Featuring
OPERATING
FACILITIES IN THE
ERA OF COVID-19:
HOW HAS THE
INDUSTRY
CHANGED?
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As a casual student of history, it is fascinating to compare the world in 1900 to the world in which we find ourselves in 2020. The first half of the century was tumultuous – the "war to end all wars" was followed by a global pandemic, the launch of the Communist experiment, the horrors of the Holocaust and World War II, and it ended with the relative stability of the Atomic Age, humanity’s reach for the stars and the rise and fall of the Cold War.

Certainly, the first part of the 21st century seems to be repeating the last century’s rocky course. It kicked off with a fight against terrorism, a global pandemic that has shuttered much of our economy, civil unrest that has us questioning our national identity, mounting global tensions that threaten to once again divide the world, and, yet again, a mission to the stars.

But for those of us going about the business of producing food, feed, fuel and fiber, the goal remains the same – provide safe, affordable and high-quality products. We will, however, need to be increasingly flexible and innovative. COVID-19 compounded supply chain issues already introduced by strained trading relationships. Fortunately, interruptions to date have been managed and short-lived. The American Feed Industry Association stands with you to navigate future disruptions and identify diverse suppliers and markets to minimize this risk.

Domestically and globally, there is likely to be continued economic strain for consumers as economies seek to get back to business. This stress will impact global food prices and consumer preferences, both of which will send our industry fluctuating market signals.

We are working with our international colleagues and U.S. industry partners to share resources, information and expertise to more rapidly respond to new developments, deliver unified messages to decision-makers and find solutions to ever-evolving challenges. This spirit of cooperation demonstrates that adversity can bring out our best selves.

In the midst of our business challenges, we are also looking toward November, when a national election occurs whose outcome will impact how our century continues. It is more important than ever that food and agriculture makes its voice heard with local, state and national candidates. While the coronavirus shined a spotlight on the importance of the animal food industry to our nation’s food supply, we must continue to remind candidates that their decisions impact our continued success. This year, candidates’ time in their districts is an even more important opportunity for you to meet with them, invite them to your facilities and share your concerns (read more about how members are doing this on page 12).

Meanwhile, the AFIA is coordinating conversations between you and your elected officials and candidates and the association leadership will meet with both presidential campaigns to reinforce our priorities and concerns.

The study of history is important because it puts into context our current experiences – to recognize that the changes, which seem so radical in our relatively short lives, are no more or less significant than what our societies have undergone before. How we respond to, and learn from, these seismic events will be what future historians praise or lament. I am confident that the food and agricultural sector will serve as an example of how one industry not only pulled through, but also thrived during this time of unprecedented change.

Constance Cullman
President and CEO

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LEGISLATIVE & REGULATORY

Legislative Outlook

In Washington, D.C., we expect that each election year will be fraught with turmoil, surprises and little legislative progress and 2020 looks to be a spectacular example of that. The year started with Congress planning more recess than legislative time and a backlog of important reauthorizations to work through. The legislative woes have only been compounded by the coronavirus pandemic and its ensuing economic collapse, ongoing racial tensions, impeachment proceedings and an absurdly unpredictable election cycle.

LEGISLATIVE CALENDAR

With roughly 11 weeks of legislative session remaining in 2020, and half of that falling during the lame duck session, much remains for Congress to consider this year. Congress needs to reauthorize several large legislative packages, including waterway infrastructure, surface transportation, defense measures and more, on top of taking action on annual appropriations and responding to this year’s headline events. The year that began with a surprising commitment to legislative action – seeing the long-awaited ratification of the U.S.-Mexico-Canada Agreement and early actions on funding appropriations, despite impeachment proceedings and presidential primaries – has quickly been bungled by the loss of legislative time to the pandemic and other divisive issues in the national spotlight. To say the schedule for the remainder of the year is tight is an understatement.

CORONAVIRUS RESPONSE

As the nation spent the spring grappling with the COVID-19 pandemic, Congress showed surprising leadership by passing three separate response packages to mitigate the economic pain felt by American businesses and workers. Legislators quickly rolled out provisions, such as the Paycheck Protection Program, reimbursable paid sick leave for workers and direct payments for taxpayers through the Coronavirus Aid, Relief and Economic Security Act (referred to as the CARES Act or S. 3548) and Families First Coronavirus Response Act (H.R. 6201), but as of early summer, the two chambers disagreed on how to move forward with future response packages.

Concern over the ballooning price tag of response efforts and uncertainty over how long the virus will continue to spread and its lasting impact on the economy means the coronavirus and its legislative response is likely to remain a focal point into the future. The American Feed Industry Association has advocated for future response packages to include liability protections for good-faith essential employers, payroll tax credits and support for ailing livestock producers and processors, and is supportive of future economic stimulus packages that fund rail and waterway infrastructure, rural broadband and additional small business aid.

APPROPRIATIONS

Though the House paused most legislative action for over two months during the height of the pandemic, it remains resolute in its efforts to pass fiscal 2021 funding measures on time this year without the need for continuing resolutions or government shutdowns – a feat not accomplished in years. The process began early in 2020 with the on-time delivery of the president’s budget and early action by appropriating committees – now a saving grace as legislators returned to the process earlier this summer. Chief House appropriator, Rep. Nita Lowey, D-N.Y., has reconfirmed her commitment to on-time funding prior to the Sept. 30 deadline, noting that the legislative text of the funding packages will be considered on the House floor by mid-July.

Fiscal 2020’s appropriations – finished slightly behind the September deadline last December, proved to be a great success for the AFIA. It included $5 million in funding for the Food and Drug Administration’s Center for Veterinary Medicine (CVM) to improve its ingredient review process, a sought-after legislative priority for the AFIA. For fiscal 2021, the AFIA is once again seeking these funds for the CVM, with an additional request of $3 million, to bring the center’s funding in-line with its original request of $8 million. These funds, if secured, will allow the CVM to more than double the size of its feed ingredient review staff, improve the timeline of ingredient reviews as well as address additional animal food industry concerns.

2020 ELECTION

The truly defining topic of 2020, despite other issues in the national spotlight, will of course be this November’s election. Decisions of how to fund the government and the government’s response to the coronavirus pandemic, trade agreements, racial protests and nearly all other policy issues this year have been shaped by each party’s efforts to turnout voters and rally against their opponents.

The election cycle began with dozens of presidential contenders, but has narrowed to the presumptive Democratic nominee former vice president Joe Biden challenging incumbent Republican President Donald Trump. It seems the term “presumptive” nominee has never been more literal than this year, as both parties grapple with how or even if they will be able to hold their respective nominating conventions or if they will be moved to other cities or held virtually, and Democrats are still divided after the defeat of Sen. Bernie Sanders, I-Vt.

The 2020 election will continue to play an integral role in the narrative of this year, only adding to an already over-seasoned flavor of unpredictability. Look for updates on the presidential race and how each candidate aligns with animal food industry priorities, along with updates on any of the aforementioned topics, in upcoming issues of AFIA’s FeedGram.

For more information on legislative issues, please contact Cory Harris, AFIA’s manager of government affairs, at charris@afia.org.
As the novel coronavirus quickly swept across the country, the Food and Drug Administration and state feed agencies adjusted their inspection procedures to protect the safety of their staff and the regulated community within the food and animal food industries. In mid-March, the FDA announced changes to its domestic inspection plans, saying it would focus its inspection force on mission critical and “for cause” inspections only and temporarily postpone routine surveillance inspections. As of early summer, the FDA has resumed normal inspections.

After pausing routine inspections for a time, some state commercial feed programs are beginning to start conducting their inspections and sampling under the state authority, not under the FDA contract. The activity will vary with each state and situation. Some inspections will be conducted with the inspector safely entering the facility, whereas others may not require entry. In most cases, the inspectors are calling in advance to learn the facility’s visitor procedures prior to entry.

**USDA UPDATES AFRICAN SWINE FEVER RESPONSE PLAN**

In May, the U.S. Department of Agriculture’s Animal and Plant Health Inspection Service updated its African swine fever (ASF) strategic plan to strengthen its response capabilities in the event of a U.S. outbreak. Among other updates, the “ASF Response Plan: The Red Book,” includes a comprehensive feral swine response and identifies specific response actions that will be taken within the first 72 hours after ASF is detected. The plan also adds a continuity of business section.

APHIS will update its response plan as new capabilities and processes become available and additional test exercises are conducted. To view this resource, visit the American Feed Industry Association’s members-only webpage at afia.org/asf. For the latest on ASF research, be sure to flip to page 19.

**FDA BEGINS HIRING NEW INGREDIENT REVIEW STAFF**

After receiving $5 million in new funding in the fiscal 2020 appropriations process to hire additional staff for animal food ingredient reviews, the FDA’s Center for Veterinary Medicine (CVM) has begun hiring new staff. This funding has been one of the AFIA’s top priorities as it will hopefully expedite the time member companies spend waiting for new ingredients to be reviewed by the regulatory body. The CVM’s Division of Animal Feed should be able to hire 14 full-time equivalent positions within its ingredient review teams. The agency has made offers for most positions, with some people already starting in their positions.

**GMP EXPORT CERTIFICATES NOW AVAILABLE**

For more than eight years, the AFIA has been working with states and the U.S. government to establish a way for firms to comply with certain countries’ requirements for Good Manufacturing Practice (GMP) export certificates. Now, that hard work has paid off.

Currently, Brazil is the only country that requires GMP certification for products exported from the United States, however, Mexico will soon also require this certificate in order to export. The AFIA has worked with the U.S. government to deter other countries from making this requirement since the federal government did not have the mechanism in place to issue these certificates and only 12 states had processes for issuing them. This meant that if your facility was not manufacturing in one of these 12 states, you could not obtain this certificate and therefore could not export to Brazil, but that has finally changed!

The FDA did not have GMP regulations in place for non-medicated feed, feed ingredients and pet food, which stymied progress at the federal level for several years. The agency solved the problem with the implementation of Current Good Manufacturing Practices (CGMP) regulations via the Food Safety Modernization Act. The FDA then delayed the effort, saying that it needed to wait until all-sized facilities were in compliance with the regulations and could be inspected. The AFIA wrote a letter to the FDA last fall, asking them to take the next step of issuing these certificates for any firm looking to export to Brazil or any other country that might require it in the future. Finally, in June, the FDA began issuing these certificates.

The certificate is flexible as to whether or not a facility has been inspected by the FDA. If the facility received a No Action Indicated (NAI) or Voluntary Action Indicated (VAI) classification on its inspection, the certificate will include language about being in compliance with the Federal Food, Drug and Cosmetic (FD&C) Act regulations. If the facility has not been inspected or received an Official Action Indicated (OAI) result, the certificate will include generic language that the facility is registered and subject to FD&C Act regulations. For more information on federal regulatory activity, contact Leah Wilkinson, AFIA’s vice president of public policy and education, at lwilkinson@afia.org.
Operating Facilities in the Era of COVID-19: How Has the Industry Changed?

No one could have imagined earlier this year the extent to which the coronavirus would turn life as we know it on its head. For some, the rapid changes have been too much to bear, but for others, including those within the animal food industry, adapting to address the public health threat head-on was the only option.

“Essential industry does not mean working the same way we have always worked. We must adjust and protect the people who feed the world,” said David Lee, Alltech’s director of quality for the North American Feed Division and a member of Alltech’s global COVID-19 management team.

“COVID-19 has reminded us of the importance of the entire food chain, from the producer to the consumer. It has brought to life the interconnectivity of the supply chain.”

