook page and Twitter handle to see videos, photos and articles from the conference.

The IPPE show partners also announced that changes are coming for the 2019 IPPE, including a more modern logo, larger show floor and new dates. Mark your calendars for Feb. 12-14, 2019, for a bigger and better show. For more information on IPPE, contact Sarah Novak, AFIA’s vice president of membership and public relations, at (703) 558-3574 or snovak@afia.org.

### AMERICAN FEED INDUSTRY ASSOCIATION MEETINGS CALENDAR

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<th>Date Range</th>
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<td>APR. 16–MAY 18</td>
<td>AFIA/KSU-500: Fundamentals of Feed Manufacturing Online Course</td>
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<td>SEPT. 11–13</td>
<td>Liquid Feed Symposium</td>
<td>San Diego, CA</td>
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<td>SEP. 11–13</td>
<td>Liquid Feed Symposium</td>
<td>Town &amp; Country Resort</td>
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<td>JUNE 11–14</td>
<td>FEED INDUSTRY INSTITUTE</td>
<td>St. Louis, MO</td>
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<td>OCT. 29–NOV. 30</td>
<td>AFIA/KSU-500: Fundamentals of Feed Manufacturing Online Course</td>
<td>Omaha, NE</td>
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<td>NOV. 7–9</td>
<td>Equipment Manufacturers Conference</td>
<td>San Antonio, TX</td>
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<td>SEPT. 9–11</td>
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<td>NOV. 2–4</td>
<td>Equipment Manufacturers Conference</td>
<td>Orlando, FL</td>
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<td>International Feed Expo at IPPE</td>
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<td>Spring Committee Meetings and Purchasing &amp; Ingredient Suppliers Conference</td>
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<td>AUG. 27–SEPT. 28</td>
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<td>NOV. 2–4</td>
<td>Equipment Manufacturers Conference</td>
<td>Hilton Marco Island Beach Resort</td>
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GETTING BUSINESS DONE IN THE LONE STAR STATE

The 2018 Purchasing and Ingredient Suppliers Conference will be held March 12-15 in Fort Worth, Texas. Hosted annually by the American Feed Industry Association, the one-of-a-kind event attracts more than 600 feed ingredient buyers and sellers and is truly “where business gets done!”

AFIA THANKS ALL SPONSORS FOR THIS YEAR’S PISC

If you are attending this year’s conference, be sure to catch the free screening of the movie “Food Evolution,” provided by the Institute for Feed Education and Research, on March 14 at noon. The film explores food-related challenges, the critical role of science in addressing those challenges, and the misperceptions involving the science of food. Following the screening, Alison Van Eenennaam, Ph.D., University of California-Davis, who is featured in the film, will lead a discussion. Snacks and a light lunch will be provided.
The American Feed Industry Association will be hosting its biennial Feed Industry Institute (FII) June 11-14 in St. Louis, Missouri. The conference, which has been held every other year since merging with the National Feed Ingredients Association in 1992, brings together roughly 125 individuals in the industry to learn the basics of the animal food manufacturing process—from the types of foods used to the animals served to federal policies that shape the output of the industry.

“The Feed Industry Institute is ideal for people who are new to the livestock feed or pet food industry, as it provides a good overview of animal health and nutrition,” said Paul Davis, Ph.D., AFIA’s director of quality, animal food safety and education.

“Throughout the four-day educational program, industry experts share practical information and best practices for attendees. Our goal is that attendees not only understand how to manufacture high-quality animal food, but why doing so is so essential for animal productivity and well-being.”

The 2018 FII will include an overview of the U.S. feed industry, animal physiology and nutrition basics, information on the types of ingredients used in animal food and why, the role of medications and other additives in animal food, and various processing techniques. It will also look at agriculture’s role in building consumer trust, the role of international trade, and provide an overview of state and federal regulations. The full agenda can be found on the event’s website at bit.ly/2018FII.

In addition to the educational program, there will be a reception Monday, June 11, and a networking outing to a St. Louis Cardinals baseball game Wednesday, June 13. The baseball outing is an additional $50 and includes a ticket to the game and $25 worth of “Cardinal bucks” to be used for food and drinks in the stadium.

AFIA encourages people to register between now and March 30 to receive the discounted rate of $650 for AFIA members and $800 for non-members. The AFIA member rate includes a $100 discount for registering online. Fees will increase April 1.

For more information about FII and to register, visit bit.ly/2018FII or contact Connie Samuels, AFIA’s manager of meetings and events, at (703) 558-3573 or csamuels@afia.org
Save the Date

2018 Liquid Feed Symposium

SEPTEMBER 11 – 13, 2018
San Diego, California
TOWN AND COUNTRY RESORT

AFIA
AMERICAN FEED INDUSTRY ASSOCIATION
LEAH WILKINSON TO HEAD AFIA’S LEGISLATIVE AND REGULATORY DEPARTMENT IN 2019

In December 2017, the American Feed Industry Association’s President and CEO Joel G. Newman announced that Leah Wilkinson will lead AFIA’s legislative and regulatory department starting in 2019. Wilkinson will assume the role currently held by Richard Sellers, AFIA’s senior vice president of public policy and education, following his retirement from the association at the end of 2018. Wilkinson’s new job title is vice president of public policy and education.

Sellers’ advanced notice of his retirement from AFIA a few years ago gave the association time to realign and prepare the legislative and regulatory department for a smooth transition. This has included monthly lunch-and-learn sessions with staff on topics such as: how AFIA sets policies, feed contaminants, working with state feed associations and legislatures, working with coalitions, the reportable food registry, handling recalls, medicated feed, and many other topics.

Upon announcing the change to the AFIA Board of Directors and staff, Newman said, “Richard Sellers has spent considerable time assembling a stellar team, transferring knowledge and creating an organization that will carry on AFIA’s long-term legislative and regulatory agenda into the future. As a next step in this transition, I announced that Leah Wilkinson would become the new team leader… Leah’s experience, knowledge and integrity make her the ideal candidate, and I can think of no one more qualified to carry on Richard’s tradition of representing AFIA before governments and the public.”

Wilkinson joined AFIA in 2010 and has been responsible for interacting with state legislatures, feed regulatory agencies in the western United States, the Association of American Feed Control Officials and the Food and Drug Administration. She also manages the AFIA Feed Regulatory, Ingredient Approval and Definition and Pet Food committees.

Growing up on a Minnesota swine farm and as a graduate in swine production from the University of Minnesota, she is very familiar with animal agriculture. Before joining AFIA, Wilkinson served as the director of policy and industry relations for ViaGen, Inc. and she has also worked for the National Pork Producers Council and the National Cattlemen's Beef Association.

RAAMEZAH AHMAD JOINS AFIA’S COMMUNICATIONS TEAM

Last November, the American Feed Industry Association welcomed Raamezah Ahmad as its new graphic and web design coordinator.

Ahmad is responsible for maintaining the overall brand for AFIA and the Institute for Feed Education and Research. She develops graphics and other visual materials for the web, social media, print and other uses, and supports both AFIA’s meetings and events team by creating myriad marketing materials and AFIA’s legislative and regulatory team with producing visuals that help them convey AFIA messages in member and public communications. She also serves as the lead designer for AFIA’s semi-annual printed magazine, AFIA Journal, and supports AFIA’s Marketing Committee.

“We are very excited for Raamezah Ahmad to join AFIA’s communications team,” said Victoria Broehm, AFIA’s director of communications. “I think she can bring a unique and creative perspective that will breathe new life into our communications products, helping us modernize for the future while still holding true to some of our long-term values that represent who we are as an industry. This industry is passionate about serving local communities and protecting animal health and welfare, and I know she will be invaluable in helping us convey our messages to policymakers and the public.”

Ahmad is a recent graduate of the George Mason University, where she earned a bachelor’s degree in art and visual technology with a concentration in graphic design, as well as served as a digital marketing coordinator in the student center. She is an Adobe Certified Associate, specializing in print and digital media publication, graphic design and illustration, and visual communication.

Ahmad can be reached at rahmad@afia.org or (703) 558-3570.
AFIA AWARDS

SANDERSON FARMS WINS
2017 Feed Facility of the Year

The American Feed Industry Association named Sanderson Farms of Collins, Mississippi, as the 2017 Feed Facility of the Year (FFY) in late January. Gary Huddleston, AFIA’s director of feed manufacturing and regulatory affairs, made the announcement and recognized the winners of each category in the program during AFIA’s Feed Education Program, held as part of the International Production & Processing Expo.

Cosponsored by AFIA and Feedstuffs, the FFY award recognizes overall excellence in feed manufacturing operations. It emphasizes the company’s commitment to safety, quality, regulatory compliance and employee development and highlights the facility’s overall operating efficiencies. To date, only 32 facilities have received this industry best practices award.

“Sanderson Farms demonstrates excellence in each of the areas the Feed Facility of the Year program measures,” Huddleston said. “They quickly rose to the top of this year’s competition, and we are happy to present the company with this award.”