THE FIRST WAVE

In the early days of the crisis, decision-makers wrestled with this concept of “interconnectivity” in agriculture. Many within the industry worried that animal food manufacturers, ingredient suppliers, shippers and retailers would be ordered to close in compliance with state shelter-in-place rules, since state leaders’ understanding of the industry varied. On March 18, the American Feed Industry Association joined 23 state and regional feed and grain associations in urging governors and other state officials to classify these businesses as “essential.”

It was not until a week later that the Department of Homeland Security’s Cybersecurity and Infrastructure Security Agency (CISA) designated the industry as “critical infrastructure,” providing a model for states to follow in their shutdown orders. Many companies provided their employees with letters to verify their “essential” status when questioned at state and border checkpoints, allowing them to proceed to work or make deliveries.

Keeping facilities open was only one part of the equation. Amid a growing public health crisis, which the medical community still knew relatively little about, companies were forced to interpret federal and state guidance and make the best decisions they could – in real-time – to protect employee health. This challenge was made abundantly clear to Westway Feed Products, with a manufacturing facility in Washington state, where the first U.S. COVID-19 hotspot emerged.

“Westway implemented a companywide directive for immediate changes to accommodate the pandemic,” said Brian Holly, plant manager for Westway’s facility in Seattle. The company communicated with its employees about how to protect themselves from potentially infected individuals (e.g., truck drivers, contractors) and fully questioned any visitors about their current health, recent travels and contact with anyone who tested positive for COVID-19. Some companies, such as Alltech, completely restricted unnecessary outside visitors and required any essential visitors to adhere to strict health and safety protocols.

While some jobs within the industry moved remotely, Holly explained that his facility does not have any positions that could be performed offsite. This meant the company not only needed to follow the Centers for Disease Control and Prevention’s social distancing guidelines, but it had to work closely with its employees to reduce health risks.

“Personal, professional and social interaction were the biggest risks,” he said. For example, he said one operator relied on public transportation and there was a concern that this individual could be exposed to an infected person and unknowingly bring COVID-19 to the site. To mitigate the risks, Westway instituted “physical barriers, operating facilities...”

Masks are worn by plant employees of the Alltech feed division to protect themselves, colleagues and customers.
no contact zones and innovative solutions for paperwork handling.”

Some companies also modified work schedules and work zones to limit exposure to other staff, increased disinfection of high-touch surfaces, installed barriers where social distancing proved challenging and cross-trained staff in the event someone is exposed to, or sickened with, COVID-19, and must quarantine for two weeks. The Occupational Safety and Health Administration provided guidance on other ways employers could boost workplace safety (see page 7).

With personal protective equipment (PPE) in high demand, the AFIA worked with federal agencies to prioritize PPE for the food and agriculture sector and provided facility managers with suggested alternatives to N95 respirators. Industry officials also sought out disinfectants and hand sanitizers, which some members even pivoted their operations to manufacture (see page 22).

Besides keeping employees safe, companies worked with their suppliers to ensure the supply chain remained intact. The industry saw some short-lived disruptions to ground and shipping transportation and also found some ingredients in short supply due to the overnight change in retail (e.g., reduced dried distillers grains from idled ethanol plants).

“Early in the crisis, our primary supply chain concern was the potential impact to trucking transportation,” said Lee. “Our response, and that of our customers, was to increase inventory levels to ensure consistent product availability.”

In cases where this was not possible, some companies worked with their procurement teams to quickly source alternatives and with their nutritionists to change feed formulations. When some meatpacking facilities shuttered due to a rise in COVID-19 cases, the AFIA coordinated with others within the agricultural community on an effort to salvage some of the animal-based products as safe and nutritious ingredients for use in feed and pet food, in accordance with stringent federal animal food safety regulations.

Throughout the crisis, the bar was never lowered on feed or pet food nutrition, safety or quality. While the FDA changed the schedule for inspections (see page 6), some inspections and audits took place virtually.

Unfortunately, bringing in new sales is an area that was put on the backburner throughout the crisis.

“Our sales staff were off the road for six weeks,” said Lon Stephens, general manager of Co-operative Feed Dealers, Inc.’s Conklin, N.Y., facility. “They are heading back onto the road now, but are calling ahead to be sure the location is receiving visitors.”

At Westway, the sales team worked with the delivery drivers to communicate customers’ inventory levels, since many were restricted with a no travel directive, Holly said. On the flip side, the use of drop-points for physical paperwork or the electronic exchange for shipping documents, and contactless options for shippers, is something Alltech embraced during this time.

PREPARING FOR THE SECOND WAVE

The need for consistent and steady communication and collaboration – among employees, customers, suppliers and the greater agricultural industry – has remained steady throughout the crisis. COVID-19 has presented a no holds barred situation, in which sharing lessons learned, no matter how difficult it may be for competitors, has the power to save lives and the future trajectory of the virus.

Several AFIA member companies provided sample policies, notifications and forms for the association to adapt and provide membership for their use in preparing their facilities for COVID-19, including a coronavirus policy, protocols for exposure, tips on how to socially distance within facilities and signage for truckers and visitors. Clarion Safety Systems, AFIA’s long-time partner on feed equipment safety signs, also developed signs AFIA members could display at or near equipment in their facilities to remind employees of new protocols and assist non-native English speakers.

Looking forward, the AFIA Board of Directors prioritized the legislative and regulatory team to work on passing federal legislation that supports the overall health of the agriculture industry. The industry will undoubtedly adjust to a reduction in market demand for protein and dairy products within the food service and retail industries, a topic for consideration in an upcoming Institute for Feed Education and Research study. Without a stable agricultural economy, it will reduce the long-term economic growth in the sector.

Stephens, who also serves on AFIA’s Board, said that the “viability of the dairy economy” was one of his immediate concerns when the crisis hit. “The low prices of the last few years, coupled with COVID-19 induced processing problems, put additional financial stress on dairies,” he said. “Without dairy processing facilities, farmers don’t have a market for their products.”

Moving into the fall, many are concerned about a potential spike in cases as states completely reopen their economies. Many companies are using this time to invest in equipment and PPE to protect the health of their staff, revamping how they operate to minimize exposure, cross-training staff and communicating the need for flexibility during this time.

“Although the outbreak has created unprecedented uncertainty, our colleagues, customers and communities can have complete confidence in our commitment to their well-being,” said Lee, a sentiment in which all within the industry would agree. ■
COVID-19 SHAPED HOW WE CARE FOR Our Pets

Veterinarian Tony Rumschlag, Elanco Animal Health’s senior director of consulting veterinarians for U.S. companion animals, believes the connection pet owners formed with their pets during the COVID-19-related lockdowns across the country this spring will be long lasting.

“You either got really sick of being locked up with them or have come to appreciate them all that much more,” he laughed. “Although, I think there are a lot of cats who will be happy when we go back to work.”

All joking aside, Rumschlag said that working from home over the past few months has solidified what many of us in the animal food industry already knew: the human-animal bond is strong and getting stronger. The more time pet owners spend with their pets, the more emotionally invested they become in their care.

A recent Banfield Pet Hospital study of U.S. pet owners found that 84% felt more attuned with their pets’ needs now after spending time home with them and two-thirds vowed to change how they care for them, from modifying their work hours to be home more to committing to more frequent preventive checkups.

One of the bigger changes in pet care has been the move to virtual veterinary visits. Rumschlag said that until now, telemedicine has mostly been reserved for human medicine, but over the last several months that changed, with the Banfield survey showing roughly 41% of pet owners contacted their veterinarians for telehealth visits during this time.

“That ‘come see me’ mentality changed almost overnight,” he said, when veterinarians with dark online pharmacy websites quickly pivoted to get them up and running so they could continue providing owners with the medicines they needed to keep their pets healthy.

Similarly, many U.S. animal shelters modified their business models, moving animals to foster homes and encouraging virtual visits to protect the health of their staff and of those looking to adopt.

“Pet fostering is at an all-time high with an estimated 40% of the country’s shelter population currently in foster homes,” said Craig Neely, vice president of marketing for Mars Petcare North America. “We’ve also seen shelters across the country shifting their processes toward virtual adoption, making it easy for people to find their new best friend and for adoptable pets to find their forever homes.”

Mars Petcare and its brands launched several programs to help pets and pet parents, including the PEDIGREE®’s “Dogs on Zoom” campaign, which connects potential adopters with shelter dogs virtually, and the FOSTER TO FOREVER™ program, which encourages foster pet parents to adopt their fosters.

E-commerce sales of pet food, treats, supplies and pharmaceuticals have been on the upswing and that trend is expected to continue, especially as some larger online retailers have adapted to selling smaller quantities of their products as opposed to bulk. Rumschlag said that people were already looking for the convenience of getting products delivered to their doorsteps, but now with ongoing public health concerns, the coronavirus “hasn’t done anything except put the gas on that.”

Looking forward, with millions of Americans facing economic hardships amid a rise in food prices, which inevitably will impact the cost of pet food, many pet food manufacturers will need to find ways to offer a variety of products at different price points that fit pet owners’ budgets. Keeping pet food and care affordable will be a critical step in reducing relinquishments of pets in the future throughout the economic downturn.

“We all want to make sure our pets are well fed and loved,” Neely said. “The pet food industry has weathered this challenge well because our pets are family.”
Slow, But Steady Progress Continues on FSMA Inspections

With all compliance deadlines for the two major types of Food Safety Modernization Act inspections – Current Good Manufacturing Practices (CGMP) and Hazard Analysis and Risk-Based Preventive Controls (HA/PC) – passing last September, many facilities, with the exception of very small facilities, underwent federal inspections during the Food and Drug Administration’s 2019 fiscal year. The FDA also conducted a limited number of sanitary transportation and Foreign Supplier Verification Program (FSVP) inspections during this time.

During fiscal 2019, which ran from October 2018 through September 2019, the FDA completed 964 domestic and 23 foreign CGMP inspections at large and small facilities. FDA investigators completed 311 of these inspections and state inspectors in states with contracts completed 673 inspections. For the CGMP inspections, 85 facilities received Form 483s with 75 classified as voluntary action indicated (VAI) and nine classified as official action indicated (OAI).

The FDA also completed 221 domestic and 13 foreign HA/PC inspections. Of these inspections, FDA investigators completed 178 and state inspectors completed 56. For the HA/PC inspections, 44 facilities received Form 483s, with 28 receiving a VAI classification and 16 receiving an OAI classification.

In addition, the FDA completed 28 FSVP inspections and 95 sanitary transportation inspections.

The FDA plans to continue its practice of stacking several types of facility inspections per visit to increase efficiency. Facilities should expect any combination of the following inspections: CGMP, HA/PC, FSVP, sanitary transportation, medicated feed CGMPs, bovine spongiform encephalopathy and veterinary feed directive. The CGMP inspections are averaging two-to-three days in length and HA/PC inspections average roughly four-to-five days.

In 2020, the FDA plans to complete 589 CGMP inspections (180 by the FDA and 409 by state inspectors), 455 HA/PC inspections (360 by the FDA and 95 by state inspectors), 75 FSVP inspections and 84 sanitary transportation inspections. However, the coronavirus pandemic has derailed inspection plans for 2020, with the agency announcing in March that all domestic and foreign routine surveillance inspection activities have been put on hold and only mission-critical food safety inspections are occurring, so the agency will likely fall short of these goals.

The goal is still for firms to voluntarily comply with the FSMA regulations, while the FDA continues educating as it regulates. The agency will issue warning letters as well as untitled letters as necessary to firms that violate the regulations. The FDA will also use other enforcement tools, such as regulatory meetings, to obtain prompt voluntary compliance. ■

The American Feed Industry Association continues to advise members that the best preparation for a FSMA inspection is knowledge of the regulations and requirements. For specific questions on FSMA compliance, contact Gary Huddleston, AFIA’s director of feed manufacturing and regulatory affairs, at ghuddleston@afia.org or Paul Davis, Ph.D., AFIA’s director of quality, animal food safety and education, at pdavis@afia.org.