Formerly the Feed Mill of the Year award, AFIA and Feedstuffs modified the program in 2016, and it is now recognized as a first-class benchmarking program for the animal food industry. Representing each of the several types of feed manufacturing facilities within AFIA’s membership, the improved format compares and recognizes top-performing facilities in five categories: commercial dry livestock, integrator, liquid feed, pet food and premix. From those, the FFY award is selected.

Several category winners were also recognized at IPPE: Sanderson Farms won the integrator category; ADM Animal Nutrition of Cordele, Georgia, won the commercial dry livestock feed plant category; Westway Feed Products of Dimmit, Texas, won the liquid feed plant category for the second consecutive year; and Animix LLC of Juneau, Wisconsin, won the premix manufacturing plant category. Due to the low application numbers, the pet food plant category did not have a winner in 2017.

SANDERSON FARMS – 2017 FEED FACILITY OF THE YEAR + INTEGRATOR CATEGORY WINNER

With more than 3.8 billion pounds of meat and more than 400,000 pounds of poultry feed produced each year, Sanderson Farms is the third largest poultry producer in the United States. The Collins facility is one of Sanderson Farms’ eight feed mills and processes 455 acres-worth of corn each day. It serves as the grain delivery point for the company’s Laurel, Mississippi, facility.

There are many factors that helped Sanderson Farms achieve the FFY award, including some of its work to boost employee engagement and promote morale. According to feed mill manager William “Bill” Bray, employees are included in daily conversations about safety, and the company’s training programs allow supervisors to assist employees by providing personal attention. Facility personnel are encouraged to offer suggestions for improvement while reviewing and implementing changes.

Bray said Sanderson Farms reviews a variety of metrics daily, weekly, quarterly and annually to maximize efficiency and maintain or increase performance. These metrics include inbound ingredient specifications, ingredient moisture, mixer analyses on specified ingredients, weekly tons of feed produced, labor costs, feed conversion rates, utility usage and performance, and delivery costs.

Sanderson Farms also places a priority on promoting community involvement. “We participate in many functions at the local level and encourage our employees to become involved in their community,” said Bray.
ADM Animal Nutrition manufactures around 40,000 tons of feed annually, mostly for equine and beef cattle, but also for poultry, swine, dairy cattle, deer, gamebirds, rabbits and more. Safety is a top priority at the facility, with meetings held each morning and at each shift change to remind employees of the importance of good safety practices. The facility also focuses on quality—all ingredients are weighed and analyzed upon arrival, and the plant will turn away ingredients that do not meet its standards.

“Cheap in, cheap out,” said plant manager Johnny Childers. “We’ll be out of an ingredient before we will settle for bad quality.”

Animix LLC is a manufacturer of vitamin and mineral premixes and supplements oriented to customer production and marketing. With 4,240 tons produced annually, Animix focuses on biosecurity, safety and technology. The company has strict quality control standards and trains all employees to be Qualified Individuals upon hire. The company also has a committee of six individuals who meet monthly to discuss safety and walk the facility to look for safety concerns and improvements.

“Animix is known by its customers as a responsive and reliable supplier of high-quality products,” said Janusz Sowinski, president and owner of Animix.

AFIA and Feedstuffs have conducted the FFY, and its predecessor program, since 1985, recognizing 70 total companies for outstanding performance in feed manufacturing.

More information on the FFY program, as well as a list of past winners, can be found at afia.org/feedmilloftheyear or by contacting Gary Huddleston, AFIA’s director of feed manufacturing and regulatory affairs, at (703) 666-8854 or ghuddleston@afia.org.

Westway Feed Products supplies liquid feed solutions globally, providing customers with resources, services, technical support and a collaborative culture to understand and meet their needs. The Dimmitt facility produces an average 94,000 tons annually and saw a 30 percent growth in tonnage over its previous fiscal year. Plant manager Phil Thomas is committed to making the Dimmitt plant one of Westway’s best. With a team of only four, the plant has a robust safety program, including monthly trainings and safety meetings.

“We have accomplished a lot in the past few years, including significant capital improvements, cost per ton advantages, greater employee engagement and an overall production increase. This team just knows how to get it done,” Thomas said.

Nine of the major livestock, poultry and aquaculture species consumed more than 236 million tons of feed in the U.S. in 2016.
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Where Business Gets Done
In the fall, the American Feed Industry Association recognized Joe Saini as its 2017 Liquid Feed Hall of Fame inductee. The AFIA Liquid Feed Committee presented the award—the highest award offered within the liquid feed industry—to Saini during a luncheon at AFIA’s Liquid Feed Symposium, held in September in Louisville, Kentucky.

“For more than 45 years, Joe’s knowledge and innovative ideas in bulk liquid feed handling, storage and manufacturing has contributed to the growth and continued success of the liquid feed industry,” said AFIA President and CEO Joel G. Newman. “Beyond his career accomplishments, he has actively given back to his community to improve education for all.”

Saini, one of the liquid feed industry’s early pioneers, has had a long and diverse career. He currently serves as a consultant to Quality Liquid Feeds, a liquid feed products manufacturer in Dodgeville, Wisconsin, which he co-founded in 1981. Saini served as vice president of operations and procurement for the organization from 1981 until his retirement in 2010. Prior to that, he served as regional manager for National Molasses from 1977-1980 and as director of operations for Illinois Liquid Feed from 1972-1977.

Saini grew up on a sugarcane farm in Ralhan, Punjab, India. He received a master’s degree in agriculture from Punjab Agriculture University in Ludhiana, Punjab, and immigrated to the United States in 1971. With a group of friends, he also co-founded the Saini School in Ambala, India, which provides education for 700 children living in poverty each year. Saini lives in Peru, Illinois, with his wife Neelam.

The Liquid Feed Symposium is the country’s largest gathering of liquid supplement leaders in manufacturing, nutrition, quality, sales and marketing. The annual Liquid Feed Hall of Fame award recognizes outstanding individuals in the liquid feed industry, and to date, only 18 prior inductees have received this award.

For more information on the Liquid Feed Hall of Fame, contact Paul Davis, Ph.D., AFIA’s director of quality, animal food safety and education, at (703) 650-0146 or pdavis@afia.org
Adisseo has acquired feed additive producer Nutriad. Through this acquisition, Adisseo will boast production facilities on three continents and will reach more than 100 countries.

The Paul F. and Virginia J. Engler Foundation has announced a donation of more than $1 million per year for 80 years to West Texas A&M University in Canyon, Texas. Paul Engler is chairman of the Board of Cactus Feeders.

Cargill is acquiring Pro-Pet LLC, a manufacturer of private-label and co-manufactured pet foods with facilities in Ohio, Kansas and Minnesota.

Congratulations to Todd Hall, ag and farm platform leader at Cargill Animal Nutrition, on receiving the Floyd Andre Award from the Iowa State University College of Agriculture and Life Sciences.

Congratulations to Diamond V, which is celebrating its 75th year. To commemorate its anniversary, the company is producing monthly videos, “Diamond V at 75: Immune Strength for Life.”

Furst-McNess Company has acquired Big Gain Wisconsin and its facilities in Lodi, Seneca and Benton, Wisconsin.

Huvepharma has acquired AgriLabs of St. Joseph, Missouri, and its subsidiaries Benchmark Biolabs, Antelope Valley Bios and VaxLiant®.

JBS United of Sheridan, Indiana, has become United Animal Health. The company also acquired Dekalb Feeds as of July 1, 2017, and is expanding its product line to include beef cattle nutrition products.

Kemin Industries is creating a Canadian division through the acquisition of Agri-Marketing Corporation of Mont-Saint-Hilaire, Quebec.

Congratulations to Land O’Lakes, Inc., on being named to FORTUNE’s 2017 Change the World List. FORTUNE recognized the company for the positive social impact its precision agronomy SUSTAIN initiative is having on the environment.

Milk Specialties Global has acquired the milk replacer and high fat businesses of Merrick Animal Nutrition Inc., a manufacturer of animal nutrition and animal feed products.

Congratulations to Rick Frank, founding partner of OFW Law, on being named the Agriculture Lawyer of the Year in the 2017 edition of the Finance Monthly Global Awards.

Congratulations to Sanderson Farms on being named the Food Company of the Year by Food DIVE. Food DIVE recognized the company for its commitment to educating consumers about responsible antibiotic use in poultry production. Sanderson Farms celebrated its 70th anniversary in 2017.

United Soybean Board named Polly Rurhland as CEO, succeeding John Becherer, who retired at the end of 2017.

Congratulations to Greg Watt, President and CEO of Watt Global Media, on being named one of Folio’s top 100 media innovators for 2017.
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<td>Elizabeth Lewis, Scientific &amp; Regulatory Advisor</td>
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**DID YOU KNOW?**

Corn makes up about 43 percent of broiler diets and 68 percent of swine diets.
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Feed Manufacturer

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D I D N’ T M I S S O U T—TRAINING TOOLS TO USE TODAY FOR FSMA

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$25 AFIA MEMBERS • $500 NON-MEMBERS
The American Feed Industry Association stands ready to protect its members and drive their positions on critical legislative and regulatory issues that affect their businesses. Your membership entitles you to the following AFIA benefits including:

- Proactive and creative representation on critical state, national and global legislative and regulatory issues that could significantly impact your business operations and financial success
- Opportunity to participate on committees, task forces and Member Interest Groups in member-driven position development
- Members-only access to critical information on legislative and regulatory issues via AFIA.org
- An influence on import and export policies that impact the future of your business

AFIA attends congressional meetings, committee hearings, offers testimony, drafts and submits comments, participates in coalitions, and has a way for members to be directly linked to D.C. through its online advocacy module.