“Thorough knowledge of the regulations is the best preparation for an inspection.”

–Gary Huddleston
AFIA Director of Feed Manufacturing and Regulatory Affairs
Debate and controversy over federal regulation continued as summer arrived in Washington, D.C. President Donald Trump’s deregulatory agenda on the environmental front reached a new milestone with the revision or repeal of over 100 existing rules. The American Feed Industry Association has been engaged on several new decisions in the environment, health and safety and transportation arenas.

Waters of the U.S. (WOTUS) Rule – In late June, the Environmental Protection Agency’s latest revisions to the definition of the WOTUS rule went into effect. AFIA members may recall that the rule, proposed in late 2018 and prompted by a White House executive order, would narrow the scope of federal authority under the Clean Water Act. EPA’s latest action is the next step in the White House’s two-step process to reevaluate and revise the WOTUS rule, and as anticipated, litigation has already ensued.

Industry Fees for Formaldehyde Risk Evaluation – The EPA is carrying out the long list of mandates in the federal Toxic Substances Control Act, which Congress rewrote in 2018. The agency has selected its first list of chemicals to evaluate and finalize potential bans or restrictions on their manufacture and use. Formaldehyde is one of the first chemicals named on the list and the EPA is required to collect fees from manufacturers and importers to help pay for its evaluation. The AFIA and other associations have been vocal in stating that it was never intended for feed operations and key product suppliers of formaldehyde to pay this fee.

Regulation of Fluorinated Compounds – The EPA continues to slowly advance a comprehensive federal plan to set restrictions on products and drinking water standards for per- and polyfluoroalkyl substances (PFAS), one of the most complex regulatory issues our industry has faced in years. Several states have taken action to address potential health hazards from certain PFAS chemicals. The AFIA has continued talks with the EPA, U.S. Department of Agriculture, Food and Drug Administration and other federal agencies to determine whether any new requirements could impact the industry in the near- or long-term.

New Stormwater Rule – In early June, the AFIA joined the major poultry associations in submitting comments on EPA’s proposed changes to the Multi-Sector General Permit (MSGP) for Industrial Stormwater. The proposal, which resulted from litigation and a settlement with environmental groups, would affect many U.S. manufacturing sectors, including livestock feed and pet food operations. It includes many potential requirements that could lead to more frequent monitoring and costly control measures, wholly out of proportion to the industry’s risk profile and potential water quality threat. While the MSGP technically applies to only a handful of states without delegated federal authority under the Clean Water Act, the new requirements will inform states considering revising their stormwater permitting programs.

COVID-19 in the Workplace – In May, the Occupational Safety and Health Administration issued a revised enforcement guidance that reinforces that COVID-19 cases are recordable illnesses under OSHA record-keeping requirements if they are: confirmed as coronavirus illnesses; work-related (as defined by 29 CFR 1904.5); and involves one or more of the general recording criteria in 29 CFR 1904.7 (e.g., medical treatment beyond first aid or days away from work). Given the nature of the disease and community spread, OSHA acknowledges that it may be difficult to determine whether a COVID-19 illness is work-related. If, after following the revised guidance, the employer cannot determine whether the exposure in the workplace caused the COVID-19 illness, the employer does not need to record it.

OSHA also issued an updated enforcement response plan for COVID-19, which provides updated guidance to area offices and compliance safety and health officers (CSHOs) for handling COVID-19-related complaints, referrals and severe illness reports and CSHO inspection procedures. The agency also published guidance on preparing workplaces for COVID-19, which helps employers and employees learn how to protect themselves and their workplaces throughout the pandemic.

Hours-of-Service (HOS) Regulations – In May, the Federal Motor Carrier Safety Administration published its final rule on changes to driver HOS regulations, which aim to increase roadway safety by giving commercial drivers more flexibility while maintaining safe limits on driving time. The AFIA believes the final rule, which goes into effect Sept. 29, makes positive changes to the existing HOS rules by providing drivers with guidance on how to comply with the 30-minute break requirement, split their sleeper birth times and handle adverse driving conditions. It also changes the short-haul exemption. The changes do not increase driving time and will continue to prevent commercial motor vehicle operators from driving more than eight consecutive hours without a 30-minute rest break. These regulatory changes are estimated to save the U.S. economy and American consumers roughly $274 million in annualized costs.

For more information on these regulatory changes, contact Gary Huddleston, AFIA’s director of feed manufacturing and regulatory affairs, at ghuddleston@afia.org.
AAFCO Moves to Virtual Format

This Association of American Feed Control Officials’ year started strong with 380 people attending its mid-year meeting in Albuquerque, N.M., in January, where they addressed issues related to the state regulation of feed, feed ingredients and pet food. Like with all things this year, the coronavirus pandemic threw a wrench in their plans for future meetings and how stakeholders can engage with the association.

The annual summer meeting has moved to a virtual format, taking place Aug. 5-7. Gone is the pre-meeting workshop, several committee meetings and guest speakers. As of press time, AAFCO had not published an agenda or registration information, but has indicated that the major committee and membership meetings will take place virtually.

AAFCO’s work has not stopped during the pandemic. In some cases, the work has increased due to the fact that state regulators found themselves with more time to spend on AAFCO topics, since they were stymied in doing physical inspections due to state stay-at-home orders. The AAFCO Pet Food Committee and its work groups continued work on the label modernization project. The American Feed Industry Association has provided industry input into this process and the work groups have continued to refine the proposed modifications, which will be presented for consideration at future meetings. What remains to be determined is if the committee will move these recommendations forward when they are completed or if it will wait for the entire package of modifications, the latter of which the industry prefers.

Two issues of particular interest to the feed industry will be considered by the full AAFCO membership in August. The AAFCO Ingredient Definitions Committee will bring forward two new feed terms for “common food” and “common or usual” to provide clarity to these terms for industry and state regulators. AAFCO will hold a pre-meeting webinar on this topic in July. The AFIA will also be watching a proposal from the AAFCO Model Bill and Regulations Committee (MBRC) to amend the adulteration provisions to clarify the reference to “health” to state “human or animal health.” If adopted by the AAFCO membership, this language will be different from the Federal Food, Drug and Cosmetic Act. The MBRC was split on the proposal and the chair broke the tie to send it to the AAFCO Board. The AFIA does not oppose the concept, but questions the reasoning behind differing from federal law. This is yet another example where AAFCO and the states are moving away from harmonization – a growing trend that the AFIA will address this summer.

AAFCO’s work will continue this year, just without the hallway chatter. For more information on AAFCO, contact Leah Wilkinson, AFIA’s vice president of public policy and education, at lwilkinson@afia.org.

AFIA and Clarion Safety Are Proud to Offer Visual Safety Solutions to Stop the Spread

Trusted, expertise-backed labels, signs and floor markers to support your business during COVID-19

Did you know... AFIA’s and Clarion Safety’s partnership means that a full portfolio of feed and grain industry-specific equipment safety labels and workplace safety signs are available to you – all with special member pricing. Visit clarionsafety.com/AFIA for details.
Markets access isn’t just about exporting products around the globe. To sell products to another country, you not only need to comply with the country’s import rules and regulations, but perhaps more importantly, there has to be a demand for your products – in other words, consumers must want or need them. Recently, the American Feed Industry Association conducted a market assessment as a first step toward analyzing the landscape for new feed and pet food products in Vietnam.

In 2019, the AFIA applied for and earned Emerging Market Program (EMP) funds through the U.S. Department of Agriculture’s Foreign Agricultural Service (FAS) to conduct a market assessment of Vietnam. Vietnam is one of the fastest growing economies in Asia with three decades of over 6% annual gross domestic product growth. Its economy has steadily expanded over the last three years and its economic outlook for the medium term is bright.

The assessment found that buoyant growth is expected to continue in Vietnam throughout 2020 due to strong Foreign Direct Investment inflows, the country’s growing export prowess and solid domestic demand. In 2018, Vietnam’s imports of agricultural and related products stood at an estimated $33.4 billion, up roughly 1% over 2017. In addition, U.S. exports to the country hit a record high of $4.5 billion in 2018, up 51% over 2017 and up 341% from 2008. This significant increase in exports has made Vietnam the seventh largest agricultural-related products market for the United States.

When looking at a potential new market, the industry looks to ensure the country has a stable and growing economy, as is the case in Vietnam, and an active livestock production sector and ability to inform in-country producers and manufacturers on how high-quality nutrition can add value. Cultivating these requirements takes time, expertise and financial support.

Through AFIA’s market assessment, the association found that Vietnam has gone from a food shortage to a food abundance economy over the past three decades. With a dramatic economic transformation, consumers have moved toward more meat-intensive consumption habits. Livestock production in Vietnam focuses mainly on pigs, poultry, beef cattle, dairy cows and aquaculture products, with pig production contributing nearly three-fourths of total meat production. Vietnam’s livestock and aquaculture sectors have gone through rapid intensification over the past decade as well, with the former sector growing faster than crop production and now representing one-third of all the country’s agricultural output. The driving factors include a growing consumer demand for higher-quality products and increased incidences of animal diseases, which has accelerated the transition from backyard farming to commercial production.

Vietnam is ripe for a trading relationship with the U.S. feed industry and now is the time to start working with Vietnamese producers and manufacturers to establish relationships and trust in the industry’s feed and pet food products. The AFIA intends to continue establishing the necessary relationships and explaining the benefits of high-quality inputs in the livestock sectors, which equals higher-quality outputs. The AFIA is laying the groundwork by cultivating the “need” and “want” for U.S. animal feed and pet food products. From the conclusions of the market assessment, the AFIA will be requesting more FAS funding to begin working with Vietnamese producers and feed manufacturers directly.

U.S.-Mexico-Canada Agreement: All three countries ratified the USMCA and it entered into force on July 1.

The full market assessment gives further insights and details into the current state and projected future of Vietnam. If you are an AFIA member and interested in trade activities with Vietnam, contact Gina Tumbarello, AFIA’s director of international policy and trade, at gtumbarello@afia.org or Mallory Gaines, AFIA’s manager of market access and trade policy, at mgaines@afia.org.
Canada: The Canadian Food Inspection Agency has been working to modernize its feed regulations since 2011. Final proposed regulations were scheduled for publication in early 2020, but have been delayed due to the COVID-19 pandemic.

United Kingdom: The U.K. broke from the European Union on Jan. 31 and has up to a year to work on various trade deals, including with the EU and United States. The U.K. and U.S. met this spring and the AFIA is working with its feed industry counterparts in the U.K. to push for future talks to include agriculture, specifically sanitary and phytosanitary issues for animal feed and pet food.

India: The Office of the U.S. Trade Representative is working on a partial trade deal with India. In February, President Donald Trump and Indian Prime Minister Narendra Modi reiterated the need for long-term trade stability between the U.S. and India and indicated a more robust bilateral trade agreement could be next. Discussions are currently ongoing.

Japan: In September 2019, the U.S. and Japan reached a limited trade deal to reduce tariffs on agricultural and industrial products and address digital trade issues. The accord reduces tariffs on over $7 billion of U.S. agricultural goods and brings America on par with the relationship that Japan affords members of the Trans-Pacific Partnership agreement, an agreement that went into effect Jan. 1. The U.S. and Japan will begin discussions on the second phase agreement soon.

China: After almost two years of back-and-forth tariff hikes and tense negotiations to address a number of trade barriers, the U.S. and China signed a phase one trade agreement on Jan. 15 and began implementation on Feb. 14. Since then, China has removed the ban on poultry products in animal feed and pet food, established a protocol for pet food exports, including lifting the ruminant ban, and addressed many discrepancies in procedures. A permanent solution for feed additives, pre-mix and compound feed facility registrations is still forthcoming.

Vietnam: The AFIA recently conducted a market assessment of Vietnam for the industry, which found many opportunities for the animal feed and pet food industries.
Like so much else in 2020, the coronavirus pandemic has impacted state legislative sessions. Several states curtailed their legislative processes starting in mid-March and focused all their efforts on COVID-19 relief. Other state legislatures, such as New York, provided the governor with broad authority in the wake of the shortened legislative session.

The American Feed Industry Association tracks state legislative and regulatory activities and below are some of the highlights as of early summer. AFIA members should stay tuned to AFIA FeedGram for biweekly updates on these and other emerging issues.

**Louisiana** – The AFIA had a late-session success in the removal of proposed language in the state’s feed law that would have changed the adulteration provisions to include human and pet health, in addition to livestock health, in the definition of “health.” The AFIA does not oppose the concept but questions the move for state laws to differ from federal law. This is yet another example where states are moving away from harmonization – a growing trend that the AFIA will continue to closely monitor.

**New Mexico** – The state passed a bill, which the AFIA opposed, that phases-in increased fees on pet foods registered in the state from $2 to $100 to pay for a spay/neuter program for pets of low-income individuals. The governor signed the legislation after vetoing similar bills the past two years.

**New Hampshire** – In March, the state Senate passed a bill to redirect licensing and registration fees for animal food products to a special fund to cover costs for the care of abused animals. Although stalled by the changed legislative session, the bill, which has been moved to the House, is expected to pass despite opposition from northeast agribusinesses.

**North Dakota, South Carolina and Minnesota** – These states are in the process of updating their commercial feed laws or regulations to reflect the current version of the Association of American Feed Control Officials’ model bill or regulations.

The AFIA has updated its staff coverage of state legislative and regulatory issues with the addition of Cory Harris, AFIA’s manager of governmental affairs, to the state team. Louise Calderwood, AFIA’s director of regulatory affairs, will cover the eastern third of the country from Maine down to Florida and will provide overall leadership to the state issues team. Harris will cover issues through the heartland and Leah Wilkinson, AFIA’s vice president of public policy and education, will track issues in the western third of the country as well as her home state of Minnesota.

If you hear of proposed bills or rules or would like to get involved in states where changes are being considered, contact the AFIA legislative and regulatory staff at afia.org/stateissues.
Advocacy in Action

The American Feed Industry Association often leans on you – our grassroots membership – to wield your influence over members of Congress to help the organization achieve success on its legislative priorities.

There is no better way to influence policy than by building strong relationships between lawmakers and their constituents. Those relationships are not inherently partisan and despite common belief, they do not have to rely on campaign contributions. Instead, the most productive of these relationships are built on regular face-to-face interactions, the lawmaker’s understanding of an industry and the impact it has on their constituency, and a trust in you – the constituent – as a reliable, straightforward source of information about that industry.

The AFIA offers its members many opportunities to engage with elected officials – through action alerts on important issues, Capitol Hill fly-ins and an always-standing offer to connect you to your congressional offices. While these are very impactful ways to advocate for our industry and start a relationship, there is no better next step than to host these officials at your facility.

Earlier this summer, AFIA’s Immediate Past Board Chair Tim Belstra of Belstra Milling Co. met with Congressman Jim Baird, R-Ind.-04, and AFIA Board Chair-Elect Mike Schuster of Laidig Systems Inc. met with Congresswoman Jackie Walorski, R-Ind.-02, at their respective facilities. Through these visits, they enjoyed uninterrupted time with their members of Congress, providing a hands-on learning experience and tangibly showing the impact that their companies and our industry have on their local communities and state economies. They were also able to share some of the industry’s concerns with current policy issues, including trade, animal food regulation and other issues facing local businesses, such as labor, healthcare, transportation and markets.

Through these incredibly valuable meetings, the AFIA now has two new policy champions for our industry and issues, two new influential leaders who have a better understanding of animal food than likely any other legislators, and two new key relationships that can be leveraged to influence future legislative priorities. We encourage YOU to demonstrate leadership for your industry by starting to build a relationship with your members of Congress today.

For more information or help with scheduling a meeting or tour with your elected officials, contact Cory Harris, AFIA’s manager of government affairs, at charris@afia.org.
Pet Food Manufacturers Boost Economy from Farms to Bowls

From traditional kibble to raw food and treats, the U.S. pet food industry provides Americans many affordable options for feeding their pets. With each bag of dog or cat food, the industry is stimulating economic growth from farmers to processors, all throughout the agricultural value chain. Yet, there has never been a study to examine the immense purchasing power of the pet food industry and how it supports the agricultural economy—until now.

In 2017, the Institute for Feed Education and Research (IFEEDER) conducted a study that looked at what ingredients are used in feed for the country’s top nine livestock, poultry and aquaculture species. The comprehensive study provided the feed industry, for the first time, a solid grasp on the sheer amount of farm-grown crops, ingredients and food coproducts that are used to manufacture over 236 million tons of high-quality, nutritious feed for animals annually.

But the study did more than provide quantifiable data for the industry to use in conversations with policymakers and stakeholders. It sparked further questions about how much U.S. pets, specifically dogs and cats, consume annually and what ingredients are used most in pet food and treats. Given the benefit to rural economies, it also piqued pet food manufacturers’ interest on the upstream value of their ingredient purchases.

With these questions in mind, the IFEEDER partnered with the Pet Food Institute (PFI) and the North American Renderers Association (NARA) to develop a study that would examine the industry’s economic impact and composition of pet food along with considering the industry’s use of sustainable byproducts.

STUDY METHODOLOGY

Using a methodology called “recipe reverse engineering,” the researchers at Decision Innovation Solutions (DIS) essentially “poured out” the bag of pet food and put each kibble back into the bag—ingredient-by-ingredient—to achieve the nutritional value listed on the label at the price point given without knowing the exact pet food formulation. From there, they could estimate the total amount of that ingredient used and compare it to the national average prices for that ingredient during the time period studied to get the overall economic value of the ingredient.

THE RESULTS

Overall, the research found that U.S. pet food manufacturers delivered back to the agricultural economy by using 8.65 million tons of animal- and plant-based ingredients for dog and cat food, at a value of $6.9 billion, in 2018. Farm and mill-based ingredients topped the list at 4 million tons with a value of $1.4 billion, followed by 1.83 million tons of meat and poultry products (valued at $3.21 billion), 1.5 million tons of rendered protein meals ($563 million) and 289 thousand tons of animal and poultry fats ($153 million).
DIS’s analysis of pet food labels found that more than 500 ingredients are used to provide complete nutrition for dogs and cats, demonstrating the industry’s commitment to providing diverse options for pet food shoppers at various price points to fit their budgets.

These ingredient purchases boost incomes for farmers and farm processors and stimulate additional economic activity throughout the agricultural value chain through the purchase of farming inputs and supplies.

The research also found that sustainable ingredients are cooked directly into pet food. Often using leftover ingredients made from the production of human food, such as bakery or brewery items or parts of the animal that humans do not eat, pet food manufacturers are providing the nutrition U.S. pets need and want while supporting the agricultural industry’s environmental impact.

Overall, the research showed that the demand for pet food is strong. The U.S. pet food industry will continue to thrive as it develops new, innovative solutions to meet the nutritional needs of pets and changing demands of consumers - all while reducing its environmental impact.

The pet food manufacturing industry used 8.65 million tons of animal- and plant-based ingredients for dog and cat food in 2018, valued at $6.9 billion.

The IFEEDER, PFI and NARA launched the report in March and are continuing to promote its results with policymakers, allied organizations, news media and other stakeholders throughout 2020. To learn more, visit ifeeder.org/pet-food-report or contact Rob Cooper, IFEEDER executive director, at rcooper@afia.org.
Reframing the Challenges that Lie Ahead

I am grateful for the family I have, the job I do, the people with whom I work and the opportunity to contribute to an association that serves it members to the highest degree. I think I speak for all members when I say my heart goes out to all people affected by the coronavirus.

In the summer of 2018, I came across a news blurb that stated that Bill Gates made an offer to buy every student graduating from college that year a copy of a book that he described as, “One of the most important books I’ve ever read – an indispensable guide to thinking clearly about the world.” I am always interested in finding a good book, so when someone offers approximately $55,000,000 of their own money to back their recommendation, it was hard not to buy a copy. I am glad I did. In fact, I bought several copies and gave them to my kids to read. The book? “FACTFULNESS: Ten Reasons We’re Wrong About the World – and Why Things Are Better Than You Think,” written by Hans Rosling, et al. If you haven’t read it, do yourself a favor and read it.

Later that year, for personal reasons, I began to read the works of the early Greek and Roman philosophers who established the school of Stoicism. Two books were quite impactful to read: “Meditations,” by Marcus Aurelius, and “Enchiridion,” by Epictetus. In our modern age, a person labeled “stoic” is often viewed as cold and lacking emotions. But, it is important to distinguish lowercase stoicism from uppercase Stoicism -- the former is a behavior or state of being, the latter is a philosophy of life. At the risk of oversimplifying a philosophy of life, the Stoics valued virtue and tranquility, with virtue defined as excelling at your purpose and tranquility as being a mind free of negative emotions and full of positive ones.

At this point, it would be fair to ask: what is this article about? Surely, it is not going to be about a list of the books that he has read over the past few years. It isn’t. It is about a common point that weaves its way through the fabric of time from the 2,000-year-old writings of Epictetus and Marcus Aurelius to the modern writings of Hans Rosling. The Stoics teach that events themselves are neither good nor bad, but rather our judgment of them makes them so. Hans Rosling’s book says that our view of the world is directly tinted by our mind’s biases. He discusses 10 instincts that have been hardwired into our brains over eons of neural evolution, including, in light of current world events – The Fear Instinct.

We are here today in part because a small, but powerful portion of our brain has excelled at quickly identifying danger and avoiding it – i.e., acting first, thinking second. The fight-or-flight mechanism is a powerful, instinctual component of our minds. When left unchecked, however, it can cause us to act in ways that, in hindsight, are counterproductive or even harmful to us.

I confess, when news started to break last December of a virus impacting a city in China, I paid only modest attention to it. When, in early March, I went to the grocery store after work one day and left wondering why there wasn’t toilet paper on the shelf, I started to pay more attention. When I went to the supermarket a week later and witnessed shelves emptied of canned goods, frozen goods, dairy and meat products, I was on full alert.

When story after story appearing in the news focused on how our food supply is in jeopardy, it is easy, or better stated instinctual, for us to give into a fear of scarcity. It is reflexive to allow this fear to shade our thinking and take on a pessimistic view of events. The reality, for us in the United States, is that we built over the decades a robust and plentiful food supply chain. It exists because of the efforts, passions and dedication of employees and owners - working on farms and in feed mills, food production facilities, allied companies, restaurants, supermarkets, etc. - to ensure we have access to safe, affordable and nutritious food.

As members of the American Feed Industry Association, I feel it is our duty, our purpose to resist the temptation to give into the fear. I encourage you to take this challenge and reframe it as a chance to lead and serve our customers, employees and communities. We get to choose to view the events of the past few months as a learning opportunity or an obstacle. Put your focus on excelling at a purpose our industry holds dear: providing people with food to survive and prosper.

I end with a final thought:

“These are the two ideas you should keep at the very front of your mind and think about. One is that things in the world do not touch your spirit, but stand quietly external to it; that which disturbs us comes only from the opinions within us. Second, everything you see changes in a moment and will soon be gone. Keep in mind always how many of these changes you have already seen. The word is constant change; your life lies in your opinion.”