To learn more about AFIA’s 4 Promises, visit afia.org/afiafourpromises.
Finding candidates with the right skills to work at animal food manufacturing facilities can be a daunting task, but it does not have to be. Some American Feed Industry Association members recently spoke with AFIA staff to share helpful tips for improving workforce recruitment and retention.

“Young people out of high school today are very tech savvy, so the challenge is finding applicants who want to put forth the effort, in not the most glamorous environment, and want to learn and excel in the manufacturing of animal feed,” said Randy Henley, Tennessee Farmers Cooperative’s (TFC) feed mills operation manager. “Money is not really an enticement to the majority of younger applicants.”

Amanda Cooper, vice president of corporate services at MFA Incorporated (MFA), couldn’t agree more. “Earnings are not as important for the younger generation as having a good work-life balance,” Cooper said. Her company has been exploring the idea of offering alternative work schedules and flexible staffing that allows them to ramp up during busy seasons, while promoting more regular schedules, without as much overtime.

While this flexibility has helped keep employees happy, it has led to gaps in coverage during busy seasons. MFA manages this, in part, by providing part-time or seasonal positions to long-time customers and retired farmers and employees. “They understand the agricultural business and know the work is seasonal,” she said. These employees have not only filled the gaps, but given the company years’ worth of knowledge to help improve its practices.

MFA also participates in career fairs on nine college campuses and has offered an internship program to recruit new staff for the past six years. The interns go through an application process and, once hired, spend the summer working in various departments within the company. It helps the company achieve some of its longer-term projects, while offering individuals an opportunity to see if MFA would be a good fit for them. In many cases, the company has hired interns full time following the completion of their internships.

Both MFA and TFC provide employee referral incentive programs for finding new employees. “The employee referral program has been great for us,” Cooper said. “It kind of gets at that philosophy that you don’t want to recommend someone you don’t want to work alongside” and has built a sense of camaraderie among the staff.

Just as finding new employees is important, so is investing in the employees you already have. Employee turnover is also a workforce challenge for many AFIA members. “After a lengthy training session, [new employees] often get bored and tired of the work and start looking to find a new job,” said Mark Rule, feed mill manager of TFC’s Tenco Feed Mill in East Tennessee. Henley added that they try to promote from within. “For TFC, if we have a ‘shining star’ hourly employee that exhibits the ability and drive to advance, we will provide the education and training needed to help the employee meet his/her goal and ultimately help TFC retain that employee for many years.”

Henley isn’t joking about employee retention. TFC boasts that the average mill management and supervisory staff has worked at the company for 23 years, and the average hourly employee has been with the company 14 years. Some of the long-term retention comes from recognizing employees with service anniversaries, promotions, and outstanding performance, and treating each employee as a “valuable asset” to the company.
company, Henley added. Cooper echoes Henley’s comments, saying MFA tries to invest in its employees, especially some of its supervisory staff.

“People don’t always leave a company, they leave a supervisor,” she said. MFA has been working on improving the skills of its management and is piloting a program that allows them to work with employees to determine their personal goals and match that with those of the company, she added.

MFA and TFC recognize that the pending retirement of Baby Boomers is going to be a big challenge for their companies, and across agriculture, and are doing more to transfer this knowledge to new staff. Neither mentioned having a formal mentoring program, but offered that it could be one idea worth exploring.

Henley and Cooper also spoke about the need to get employees out to speak at career fairs, FFA and 4-H events, and to high school and college students about the various types of opportunities available in feed manufacturing. They both added that social media has been helpful for sharing job listings and vetting potential candidates before moving forward in the interview process.

In the end, it all boils down to finding people with the right work ethic and keeping an eye to the future.

“I always look to hire someone with a good attitude,” Cooper said, “because you can’t train that! If the person has a good level of curiosity and is always looking to continue to grow, that is a good quality to have because we can do on-the-job training for other skills.”

When it comes to words of advice to hiring managers, Cooper adds, “Never stop recruiting. You never know when you’ll need new people, so it’s always important to keep an eye out for good people.”

If you would like to see AFIA Journal explore more topics like this in future issues, please contact Victoria Broehm, AFIA’s director of communications, at (703) 558-3579 or vbroehm@afia.org with story suggestions.

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