– Marcus Aurelius, Meditations 4.3.4.
Have you heard the news? Animal agriculture is to blame for COVID-19 and “the end of meat is here” – that is, according to animal rights groups. The coronavirus pandemic has flipped most of our lives upside down with social distancing requirements, canceled or postponed events, mask wearing, you name it. As communities across the country are doing their part to limit the spread of this virus and our food supply chain continues to ensure grocery store shelves are stocked, activists have shown no signs of slowing down their attacks on animal agriculture.

Groups like Direct Action Everywhere (DXE) defied state stay-at-home orders and social distancing guidelines to hold protests and enter barns without permission as part of their “Cancel Animal Ag” campaign. DXE also launched “Project Counterglow,” a map of more than 27,500 U.S. farms and facilities to encourage farm visits and the collection of undercover photos and videos. People for the Ethical Treatment of Animals (PETA) recently purchased stock in Smithfield to elevate the activist group’s “Go 100% Vegan” campaign and ensure a seat at the boardroom table. And, groups like Mercy for Animals are relying on online channels to carry their message by posting op-eds and online pieces blaming animal agriculture for the current pandemic.

Activist organizations have made it crystal clear that they are willing to go to any length to disrupt the current food system – no matter the impact on food security and nutrition. It is shameful that they are taking advantage of current circumstances to promote their agendas, but they are ruthless in pursuing their mission of putting an end to animal agriculture. They will target consumers, policymakers, researchers, investors and anyone with a stake or connection to animal agriculture – including the businesses that work to ensure those animals are fed.

The Animal Agriculture Alliance is encouraging everyone to be on high alert for activist groups looking for ways to benefit from the current situation. As always, working together to share positive and consistent messaging can help to quell baseless accusations that agriculture played a role in the COVID-19 pandemic and that people need to eliminate meat from their diets.

If you are worried that your favorite proteins might be on their way out or that alternative meats are taking over the meat case, you can rest assured that meat isn’t going anywhere. Meat sales are up by double digits compared to 2019, which was a record year for meat consumption (see related article on current consumer trends on page 36). Alternative protein sales may have increased for a time due to processing plant disruptions, but the vast majority of Americans want real meat and poultry – as evidenced by empty meat cases that left alternative proteins as the only option for consumers. Sales of these alternatives continue to be a drop in the bucket compared to purchases of meat and poultry.

We applaud the farmers, feed distributors, packers, restaurants, retailers and all sectors of the agricultural community that have risen to the challenge of unanticipated demand and worked tirelessly to keep shelves stocked with safe and nutritious food. We need to continue working together to share the positive messages of agriculture and debunk the narratives that anti-ag groups are trying to sell.
AFIA’s Safe Feed/Safe Food Program Brings Value in Regulatory Compliance and More

The American Feed Industry Association’s Safe Feed/Safe Food (SF/SF) program began in 2004 with Food Sector Category 36 (FSC36), a voluntary, independently certified program designed for the total feed industry. The SF/SF certification program maintains comprehensive standards of excellence that go beyond existing regulations to maximize feed and food safety. Excelling at every aspect of feed production remains “Our Responsibility, Our Promise” to regulators, customers and American consumers.

Since its beginnings more than a decade and a half ago, FSC36 has enjoyed sustained growth and increased in popularity. Society, as a whole, is increasingly aware of and interested in food safety and where its food comes from. Animal agriculture is certainly no stranger to this reality and concerns about food defense and intentional adulteration have become more prevalent.

At its core, SF/SF provides a code, which a feed facility can be audited against by an approved third-party, often referred to as a certifying body or auditor. The FSC36 code encompasses the entirety of the Food Safety Modernization Act (FSMA) for animal food, but it does not stop there. The code also contains criteria for food defense, biosecurity and approving suppliers. The additional focus areas are increasingly beneficial in safeguarding the health and safety of humans and animals.

The FSC36 content is managed under the direction of AFIA’s Quality and Animal Food Safety Committee, which is comprised of 15 representatives from the AFIA membership who are recognized as thought leaders in quality and food safety systems. Throughout the years, under the committee’s direction, the SF/SF content has changed and evolved, keeping pace with the latest scientific knowledge, regulations and industry practices. As such, participants have identified several ways that the program has brought value to them over time.

Recently, the AFIA conducted an informal survey of participants that found that the industry values SF/SF as a regulatory compliance resource, a differentiator in the marketplace and an aid in business-to-business transactions. It is pleasing to see value revealed in multiple ways and the applicability of SF/SF to a variety of businesses.

As an aid in regulatory compliance, SF/SF excels in creating a culture of food safety and an awareness of potential hazards due to the parallels with FSMA for animal food. Further, it brings to light the need for awareness in biosecurity and food defense, as well as the importance of dealing with approved suppliers. As a differentiator in the market, SF/SF provides peace of mind to livestock and pet owners who rely on the products produced by certified facilities. Lastly, among myriad certification programs, SF/SF is seen as making business transactions easier and faster, given its presence and respect in our industry.

If your facility would like to enjoy the benefits mentioned above and solidify its food safety culture, the AFIA encourages you to consider participating. For more information regarding SF/SF, please visit safefeedsafefood.org or contact Paul Davis, Ph.D., the program’s technical advisor, at pdavis@afia.org or Kori Chung, program administrator, at kchung@afia.org.

DID YOU KNOW?

Pet food manufacturers use leftover ingredients from human food production, such as parts of the animal that we don’t eat, to provide quality pet food nutrition.

540+ diverse ingredients used in pet food

Based on 2020 report from IFEEDER, NARA & PPI.
## RECENTLY CERTIFIED FACILITIES

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<tr>
<th>FACILITY</th>
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Latest Research Reveals New Data on ASF Risks in Feed

With the constant barrage of coronavirus news coverage, it is easy to forget about another potentially catastrophic virus the U.S. animal food industry is fighting to keep offshore – African swine fever (ASF). In May, Iowa State University found that if ASF were to enter the U.S. pork market, it could cost upwards of $50 billion in losses over a 10-year period, if left unchecked. This virus would not only devastate pig populations and the livelihoods of pork producers, but could also be detrimental to the food supply and U.S. economy.

Below is a snapshot of the latest research from experts who are looking to reduce the threat of ASF or other similar viruses from being introduced into the U.S. through feed.

<table>
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<td>Use of a Demonstration Project to Evaluate Viral Survival in Feed: Proof of Concept</td>
<td>Scott Dee, D.V.M., Ph.D./2020</td>
<td>To validate past laboratory research observations of the viral contamination of feed using a real-world “demonstration project” approach. The study simulates the actual transport of feed contaminated with several viruses [Seneca Valley virus (SVA), porcine epidemic diarrhea virus (PEDv) and porcine reproductive and respiratory syndrome virus (PRRSV)] by traveling across the United States in a commercial transport vehicle.</td>
</tr>
<tr>
<td>Efficacy of Chemical Mitigants in Reducing the Risk of Pathogen Transmission via Contaminated Feed</td>
<td>Diego G. Diel, D.V.M., Ph.D./2020</td>
<td>This study evaluated the potential of three chemical feed additives for mitigating the transmission of pathogens through feed, following the natural consumption of contaminated and mitigated feed by swine.</td>
</tr>
<tr>
<td>Sampling Validation for Detecting Swine Viruses in Bulk Ingredients</td>
<td>Cassandra Jones, Ph.D., et al./2020</td>
<td>This experiment examined the best type of sample companies should collect to determine if an ingredient is contaminated with PEDv.</td>
</tr>
<tr>
<td>Assessing Tools for the Mitigation of Foreign Animal Disease Introduction and Transmission in Feed</td>
<td>Megan Niederwerder, D.V.M., Ph.D./2020</td>
<td>This project looked to 1) identify animal feed ingredients that support the survival of classical swine fever virus (CSFV) and pseudorabies virus (PRV) exposed to trans-Pacific shipment conditions; 2) improve the half-life calculations of ASF virus (ASFV) in feed ingredients exposed to trans-Atlantic shipment conditions; and 3) investigate antiviral chemical mitigants as a tool for reducing the risk of introduction and transmission of CSFV, ASFV and PRV in feed and feed ingredients.</td>
</tr>
<tr>
<td>Commercial Feed Containing Porcine Plasma Spiked with African Swine Fever Virus Is Not Infective in Pigs When Administered for 14 Consecutive Days</td>
<td>E. Blázquez et al./2020</td>
<td>To determine if adding ASFV to unprocessed liquid porcine plasma and then adding it to feed for 14 consecutive days would result in ASFV-infected pigs.</td>
</tr>
</tbody>
</table>
### MAJOR RESULTS

| Results indicated the presence of viable PRRSV, SVA and PEDv in both soy products tested, while only recovering viable SVA from all five ingredients tested. In contrast, the study showed limited virus survival in the vitamins and amino acid ingredients. |
| Results showed that chemical mitigation alone (with mitigants A, B and C) may be unable to prevent the transmission of pathogens through feed. Alternative strategies, such as storage time and importation of feed ingredients from known and trusted sources, should also be carefully considered. |
| The research did not detect PEDv from the swab, probe and composite sample of the control samples. At the lowest dose, it also did not detect PEDv in the swabs, individual probes and composite samples, but confirmed it in 100% of the inoculant samples. At the highest dose, only 37% of the probes and 33% of the swabs had detectable PEDv. |
| Sampling bulk feed or ingredients for PEDv should include compositing at least 10 individual samples. Clearly, additional research is needed to better detect PEDv in soybean meal and environmental probes when there are low levels of contamination. Future research efforts should identify alternative methods that require less time and effort to collect such samples. |
| ASFV Georgia 07, CSFV and PRV are capable of surviving transoceanic shipment conditions in several ingredients and complete feed under laboratory conditions. |
| This research improved the ability to quantify the risk of CSFV and PRV in feed if inoculated under laboratory conditions and updated the recommended storage times for reducing the spread of ASFV in feed. |
| Adding ASFV to unprocessed liquid porcine plasma mixed in feed and then feeding it to 10 pigs for 14 consecutive days at a minimum infectious dose of 104.3 TCID50/mL or a higher dose of 105 TCID50/pig/day did not cause ASFV symptoms or infect various tissues. |
| This study suggests that the minimum infectious dose of ASFV in feed may be much higher than in previously reported studies. As discovery is still occurring with this topic, the feed industry should remain diligent in ingredient sourcing, supplier approval programs, hold times and biosecurity practices to reduce the risks of contamination and unintentional virus transmission. |

### CAVEATS

| Only mitigant A reduced SVA transmission through feed. No significant differences between the control (i.e., non-mitigated) and mitigated feed were observed for PEDv. |
| This proves that if feed is inoculated, viruses can survive in certain feed ingredients; however, there is still no evidence of actual contamination occurring naturally. |
| This research improved the ability to quantify the risk of CSFV and PRV in feed if inoculated under laboratory conditions and updated the recommended storage times for reducing the spread of ASFV in feed. |
| This proves that if feed is inoculated, viruses can survive in certain feed ingredients; however, there is still no evidence of actual contamination occurring naturally. |

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For more information contact Paul Davis, Ph.D., AFIA’s director of quality, animal food safety and education, at pdavis@afia.org or Leah Wilkinson, AFIA’s vice president of public policy and education, at lwilkinson@afia.org.
Change Is a Good Thing – IFEEDER Adapts to Industry Needs

Is change good? That is a question many of us are currently trying to answer. Over the past several months, most everything we know has changed in one way or another. As we start to adapt to “the new normal,” we will have the chance to ask the question again, is change good?

On the heels of the recent (virtual) Institute for Feed Education and Research (IFEEDER) Board of Trustees meeting, change is certainly good for the industry charity. The IFEEDER is taking this time to look forward to the next five years and what our industry wants its public charity to accomplish.

In May, the Board of Trustees adopted a plan to strategically plan IFEEDER’s work – ensuring that only compelling projects that address the industry’s needs are taken on, knowledge gaps in research are identified, new technologies and trends are investigated and the industry continues to have a pulse on its sustainability impact. The IFEEDER is also looking to better engage with its stakeholders, building capacity to launch future capital campaigns.

In the coming months, the IFEEDER will be reaching out to its donors and supporters to gather advice and input to ensure the industry’s research and education arm is still relevant and valued across all segments of the animal food industry.

WHAT’S NEW WITH RESEARCH

Later this year, the IFEEDER will work with Decision Innovation Solutions to update its 2016 animal feed consumption research study. This first-of-a-kind study analyzed the industry’s production prowess, providing data on the ingredients used in the top livestock species’ diets across the country. Many of the American Feed Industry Association’s members use the consumption study to share with their state leaders the impact the feed industry has in their local communities. The IFEEDER is excited to not only update the study and provide timely data, but to also look at the possible impacts on livestock and poultry production due to the coronavirus pandemic.

The IFEEDER is committed to focusing on ways to help the industry protect itself from the introduction or transmission of animal diseases. To that end, the institute is partnering with the North American Renderers Association and the North American Spray Dried Blood and Plasma Producers to participate in a research study that quantifies where, when and how often animal diseases could spread via the movement of supplies (e.g., feed), people and equipment (e.g., trucks). With the recent African swine fever outbreaks around the globe and the industry’s experience with porcine epidemic diarrhea virus, the IFEEDER continues to look for ways to assist the animal food industry in updating its safety and biosecurity guidelines. By better understanding how the feed industry could contribute to the spread of diseases, the industry will have reliable, scientific data to prevent future outbreaks and provide to policymakers developing national response plans.

Another area the IFEEDER is working on is sustainability. Recognizing that all AFIA member companies have their own company sustainability goals, the IFEEDER will be conducting a thorough analysis of the opportunities that exist that can shape and inform an overall sustainability strategy for the industry. This project represents phase one of the industry’s ongoing sustainability efforts and will prepare the animal food industry to continue addressing sustainability in a comprehensive, consistent and strategic way.

WELCOME TO THE BOARD OF TRUSTEES

The IFEEDER welcomed several new AFIA members to the Board of Trustees this spring, including: Scott Druker of Church & Dwight Company, Inc.; Kevin Halpin, Ph.D., of International Ingredients Corporation; Steve Lerner, Ph.D., of Chr. Hansen Animal Health and Nutrition; and Joe Lucas of CJ Bio America, Inc.

The Board recognized Bruce Crutcher of Micronutrients as he passed the gavel to Tim Belstra of Belstra Milling, who will serve as chair this year. In addition, several long-time trustees were recognized as their terms expired, including: Dean Warras of Phibro Animal Health Corporation; Cathy Bandyk, Ph.D., of AB Vista, Inc.; and Ross Hamilton, Ph.D., of Darling Ingredients Inc.

DID YOU KNOW?

In 2019, pet food ingredient purchases lead to the purchase of $5.3 billion of materials and services by farmers.
When COVID-19 began spreading across the United States, biofuels manufacturer POET quickly pivoted its operations to create a sanitizer product for high-risk groups in the Sioux Falls, S.D., area. The editor of the American Feed Industry Association’s Journal spoke with Matt Reiners, vice president of business development for POET Nutrition, and Austin Broin, business development coordinator, on the public service.

**How did POET decide to create a hand sanitizer?**

At POET, we saw an opportunity to support our country and our community while living out our mission – to be good stewards of the Earth by converting renewable resources to valuable goods – so we created an all-natural, purified, ethanol-based sanitizer product. As COVID-19 spread, we embraced our culture of innovation and found a way to use our existing resources and expertise to protect frontline workers.

**What steps were involved in modifying operations?**

We saw the sanitizer shortage become a significant problem across the country and our team got to work quickly. We convened a working group of researchers, engineers and production experts who worked around-the-clock to figure out how we could adjust our process to create a pharmaceutical-grade product. POET also reached out to local companies to facilitate the bottling and labeling of the product.

**How did POET decide where its sanitizer went?**

We wanted to make sure that our product went to those with the greatest need first, which included first responders like health care workers, firefighters, EMTs and police officers. We partnered with several local and state organizations to distribute the product to those groups.

**What lessons were learned from this experience?**

Human compassion is an incredible driving force and when you combine that with a little ingenuity and a lot of hard work, it is unstoppable. We had so many dedicated team members put in countless hours to bring this project from an idea on day one into a bottle eight days later. They were not driven by greed or ulterior motives – just the desire to do whatever they could to help those in need. This experience was a terrific example of the culture of innovation and generosity that makes us all so proud to work at POET.

**What advice do you have for companies looking to help?**

Just do it! Utilize your resources and your people and do what you do best. We had no idea if we would be able to successfully manufacture sanitizer, but we rolled up our sleeves and got to work. Take a risk, even if it might seem unreasonable. In times like these, it’s worth it.
Members Go Above and Beyond to Help Communities During COVID-19

From food donations to helping frontline workers in their communities to supporting the nation's pets, the American Feed Industry Association's members have been hard at work giving back throughout the COVID-19 pandemic. Below are a few highlights.

FOOD SECURITY EFFORTS

**Ardent Mills** donated flour as part of a partnership with Heidi's Brooklyn Deli to give away bread at locations across America.

With decreased cruise sailings out of Florida, **Cargill Protein** donated 10,000 pounds of frozen beef, pork and chicken to food banks in the Florida Keys. In addition, the Kansas City Cargill Protein team donated to two organizations – Harvesters Food Network and Hope Faith Ministries.

**Cooper Farms** provided more than 21,000 meals and donated $10,000 in gift cards to local businesses and first responders in Western Ohio. They also donated nearly 6,000 pounds of turkey and about 27,000 dozen eggs to area food banks and 1,100 pounds of turkey burgers to groups providing children with hot lunches.

**Elanco Animal Health** launched the Elanco Foundation, pledging to fight rising food insecurity challenges in communities where it operates. In Indiana, home to the company's headquarters, it led a coalition to raise over a million dollars to feed families with children in the Indianapolis Public School System, where roughly four in five children struggle with having enough to eat.

**Elanco Animal Health** pledged to fight rising food insecurity challenges in communities where it operates.

**Foster Farms**, **Pilgrim's Pride** and **Perdue Farms** supported community food banks and organizations where they operate by donating millions of pounds of protein to those in need.

**Kalmbach Feeds** donated one meal to Feeding America for every bag of Kalmbach Feed sold.

**Maple Leaf Farms** partnered with a famous Chicago chef to donate a few hundred meals to area healthcare workers.

**Mars, Inc.** committed $20 million in support of people, pets and communities most affected by COVID-19 to global organizations CARE International and the United Nations’ World Food Programme. They also donated $500,000 to the D.C. Capital Area Food Bank.

**Elanco Animal Health** pledged to fight rising food insecurity challenges in communities where it operates.

**Smithfield Foods** launched the Good Food Challenge, donating millions in cash and in-kind donations, including 4 million protein servings, to provide 10 million meals to Feeding America's network of food banks. Through #TheGreatAmericanTakeout campaign, the company also donated to the Children of Restaurant Employees, supporting food and beverage service industry employees and their families following COVID-19 diagnoses.

**Trouw Nutrition** partnered with **Mountaire Farms** to donate 25,000 pounds of chicken to food banks throughout the Midwest where they have locations.

**Vita Plus** supported dairy and livestock producers in the Upper Midwest through its Serving Customers and Rural Communities Project, which provided $100,000 for food security initiatives in rural communities.

**Western Milling** donated 300 breakfasts to local healthcare professionals along with employee-written letters of appreciation.

PET EFFORTS

AFIA’s members are giving back to pet owners and the nation’s pets, who are providing comfort and solace during a time of social distancing.

**Hill's Pet Nutrition** donated pet food to pantry partners, animal shelters and other nonprofits caring for pets through its Food, Shelter and Love program, the Disaster Relief Network and in conjunction with its animal welfare partners.
Other members, such as Greenies, Merrick, Nature’s Variety and Wellpet, offered discounted prices on pet food and treats, with the amount discounted donated to COVID-19 relief efforts, allowing people to benefit from affordable pet food, while working to curtail the pandemic.

HEALTHCARE EFFORTS

ADM donated $800,000 to COVID-19 relief efforts at local organizations in communities and regions where it operates. The company also financially supported a partnership with Rutgers University to advance virus mitigation research and medical support in Europe, the Asia-Pacific and South America.

Alltech’s Lexington Brewing and Distilling Company in Kentucky used its supply of alcohol to make and donate much-needed hand sanitizer to city and state leaders fighting the pandemic.

Animal Science Products donated face shields for emergency workers.

Cargill donated personal protective equipment to the medical community worldwide.

Royal DSM, along with two other organizations, began large-scale production of medical FFP2 facemasks in the Netherlands to protect healthcare workers from COVID-19.

Elanco Animal Health donated viral transport media to a local COVID-19 testing center in Iowa. Viral transport media is a preservative solution that keeps a virus active until it is tested, so that patients obtain more accurate test results.

Texas Farm Products donated N-95 respirators to the community task force conducting COVID-19 testing efforts.

OTHER BROADER EFFORTS

ADM pledged millions to organizations, including the United Nations Foundation’s “COVID-19 Solidarity Response Fund for the World Health Organization” and various regional and local charities involved in COVID-19 relief and mitigation, and provided grants to employees facing financial hardships through its Colleague Emergency Fund.

Land O’Lakes has been a longtime supporter of expanding broadband and Wi-Fi in rural America. The company’s facilities and cooperative network across 170 locations in 14 states offered free and open Wi-Fi access to help people bridge the telehealth and educational digital divide during COVID-19.

JBS USA and Pilgrim’s invested more than $50 million to support its team members and local communities, including donations to local and global organizations to alleviate food insecurity, strengthen long-term community infrastructure and well-being and support COVID-19 emergency response and relief efforts.

Tyson Foods donated 4 million pounds in protein products and community grants, including ones that support nonprofits providing emergency response efforts (e.g., rent and utility assistance, food distribution, healthcare, childcare, small business support and other economic recovery services), and supported employees facing financial hardship through its Helping Hands program.

These philanthropic examples are just a snapshot of the animal food industry’s support of their local communities, employees and customers during this unprecedented time. If your company is supporting COVID-19 relief efforts, let the AFIA know so we can share it on our social media channels by emailing Sarah Novak, vice president of membership and public relations, at snovak@afia.org.
Looking to Learn In All the Wrong Places?

Is your travel limited this year, but you are still looking for professional educational opportunities that won’t break the bank? If so, then the American Feed Industry Association has a few options for you (and your team) to consider!

**AFIA-KSU 500 FUNDAMENTALS OF FEED MANUFACTURING ONLINE**

The AFIA-Kansas State University 500 is a structured self-paced, five-week professional development course. The course outlines the fundamentals of feed manufacturing, including how the U.S. feed industry evolved and its current structure as well as the different steps involved in manufacturing feed. The lectures are available as narrated presentations offered in real-time or for download. Quizzes, discussion questions and additional course materials are available via the AFIA 500 K-State’s Canvas learning system.

The next session begins Aug. 4, with another session starting shortly thereafter on Oct. 6. The cost is $499 for members and $685 for non-members.

**AFIA-KSU 500 ON-DEMAND MODULES**

If you do not need the entire aforementioned AFIA-KSU 500 course, but instead need to learn about one or two of the topics discussed, the AFIA now offers the most popular information as stand-alone modules. Animal food industry employees are able to take any of the available courses at a time that best fits their schedules. The modules include narrated presentations and knowledge checks. Participants will receive a certificate of completion after successfully going through the module. Please note, once a module is purchased, the participant will have 30 days to complete it. Available modules include:

- AFIA 500A: Overview of U.S. Feed Industry and History
- AFIA 500B: Batching, Mixing and Particle Size Reduction
- AFIA 500C: Pelleting Process
- AFIA 500D: Finished Product Packaging and Bulk Loadout
- AFIA 500E: Basics of Quality Assurance
- AFIA 500F: Boilers and Boiler Efficiency
- AFIA 500G: Preventive Maintenance, Sanitation and Energy Conservation

Read more on the new online, on-demand modules at afia.org/afia-ksuondemand.

**VIRTUAL FEED INDUSTRY INSTITUTE**

AFIA’s popular biennial program, the Feed Industry Institute, has moved virtual. This is a great program for industry newcomers to learn about the feed, pet food and ingredient industry from those who know it best — industry experts!

Launching in August, FII is being offered in a self-paced, virtual learning environment over the span of a few weeks. Attendees (or students as we like to call them) will watch nearly 30 lectures at their leisure and answer short quiz questions for each session between Aug. 17 and Sept. 22. Then, on Sept. 23, the AFIA will host a live webinar to answer questions, recap the presentations and hold an online graduation.

Register before Sept. 22 at the rate of $450 for members or $850 for nonmembers.

More information can be found at afia.org/FII2020.

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What’s New at the 2021 IPPE?

The International Production & Processing Expo (IPPE) continues to evolve and grow to meet the needs of its attendees and exhibitors. For 2021, IPPE will again be in all four halls and will bring together more than 1,400 exhibitors and more than 30,000 visitors in Atlanta, Ga. Mark your calendars to join us Jan. 26-28 – you will not want to miss it!

IPPE focuses on innovation - bringing together buyers and sellers of the latest technology of products and services to make your business successful; education - learning from the experts in free- and fee-based world-class programs on topics that cross industry interests; global reach - attracting international visitors from more than 100 countries; and networking - meeting new and rekindling old relationships with leaders across the industries. Registration will open Sept. 14 at ippexpo.org. Register before Jan. 10 for $75; after that, the on-site rate is $125.

The American Feed Industry Association will be hosting several educational programs during IPPE, including:

- AFIA Pet Food Conference
- AFIA Feed Education Program
- Business Continuity in Times of Disruption: Lessons Learned For the Feed Industry

Returning next year is the popular Members to Atlanta (M2A) program. This program waives the registration fee for attendees from member firms of all three associations engaged in the production of poultry, eggs and meat for consumption, and feed and pet food manufacturers. Qualified individuals must register by Dec. 31.

AFIA PET FOOD CONFERENCE

The 14th annual AFIA Pet Food Conference will be held Tuesday, Jan. 26, from 7:30 a.m. to 4 p.m. Eastern time. The day-long conference informs pet food industry representatives of the latest industry trends and features an array of speakers from government agencies, private corporations, universities and AFIA staff, who are experts in pet food regulations, production, marketing and nutrition. The AFIA will also announce the recipients of the second annual Friend of Pet Food award (see article on page 32).

The 2021 program will include breakfast and lunch. The early-bird registration fee is $90 and after Jan. 10, the on-site fee is $110.

IPPE & COVID-19

Learn how the IPPE organizers are working to keep 2021 show participants safe at ippexpo.org/COVID-19.

AFIA FEED EDUCATION PROGRAM

AFIA’s Production Compliance Committee is hosting its annual Feed Education Program Wednesday, Jan. 27, from 8 to 10 a.m. Eastern time, which is free to all IPPE attendees and does not require pre-registration.

As regulatory requirements for the animal food industry continue to expand, this training session will update participants on recent changes from several federal agencies, including the U.S. Departments of Labor and Transportation, the Environmental Protection Agency, the Food and Drug Administration and the Occupational Safety and Health Administration.

BUSINESS CONTINUITY IN TIMES OF DISRUPTION: LESSONS LEARNED FOR THE FEED INDUSTRY

AFIA’s Nutrition Committee is hosting a program focused on how to manage your feed facility during times of disruption and what lessons were learned from COVID-19. Held on Wednesday, Jan. 27, from 10 a.m. to noon Eastern time, feed industry experts will discuss how these types of situations impact feed and ingredient manufacturing operations.

The early-bird registration fee is $55, and after Jan. 10, 2021, the on-site fee is $65.

For more information about IPPE, contact Sarah Novak, AFIA’s vice president of membership and public relations, at snovak@afia.org, or Veronica Rovelli, AFIA’s senior director of meetings and events, at vrovelli@afia.org.
HOW WILL AFIA EVENTS DIFFER WITH COVID-19?

The American Feed Industry Association is consulting state and local regulations and Centers for Disease Control and Prevention guidance when planning its upcoming meetings. As guidance may change by state and venue, the AFIA will provide more information to registered attendees closer to each event. Should you have any questions or concerns, contact Veronica Rovelli, AFIA’s senior director of meetings and events, at vrovelli@afia.org.

AFIA EVENTS

AFIA MEETINGS CALENDAR
Visit afia.org/events for meeting updates and other virtual learning opportunities.

2020

AUG. 4–SEPT. 8
AFIA/KSU-500: Fundamentals of Feed Manufacturing
Online Course

AUG. 1–SEPT. 23
Feed Industry Institute
Online Course

OCT. 6–NOV. 10
AFIA/KSU-500: Fundamentals of Feed Manufacturing
Online Course

NOV. 4–6
Equipment Manufacturers Conference
Omni Royal Orleans Hotel
New Orleans, LA

2021

JAN. 26–28
International Production & Processing Expo
Georgia World Congress Center
Atlanta, GA

MAR. 9–11
Purchasing and Ingredient Suppliers Conference
Hyatt Regency Grand Cypress
Orlando, FL

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AFIA Thanks Outgoing Committee Members

The American Feed Industry Association depends on members who volunteer annually to serve on committees that advance the association’s mission, objectives and programs. The AFIA thanks these dedicated volunteer members and the companies they represent for their 2020 service.

Aquaculture Committee
- Jorge Arias, Alltech, Inc.
- David Brock, Rangen Inc.
- Rachid Ganga, Tyson Foods, Inc.
- Gavin Shaw, Skretting North America

Equine Committee
- Michael Barrett, ADM Animal Nutrition, Inc.
- James Jarzombek, Cargill Animal Nutrition

Equipment Manufacturers Committee
- Alan Berndtson, WEM Automation, Inc.
- Tim Lease, WL Port-Land Systems, Inc.
- Jonathan Wheat, 4B Components, Ltd.
- Mike Schuster, Laidig Systems Inc.

Ingredient Approval and Definition Committee
- Carlos Gonzalez, Hill’s Pet Nutrition, Inc.
- Emily Helmes, Elanco Animal Health
- Phil McGuire, Anitox
- Jim LaMarta, DSM

International Trade Committee
- Susan Wiegert, Phibro Animal Health Corporation
- Adam Ancelet, Phibro Animal Health Corporation
- Jim LaMarta, DSM
- Scott McLellan, Nature’s Variety
- Doug Paulson, Diamond V
- Jeff Pendleton, Hallway Feeds

Liquid Feed Committee
- Christine Davis, Buffalo Molasses LLC
- Rob Hudson, Nutrien

Marketing Committee
- Kim Litteken, Trouw Nutrition USA, LLC
- Sheldon Spratt, Land O’Lakes, Inc.

Nutrition Committee
- Amy Batal, Sanderson Farms, Inc.
- Larry Mack, Seminole Feed
- Mike Messman, Cargill Feed & Nutrition
- Daniel Nelson, Zoetis
- Wendy Plocher, Genesis Alkali LLC
- Janet Remus, DuPont Animal Nutrition

Pet Food Committee
- Eric Altom, Balchem Animal Nutrition & Health
- Ken Gilmurray, JBS USA Rendered Products (died April 2020)
- Pam Kaufman, Royal Canin USA, Inc.

Production Compliance Committee
- Andrew Bishop, Kalmbach Feeds, Inc.
- Edward Eby, QLF, Inc.
- Jason Hoekstra, EPL Feed LLC
- Rick Kanaby, Neogen Corporation
- Mark Warren, International Ingredient Corporation
- Rob Yarborough, Purina Animal Nutrition LLC

Purchasing & Ingredient Suppliers Committee
- Ladd Hanacek, Sumitomo Chemical America, Inc.
- Evan Ibach, Scoular
- Will Rock, Bill Barr & Company, Inc.

Quality and Animal Food Safety Committee
- Gina Holladay, Kent Nutrition Group, Inc.
- Andrew Yersin, Kemin Industries Inc. Animal Nutrition and Health North America

Sustainability Oversight Committee
- Elizabeth Barber, The F. L. Emmert Company
- Elena Lindemann, Land O’Lakes, Inc.
- Dan Meagher, Novus International, Inc.
Promote a balanced regulatory framework. Support a fair global playing field. Facilitate market access. Support the competitiveness of the feed and livestock industries. These are the objectives of a committee that Leah Wilkinson, the American Feed Industry Association’s vice president of public policy and education, has been appointed to lead within the international arena.

The International Feed Industry Federation (IFIF) appointed Wilkinson as the chair of the IFIF Regulatory Committee last fall at the joint IFIF and Food and Agriculture Organization of the United Nations’ (FAO) annual meeting.

“I feel very honored to have the opportunity to lead such important work for our industry,” said Wilkinson. “It is crucial for the entire global feed industry to collaborate on critical issues to ensure safe, nutritious and sustainable feed and food.”

IFIF focuses on several regulatory initiatives, including:

• Supporting worldwide trade and ensuring that future demands for feed and food can be met efficiently;
• Establishing common guidance that covers technical requirements for the assessment of feed ingredients, including new uses of existing feed ingredients;
• Setting international regulatory standards for the whole feed chain and supporting fair trade;
• Developing international standards for contaminants in feed and aiming to establish an appropriate international list of contaminants standards for ingredients and their mixtures for safe feed manufacture reflecting a risk-based approach;
• Working to prevent and manage infectious diseases, including zoonotic diseases, as well as supporting the development, updates and implementation of World Organisation for Animal Health (OIE) standards and guidelines; and
• Aiming to provide guidance and tools to operators and countries on implementing Globally Harmonized System requirements worldwide to support a harmonized approach.

IFIF is composed of national and regional feed associations from Africa, Asia-Pacific region, Europe, North and South America and the Middle East, as well as feed-related organizations and corporate members from around the globe. Overall, its members represent over 80% of total compound animal feed production worldwide. For questions, contact Wilkinson at lwilkinson@afia.org.

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“I have been able to make good purchases/purchase at the right time, from the information that I receive from Feedinfo.”

Cargill
It is hard to believe that the American Feed Industry Association is nearing the one-year anniversary of the AFIA Feed Bites blog. In this time, the AFIA has offered readers a different perspective on issues impacting the animal food industry on a variety of topics, including COVID-19, trade, liquid feed, hemp, pet food, African swine fever and many more! Of the topics discussed, which blog articles did readers love the most? Read snippets of the top posts below or read them in their entirety on our blog at aﬁa.org/blog!

#1: GMOS AND ANIMAL FEED: GETTING THE FACTS
Is GMO food some kind of Frankenfood? Are they safe? Will they make me sick? Genetically modified organisms serve a very important purpose in the animal feed industry – providing reliable, nutritious and affordable ingredients to make animal feed.

#2: TIM BELSTRA DISCUSSES THE IMPORTANCE OF FREE, FAIR AND RECIPROCAL TRADE
I had the wonderful and humbling experience of seeing firsthand the United States and China sign a historic phase one agreement on trade. Growing up and living in the Midwest, one would think I’m far removed from the struggles of U.S. and Chinese trade woes, but I haven’t been and I am not.

#3: CORONAVIRUS PART 1: THE BASICS
You can’t check your social media feed, turn on the TV or read a newspaper without a reference to the coronavirus. So, how does it impact the animal food industry? What do I need to know? Let’s start with the basics.

#4: I CAN’T FIND N95 RESPIRATORS: NOW WHAT DO I DO?
Many feed manufacturing facilities suddenly found it difficult to obtain N95 respirators due to the COVID-19 outbreak. As the country faced a temporary shortage of this personal protective equipment, there are several things facility managers thought about concerning their facility’s respirator programs.

#5: A FEAST FIT FOR A [TIGER] KING
If you haven’t seen the hit Netflix documentary “Tiger King,” chances are you have heard about it or seen the memes that are taking the internet by storm. While watching, I couldn’t help but wonder: what would our members who make feed for exotic animals in zoos have to say about how the tigers in the series are fed?

Do you have questions about the animal food industry or blog topic suggestions? Email aﬁaeditor@aﬁa.org!
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The American Feed Industry Association named Gail Kuhlman, Ph.D., of Mars Petcare and Kate Shoveller, Ph.D., of the University of Guelph as recipients of the inaugural Friend of Pet Food Award. The awards were presented at AFIA’s 2020 Pet Food Conference, in conjunction with the International Production & Processing Expo.

Launched this year, the Friend of Pet Food Award recognizes individuals who have made significant contributions to support the growth of the pet food industry.

Kuhlman is a technical manager in research and development at Mars Petcare. She is skilled at bringing together diverse, innovative scientists to design, develop and validate new and upgraded diets for companion animals and then bring those diets to market.

“Gail has been instrumental in influencing decisions and providing for data-driven solutions throughout the pet food industry,” said Louise Calderwood, AFIA’s director of regulatory affairs, upon presenting the award. “She has been a valuable resource, mentoring and coaching future pet passionate professionals.”

Shoveller is an associate professor with the University of Guelph in Canada. She is dedicated to debunking myths on pet food and working to transfer knowledge that is fact-based and relevant, helping students learn and giving the industry and consumers another place to turn to for correct information.

“Kate is a professional who is shaping the future of the industry,” Calderwood said. “Her years of industry experience benefits the next generation of pet food professionals by helping them understand how nutrition impacts the health and well-being of dogs and cats, and how to apply this knowledge when developing commercial products.”

Shoveller (left) and Kuhlman (right) are not only friends of pet food, but are personal friends and colleagues as well, having worked together in the pet food industry for many years.

The AFIA is accepting nominations for the 2021 Friend of Pet Food Award until Sept. 18. Learn more at afia.org/friendofpetfoodaward.

“What impressed me most was how well our industry here in America has responded and stepped up to the challenges the pandemic has posed. Despite some rough economic headwinds coming our way, I think the general tone of leaders in our industry is very positive...”

–Scott Druker
Church & Dwight Company
AFIA Board chair (2020-21)
The American Feed Industry Association and Feedstuffs named Koch Farms of Morton, Miss., as the 2019 Feed Facility of the Year (FFY). Gary Huddleston, AFIA’s director of feed manufacturing and regulatory affairs, presented the award during AFIA’s Feed Production Education Program, held at the International Production & Processing Expo.

The FFY award recognizes overall excellence in feed manufacturing operations, from the company’s commitment to safety, quality and regulatory compliance to employee development to overall operating efficiencies. To date, only 34 facilities have received this esteemed industry award.

“Koch Farms is our overall winner because it is extremely obvious that the mill is very well managed,” said Huddleston. “I was blown away by the cleanliness of the facility and that shows how dedicated the whole team is to delivering a safe and high quality product.”

KOCH FARMS – 2019 FEED FACILITY OF THE YEAR + INTEGRATOR WINNER

At Koch Farms, cleanliness and safety go hand-in-hand and are the center of the team’s daily mission. Prominently displayed at the mill is the message: “A clean work area is a safe work area.” The mill produces nearly 800,000 tons of feed annually, making organization and cleanliness even more essential.

“Cleanliness is important not only from a safety and quality standpoint, but it also helps with employee morale and retention,” said mill manager Frank Garczynski. “The facility is often visited by the Koch management team and potential and existing customers.”

TROUW NUTRITION – PREMIX WINNER

As a nutrition-focused company, Trouw Nutrition’s Neosho, Mo., mill strives to provide the safest, highest-quality blends and ingredients to the pet food industry, giving pets a healthier life. High quality and safety does not come easy – the mill employs extensive internal quality control procedures; every premix is evaluated and touched by the facility’s staff over 100 times before heading to customers.

“Our team focuses 100% on animal well-being and safety,” said plant manager Doug Vanjoff. “We pride ourselves on taking the necessary steps to confirm ingredients and finished products to meet or exceed our customers’ standards.”

QUALITY LIQUID FEEDS – LIQUID FEED WINNER

Quality Liquid Feeds (QLF) has been dedicated to providing excellent customer service for over 42 years, growing from a primarily Midwestern marketer of liquid feed supplements to a full-line liquid feed and cooked low-moisture block organization that serves the
animal feed industry nationwide. The Menomonie, Wis., plant, one of 17 in the QLF network of manufacturing facilities, fulfills the customer-focused vision by focusing on continuous improvement.

“What makes QLF outstanding is the excellent customer service we provide,” said Nick Brandon, the Menomonie plant manager for most of 2019. “We are available for customers of every size, from small operations all the way up to large corporations.”

WESTERN MILLING – COMMERCIAL DRY FEED WINNER

Through employee ownership and a commitment to providing trusted nutrient solutions, Western Milling’s goal has been to provide long-term value for its employees and customers for more than 80 years. Its Goshen, Calif., facility is one of the largest and most diverse U.S. animal food operations, producing more than 1.4 million tons of dry commercial feed annually.

“The bottom line is that our products are safer, higher in quality and produced more efficiently as a result of this investment in automation,” said Buster Freeman, director of commercial feed operations at Goshen.

The AFIA would also like to recognize the semi-finalists, including: Kent Nutrition Group of Bow, N.H., ADM Nutrition of Cordele, Ga., and Kent Nutrition Group of Columbus, Neb., for the commercial dry livestock feed category; Animix of Juneau, Wis., and Belstra Milling of Demotte, Ind., in the premix category; Sanderson Farms of Oakwood, Texas, Collins, Miss., and of Laurel, Miss., for the integrator category; and Performix Nutrition Systems of Nampa, Idaho, for the liquid feed plant category.

AFIA’s FFY benchmarking program will be back and better than ever in 2021. The AFIA is giving the program a needed update to make it a more effective benchmarking tool and make participation easier for plant managers. Stay tuned for more information on the new and improved FFY program at afia.org/FFY!
## AFIA Member Companies

<table>
<thead>
<tr>
<th>Company</th>
<th>News</th>
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<tbody>
<tr>
<td><strong>APC</strong></td>
<td>APC has launched an updated brand look and website at apcproteins.com.</td>
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<tr>
<td><strong>Chr. Hansen</strong></td>
<td>Chr. Hansen is acquiring Wisconsin-based UAS Laboratories LLC.</td>
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<td><strong>EW Nutrition</strong></td>
<td>EW Nutrition opened a new production plant in Haimen, China, which manufactures products addressing gut and respiratory health issues and toxin risk management.</td>
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<td><strong>Hallway Feeds</strong></td>
<td>The Kentucky World Trade Center recognized Hallway Feeds as Small Business Exporter of the Year.</td>
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<td><strong>Kent Nutrition</strong></td>
<td>Deloitte Private and The Wall Street Journal selected Kent Corporation, parent company of Kent Nutrition Group, as one of 2020’s Best Managed Companies.</td>
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<tr>
<td><strong>Lincoln Poultry</strong></td>
<td>Lincoln Premium Poultry has opened a new, state-of-the-art poultry processing plant in Freemont, Neb., which produces poultry products for Costco.</td>
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<tr>
<td><strong>MPS Egg Farms</strong></td>
<td>Midwest Poultry Services, now called MPS Egg Farms, opened a new headquarters in North Manchester, Ind.</td>
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<tr>
<td><strong>Neogen Corporation</strong></td>
<td>Neogen Corporation acquired the Italy-based company Diessechem S.R.L.</td>
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<td><strong>Nobis Agri Science</strong></td>
<td>Nobis Agri Science promoted Megan Versau, who previously managed the company’s marketing, compliance and human resources department, to chief operating officer.</td>
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<td><strong>Premier Tech</strong></td>
<td>Premier Tech and the Bühler Group formed a joint venture to develop and market new packaging solutions in China based on Premier Tech’s automated packaging technologies.</td>
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<tr>
<td><strong>Trouw Nutrition</strong></td>
<td>Trouw Nutrition established formal partnerships with two Canadian universities, the Universities of Guelph and Alberta, to accelerate research and development activities in animal health and nutrition.</td>
</tr>
<tr>
<td><strong>Wilbur-Ellis Nutrition</strong></td>
<td>Wilbur-Ellis Nutrition acquired Rangen, Inc., an aquafeed and land animal feed production company with locations in Buhl, Idaho and Angleton, Texas.</td>
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One of the most important promises the American Feed Industry Association makes to its members is Representation. We were formed in 1909 to represent the interests of feed manufacturers and still today, we represent your interests at the state, federal and international levels in both the regulatory and legislative areas. Be sure to see pages 1 and 2 to learn what is happening on the Hill and at the various federal agencies.

The AFIA 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 benefits including:

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UNPACKING CONSUMER TRENDS

From stocking up to staying in, the COVID-19 pandemic changed how consumers shopped for food and other household goods this past spring. Using data from various public opinion surveys and research firms, we looked at some of the consumer trends that emerged from the beginning of March until the end of May. What trends will affect your business going forward?

75%

Americans are eating at home 75% of time now vs. 50% of time before pandemic.¹

Almost half of Americans (47%) stockpiled groceries/household goods in the early days of the crisis.²

What essentials topped these grocery carts?
Food/water (93%), toiletries (74%), cleaning supplies (58%), medicine/healthcare items (45%) & pet supplies (41%).²

Some top food sellers in the week of March 14 (when most state shutdown orders began) included: oat milk (↑477% year-over-year), dried beans (↑231% YOY), canned meat (↑188% YOY), tuna (↑142% YOY) & soup (↑127% YOY). Americans looked for shelf-stable food items to stock their pantries.³
Americans didn’t forget about their pets! In March, pet food dollar sales ↑24% YOY & pet supply dollar sales ↑10.1% YOY.1

In-person shoppers now go to 1-2 stores/month to limit their virus exposure vs. 4.4 stores/month in previous years.2

Despite a decrease in household incomes, grocery bills have gone up, with April showing the biggest monthly increase (2.6%) in 50 years. Meat, poultry, fish & eggs saw the steepest price increases that month.3

In late May, the U.S. Department of Agriculture forecasted grocery prices to ↑2-3% this year (average is >1% annually), with the price of eggs expected to ↑8-9% & beef ↑3-4%.4

Food continues to be a source of comfort & indulgence during this time.5

To reduce grocery spending, 14% of net U.S. households bought more private label during May compared to prior to the crisis.6

Online sales have doubled since this time last year, for example, there was ↑30% from March through mid-April alone!7

50M U.S. households saw a 25+% drop in their incomes in May.8

Throughout the crisis, demand for protein has remained high, with meat sales ↑28% from mid-April to mid-May alone.9

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THANK YOU TO
OUR ESSENTIAL
WORKERS!
You were here for us, AFIA and IFEEDER is here for the animal food industry.